

MCMAHON PULSE SURVEY

Outlook for 2020

Winter 2019



mcmahongroup.com
314.744.5040



Takeaways

A Pulse Survey was sent to McMahon Group's database of clubs in November 2019. The following pages provide a summary of the results with full question-by-question data tables cross-tabbed by different demographics in the back of the report.

Highlights

64% state they have a written strategic plan developed within the last 5 years. This is the highest percentage we have seen since asking this question back in 2011.

- The larger club (membership size), the more likely they are to have a strategic plan with 78% of clubs with a membership size over 1,000 have one. The same with clubs with an initiation fee over \$50,000, as 72% of this group stated they have one.

Just under half of the respondents believe they will experience a growth in membership in 2020. With about half of this group saying it would be in the 1%-3% range.

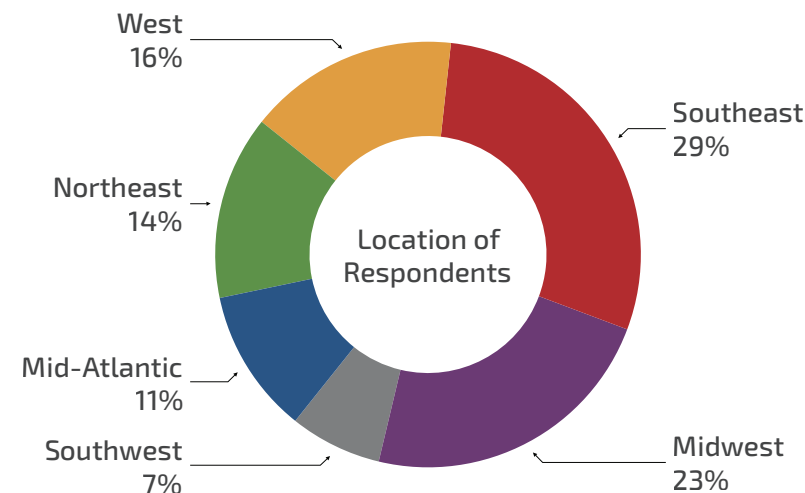
95% of respondents see value in having a Facility Master Plan; however, only 59% stated they have one.

Respondents

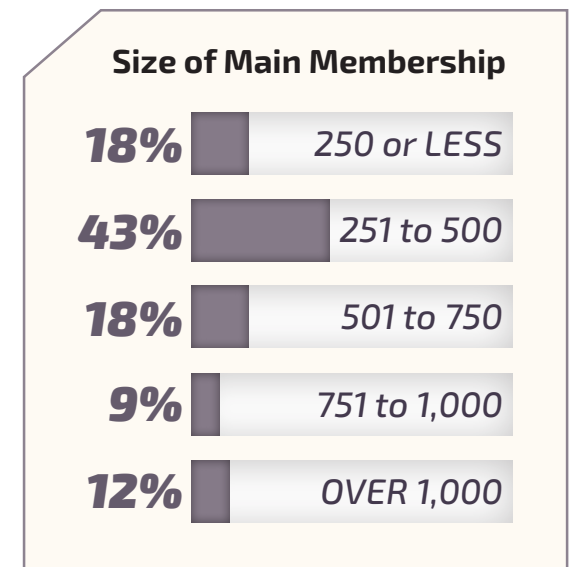
314 Total Responses

74% From golf and country clubs
9% From yacht clubs
9% From city/athletic clubs

28% Located in a gated/residential community



*There were also 43 total responses from Canadian clubs, with a majority (62%) coming from Ontario.



Membership

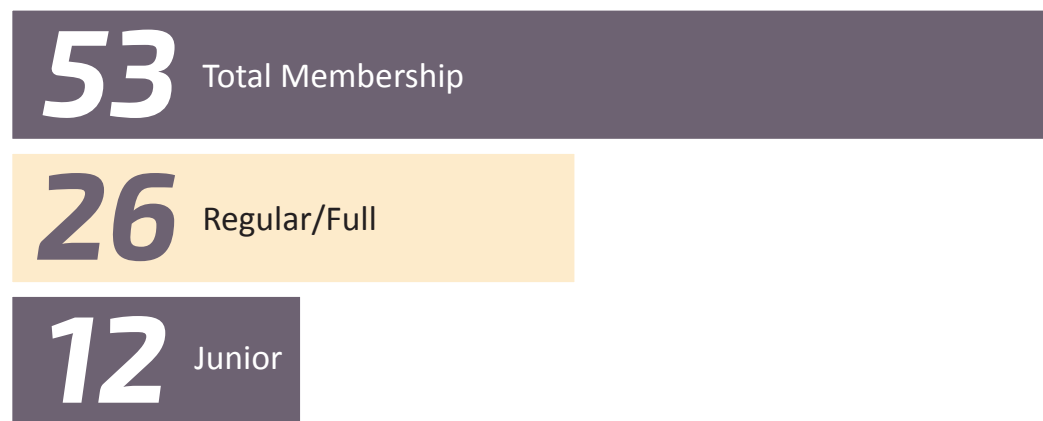
Average Initiation Fee and Dues at Clubs:

Regular Members	Golf/Country	City/Athletic	Yacht
Initiation Fee	\$36,772	\$8,930	\$13,096
Monthly Dues	\$798	\$487	\$326

Junior Members	Golf/Country	City/Athletic	Yacht
Initiation Fee	\$12,935	\$2,933	\$6,200
Monthly Dues	\$416	\$246	\$164

How many new members joined clubs in 2019?

Golf/Country Club



Among the other club types, the results show they had more on average join in each of the above categories.

Dues Approach for 2020

The table below shows how the approach on dues will be for 2020 compared to the past several years:

	Inflation Increase	Curtail Increase	Increase More	Other
For 2020	53%	9%	29%	9%
For 2019	50%	9%	29%	11%
For 2018	52%	14%	26%	8%
For 2017	48%	14%	26%	12%
For 2015	53%	19%	20%	8%
For 2014	53%	28%	20%	
For 2013	61%	20%	19%	
For 2012	55%	26%	19%	
For 2011	54%	28%	18%	

Membership

Capital Dues Surcharge



Of those who have a surcharge, among golf/country clubs, the average amount is **\$106/month**
 For city/athletic clubs it is **\$47**, and for yacht clubs it is **\$96**

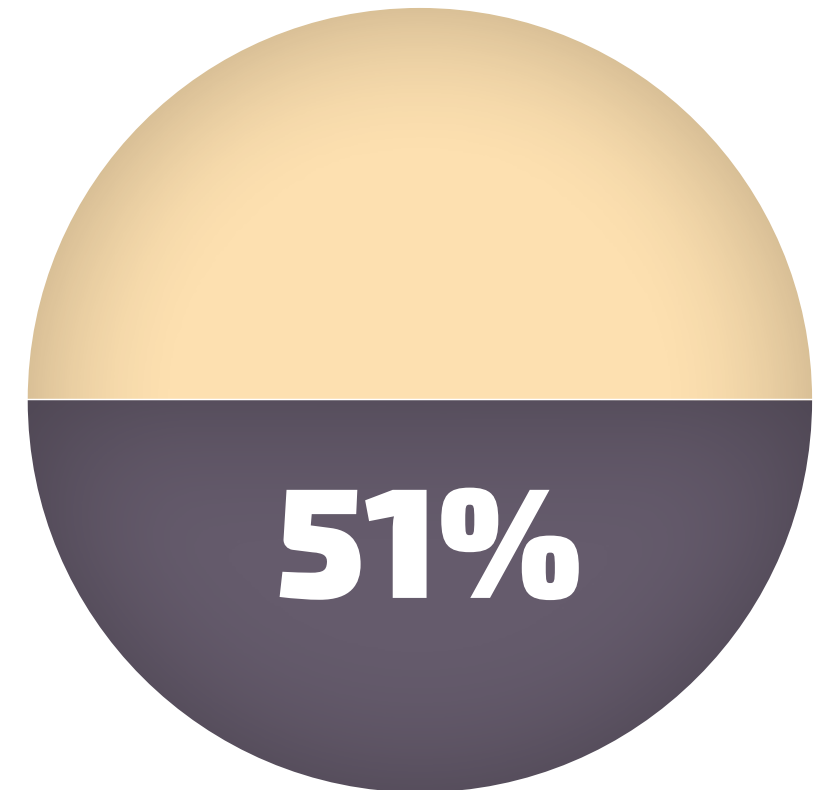
Among clubs with an initiation fee of \$5,000 or below, the average amount is **\$65**.
 Among those with an initiation fee of \$50,000 or more, the average is **\$200**.

Member Retention and Attraction

51% of all clubs stated they plan to implement strategies to retain members in 2020. The smaller the club membership size and smaller initiation fee, the more likely they are to implement strategies.

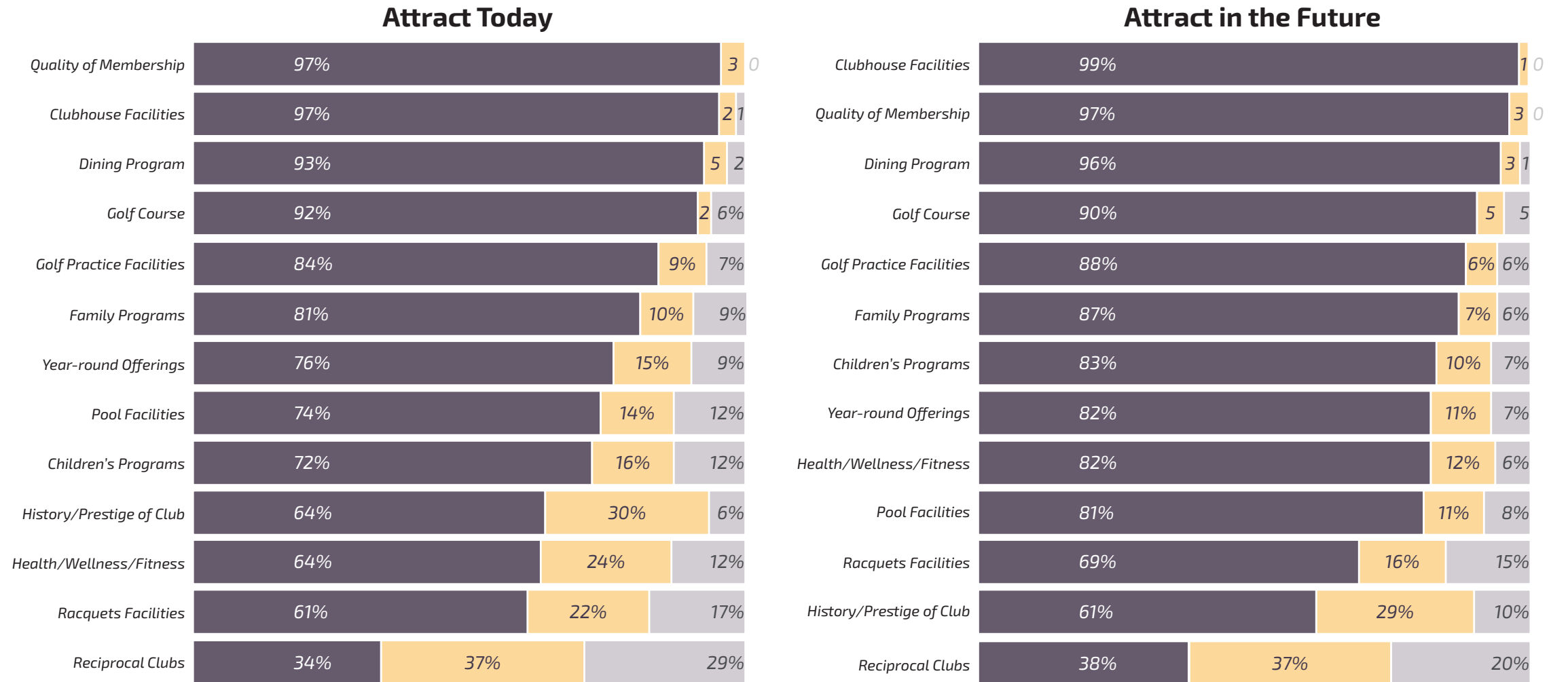
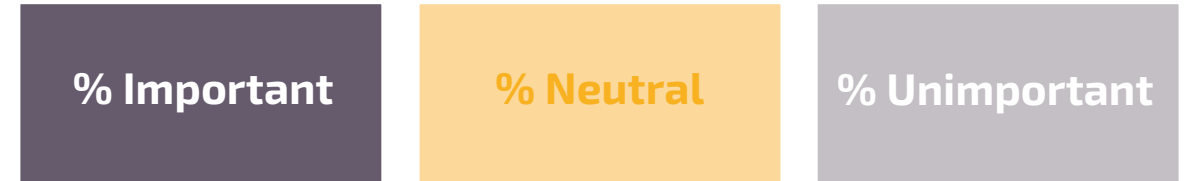
Only **40%** of clubs stated they will be offering programs to attract members in 2020.

See the written comments section for strategies and programs being offered



Membership

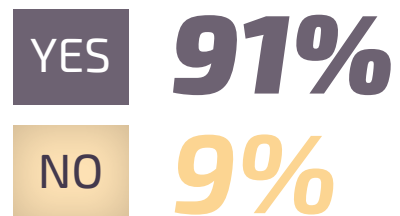
Respondents were asked to rate the importance of how certain aspects of their club are important in attracting new members to their club today and in the future:



Strategies for attracting new and younger members: See the written comments section for interesting ideas.

Dining

Do members want your club to be one of their favorite places to dine for good a la carte dining?



Do members consider the a la carte dining experience at your club to be one of their favorite?



2019 Revenue

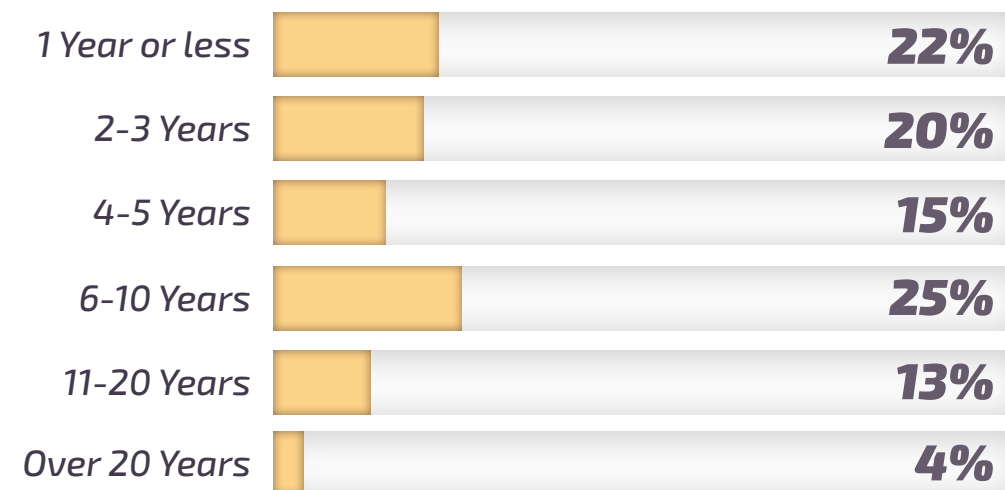
A la carte dining: Average for all clubs is

\$1,044,580

Looking at clubs by initiation fee, the larger the fee the higher the revenue – clubs under \$5,000 initiation fee have average revenue of \$1,006,735 compared to clubs with an initiation fee over \$50,000 who have an average revenue of \$2,841,552.

Banquet/function: Average for all clubs is \$1,044,580. Among the city/dining/athletic clubs, the annual revenue is \$1,889,996 compared to golf/country clubs who have an average revenue of \$906,068.

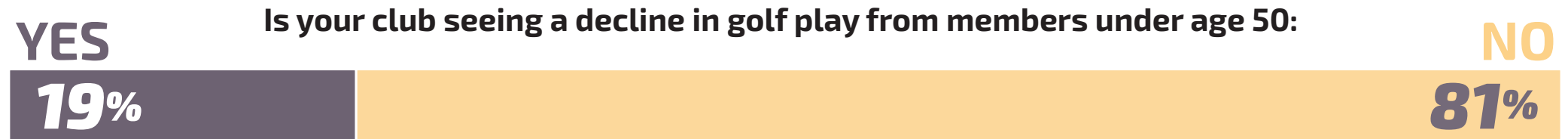
Respondents were asked how many years it has been since they did an upgrade to their a la carte dining areas:



57% have done an upgrade in the last 5 years.

Golf

214 respondents to the survey have a golf course with a vast majority (71%) having 18 holes



Studying the clubs by initiation fee, the smaller the initiation fee (\$5,000 and under – 29%) shows a higher number of clubs with decline among the under age 50 crowd versus the clubs with a larger initiation fee (over \$50,000 – 7%).

49% of respondents who have a golf course stated that golf rounds were **Up** compared to 2018.

Only **13%** stated rounds were **Down**,

and the remaining **38%** stated rounds **Stayed the Same**.

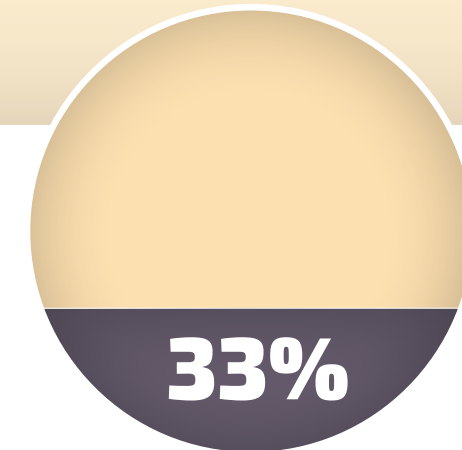
Among the 13% who stated rounds were down, weather appears to be the main reason why.

Golf

Golf Practice Facilities

Respondents rated their satisfaction with their golf practice facilities:

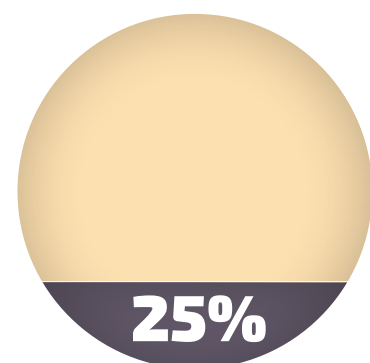
	% Satisfied	% Neutral	% Dissatisfied
Practice Putting Green	88%	8%	4%
Short Game Area	71%	15%	14%
Driving Range	69%	11%	20%
Simulators	63%	20%	17%
Indoor Golf Hitting Area	51%	22%	27%



33%

Only 33%

stated they have a dedicated Golf Performance Center for year-round teaching and training. The larger the initiation fee, the more likely you are to see a Golf Performance Center at their club (50% of clubs with over \$50,000 initiation fee have one).



25%

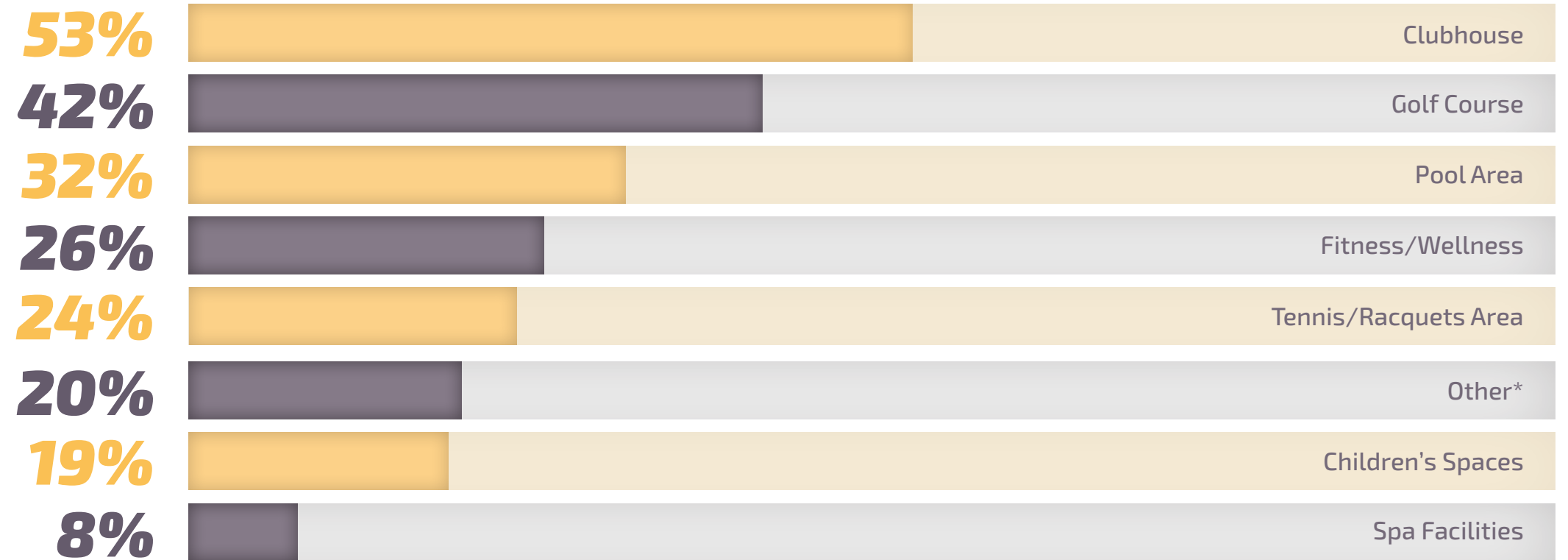
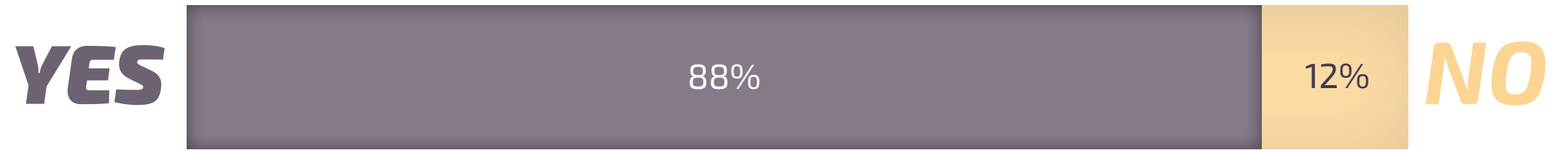
1/4 of respondents stated they have golf/game simulators for their members.

In the Written Comments section, we have the results from the open-ended questions on:

- 1 What programs/events clubs have implemented to increase golf play for all members
- 2 What they see happening in golf activity for members under age 50

Facilities

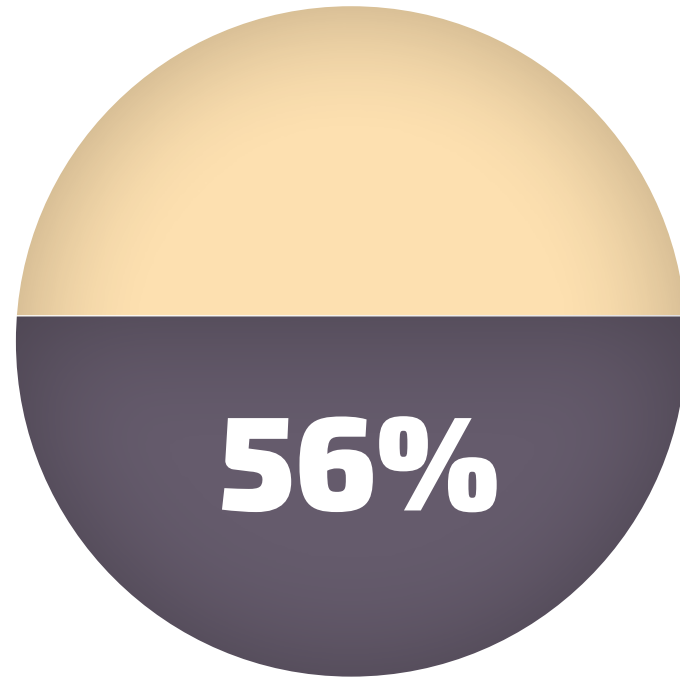
Is your club planning an improvement project in the next 3 to 5 years?



*Some of the "other" areas include: Driving range, golf simulators, golf performance center, maintenance building and pickleball.

Facilities

Facility Master Planning



56% of respondents stated they completed an improvement project within the last 5 years. The average cost of the facility programs was \$7,082,151. Fifty-seven percent (57%) took on debt to finance their projects.

Respondents were asked if they gained, lost or had not change to their membership size as a result of a completed project:

56% had a **gain**

7% **lost** members

37% had **no change**

Final Thoughts

In the Written Comments section, you will find respondents comments on:

- 1 The 6 mega trends and how they are affecting clubs.
- 2 The urban country club model
- 3 Where respondents see private clubs going in the future

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DATA TABLES

McMahonGroup 
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Figure 6: 8. Is your club located within a gated/residential community?

	Overall		CLUB TYPE				MEMBERSHIP SIZE						INITIATION FEE													
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	28.1%	88	32.2%	74	3.7%	1	10.7%	3	35.7%	10	28.6%	53	27.5%	22	24.3%	9	21.2%	18	30.0%	12	21.4%	12	30.2%	13	35.9%	23
No	71.9%	225	67.8%	156	96.3%	26	89.3%	25	64.3%	18	71.4%	132	72.5%	58	75.7%	28	78.8%	67	70.0%	28	78.6%	44	69.8%	30	64.1%	41
Totals	100.0%	313	100.0%	230	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	80	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	43	100.0%	64

Figure 7: 9. In your opinion, what impact do you think the current economy will have on your club in 2020?

	Overall		CLUB TYPE				MEMBERSHIP SIZE						INITIATION FEE													
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Will be better	45.9%	144	47.2%	109	37.0%	10	35.7%	10	53.6%	15	47.0%	87	46.9%	38	37.8%	14	54.1%	46	42.5%	17	39.3%	22	43.2%	19	45.3%	29
No change	46.8%	147	46.3%	107	51.9%	14	50.0%	14	42.9%	12	44.9%	83	48.1%	39	51.4%	19	37.6%	32	45.0%	18	55.4%	31	52.3%	23	50.0%	32
Will be worse	7.3%	23	6.5%	15	11.1%	3	14.3%	4	3.6%	1	8.1%	15	4.9%	4	10.8%	4	8.2%	7	12.5%	5	5.4%	3	4.5%	2	4.7%	3
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64

Figure 8: 11. How does your club's total debt compare to your club's annual total revenue, including dues?

	Overall		CLUB TYPE							MEMBERSHIP SIZE						INITIATION FEE										
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Annual revenue																										
\$3M/Less	12.0%	34	10.7%	23	18.2%	4	24.0%	6	4.3%	1	17.1%	29	3.8%	3	6.1%	2	33.3%	26	10.5%	4	5.7%	3	0.0%	0	1.6%	1
\$3.1M-\$5M	21.8%	62	19.2%	41	27.3%	6	32.0%	8	30.4%	7	28.8%	49	15.4%	12	3.0%	1	33.3%	26	36.8%	14	24.5%	13	11.6%	5	3.2%	2
\$5.1M-\$7.5M	22.9%	65	25.7%	55	13.6%	3	16.0%	4	13.0%	3	27.6%	47	20.5%	16	3.0%	1	15.4%	12	26.3%	10	35.8%	19	30.2%	13	12.9%	8
\$7.51M-\$10M	18.7%	53	19.6%	42	18.2%	4	20.0%	5	8.7%	2	16.5%	28	24.4%	19	15.2%	5	9.0%	7	21.1%	8	18.9%	10	20.9%	9	27.4%	17
\$10.1M-\$15M	12.7%	36	14.5%	31	4.5%	1	4.0%	1	13.0%	3	8.8%	15	19.2%	15	15.2%	5	3.8%	3	5.3%	2	11.3%	6	20.9%	9	22.6%	14
\$15.1M-\$20M	3.9%	11	3.3%	7	9.1%	2	4.0%	1	4.3%	1	0.6%	1	9.0%	7	9.1%	3	3.8%	3	0.0%	0	1.9%	1	2.3%	1	9.7%	6
>\$20M	8.1%	23	7.0%	15	9.1%	2	0.0%	0	26.1%	6	0.6%	1	7.7%	6	48.5%	16	1.3%	1	0.0%	0	1.9%	1	14.0%	6	22.6%	14
Totals	100.0%	284	100.0%	214	100.0%	22	100.0%	25	100.0%	23	100.0%	170	100.0%	78	100.0%	33	100.0%	78	100.0%	38	100.0%	53	100.0%	43	100.0%	62
Club debt																										
\$0	28.4%	80	23.2%	49	45.8%	11	41.7%	10	43.5%	10	24.9%	42	35.1%	27	30.3%	10	21.8%	17	34.2%	13	30.2%	16	23.3%	10	35.0%	21
\$3M/Less	36.5%	103	37.9%	80	33.3%	8	33.3%	8	30.4%	7	44.4%	75	27.3%	21	18.2%	6	52.6%	41	42.1%	16	37.7%	20	27.9%	12	18.3%	11
\$3.1M- \$5M	15.6%	44	18.5%	39	0.0%	0	12.5%	3	8.7%	2	17.2%	29	11.7%	9	18.2%	6	14.1%	11	13.2%	5	15.1%	8	20.9%	9	15.0%	9
\$5.1M-\$7M	9.2%	26	8.5%	18	20.8%	5	4.2%	1	8.7%	2	6.5%	11	9.1%	7	21.2%	7	7.7%	6	2.6%	1	9.4%	5	14.0%	6	11.7%	7
\$7.1M-\$15M	8.2%	23	9.5%	20	0.0%	0	8.3%	2	4.3%	1	7.1%	12	10.4%	8	9.1%	3	3.8%	3	7.9%	3	5.7%	3	11.6%	5	13.3%	8
>\$15M	2.1%	6	2.4%	5	0.0%	0	0.0%	0	4.3%	1	0.0%	0	6.5%	5	3.0%	1	0.0%	0	0.0%	0	1.9%	1	2.3%	1	6.7%	4
Totals	100.0%	282	100.0%	211	100.0%	24	100.0%	24	100.0%	23	100.0%	169	100.0%	77	100.0%	33	100.0%	78	100.0%	38	100.0%	53	100.0%	43	100.0%	60

Figure 9: 12. Does your club have a written Strategic Plan developed within the last 5 years?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	64.9%	198	65.2%	148	63.0%	17	52.0%	13	76.9%	20	57.6%	106	76.5%	62	78.4%	29	58.8%	50	57.5%	23	78.6%	44	55.8%	24	71.9%	46
No	35.1%	107	34.8%	79	37.0%	10	48.0%	12	23.1%	6	42.4%	78	23.5%	19	21.6%	8	41.2%	35	42.5%	17	21.4%	12	44.2%	19	28.1%	18
Totals	100.0%	305	100.0%	227	100.0%	27	100.0%	25	100.0%	26	100.0%	184	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	43	100.0%	64

Figure 10: 13. Do you see value in club strategic planning?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	97.7%	299	97.4%	222	96.3%	26	100.0%	25	100.0%	26	96.8%	179	100.0%	81	97.3%	36	95.3%	81	97.5%	39	100.0%	56	100.0%	44	98.4%	63
No	2.3%	7	2.6%	6	3.7%	1	0.0%	0	0.0%	0	3.2%	6	0.0%	0	2.7%	1	4.7%	4	2.5%	1	0.0%	0	0.0%	0	1.6%	1
Totals	100.0%	306	100.0%	228	100.0%	27	100.0%	25	100.0%	26	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64

Figure 11: 14. How many members do you have in your main (Full/Regular) membership category?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
250/less	17.8%	54	19.0%	43	14.8%	4	12.5%	3	15.4%	4	29.2%	54	0.0%	0	0.0%	0	31.8%	27	17.5%	7	12.5%	7	13.6%	6	9.4%	6
251 to 500	43.2%	131	50.9%	115	14.8%	4	33.3%	8	15.4%	4	70.8%	131	0.0%	0	0.0%	0	35.3%	30	57.5%	23	42.9%	24	43.2%	19	42.2%	27
501 to 750	18.2%	55	17.7%	40	22.2%	6	12.5%	3	23.1%	6	0.0%	0	67.9%	55	0.0%	0	12.9%	11	10.0%	4	23.2%	13	22.7%	10	21.9%	14
751 to 1000	8.6%	26	7.1%	16	7.4%	2	25.0%	6	7.7%	2	0.0%	0	32.1%	26	0.0%	0	7.1%	6	7.5%	3	10.7%	6	6.8%	3	12.5%	8
1001 to 1500	4.3%	13	2.2%	5	18.5%	5	8.3%	2	3.8%	1	0.0%	0	0.0%	0	35.1%	13	3.5%	3	5.0%	2	3.6%	2	6.8%	3	4.7%	3
>1500	7.9%	24	3.1%	7	22.2%	6	8.3%	2	34.6%	9	0.0%	0	0.0%	0	64.9%	24	9.4%	8	2.5%	1	7.1%	4	6.8%	3	9.4%	6
Totals	100.0%	303	100.0%	226	100.0%	27	100.0%	24	100.0%	26	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64

Figure 12: 15. If you offer Junior memberships, how many Junior members does your club have?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
0	6.3%	14	4.1%	7	5.9%	1	16.7%	3	20.0%	3	6.3%	9	7.3%	4	4.2%	1	8.3%	5	9.1%	3	2.1%	1	6.5%	2	6.8%	3
1 to 10	5.9%	13	6.4%	11	5.9%	1	5.6%	1	0.0%	0	8.4%	12	1.8%	1	0.0%	0	6.7%	4	9.1%	3	6.3%	3	6.5%	2	2.3%	1
11 to 25	14.0%	31	15.7%	27	11.8%	2	5.6%	1	6.7%	1	19.6%	28	5.5%	3	0.0%	0	15.0%	9	9.1%	3	10.4%	5	22.6%	7	15.9%	7
26 to 50	26.6%	59	29.7%	51	11.8%	2	11.1%	2	26.7%	4	31.5%	45	23.6%	13	4.2%	1	26.7%	16	27.3%	9	35.4%	17	12.9%	4	22.7%	10
51 to 75	17.1%	38	18.0%	31	11.8%	2	16.7%	3	13.3%	2	16.8%	24	21.8%	12	8.3%	2	13.3%	8	21.2%	7	27.1%	13	12.9%	4	13.6%	6
76 to 100	9.9%	22	10.5%	18	5.9%	1	11.1%	2	6.7%	1	9.8%	14	14.5%	8	0.0%	0	11.7%	7	15.2%	5	6.3%	3	6.5%	2	11.4%	5
101 to 125	4.5%	10	4.7%	8	0.0%	0	5.6%	1	6.7%	1	1.4%	2	10.9%	6	8.3%	2	5.0%	3	0.0%	0	0.0%	0	12.9%	4	6.8%	3
126 to 150	4.1%	9	2.9%	5	17.6%	3	5.6%	1	0.0%	0	2.8%	4	5.5%	3	8.3%	2	6.7%	4	0.0%	0	0.0%	0	6.5%	2	2.3%	1
>150	11.7%	26	8.1%	14	29.4%	5	22.2%	4	20.0%	3	3.5%	5	9.1%	5	66.7%	16	6.7%	4	9.1%	3	12.5%	6	12.9%	4	18.2%	8
Totals	100.0%	222	100.0%	172	100.0%	17	100.0%	18	100.0%	15	100.0%	143	100.0%	55	100.0%	24	100.0%	60	100.0%	33	100.0%	48	100.0%	31	100.0%	44

Figure 13: 15. If you offer Junior memberships, how many Junior members does your club have?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Mean	101.97	74.28	180.76	112.06	318.07	49.06	88.60	447.88	65.88	71.06	157.52	74.77	132.16	
Median	50.00	46.50	100.00	68.50	50.00	40.00	66.00	246.50	42.00	50.00	50.00	53.00	60.00	

Figure 14: 16. What are your current initiation fees and dues for the following categories?

Regular/Full

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Initiation																										
\$5,000/ Less	29.4%	85	26.2%	56	61.5%	16	29.2%	7	24.0%	6	32.4%	57	21.8%	17	31.4%	11	100.0%	85	0.0%	0	0.0%	0	0.0%	0	0.0%	0
\$5,001-\$10,000	13.8%	40	13.1%	28	15.4%	4	20.8%	5	12.0%	3	17.0%	30	9.0%	7	8.6%	3	0.0%	0	100.0%	40	0.0%	0	0.0%	0	0.0%	0
\$10,001-\$25,000	19.4%	56	16.4%	35	11.5%	3	41.7%	10	32.0%	8	17.6%	31	24.4%	19	17.1%	6	0.0%	0	0.0%	0	100.0%	56	0.0%	0	0.0%	0
\$25,001-\$50,000	15.2%	44	17.8%	38	11.5%	3	8.3%	2	4.0%	1	14.2%	25	16.7%	13	17.1%	6	0.0%	0	0.0%	0	100.0%	44	0.0%	0	0.0%	0
\$50,001+	22.1%	64	26.6%	57	0.0%	0	0.0%	0	28.0%	7	18.8%	33	28.2%	22	25.7%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	64
Totals	100.0%	289	100.0%	214	100.0%	26	100.0%	24	100.0%	25	100.0%	176	100.0%	78	100.0%	35	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Dues																										
\$0	1.4%	4	0.5%	1	3.7%	1	4.2%	1	4.3%	1	1.7%	3	1.3%	1	0.0%	0	4.8%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
\$1-\$250	11.2%	32	2.8%	6	37.0%	10	41.7%	10	26.1%	6	6.3%	11	10.7%	8	37.1%	13	26.5%	22	7.5%	3	7.3%	4	6.8%	3	0.0%	0
\$251-\$500	28.7%	82	25.0%	53	40.7%	11	45.8%	11	30.4%	7	28.4%	50	32.0%	24	22.9%	8	39.8%	33	37.5%	15	41.8%	23	15.9%	7	6.3%	4
\$501-\$750	23.4%	67	27.8%	59	11.1%	3	4.2%	1	17.4%	4	24.4%	43	24.0%	18	17.1%	6	22.9%	19	32.5%	13	30.9%	17	18.2%	8	15.9%	10
\$751-\$1,000	19.2%	55	24.5%	52	0.0%	0	0.0%	0	13.0%	3	22.2%	39	14.7%	11	14.3%	5	4.8%	4	17.5%	7	16.4%	9	31.8%	14	33.3%	21
\$1,001-\$1,500	10.5%	30	13.7%	29	0.0%	0	0.0%	0	4.3%	1	11.9%	21	10.7%	8	2.9%	1	1.2%	1	0.0%	0	0.0%	0	22.7%	10	30.2%	19
\$1,501-\$2,000	3.5%	10	3.8%	8	0.0%	0	4.2%	1	4.3%	1	2.8%	5	5.3%	4	2.9%	1	0.0%	0	2.5%	1	1.8%	1	2.3%	1	11.1%	7
Above \$2,000	2.1%	6	1.9%	4	7.4%	2	0.0%	0	0.0%	0	2.3%	4	1.3%	1	2.9%	1	0.0%	0	2.5%	1	1.8%	1	2.3%	1	3.2%	2
Totals	100.0%	286	100.0%	212	100.0%	27	100.0%	24	100.0%	23	100.0%	176	100.0%	75	100.0%	35	100.0%	83	100.0%	40	100.0%	55	100.0%	44	100.0%	63

Figure 15: 16. What are your current initiation fees and dues for the following categories?

Regular/Full

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Initiation														
Mean	32729.53		36772.20	8930.58	13096.38	41723.00	28349.01	40437.79	37578.86	2408.86	8097.00	18102.68	39647.73	96436.72
Median	15000.00		20000.00	3750.00	11500.00	18000.00	11750.00	21250.00	19800.00	2500.00	7750.00	17500.00	40000.00	80000.00
Dues														
Mean	707.14		798.33	487.86	326.38	521.26	756.06	669.99	540.74	387.05	628.28	638.16	913.43	1060.08
Median	587.50		671.50	290.00	272.50	500.00	602.50	565.00	335.00	376.00	560.00	501.00	827.50	1000.00

Figure 16: **Junior**

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Initiation																										
\$0	22.1%	45	23.0%	37	11.1%	2	23.1%	3	25.0%	3	22.0%	29	20.4%	10	26.1%	6	32.3%	20	6.9%	2	28.3%	13	19.4%	6	11.1%	4
\$1 - \$2500	25.5%	52	20.5%	33	66.7%	12	38.5%	5	16.7%	2	28.0%	37	14.3%	7	34.8%	8	59.7%	37	31.0%	9	6.5%	3	9.7%	3	0.0%	0
\$2501 - \$5000	12.7%	26	13.0%	21	5.6%	1	0.0%	0	33.3%	4	16.7%	22	8.2%	4	0.0%	0	8.1%	5	34.5%	10	19.6%	9	6.5%	2	0.0%	0
\$5001 - \$10000	10.3%	21	11.8%	19	5.6%	1	7.7%	1	0.0%	0	9.8%	13	16.3%	8	0.0%	0	0.0%	0	24.1%	7	23.9%	11	6.5%	2	2.8%	1
\$10001 - \$20000	11.8%	24	11.8%	19	11.1%	2	23.1%	3	0.0%	0	10.6%	14	14.3%	7	13.0%	3	0.0%	0	3.4%	1	17.4%	8	35.5%	11	11.1%	4
Above \$20,000	17.6%	36	19.9%	32	0.0%	0	7.7%	1	25.0%	3	12.9%	17	26.5%	13	26.1%	6	0.0%	0	0.0%	0	4.3%	2	22.6%	7	75.0%	27
Totals	100.0%	204	100.0%	161	100.0%	18	100.0%	13	100.0%	12	100.0%	132	100.0%	49	100.0%	23	100.0%	62	100.0%	29	100.0%	46	100.0%	31	100.0%	36
Dues																										
\$0	2.0%	4	1.9%	3	5.0%	1	0.0%	0	0.0%	0	3.1%	4	0.0%	0	0.0%	0	6.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
\$1 - \$250	35.1%	72	25.8%	41	60.0%	12	84.6%	11	61.5%	8	29.0%	38	42.0%	21	54.2%	13	53.2%	33	17.2%	5	42.2%	19	31.3%	10	13.9%	5
\$251 - \$500	40.0%	82	44.7%	71	30.0%	6	15.4%	2	23.1%	3	43.5%	57	38.0%	19	25.0%	6	33.9%	21	55.2%	16	51.1%	23	31.3%	10	33.3%	12
\$501 - \$750	17.1%	35	20.8%	33	0.0%	0	0.0%	0	15.4%	2	18.3%	24	14.0%	7	16.7%	4	6.5%	4	27.6%	8	6.7%	3	25.0%	8	33.3%	12
\$751 - \$1000	4.4%	9	5.7%	9	0.0%	0	0.0%	0	0.0%	0	4.6%	6	4.0%	2	4.2%	1	0.0%	0	0.0%	0	0.0%	0	9.4%	3	16.7%	6
Above \$1000	1.5%	3	1.3%	2	5.0%	1	0.0%	0	0.0%	0	1.5%	2	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1	2.8%	1
Totals	100.0%	205	100.0%	159	100.0%	20	100.0%	13	100.0%	13	100.0%	131	100.0%	50	100.0%	24	100.0%	62	100.0%	29	100.0%	45	100.0%	32	100.0%	36

Figure 17: **Junior**

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Initiation														
Mean	12053.65		12935.34	2933.22	6200.54	20245.83	8946.12	16241.47	20966.30	1118.79	4043.10	6602.17	13318.71	43215.28
Median	3500.00		4500.00	1500.00	500.00	3300.00	2625.00	8525.00	1500.00	1000.00	3500.00	5000.00	15000.00	43250.00
Dues														
Mean	371.70		416.58	246.85	164.54	222.00	400.21	338.74	284.75	223.58	391.62	286.24	545.69	531.56
Median	335.00		375.00	140.00	150.00	128.00	350.00	292.50	200.00	200.00	385.00	290.00	423.50	518.50

Figure 18: **Senior**

	Overall		CLUB TYPE					MEMBERSHIP SIZE					INITIATION FEE													
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Initiation																										
\$5,000/ Less	50.8%	61	47.7%	42	78.6%	11	50.0%	5	37.5%	3	56.5%	39	39.4%	13	50.0%	9	100.0%	40	50.0%	9	17.2%	5	21.1%	4	21.4%	3
\$5,001-\$10,000	11.7%	14	12.5%	11	0.0%	0	10.0%	1	25.0%	2	15.9%	11	6.1%	2	5.6%	1	0.0%	0	50.0%	9	13.8%	4	0.0%	0	7.1%	1
\$10,001-\$25,000	20.8%	25	18.2%	16	21.4%	3	40.0%	4	25.0%	2	13.0%	9	36.4%	12	22.2%	4	0.0%	0	0.0%	0	69.0%	20	21.1%	4	7.1%	1
\$25,001-\$50,000	10.8%	13	14.8%	13	0.0%	0	0.0%	0	0.0%	0	10.1%	7	12.1%	4	11.1%	2	0.0%	0	0.0%	0	0.0%	0	57.9%	11	14.3%	2
\$50,001+	5.8%	7	6.8%	6	0.0%	0	0.0%	0	12.5%	1	4.3%	3	6.1%	2	11.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	50.0%	7
Totals	100.0%	120	100.0%	88	100.0%	14	100.0%	10	100.0%	8	100.0%	69	100.0%	33	100.0%	18	100.0%	40	100.0%	18	100.0%	29	100.0%	19	100.0%	14
Dues																										
\$0	1.3%	2	1.7%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.0%	0	2.1%	1	4.3%	1	0.0%	0	0.0%	0	0.0%	0
\$1-\$250	25.6%	41	10.9%	13	70.6%	12	84.6%	11	45.5%	5	13.7%	13	39.5%	17	50.0%	11	38.3%	18	30.4%	7	34.3%	12	12.0%	3	3.3%	1
\$251-\$500	43.1%	69	47.1%	56	29.4%	5	15.4%	2	54.5%	6	53.7%	51	30.2%	13	22.7%	5	53.2%	25	43.5%	10	40.0%	14	32.0%	8	40.0%	12
\$501-\$750	19.4%	31	26.1%	31	0.0%	0	0.0%	0	0.0%	0	21.1%	20	14.0%	6	22.7%	5	6.4%	3	13.0%	3	17.1%	6	40.0%	10	30.0%	9
\$751-\$1,000	9.4%	15	12.6%	15	0.0%	0	0.0%	0	0.0%	0	9.5%	9	11.6%	5	4.5%	1	0.0%	0	8.7%	2	8.6%	3	12.0%	3	23.3%	7
\$1,001-\$1,500	0.6%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	1	0.0%	0
\$1,501-\$2,000	0.6%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	1
Above \$2,000	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Totals	100.0%	160	100.0%	119	100.0%	17	100.0%	13	100.0%	11	100.0%	95	100.0%	43	100.0%	22	100.0%	47	100.0%	23	100.0%	35	100.0%	25	100.0%	30

Figure 19: **Senior**

	Overall		CLUB TYPE					MEMBERSHIP SIZE			INITIATION FEE														
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64											
Initiation																									
Mean	14098.42		16007.39		4694.64		8093.50		17062.50		11478.26		17787.12		17379.72		1461.50		4600.00		13018.97		27421.05		46571.43
Median	5000.00		6750.00		2600.00		3750.00		8000.00		3600.00		12500.00		5750.00		1125.00		5000.00		15000.00		32500.00		50500.00
Dues																									
Mean	414.47		485.61		188.12		178.54		273.45		437.22		418.00		309.32		284.79		346.13		386.69		542.36		595.87
Median	385.00		427.00		150.00		155.00		290.00		410.00		339.00		252.50		300.00		325.00		360.00		565.00		525.00

Figure 20: 17. How many new members will have joined your club in 2019?

	Overall		CLUB TYPE			SIZE			GATED/RESIDENTIAL		INITIATION FEE																		
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Other 17.8%, 56	500/Less 61.1%, 185	501 to 1,000 26.7%, 81	1,001/More 12.2%, 37	Yes 28.1%, 88	No 71.9%, 225	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64														
Total																													
1-15	11.8%	33	10.6%	22	11.5%	3	17.0%	8	17.2%	30	2.7%	2	3.1%	1	13.5%	10	11.2%	23	7.4%	6	10.0%	4	9.4%	5	7.3%	3	23.8%	15	
16-25	17.1%	48	17.9%	37	3.8%	1	21.3%	10	20.7%	36	14.9%	11	3.1%	1	14.9%	11	18.0%	37	11.1%	9	5.0%	2	22.6%	12	17.1%	7	27.0%	17	
26-40	22.1%	62	23.2%	48	19.2%	5	19.1%	9	24.1%	42	20.3%	15	15.6%	5	25.7%	19	21.0%	43	16.0%	13	22.5%	9	18.9%	10	29.3%	12	27.0%	17	
>40	48.9%	137	48.3%	100	65.4%	17	42.6%	20	37.9%	66	62.2%	46	78.1%	25	45.9%	34	49.8%	102	65.4%	53	62.5%	25	49.1%	26	46.3%	19	22.2%	14	
Totals	100.0%	280	100.0%	207	100.0%	26	100.0%	47	100.0%	174	100.0%	74	100.0%	32	100.0%	74	100.0%	205	100.0%	81	100.0%	40	100.0%	53	100.0%	41	100.0%	63	
Regular																													
1-15	35.0%	91	39.4%	76	20.0%	5	23.8%	10	48.5%	79	15.2%	10	6.5%	2	36.7%	22	34.7%	69	28.8%	21	43.2%	16	36.5%	19	24.4%	10	44.6%	25	
16-25	22.7%	59	23.8%	46	20.0%	5	19.0%	8	24.5%	40	21.2%	14	16.1%	5	20.0%	12	23.6%	47	17.8%	13	18.9%	7	21.2%	11	24.4%	10	30.4%	17	
26-40	18.8%	49	19.7%	38	12.0%	3	19.0%	8	16.0%	26	30.3%	20	9.7%	3	11.7%	7	21.1%	42	20.5%	15	13.5%	5	15.4%	8	29.3%	12	16.1%	9	
>40	23.5%	61	17.1%	33	48.0%	12	38.1%	16	11.0%	18	33.3%	22	67.7%	21	31.7%	19	20.6%	41	32.9%	24	24.3%	9	26.9%	14	22.0%	9	8.9%	5	
Totals	100.0%	260	100.0%	193	100.0%	25	100.0%	42	100.0%	163	100.0%	66	100.0%	31	100.0%	60	100.0%	199	100.0%	73	100.0%	37	100.0%	52	100.0%	41	100.0%	56	
Junior																													
1-15	72.1%	147	75.6%	121	55.6%	10	61.5%	16	78.6%	103	74.0%	37	30.4%	7	75.7%	28	71.1%	118	66.1%	39	64.3%	18	75.6%	34	79.4%	27	75.7%	28	
16-25	13.7%	28	14.4%	23	16.7%	3	7.7%	2	13.0%	17	16.0%	8	13.0%	3	13.5%	5	13.9%	23	16.9%	10	17.9%	5	13.3%	6	8.8%	3	10.8%	4	
26-40	7.4%	15	6.3%	10	11.1%	2	11.5%	3	5.3%	7	10.0%	5	13.0%	3	5.4%	2	7.8%	13	10.2%	6	14.3%	4	4.4%	2	5.9%	2	2.7%	1	
>40	6.9%	14	3.8%	6	16.7%	3	19.2%	5	3.1%	4	0.0%	0	43.5%	10	5.4%	2	7.2%	12	6.8%	4	3.6%	1	6.7%	3	5.9%	2	10.8%	4	
Totals	100.0%	204	100.0%	160	100.0%	18	100.0%	26	100.0%	131	100.0%	50	100.0%	23	100.0%	37	100.0%	166	100.0%	59	100.0%	28	100.0%	45	100.0%	34	100.0%	37	

Figure 21: 17. How many new members will have joined your club in 2019?

	Overall		CLUB TYPE			SIZE			GATED/RESIDENTIAL		INITIATION FEE																	
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Other 17.8%, 56	500/Less 61.1%, 185	501 to 1,000 26.7%, 81	1,001/More 12.2%, 37	Yes 28.1%, 88	No 71.9%, 225	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64													
Total																												
Mean	58.47		53.26		89.00		64.55		48.59		52.31		126.47		65.70		55.86		83.96		56.97		55.06		55.20		32.65	
Median	40.00		40.00		49.50		30.00		30.00		45.50		100.00		35.50		40.00		54.00		50.00		40.00		37.00		25.00	
Regular																												
Mean	48.53		26.17		66.88		140.40		22.67		34.91		213.55		100.73		32.74		97.04		27.86		34.92		35.85		21.46	
Median	23.00		20.00		40.00		29.50		16.00		34.00		70.00		22.50		23.00		30.00		20.00		21.50		26.00		16.50	
Junior																												
Mean	13.93		11.85		21.39		21.58		10.33		12.04		38.57		11.70		14.51		14.37		14.96		15.04		12.88		12.19	
Median	9.00		9.00		10.50		9.00		6.00		10.00		30.00		7.00		9.50		10.00		11.00		9.00		9.50		6.00	

Figure 22: 18. What is your approach on dues for 2020?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Inflationary increase	53.1%	153	54.9%	117	48.1%	13	41.7%	10	54.2%	13	53.4%	94	51.9%	40	54.3%	19	51.8%	44	52.5%	21	55.6%	30	58.1%	25	47.6%	30
Curtail increase	9.0%	26	8.5%	18	11.1%	3	20.8%	5	0.0%	0	11.4%	20	3.9%	3	8.6%	3	14.1%	12	7.5%	3	14.8%	8	4.7%	2	1.6%	1
Increase> inflation	28.8%	83	28.2%	60	25.9%	7	33.3%	8	33.3%	8	26.7%	47	36.4%	28	22.9%	8	20.0%	17	32.5%	13	24.1%	13	34.9%	15	39.7%	25
Other	9.0%	26	8.5%	18	14.8%	4	4.2%	1	12.5%	3	8.5%	15	7.8%	6	14.3%	5	14.1%	12	7.5%	3	5.6%	3	2.3%	1	11.1%	7
Totals	100.0%	288	100.0%	213	100.0%	27	100.0%	24	100.0%	24	100.0%	176	100.0%	77	100.0%	35	100.0%	85	100.0%	40	100.0%	54	100.0%	43	100.0%	63

Figure 23: 19. Does your club have a capital dues surcharge?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	64.2%	185	69.0%	147	51.9%	14	66.7%	16	33.3%	8	68.2%	120	61.0%	47	51.4%	18	58.8%	50	55.0%	22	65.5%	36	81.4%	35	62.9%	39
No	35.8%	103	31.0%	66	48.1%	13	33.3%	8	66.7%	16	31.8%	56	39.0%	30	48.6%	17	41.2%	35	45.0%	18	34.5%	19	18.6%	8	37.1%	23
Totals	100.0%	288	100.0%	213	100.0%	27	100.0%	24	100.0%	24	100.0%	176	100.0%	77	100.0%	35	100.0%	85	100.0%	40	100.0%	55	100.0%	43	100.0%	62

Figure 24: 20. How much is your capital dues surcharge/month?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
\$1-\$25	14.0%	25	9.2%	13	21.4%	3	46.7%	7	25.0%	2	13.2%	15	14.9%	7	17.6%	3	29.2%	14	14.3%	3	11.8%	4	11.4%	4	0.0%	0
\$26-\$50	18.0%	32	15.6%	22	35.7%	5	20.0%	3	25.0%	2	18.4%	21	14.9%	7	23.5%	4	25.0%	12	23.8%	5	20.6%	7	20.0%	7	2.6%	1
\$51-\$75	12.4%	22	10.6%	15	35.7%	5	13.3%	2	0.0%	0	12.3%	14	10.6%	5	17.6%	3	14.6%	7	14.3%	3	14.7%	5	8.6%	3	7.7%	3
\$76-\$100	22.5%	40	24.8%	35	7.1%	1	13.3%	2	25.0%	2	22.8%	26	19.1%	9	29.4%	5	18.8%	9	23.8%	5	26.5%	9	20.0%	7	25.6%	10
\$101-\$150	16.9%	30	21.3%	30	0.0%	0	0.0%	0	0.0%	0	19.3%	22	17.0%	8	0.0%	0	6.3%	3	14.3%	3	11.8%	4	25.7%	9	28.2%	11
\$151-\$200	10.1%	18	12.8%	18	0.0%	0	0.0%	0	0.0%	0	7.0%	8	17.0%	8	11.8%	2	4.2%	2	4.8%	1	5.9%	2	14.3%	5	20.5%	8
>\$200	6.2%	11	5.7%	8	0.0%	0	6.7%	1	25.0%	2	7.0%	8	6.4%	3	0.0%	0	2.1%	1	4.8%	1	8.8%	3	0.0%	0	15.4%	6
Totals	100.0%	178	100.0%	141	100.0%	14	100.0%	15	100.0%	8	100.0%	114	100.0%	47	100.0%	17	100.0%	48	100.0%	21	100.0%	34	100.0%	35	100.0%	39

Figure 25: 20. How much is your capital dues surcharge/month?

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Mean	112.19	105.77	47.14	96.07	369.25	103.61	146.40	75.12	64.54	88.57	110.94	96.20	199.92
Median	85.00	100.00	45.00	50.00	67.00	91.00	85.00	63.00	46.50	75.00	85.00	100.00	125.00

Figure 26: 21. What are your general expectations for membership growth or decline for 2020?

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Up	54.2% 155	53.1% 112	70.4% 19	58.3% 14	41.7% 10	58.0% 101	46.8% 36	51.4% 18	63.5% 54	62.5% 25	50.9% 27	53.5% 23	38.7% 24
Down	3.8% 11	4.3% 9	3.7% 1	4.2% 1	0.0% 0	4.6% 8	3.9% 3	0.0% 0	5.9% 5	5.0% 2	1.9% 1	4.7% 2	1.6% 1
No change	42.0% 120	42.7% 90	25.9% 7	37.5% 9	58.3% 14	37.4% 65	49.4% 38	48.6% 17	30.6% 26	32.5% 13	47.2% 25	41.9% 18	59.7% 37
Totals	100.0% 286	100.0% 211	100.0% 27	100.0% 24	100.0% 24	100.0% 174	100.0% 77	100.0% 35	100.0% 85	100.0% 40	100.0% 53	100.0% 43	100.0% 62

Figure 27: Percentage of growth/decline:

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Up													
1 to 2%	29.8% 45	33.3% 36	26.3% 5	21.4% 3	10.0% 1	27.3% 27	29.4% 10	44.4% 8	22.2% 12	43.5% 10	33.3% 9	22.7% 5	39.1% 9
3%	16.6% 25	13.0% 14	21.1% 4	21.4% 3	40.0% 4	15.2% 15	20.6% 7	16.7% 3	14.8% 8	17.4% 4	25.9% 7	9.1% 2	17.4% 4
4%	6.6% 10	6.5% 7	10.5% 2	7.1% 1	0.0% 0	6.1% 6	8.8% 3	5.6% 1	3.7% 2	4.3% 1	11.1% 3	18.2% 4	0.0% 0
5%	18.5% 28	18.5% 20	15.8% 3	14.3% 2	30.0% 3	18.2% 18	23.5% 8	11.1% 2	22.2% 12	13.0% 3	7.4% 2	27.3% 6	21.7% 5
6 - 10%	21.9% 33	21.3% 23	15.8% 3	35.7% 5	20.0% 2	25.3% 25	14.7% 5	16.7% 3	29.6% 16	21.7% 5	7.4% 2	18.2% 4	17.4% 4
Above 10%	6.6% 10	7.4% 8	10.5% 2	0.0% 0	0.0% 0	8.1% 8	2.9% 1	5.6% 1	7.4% 4	0.0% 0	14.8% 4	4.5% 1	4.3% 1
Totals	100.0% 151	100.0% 108	100.0% 19	100.0% 14	100.0% 10	100.0% 99	100.0% 34	100.0% 18	100.0% 54	100.0% 23	100.0% 27	100.0% 22	100.0% 23
Down													
1 to 2%	45.5% 5	33.3% 3	100.0% 1	100.0% 1	0	50.0% 4	33.3% 1	0	60.0% 3	100.0% 2	0.0% 0	0.0% 0	0.0% 0
3%	18.2% 2	22.2% 2	0.0% 0	0.0% 0	0	25.0% 2	0.0% 0	0	0.0% 0	0.0% 0	100.0% 1	50.0% 1	0.0% 0
4%	9.1% 1	11.1% 1	0.0% 0	0.0% 0	0	0.0% 0	33.3% 1	0	20.0% 1	0.0% 0	0.0% 0	0.0% 0	0.0% 0
5%	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0	0.0% 0	0.0% 0	0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0
6 - 10%	18.2% 2	22.2% 2	0.0% 0	0.0% 0	0	25.0% 2	0.0% 0	0	20.0% 1	0.0% 0	0.0% 0	0.0% 0	100.0% 1
Above 10%	9.1% 1	11.1% 1	0.0% 0	0.0% 0	0	0.0% 0	33.3% 1	0	0.0% 0	0.0% 0	0.0% 0	50.0% 1	0.0% 0
Totals	100.0% 11	100.0% 9	100.0% 1	100.0% 1	% 0	100.0% 8	100.0% 3	% 0	100.0% 5	100.0% 2	100.0% 1	100.0% 2	100.0% 1

Figure 28: 22. Do you plan to implement special strategies for member retention in 2020?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	51.4%	146	50.0%	105	70.4%	19	41.7%	10	52.2%	12	56.3%	98	46.1%	35	38.2%	13	64.3%	54	57.5%	23	48.1%	25	53.5%	23	29.0%	18
No	48.6%	138	50.0%	105	29.6%	8	58.3%	14	47.8%	11	43.7%	76	53.9%	41	61.8%	21	35.7%	30	42.5%	17	51.9%	27	46.5%	20	71.0%	44
Totals	100.0%	284	100.0%	210	100.0%	27	100.0%	24	100.0%	23	100.0%	174	100.0%	76	100.0%	34	100.0%	84	100.0%	40	100.0%	52	100.0%	43	100.0%	62

Figure 29: 24. Will you be offering special membership programs to attract new members in 2020?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	40.5%	115	43.1%	91	38.5%	10	29.2%	7	30.4%	7	49.4%	86	21.1%	16	38.2%	13	54.8%	46	52.5%	21	44.2%	23	30.2%	13	16.1%	10
No	59.5%	169	56.9%	120	61.5%	16	70.8%	17	69.6%	16	50.6%	88	78.9%	60	61.8%	21	45.2%	38	47.5%	19	55.8%	29	69.8%	30	83.9%	52
Totals	100.0%	284	100.0%	211	100.0%	26	100.0%	24	100.0%	23	100.0%	174	100.0%	76	100.0%	34	100.0%	84	100.0%	40	100.0%	52	100.0%	43	100.0%	62

Figure 30: 26. How important do you feel the following are in attracting new members to your club today?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Quality members																										
Very Important	72.5%	206	67.9%	142	77.8%	21	87.5%	21	91.7%	22	68.8%	119	77.6%	59	80.0%	28	60.0%	51	67.5%	27	76.9%	40	76.2%	32	87.1%	54
Important	24.6%	70	29.2%	61	18.5%	5	12.5%	3	4.2%	1	28.3%	49	19.7%	15	17.1%	6	34.1%	29	30.0%	12	21.2%	11	23.8%	10	11.3%	7
Neutral	2.8%	8	2.9%	6	3.7%	1	0.0%	0	4.2%	1	2.9%	5	2.6%	2	2.9%	1	5.9%	5	2.5%	1	1.9%	1	0.0%	0	1.6%	1
Unimportant	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Very Unimportant	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Totals	100.0%	284	100.0%	209	100.0%	27	100.0%	24	100.0%	24	100.0%	173	100.0%	76	100.0%	35	100.0%	85	100.0%	40	100.0%	52	100.0%	42	100.0%	62
Mean		4.70		4.65		4.74		4.88		4.88		4.66		4.75		4.77		4.54		4.65		4.75		4.76		4.85
Clubhouse																										
Very Important	60.6%	172	57.9%	121	63.0%	17	79.2%	19	62.5%	15	56.6%	98	65.8%	50	68.6%	24	54.1%	46	50.0%	20	59.6%	31	71.4%	30	69.4%	43
Important	36.6%	104	39.7%	83	33.3%	9	12.5%	3	37.5%	9	40.5%	70	31.6%	24	28.6%	10	42.4%	36	47.5%	19	36.5%	19	23.8%	10	30.6%	19
Neutral	2.1%	6	1.9%	4	0.0%	0	8.3%	2	0.0%	0	2.3%	4	1.3%	1	2.9%	1	2.4%	2	2.5%	1	3.8%	2	2.4%	1	0.0%	0
Unimportant	0.4%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1	0.0%	0
Very Unimportant	0.4%	1	0.0%	0	3.7%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Totals	100.0%	284	100.0%	209	100.0%	27	100.0%	24	100.0%	24	100.0%	173	100.0%	76	100.0%	35	100.0%	85	100.0%	40	100.0%	52	100.0%	42	100.0%	62
Mean		4.57		4.55		4.52		4.71		4.63		4.53		4.62		4.66		4.48		4.47		4.56		4.64		4.69
Dining program																										
Very Important	56.5%	160	51.4%	107	70.4%	19	75.0%	18	66.7%	16	54.7%	94	64.5%	49	48.6%	17	54.1%	46	45.0%	18	52.9%	27	66.7%	28	61.3%	38
Important	36.7%	104	39.9%	83	29.6%	8	20.8%	5	33.3%	8	36.6%	63	31.6%	24	48.6%	17	38.8%	33	45.0%	18	39.2%	20	31.0%	13	32.3%	20
Neutral	5.3%	15	7.2%	15	0.0%	0	0.0%	0	0.0%	0	7.0%	12	2.6%	2	2.9%	1	4.7%	4	7.5%	3	7.8%	4	0.0%	0	6.5%	4
Unimportant	1.1%	3	1.0%	2	0.0%	0	4.2%	1	0.0%	0	1.7%	3	0.0%	0	0.0%	0	1.2%	1	2.5%	1	0.0%	0	2.4%	1	0.0%	0
Very Unimportant	0.4%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Totals	100.0%	283	100.0%	208	100.0%	27	100.0%	24	100.0%	24	100.0%	172	100.0%	76	100.0%	35	100.0%	85	100.0%	40	100.0%	51	100.0%	42	100.0%	62
Mean		4.48		4.41		4.70		4.67		4.67		4.44		4.58		4.46		4.44		4.32		4.45		4.62		4.55

Figure 31: 26. How important do you feel the following are in attracting new members to your club today?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
History/prestige																										
Very Important	22.5%	64	18.2%	38	40.7%	11	33.3%	8	29.2%	7	16.2%	28	28.9%	22	40.0%	14	16.5%	14	17.5%	7	19.2%	10	23.8%	10	37.1%	23
Important	41.2%	117	39.2%	82	48.1%	13	45.8%	11	45.8%	11	42.2%	73	43.4%	33	31.4%	11	41.2%	35	42.5%	17	46.2%	24	38.1%	16	37.1%	23
Neutral	29.9%	85	34.4%	72	11.1%	3	20.8%	5	20.8%	5	35.3%	61	21.1%	16	22.9%	8	29.4%	25	40.0%	16	30.8%	16	35.7%	15	19.4%	12
Unimportant	5.3%	15	6.7%	14	0.0%	0	0.0%	0	4.2%	1	5.2%	9	6.6%	5	2.9%	1	9.4%	8	0.0%	0	3.8%	2	2.4%	1	6.5%	4
Very Unimportant	1.1%	3	1.4%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	2.9%	1	3.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Totals	100.0%	284	100.0%	209	100.0%	27	100.0%	24	100.0%	24	100.0%	173	100.0%	76	100.0%	35	100.0%	85	100.0%	40	100.0%	52	100.0%	42	100.0%	62
Mean		3.79		3.66		4.30		4.13		4.00		3.67		3.95		4.03		3.58		3.78		3.81		3.83		4.05
Year-round																										
Very Important	35.6%	100	33.3%	69	34.6%	9	45.8%	11	45.8%	11	31.4%	54	37.3%	28	52.9%	18	33.3%	28	40.0%	16	43.1%	22	19.0%	8	42.6%	26
Important	40.2%	113	40.6%	84	50.0%	13	37.5%	9	29.2%	7	37.2%	64	48.0%	36	38.2%	13	44.0%	37	42.5%	17	33.3%	17	47.6%	20	31.1%	19
Neutral	15.3%	43	17.4%	36	15.4%	4	8.3%	2	4.2%	1	19.2%	33	10.7%	8	5.9%	2	16.7%	14	10.0%	4	9.8%	5	26.2%	11	14.8%	9
Unimportant	5.0%	14	5.8%	12	0.0%	0	4.2%	1	4.2%	1	7.6%	13	1.3%	1	0.0%	0	3.6%	3	0.0%	0	11.8%	6	4.8%	2	4.9%	3
Very Unimportant	3.9%	11	2.9%	6	0.0%	0	4.2%	1	16.7%	4	4.7%	8	2.7%	2	2.9%	1	2.4%	2	7.5%	3	2.0%	1	2.4%	1	6.6%	4
Totals	100.0%	281	100.0%	207	100.0%	26	100.0%	24	100.0%	24	100.0%	172	100.0%	75	100.0%	34	100.0%	84	100.0%	40	100.0%	51	100.0%	42	100.0%	61
Mean		3.99		3.96		4.19		4.17		3.83		3.83		4.16		4.38		4.02		4.07		4.04		3.76		3.98
Golf course																										
Very Important	68.6%	157	72.5%	150	0.0%	0	0.0%	0	63.6%	7	69.5%	107	64.4%	38	75.0%	12	64.6%	42	60.0%	18	71.4%	25	69.2%	27	74.1%	43
Important	23.6%	54	25.1%	52	0.0%	0	0.0%	0	18.2%	2	22.1%	34	27.1%	16	25.0%	4	20.0%	13	33.3%	10	20.0%	7	23.1%	9	25.9%	15
Neutral	2.2%	5	1.9%	4	0.0%	0	16.7%	1	0.0%	0	2.6%	4	1.7%	1	0.0%	0	3.1%	2	0.0%	0	5.7%	2	2.6%	1	0.0%	0
Unimportant	0.9%	2	0.5%	1	0.0%	0	0.0%	0	9.1%	1	1.3%	2	0.0%	0	0.0%	0	3.1%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Very Unimportant	4.8%	11	0.0%	0	100.0%	5	83.3%	5	9.1%	1	4.5%	7	6.8%	4	0.0%	0	9.2%	6	6.7%	2	2.9%	1	5.1%	2	0.0%	0
Totals	100.0%	229	100.0%	207	100.0%	5	100.0%	6	100.0%	11	100.0%	154	100.0%	59	100.0%	16	100.0%	65	100.0%	30	100.0%	35	100.0%	39	100.0%	58
Mean		4.50		4.70		1.00		1.33		4.18		4.51		4.42		4.75		4.28		4.40		4.57		4.51		4.74
Golf practice																										
Very Important	46.5%	107	49.3%	102	0.0%	0	0.0%	0	41.7%	5	49.4%	76	38.3%	23	50.0%	8	38.5%	25	46.7%	14	40.0%	14	53.8%	21	52.5%	31
Important	37.8%	87	40.1%	83	0.0%	0	0.0%	0	33.3%	4	35.1%	54	45.0%	27	37.5%	6	38.5%	25	40.0%	12	45.7%	16	33.3%	13	35.6%	21
Neutral	8.7%	20	8.7%	18	0.0%	0	16.7%	1	8.3%	1	9.7%	15	6.7%	4	6.3%	1	7.7%	5	6.7%	2	11.4%	4	7.7%	3	10.2%	6
Unimportant	2.2%	5	1.9%	4	0.0%	0	0.0%	0	8.3%	1	1.3%	2	3.3%	2	6.3%	1	6.2%	4	0.0%	0	0.0%	0	0.0%	0	1.7%	1
Very Unimportant	4.8%	11	0.0%	0	100.0%	5	83.3%	5	8.3%	1	4.5%	7	6.7%	4	0.0%	0	9.2%	6	6.7%	2	2.9%	1	5.1%	2	0.0%	0
Totals	100.0%	230	100.0%	207	100.0%	5	100.0%	6	100.0%	12	100.0%	154	100.0%	60	100.0%	16	100.0%	65	100.0%	30	100.0%	35	100.0%	39	100.0%	59
Mean		4.19		4.37		1.00		1.33		3.92		4.23		4.05		4.31		3.91		4.20		4.20		4.31		4.39

Figure 32: 26. How important do you feel the following are in attracting new members to your club today?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Health/fitness														
Very Important	33.7%	85	32.3% 63	35.0% 7	6.3% 1	66.7% 14	23.9% 37	43.3% 29	63.3% 19	25.7% 18	28.6% 10	27.7% 13	32.5% 13	52.6% 30
Important	29.8%	75	30.8% 60	25.0% 5	31.3% 5	23.8% 5	31.6% 49	26.9% 18	26.7% 8	31.4% 22	31.4% 11	40.4% 19	30.0% 12	17.5% 10
Neutral	24.2%	61	25.1% 49	10.0% 2	56.3% 9	4.8% 1	28.4% 44	20.9% 14	10.0% 3	27.1% 19	28.6% 10	23.4% 11	22.5% 9	19.3% 11
Unimportant	8.3%	21	8.7% 17	15.0% 3	0.0% 0	4.8% 1	11.0% 17	6.0% 4	0.0% 0	8.6% 6	8.6% 3	8.5% 4	7.5% 3	8.8% 5
Very Unimportant	4.0%	10	3.1% 6	15.0% 3	6.3% 1	0.0% 0	5.2% 8	3.0% 2	0.0% 0	7.1% 5	2.9% 1	0.0% 0	7.5% 3	1.8% 1
Totals	100.0%	252	100.0% 195	100.0% 20	100.0% 16	100.0% 21	100.0% 155	100.0% 67	100.0% 30	100.0% 70	100.0% 35	100.0% 47	100.0% 40	100.0% 57
Mean		3.81	3.81	3.50	3.31	4.52	3.58	4.01	4.53	3.60	3.74	3.87	3.72	4.11

Figure 33: 26. How important do you feel the following are in attracting new members to your club today?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Pool facilities																										
Very Important	32.7%	83	30.3%	59	33.3%	5	23.8%	5	60.9%	14	27.7%	44	32.3%	21	60.0%	18	30.1%	22	32.4%	12	29.8%	14	24.3%	9	43.1%	25
Important	41.7%	106	41.5%	81	26.7%	4	66.7%	14	30.4%	7	40.3%	64	47.7%	31	36.7%	11	39.7%	29	43.2%	16	48.9%	23	45.9%	17	34.5%	20
Neutral	13.8%	35	16.9%	33	6.7%	1	0.0%	0	4.3%	1	17.0%	27	10.8%	7	3.3%	1	12.3%	9	16.2%	6	19.1%	9	10.8%	4	12.1%	7
Unimportant	5.5%	14	6.2%	12	0.0%	0	4.8%	1	4.3%	1	6.9%	11	4.6%	3	0.0%	0	5.5%	4	5.4%	2	2.1%	1	10.8%	4	5.2%	3
Very Unimportant	6.3%	16	5.1%	10	33.3%	5	4.8%	1	0.0%	0	8.2%	13	4.6%	3	0.0%	0	12.3%	9	2.7%	1	0.0%	0	8.1%	3	5.2%	3
Totals	100.0%	254	100.0%	195	100.0%	15	100.0%	21	100.0%	23	100.0%	159	100.0%	65	100.0%	30	100.0%	73	100.0%	37	100.0%	47	100.0%	37	100.0%	58
Mean		3.89		3.86		3.27		4.00		4.48		3.72		3.98		4.57		3.70		3.97		4.06		3.68		4.05
Racquets facilities																										
Very Important	24.4%	58	19.2%	35	41.2%	7	29.4%	5	50.0%	11	19.6%	29	22.6%	14	53.6%	15	22.6%	14	14.7%	5	29.5%	13	26.3%	10	28.1%	16
Important	36.1%	86	39.6%	72	17.6%	3	17.6%	3	36.4%	8	31.1%	46	45.2%	28	42.9%	12	29.0%	18	35.3%	12	29.5%	13	36.8%	14	49.1%	28
Neutral	22.3%	53	24.2%	44	11.8%	2	29.4%	5	9.1%	2	28.4%	42	16.1%	10	3.6%	1	25.8%	16	26.5%	9	31.8%	14	15.8%	6	10.5%	6
Unimportant	9.2%	22	11.0%	20	0.0%	0	5.9%	1	4.5%	1	11.5%	17	8.1%	5	0.0%	0	8.1%	5	11.8%	4	6.8%	3	13.2%	5	8.8%	5
Very Unimportant	8.0%	19	6.0%	11	29.4%	5	17.6%	3	0.0%	0	9.5%	14	8.1%	5	0.0%	0	14.5%	9	11.8%	4	2.3%	1	7.9%	3	3.5%	2
Totals	100.0%	238	100.0%	182	100.0%	17	100.0%	17	100.0%	22	100.0%	148	100.0%	62	100.0%	28	100.0%	62	100.0%	34	100.0%	44	100.0%	38	100.0%	57
Mean		3.60		3.55		3.41		3.35		4.32		3.40		3.66		4.50		3.37		3.29		3.77		3.61		3.89
Children's programs																										
Very Important	29.1%	78	29.1%	59	15.0%	3	33.3%	7	37.5%	9	24.8%	41	35.7%	25	36.4%	12	19.0%	15	31.6%	12	44.9%	22	24.4%	10	29.3%	17
Important	42.5%	114	42.9%	87	45.0%	9	38.1%	8	41.7%	10	46.7%	77	31.4%	22	45.5%	15	49.4%	39	44.7%	17	26.5%	13	46.3%	19	44.8%	26
Neutral	15.7%	42	16.3%	33	20.0%	4	14.3%	3	8.3%	2	11.5%	19	25.7%	18	15.2%	5	19.0%	15	10.5%	4	14.3%	7	14.6%	6	15.5%	9
Unimportant	7.8%	21	8.9%	18	5.0%	1	0.0%	0	8.3%	2	10.3%	17	5.7%	4	0.0%	0	3.8%	3	7.9%	3	10.2%	5	12.2%	5	8.6%	5
Very Unimportant	4.9%	13	3.0%	6	15.0%	3	14.3%	3	4.2%	1	6.7%	11	1.4%	1	3.0%	1	8.9%	7	5.3%	2	4.1%	2	2.4%	1	1.7%	1
Totals	100.0%	268	100.0%	203	100.0%	20	100.0%	21	100.0%	24	100.0%	165	100.0%	70	100.0%	33	100.0%	79	100.0%	38	100.0%	49	100.0%	41	100.0%	58
Mean		3.83		3.86		3.40		3.76		4.00		3.73		3.94		4.12		3.66		3.89		3.98		3.78		3.91
Family programs																										
Very Important	34.7%	94	34.8%	71	13.6%	3	36.4%	8	52.2%	12	35.3%	59	35.7%	25	29.4%	10	26.3%	21	42.1%	16	36.5%	19	34.1%	14	38.6%	22
Important	45.8%	124	44.6%	91	68.2%	15	45.5%	10	34.8%	8	44.3%	74	42.9%	30	58.8%	20	50.0%	40	36.8%	14	42.3%	22	46.3%	19	49.1%	28
Neutral	10.3%	28	11.8%	24	4.5%	1	4.5%	1	8.7%	2	8.4%	14	14.3%	10	11.8%	4	15.0%	12	13.2%	5	9.6%	5	9.8%	4	3.5%	2
Unimportant	6.3%	17	6.4%	13	4.5%	1	9.1%	2	4.3%	1	7.8%	13	5.7%	4	0.0%	0	3.8%	3	5.3%	2	9.6%	5	7.3%	3	7.0%	4
Very Unimportant	3.0%	8	2.5%	5	9.1%	2	4.5%	1	0.0%	0	4.2%	7	1.4%	1	0.0%	0	5.0%	4	2.6%	1	1.9%	1	2.4%	1	1.8%	1
Totals	100.0%	271	100.0%	204	100.0%	22	100.0%	22	100.0%	23	100.0%	167	100.0%	70	100.0%	34	100.0%	80	100.0%	38	100.0%	52	100.0%	41	100.0%	57
Mean		4.03		4.03		3.73		4.00		4.35		3.99		4.06		4.18		3.89		4.11		4.02		4.02		4.16

Figure 34: 26. How important do you feel the following are in attracting new members to your club today?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Reciprocal clubs																										
Very Important	9.2%	25	5.5%	11	26.9%	7	20.8%	5	9.1%	2	7.8%	13	12.5%	9	8.8%	3	16.7%	14	7.5%	3	6.1%	3	4.9%	2	5.4%	3
Important	24.5%	67	19.9%	40	46.2%	12	41.7%	10	22.7%	5	23.4%	39	22.2%	16	35.3%	12	39.3%	33	25.0%	10	24.5%	12	7.3%	3	10.7%	6
Neutral	37.4%	102	41.8%	84	15.4%	4	25.0%	6	36.4%	8	34.7%	58	44.4%	32	35.3%	12	31.0%	26	40.0%	16	36.7%	18	46.3%	19	41.1%	23
Unimportant	17.9%	49	20.9%	42	7.7%	2	8.3%	2	13.6%	3	21.0%	35	12.5%	9	14.7%	5	9.5%	8	20.0%	8	20.4%	10	24.4%	10	23.2%	13
Very Unimportant	11.0%	30	11.9%	24	3.8%	1	4.2%	1	18.2%	4	13.2%	22	8.3%	6	5.9%	2	3.6%	3	7.5%	3	12.2%	6	17.1%	7	19.6%	11
Totals	100.0%	273	100.0%	201	100.0%	26	100.0%	24	100.0%	22	100.0%	167	100.0%	72	100.0%	34	100.0%	84	100.0%	40	100.0%	49	100.0%	41	100.0%	56
Mean		3.03		2.86		3.85		3.67		2.91		2.92		3.18		3.26		3.56		3.05		2.92		2.59		2.59

Figure 35: 27. How important do you feel the following are in attracting new members to your club in the future?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Quality members														
Very Important	70.5%	198	64.9%	81.5%	87.5%	90.9%	67.3%	70.7%	85.7%	61.9%	70.0%	73.1%	66.7%	83.3%
Important	26.3%	74	31.3%	18.5%	12.5%	4.5%	28.7%	26.7%	14.3%	33.3%	27.5%	23.1%	31.0%	15.0%
Neutral	2.8%	8	3.4%	0.0%	0.0%	4.5%	3.5%	2.7%	0.0%	4.8%	2.5%	1.9%	2.4%	1.7%
Unimportant	0.4%	1	0.5%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%
Very Unimportant	0.0%	0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Totals	100.0%	281	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean	4.67		4.61	4.81	4.88	4.86	4.63	4.68	4.86	4.57	4.68	4.67	4.64	4.82
Clubhouse														
Very Important	67.0%	189	64.1%	70.4%	83.3%	72.7%	62.8%	73.3%	74.3%	56.5%	62.5%	73.1%	78.6%	71.7%
Important	31.9%	90	34.9%	25.9%	16.7%	27.3%	36.0%	25.3%	25.7%	42.4%	37.5%	25.0%	21.4%	26.7%
Neutral	0.7%	2	1.0%	0.0%	0.0%	0.0%	0.6%	1.3%	0.0%	0.0%	0.0%	1.9%	0.0%	1.7%
Unimportant	0.0%	0	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Very Unimportant	0.4%	1	0.0%	3.7%	0.0%	0.0%	0.6%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Totals	100.0%	282	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean	4.65		4.63	4.59	4.83	4.73	4.60	4.72	4.74	4.53	4.63	4.71	4.79	4.70
Dining program														
Very Important	62.6%	176	59.3%	81.5%	73.9%	59.1%	61.0%	66.2%	62.9%	57.6%	55.0%	58.8%	73.8%	68.3%
Important	33.1%	93	34.9%	18.5%	26.1%	40.9%	33.7%	31.1%	34.3%	36.5%	42.5%	33.3%	23.8%	30.0%
Neutral	3.6%	10	4.8%	0.0%	0.0%	0.0%	4.7%	1.4%	2.9%	4.7%	2.5%	7.8%	0.0%	1.7%
Unimportant	0.4%	1	0.5%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%
Very Unimportant	0.4%	1	0.5%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%
Totals	100.0%	281	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean	4.57		4.52	4.81	4.74	4.59	4.55	4.61	4.60	4.49	4.53	4.51	4.69	4.67
History/prestige														
Very Important	22.7%	64	19.1%	44.4%	29.2%	22.7%	18.0%	26.7%	37.1%	20.0%	12.5%	21.2%	23.8%	35.0%
Important	38.7%	109	35.4%	44.4%	50.0%	50.0%	38.4%	38.7%	40.0%	37.6%	50.0%	46.2%	35.7%	26.7%
Neutral	28.7%	81	34.0%	11.1%	12.5%	18.2%	32.6%	24.0%	20.0%	28.2%	35.0%	21.2%	28.6%	31.7%
Unimportant	7.4%	21	8.1%	0.0%	8.3%	9.1%	8.1%	8.0%	2.9%	10.6%	2.5%	9.6%	9.5%	3.3%
Very Unimportant	2.5%	7	3.3%	0.0%	0.0%	0.0%	2.9%	2.7%	0.0%	3.5%	0.0%	1.9%	2.4%	3.3%
Totals	100.0%	282	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean	3.72		3.59	4.33	4.00	3.86	3.60	3.79	4.11	3.60	3.72	3.75	3.69	3.87

Figure 36: 27. How important do you feel the following are in attracting new members to your club in the future?

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64										
Year-round																							
Very Important	47.1% 131	45.4% 93	42.3% 11	50.0% 12	65.2% 15	40.2% 68	51.4% 38	71.4% 25	48.2% 40	33.3% 13	56.9% 29	38.1% 16	53.3% 32										
Important	34.9% 97	36.6% 75	42.3% 11	33.3% 8	13.0% 3	37.3% 63	37.8% 28	17.1% 6	31.3% 26	53.8% 21	27.5% 14	35.7% 15	31.7% 19										
Neutral	10.8% 30	11.2% 23	15.4% 4	8.3% 2	4.3% 1	12.4% 21	8.1% 6	8.6% 3	16.9% 14	5.1% 2	5.9% 3	19.0% 8	5.0% 3										
Unimportant	3.6% 10	2.9% 6	0.0% 0	8.3% 2	8.7% 2	5.3% 9	1.4% 1	0.0% 0	1.2% 1	5.1% 2	5.9% 3	4.8% 2	3.3% 2										
Very Unimportant	3.6% 10	3.9% 8	0.0% 0	0.0% 0	8.7% 2	4.7% 8	1.4% 1	2.9% 1	2.4% 2	2.6% 1	3.9% 2	2.4% 1	6.7% 4										
Totals	100.0% 278	100.0% 205	100.0% 26	100.0% 24	100.0% 23	100.0% 169	100.0% 74	100.0% 35	100.0% 83	100.0% 39	100.0% 51	100.0% 42	100.0% 60										
Mean	4.18	4.17	4.27	4.25	4.17	4.03	4.36	4.54	4.22	4.10	4.27	4.02	4.22										

Figure 37: 27. How important do you feel the following are in attracting new members to your club in the future?

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																	
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64													
Golf course																										
Very Important	65.7%	153	70.0%	145	0.0%	0	0.0%	0	66.7%	8	66.5%	103	60.3%	35	75.0%	15	59.7%	40	63.3%	19	68.4%	26	71.1%	27	67.2%	39
Important	24.0%	56	26.6%	55	16.7%	1	0.0%	0	0.0%	0	23.9%	37	29.3%	17	10.0%	2	23.9%	16	26.7%	8	18.4%	7	18.4%	7	31.0%	18
Neutral	5.2%	12	2.9%	6	0.0%	0	50.0%	4	16.7%	2	4.5%	7	5.2%	3	10.0%	2	6.0%	4	3.3%	1	7.9%	3	7.9%	3	1.7%	1
Unimportant	0.4%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Very Unimportant	4.7%	11	0.0%	0	83.3%	5	50.0%	4	16.7%	2	4.5%	7	5.2%	3	5.0%	1	9.0%	6	6.7%	2	5.3%	2	2.6%	1	0.0%	0
Totals	100.0%	233	100.0%	207	100.0%	6	100.0%	8	100.0%	12	100.0%	155	100.0%	58	100.0%	20	100.0%	67	100.0%	30	100.0%	38	100.0%	38	100.0%	58
Mean	4.45		4.66		1.50		2.00		4.00		4.47		4.40		4.50		4.24		4.40		4.45		4.55		4.66	
Golf practice																										
Very Important	56.0%	131	59.4%	123	0.0%	0	0.0%	0	61.5%	8	56.8%	88	52.5%	31	60.0%	12	47.8%	32	53.3%	16	50.0%	19	63.2%	24	64.4%	38
Important	32.1%	75	35.3%	73	16.7%	1	0.0%	0	7.7%	1	31.6%	49	37.3%	22	20.0%	4	31.3%	21	36.7%	11	34.2%	13	31.6%	12	30.5%	18
Neutral	6.4%	15	4.3%	9	0.0%	0	50.0%	4	15.4%	2	6.5%	10	3.4%	2	15.0%	3	9.0%	6	3.3%	1	10.5%	4	2.6%	1	5.1%	3
Unimportant	0.9%	2	1.0%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	1.7%	1	0.0%	0	3.0%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Very Unimportant	4.7%	11	0.0%	0	83.3%	5	50.0%	4	15.4%	2	4.5%	7	5.1%	3	5.0%	1	9.0%	6	6.7%	2	5.3%	2	2.6%	1	0.0%	0
Totals	100.0%	234	100.0%	207	100.0%	6	100.0%	8	100.0%	13	100.0%	155	100.0%	59	100.0%	20	100.0%	67	100.0%	30	100.0%	38	100.0%	38	100.0%	59
Mean	4.34		4.53		1.50		2.00		4.00		4.35		4.31		4.30		4.06		4.30		4.24		4.53		4.59	
Health/fitness																										
Very Important	49.6%	129	46.3%	94	57.9%	11	41.2%	7	81.0%	17	39.9%	63	55.7%	39	84.4%	27	44.6%	33	48.6%	18	46.9%	23	48.7%	19	60.3%	35
Important	31.9%	83	32.5%	66	21.1%	4	58.8%	10	14.3%	3	32.9%	52	37.1%	26	15.6%	5	28.4%	21	27.0%	10	49.0%	24	33.3%	13	24.1%	14
Neutral	11.5%	30	13.8%	28	5.3%	1	0.0%	0	4.8%	1	17.7%	28	2.9%	2	0.0%	0	16.2%	12	21.6%	8	2.0%	1	10.3%	4	6.9%	4
Unimportant	3.1%	8	3.9%	8	0.0%	0	0.0%	0	0.0%	0	4.4%	7	1.4%	1	0.0%	0	4.1%	3	0.0%	0	2.0%	1	2.6%	1	5.2%	3
Very Unimportant	3.8%	10	3.4%	7	15.8%	3	0.0%	0	0.0%	0	5.1%	8	2.9%	2	0.0%	0	6.8%	5	2.7%	1	0.0%	0	5.1%	2	3.4%	2
Totals	100.0%	260	100.0%	203	100.0%	19	100.0%	17	100.0%	21	100.0%	158	100.0%	70	100.0%	32	100.0%	74	100.0%	37	100.0%	49	100.0%	39	100.0%	58
Mean	4.20		4.14		4.05		4.41		4.76		3.98		4.41		4.84		4.00		4.19		4.41		4.18		4.33	
Pool facilities																										
Very Important	42.9%	109	40.9%	81	42.9%	6	42.1%	8	60.9%	14	40.1%	63	40.9%	27	61.3%	19	40.3%	29	54.1%	20	40.8%	20	39.5%	15	42.9%	24
Important	38.2%	97	37.9%	75	28.6%	4	57.9%	11	30.4%	7	33.8%	53	48.5%	32	38.7%	12	36.1%	26	27.0%	10	40.8%	20	42.1%	16	42.9%	24
Neutral	10.6%	27	12.6%	25	0.0%	0	0.0%	0	8.7%	2	14.0%	22	7.6%	5	0.0%	0	9.7%	7	13.5%	5	14.3%	7	10.5%	4	7.1%	4
Unimportant	3.1%	8	4.0%	8	0.0%	0	0.0%	0	0.0%	0	5.1%	8	0.0%	0	0.0%	0	5.6%	4	2.7%	1	4.1%	2	0.0%	0	1.8%	1
Very Unimportant	5.1%	13	4.5%	9	28.6%	4	0.0%	0	0.0%	0	7.0%	11	3.0%	2	0.0%	0	8.3%	6	2.7%	1	0.0%	0	7.9%	3	5.4%	3
Totals	100.0%	254	100.0%	198	100.0%	14	100.0%	19	100.0%	23	100.0%	157	100.0%	66	100.0%	31	100.0%	72	100.0%	37	100.0%	49	100.0%	38	100.0%	56
Mean	4.11		4.07		3.57		4.42		4.52		3.95		4.24		4.61		3.94		4.27		4.18		4.05		4.16	

Figure 38: 27. How important do you feel the following are in attracting new members to your club in the future?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Racquets facilities																										
Very Important	30.4%	73	24.5%	46	40.0%	6	50.0%	7	60.9%	14	23.5%	35	32.8%	20	60.0%	18	28.1%	18	21.2%	7	32.6%	14	30.8%	12	37.9%	22
Important	38.8%	93	42.6%	80	20.0%	3	21.4%	3	30.4%	7	39.6%	59	37.7%	23	36.7%	11	35.9%	23	39.4%	13	32.6%	14	38.5%	15	46.6%	27
Neutral	15.8%	38	17.6%	33	13.3%	2	7.1%	1	8.7%	2	18.1%	27	16.4%	10	3.3%	1	15.6%	10	24.2%	8	18.6%	8	15.4%	6	6.9%	4
Unimportant	7.9%	19	9.6%	18	0.0%	0	7.1%	1	0.0%	0	10.7%	16	4.9%	3	0.0%	0	10.9%	7	3.0%	1	14.0%	6	7.7%	3	3.4%	2
Very Unimportant	7.1%	17	5.9%	11	26.7%	4	14.3%	2	0.0%	0	8.1%	12	8.2%	5	0.0%	0	9.4%	6	12.1%	4	2.3%	1	7.7%	3	5.2%	3
Totals	100.0%	240	100.0%	188	100.0%	15	100.0%	14	100.0%	23	100.0%	149	100.0%	61	100.0%	30	100.0%	64	100.0%	33	100.0%	43	100.0%	39	100.0%	58
Mean	3.78		3.70		3.47		3.86		4.52		3.60		3.82		4.57		3.63		3.55		3.79		3.77		4.09	
Children's programs																										
Very Important	44.6%	120	44.9%	92	18.2%	4	57.1%	12	57.1%	12	42.4%	70	47.9%	34	48.5%	16	36.3%	29	47.5%	19	60.4%	29	40.0%	16	43.1%	25
Important	37.9%	102	38.0%	78	50.0%	11	33.3%	7	28.6%	6	36.4%	60	39.4%	28	42.4%	14	41.3%	33	35.0%	14	22.9%	11	45.0%	18	44.8%	26
Neutral	10.0%	27	10.2%	21	13.6%	3	4.8%	1	9.5%	2	10.3%	17	9.9%	7	9.1%	3	12.5%	10	10.0%	4	8.3%	4	10.0%	4	6.9%	4
Unimportant	3.3%	9	3.9%	8	4.5%	1	0.0%	0	0.0%	0	4.8%	8	1.4%	1	0.0%	0	3.8%	3	2.5%	1	4.2%	2	5.0%	2	1.7%	1
Very Unimportant	4.1%	11	2.9%	6	13.6%	3	4.8%	1	4.8%	1	6.1%	10	1.4%	1	0.0%	0	6.3%	5	5.0%	2	4.2%	2	0.0%	0	3.4%	2
Totals	100.0%	269	100.0%	205	100.0%	22	100.0%	21	100.0%	21	100.0%	165	100.0%	71	100.0%	33	100.0%	80	100.0%	40	100.0%	48	100.0%	40	100.0%	58
Mean	4.16		4.18		3.55		4.38		4.33		4.04		4.31		4.39		3.97		4.18		4.31		4.20		4.22	
Family programs																										
Very Important	47.1%	128	46.9%	97	22.7%	5	61.9%	13	59.1%	13	44.3%	74	52.1%	37	50.0%	17	43.2%	35	50.0%	20	51.0%	25	45.0%	18	47.5%	28
Important	39.7%	108	38.6%	80	63.6%	14	28.6%	6	36.4%	8	40.7%	68	35.2%	25	44.1%	15	43.2%	35	35.0%	14	32.7%	16	42.5%	17	42.4%	25
Neutral	7.4%	20	8.2%	17	4.5%	1	9.5%	2	0.0%	0	6.6%	11	9.9%	7	5.9%	2	8.6%	7	7.5%	3	8.2%	4	7.5%	3	5.1%	3
Unimportant	3.3%	9	3.9%	8	0.0%	0	0.0%	0	4.5%	1	4.8%	8	1.4%	1	0.0%	0	1.2%	1	5.0%	2	6.1%	3	5.0%	2	1.7%	1
Very Unimportant	2.6%	7	2.4%	5	9.1%	2	0.0%	0	0.0%	0	3.6%	6	1.4%	1	0.0%	0	3.7%	3	2.5%	1	2.0%	1	0.0%	0	3.4%	2
Totals	100.0%	272	100.0%	207	100.0%	22	100.0%	21	100.0%	22	100.0%	167	100.0%	71	100.0%	34	100.0%	81	100.0%	40	100.0%	49	100.0%	40	100.0%	59
Mean	4.25		4.24		3.91		4.52		4.50		4.17		4.35		4.44		4.21		4.25		4.24		4.28		4.29	
Reciprocal clubs																										
Very Important	11.8%	32	8.0%	16	29.6%	8	21.7%	5	14.3%	3	9.1%	15	15.3%	11	17.6%	6	18.8%	16	7.7%	3	10.0%	5	5.0%	2	11.1%	6
Important	26.2%	71	21.0%	42	40.7%	11	56.5%	13	23.8%	5	24.2%	40	29.2%	21	29.4%	10	35.3%	30	28.2%	11	26.0%	13	22.5%	9	11.1%	6
Neutral	37.3%	101	42.0%	84	22.2%	6	13.0%	3	38.1%	8	35.8%	59	40.3%	29	38.2%	13	34.1%	29	41.0%	16	34.0%	17	32.5%	13	46.3%	25
Unimportant	14.0%	38	17.5%	35	3.7%	1	0.0%	0	9.5%	2	18.2%	30	8.3%	6	5.9%	2	8.2%	7	15.4%	6	14.0%	7	32.5%	13	9.3%	5
Very Unimportant	10.7%	29	11.5%	23	3.7%	1	8.7%	2	14.3%	3	12.7%	21	6.9%	5	8.8%	3	3.5%	3	7.7%	3	16.0%	8	7.5%	3	22.2%	12
Totals	100.0%	271	100.0%	200	100.0%	27	100.0%	23	100.0%	21	100.0%	165	100.0%	72	100.0%	34	100.0%	85	100.0%	39	100.0%	50	100.0%	40	100.0%	54
Mean	3.14		2.96		3.89		3.83		3.14		2.99		3.38		3.41		3.58		3.13		3.00		2.85		2.80	

Figure 39: 29. In your opinion, do your members want your club to be one of their favorite places to dine for good a la carte (not gourmet) dining?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	90.5%	256	91.3%	190	81.5%	22	100.0%	24	83.3%	20	89.0%	153	92.1%	70	94.3%	33	83.3%	70	87.5%	35	90.4%	47	100.0%	42	95.2%	59
No	9.5%	27	8.7%	18	18.5%	5	0.0%	0	16.7%	4	11.0%	19	7.9%	6	5.7%	2	16.7%	14	12.5%	5	9.6%	5	0.0%	0	4.8%	3
Totals	100.0%	283	100.0%	208	100.0%	27	100.0%	24	100.0%	24	100.0%	172	100.0%	76	100.0%	35	100.0%	84	100.0%	40	100.0%	52	100.0%	42	100.0%	62

Figure 40: 30. In your opinion, do your members consider your a la carte dining offering to be one of their favorite places to dine when dining out for a meal?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	66.2%	188	66.0%	138	63.0%	17	75.0%	18	62.5%	15	65.3%	113	72.4%	55	57.1%	20	56.5%	48	62.5%	25	73.1%	38	69.0%	29	72.6%	45
No	33.8%	96	34.0%	71	37.0%	10	25.0%	6	37.5%	9	34.7%	60	27.6%	21	42.9%	15	43.5%	37	37.5%	15	26.9%	14	31.0%	13	27.4%	17
Totals	100.0%	284	100.0%	209	100.0%	27	100.0%	24	100.0%	24	100.0%	173	100.0%	76	100.0%	35	100.0%	85	100.0%	40	100.0%	52	100.0%	42	100.0%	62

Figure 41: 31. What is your estimated total a la carte F&B revenue for the current fiscal year?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
\$500,000/Less	17.6%	47	19.0%	38	17.4%	4	12.5%	3	10.0%	2	24.5%	39	6.8%	5	8.8%	3	31.2%	24	10.3%	4	19.6%	10	9.8%	4	8.5%	5
\$500,001 - \$800,000	13.1%	35	13.5%	27	17.4%	4	12.5%	3	5.0%	1	18.2%	29	6.8%	5	2.9%	1	19.5%	15	25.6%	10	9.8%	5	7.3%	3	3.4%	2
\$800,001 - \$1,000,000	12.7%	34	12.5%	25	13.0%	3	8.3%	2	20.0%	4	15.1%	24	12.2%	9	2.9%	1	14.3%	11	15.4%	6	15.7%	8	7.3%	3	10.2%	6
\$1,000,00 - \$1,500,000	21.0%	56	21.5%	43	8.7%	2	33.3%	8	15.0%	3	23.3%	37	18.9%	14	14.7%	5	18.2%	14	30.8%	12	23.5%	12	26.8%	11	11.9%	7
\$15,00,001 - \$2,000,000	15.4%	41	15.5%	31	17.4%	4	16.7%	4	10.0%	2	12.6%	20	23.0%	17	11.8%	4	9.1%	7	15.4%	6	15.7%	8	24.4%	10	16.9%	10
\$2,000,001 - \$3,000,000	11.2%	30	11.5%	23	13.0%	3	12.5%	3	5.0%	1	5.7%	9	21.6%	16	14.7%	5	5.2%	4	2.6%	1	9.8%	5	14.6%	6	23.7%	14
Above \$3,000,000	9.0%	24	6.5%	13	13.0%	3	4.2%	1	35.0%	7	0.6%	1	10.8%	8	44.1%	15	2.6%	2	0.0%	0	5.9%	3	9.8%	4	25.4%	15
Totals	100.0%	267	100.0%	200	100.0%	23	100.0%	24	100.0%	20	100.0%	159	100.0%	74	100.0%	34	100.0%	77	100.0%	39	100.0%	51	100.0%	41	100.0%	59

Figure 42: 31. What is your estimated total a la carte F&B revenue for the current fiscal year?

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Mean	1639482.63	1482866.13	1643221.75	1421000.00	3463524.75	1018903.38	1879096.63	4020088.00	1006735.38	1083108.63	1520836.50	1774821.88	2841552.25
Median	1150000.00	1100000.00	1200000.00	1175000.00	1573301.00	1000000.00	1600000.00	3000000.00	800000.00	1000000.00	1100000.00	1500000.00	2000000.00

Figure 43: 32. What is your estimated total banquet/function F&B revenue for the current fiscal year?

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																	
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64													
\$500,000/Less	39.4%	104	41.6%	82	20.8%	5	43.5%	10	35.0%	7	50.6%	80	23.6%	17	20.6%	7	60.8%	48	44.4%	16	31.4%	16	26.8%	11	22.8%	13
\$500,001 - \$800,000	16.3%	43	15.7%	31	4.2%	1	26.1%	6	25.0%	5	17.7%	28	20.8%	15	0.0%	0	11.4%	9	16.7%	6	25.5%	13	22.0%	9	10.5%	6
\$800,001 - \$1,000,000	8.3%	22	9.6%	19	8.3%	2	0.0%	0	5.0%	1	9.5%	15	8.3%	6	2.9%	1	6.3%	5	11.1%	4	5.9%	3	12.2%	5	8.8%	5
\$1,000,000 - \$1,500,000	18.2%	48	18.3%	36	25.0%	6	21.7%	5	5.0%	1	16.5%	26	23.6%	17	14.7%	5	7.6%	6	19.4%	7	25.5%	13	22.0%	9	22.8%	13
\$15,00,001 - \$2,000,000	6.1%	16	6.1%	12	8.3%	2	4.3%	1	5.0%	1	3.8%	6	6.9%	5	14.7%	5	1.3%	1	5.6%	2	5.9%	3	7.3%	3	12.3%	7
\$2,000,001 - \$3,000,000	6.8%	18	6.6%	13	8.3%	2	4.3%	1	10.0%	2	1.3%	2	13.9%	10	17.6%	6	5.1%	4	0.0%	0	3.9%	2	9.8%	4	14.0%	8
Above \$3,000,000	4.9%	13	2.0%	4	25.0%	6	0.0%	0	15.0%	3	0.6%	1	2.8%	2	29.4%	10	7.6%	6	2.8%	1	2.0%	1	0.0%	0	8.8%	5
Totals	100.0%	264	100.0%	197	100.0%	24	100.0%	23	100.0%	20	100.0%	158	100.0%	72	100.0%	34	100.0%	79	100.0%	36	100.0%	51	100.0%	41	100.0%	57

Figure 44: 32. What is your estimated total banquet/function F&B revenue for the current fiscal year?

	Overall 314	CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Mean	1044580.63	906068.00	1889996.00	777173.94	1701950.38	671854.00	1151824.50	2549558.75	853117.44	842470.69	953980.25	975975.63	1568001.25
Median	700000.00	650000.00	1432500.00	550000.00	667863.00	500000.00	1000000.00	2000000.00	365000.00	625000.00	710000.00	900000.00	1200000.00

Figure 45: 33. When was the last time your a la carte dining area(s) was upgraded? (Please mark the # of years since last upgrade.)

	Overall		CLUB TYPE							MEMBERSHIP SIZE						INITIATION FEE												
		314	Golf/Country 73.6%, 231		City/Dine/Athletic 8.6%, 27		Yacht Club 8.9%, 28		Other 8.9%, 28		500/Less 61.1%, 185		501 to 1000 26.7%, 81		1001-Moree 12.2%, 37		\$5,000/ Less 29.4%, 85		\$5,001-\$10,000 13.8%, 40		\$10,001-\$25,000 19.4%, 56		\$25,001-\$50,000 15.2%, 44		\$50,001+ 22.1%, 64			
<1 year	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
1 year	22.4%	60	22.5%	45	18.2%	4	25.0%	6	22.7%	5	18.9%	30	22.7%	17	38.2%	13	22.8%	18	15.4%	6	10.0%	5	26.2%	11	35.7%	20		
2 years	10.8%	29	9.5%	19	22.7%	5	12.5%	3	9.1%	2	10.7%	17	12.0%	9	8.8%	3	11.4%	9	5.1%	2	14.0%	7	11.9%	5	8.9%	5		
3 years	9.0%	24	9.5%	19	9.1%	2	4.2%	1	9.1%	2	8.2%	13	9.3%	7	11.8%	4	8.9%	7	7.7%	3	6.0%	3	7.1%	3	14.3%	8		
4 years	8.6%	23	8.0%	16	9.1%	2	8.3%	2	13.6%	3	8.2%	13	6.7%	5	14.7%	5	7.6%	6	10.3%	4	10.0%	5	9.5%	4	7.1%	4		
5 years	6.3%	17	6.5%	13	0.0%	0	4.2%	1	13.6%	3	7.5%	12	6.7%	5	0.0%	0	3.8%	3	12.8%	5	8.0%	4	2.4%	1	7.1%	4		
6 years	4.1%	11	4.0%	8	0.0%	0	0.0%	0	13.6%	3	5.0%	8	4.0%	3	0.0%	0	2.5%	2	2.6%	1	10.0%	5	2.4%	1	3.6%	2		
7 years	5.2%	14	5.5%	11	4.5%	1	8.3%	2	0.0%	0	4.4%	7	9.3%	7	0.0%	0	6.3%	5	0.0%	0	10.0%	5	2.4%	1	5.4%	3		
8 years	3.4%	9	4.0%	8	0.0%	0	0.0%	0	4.5%	1	3.1%	5	4.0%	3	2.9%	1	3.8%	3	2.6%	1	4.0%	2	4.8%	2	1.8%	1		
9 years	4.1%	11	4.5%	9	4.5%	1	4.2%	1	0.0%	0	3.8%	6	5.3%	4	2.9%	1	2.5%	2	10.3%	4	2.0%	1	7.1%	3	1.8%	1		
10 years	8.6%	23	7.0%	14	4.5%	1	25.0%	6	9.1%	2	8.8%	14	8.0%	6	8.8%	3	11.4%	9	15.4%	6	8.0%	4	2.4%	1	5.4%	3		
11 - 15	8.2%	22	10.5%	21	0.0%	0	0.0%	0	4.5%	1	12.6%	20	2.7%	2	0.0%	0	7.6%	6	7.7%	3	8.0%	4	16.7%	7	1.8%	1		
16 - 20	5.2%	14	5.0%	10	13.6%	3	4.2%	1	0.0%	0	3.8%	6	6.7%	5	8.8%	3	3.8%	3	7.7%	3	8.0%	4	2.4%	1	5.4%	3		
Above 20	4.1%	11	3.5%	7	13.6%	3	4.2%	1	0.0%	0	5.0%	8	2.7%	2	2.9%	1	7.6%	6	2.6%	1	2.0%	1	4.8%	2	1.8%	1		
Totals	100.0%	268	100.0%	200	100.0%	22	100.0%	24	100.0%	22	100.0%	159	100.0%	75	100.0%	34	100.0%	79	100.0%	39	100.0%	50	100.0%	42	100.0%	56		

Figure 46: 34. Does your club have a golf course?

	Overall		CLUB TYPE							MEMBERSHIP SIZE						INITIATION FEE										
		314	Golf/Country 73.6%, 231		City/Dine/Athletic 8.6%, 27		Yacht Club 8.9%, 28		Other 8.9%, 28		500/Less 61.1%, 185		501 to 1000 26.7%, 81		1001-Moree 12.2%, 37		\$5,000/ Less 29.4%, 85		\$5,001-\$10,000 13.8%, 40		\$10,001-\$25,000 19.4%, 56		\$25,001-\$50,000 15.2%, 44		\$50,001+ 22.1%, 64	
Yes	76.4%	214	99.0%	205	0.0%	0	0.0%	0	39.1%	9	84.7%	144	72.0%	54	45.7%	16	69.0%	58	70.0%	28	62.7%	32	88.1%	37	95.0%	57
No	23.6%	66	1.0%	2	100.0%	27	100.0%	23	60.9%	14	15.3%	26	28.0%	21	54.3%	19	31.0%	26	30.0%	12	37.3%	19	11.9%	5	5.0%	3
Totals	100.0%	280	100.0%	207	100.0%	27	100.0%	23	100.0%	23	100.0%	170	100.0%	75	100.0%	35	100.0%	84	100.0%	40	100.0%	51	100.0%	42	100.0%	60

Figure 47: 35. How many holes of golf does your club have?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64										
9	1.4%	3	1.5%	3	0	0	0.0%	0	0.7%	1	3.8%	2	0.0%	0	1.8%	1	0.0%	0	3.1%	1	2.7%	1	0.0%	0
18	71.2%	151	73.4%	149	0	0	22.2%	2	82.5%	118	56.6%	30	18.8%	3	80.4%	45	78.6%	22	59.4%	19	70.3%	26	64.9%	37
27	9.0%	19	9.4%	19	0	0	0.0%	0	9.1%	13	9.4%	5	6.3%	1	8.9%	5	21.4%	6	6.3%	2	8.1%	3	5.3%	3
36	9.4%	20	7.9%	16	0	0	44.4%	4	4.2%	6	20.8%	11	18.8%	3	3.6%	2	0.0%	0	18.8%	6	8.1%	3	15.8%	9
Other	9.0%	19	7.9%	16	0	0	33.3%	3	3.5%	5	9.4%	5	56.3%	9	5.4%	3	0.0%	0	12.5%	4	10.8%	4	14.0%	8
Totals	100.0%	212	100.0%	203	%	0	%	0	100.0%	9	100.0%	143	100.0%	53	100.0%	16	100.0%	56	100.0%	28	100.0%	32	100.0%	57

Figure 48: 36. Is your club seeing a decline in golf play from members under age 50?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64										
Yes	19.2%	41	19.6%	40	0	0	11.1%	1	22.2%	32	9.4%	5	25.0%	4	29.3%	17	25.0%	7	19.4%	6	13.5%	5	7.0%	4
No	80.8%	172	80.4%	164	0	0	88.9%	8	77.8%	112	90.6%	48	75.0%	12	70.7%	41	75.0%	21	80.6%	25	86.5%	32	93.0%	53
Totals	100.0%	213	100.0%	204	%	0	%	0	100.0%	9	100.0%	144	100.0%	53	100.0%	16	100.0%	58	100.0%	28	100.0%	31	100.0%	57

Figure 49: 37. How many 18-hole golf rounds are estimated to be played at your club in 2019?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64										
15,000/less	24.6%	51	25.6%	51	0	0	0.0%	0	33.6%	47	7.5%	4	0.0%	0	25.9%	14	28.6%	8	15.6%	5	25.7%	9	26.3%	15
15,001-20,000	21.7%	45	21.6%	43	0	0	25.0%	2	26.4%	37	13.2%	7	7.1%	1	18.5%	10	35.7%	10	21.9%	7	17.1%	6	21.1%	12
20,001-25,000	14.5%	30	15.1%	30	0	0	0.0%	0	15.7%	22	15.1%	8	0.0%	0	16.7%	9	10.7%	3	9.4%	3	14.3%	5	15.8%	9
25,001-30,000	11.6%	24	12.1%	24	0	0	0.0%	0	8.6%	12	18.9%	10	14.3%	2	13.0%	7	3.6%	1	15.6%	5	20.0%	7	7.0%	4
Above 30,000	27.5%	57	25.6%	51	0	0	75.0%	6	15.7%	22	45.3%	24	78.6%	11	25.9%	14	21.4%	6	37.5%	12	22.9%	8	29.8%	17
Totals	100.0%	207	100.0%	199	%	0	%	0	100.0%	8	100.0%	140	100.0%	53	100.0%	14	100.0%	54	100.0%	28	100.0%	32	100.0%	35

Figure 50: 38. How were rounds in 2019 compared to 2018?

	Overall		CLUB TYPE				MEMBERSHIP SIZE						INITIATION FEE													
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37					\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64								
Up	48.8%	104	49.0%	100	0	0	44.4%	4	47.9%	68	50.9%	28	50.0%	8	47.4%	27	42.9%	12	46.9%	15	62.2%	23	44.8%	26		
Down	13.6%	29	14.2%	29	0	0	0.0%	0	16.2%	23	7.3%	4	12.5%	2	22.8%	13	25.0%	7	12.5%	4	8.1%	3	3.4%	2		
Stayed same	37.6%	80	36.8%	75	0	0	55.6%	5	35.9%	51	41.8%	23	37.5%	6	29.8%	17	32.1%	9	40.6%	13	29.7%	11	51.7%	30		
Totals	100.0%	213	100.0%	204	%	0	%	0	100.0%	9	100.0%	142	100.0%	55	100.0%	16	100.0%	57	100.0%	28	100.0%	32	100.0%	37	100.0%	58

Figure 51: 40. How satisfied are you with your golf practice facilities?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-More 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64										
Driving range																								
Very Satisfied	28.2%	58	27.9%	55	0	0	33.3%	3	25.9%	36	33.3%	17	31.3%	5	18.2%	10	14.8%	4	34.4%	11	28.6%	10	38.2%	21
Satisfied	40.3%	83	39.6%	78	0	0	55.6%	5	44.6%	62	27.5%	14	43.8%	7	50.9%	28	59.3%	16	34.4%	11	34.3%	12	29.1%	16
Neutral	10.7%	22	11.2%	22	0	0	0.0%	0	9.4%	13	13.7%	7	12.5%	2	12.7%	7	7.4%	2	9.4%	3	8.6%	3	12.7%	7
Dissatisfied	16.0%	33	16.2%	32	0	0	11.1%	1	17.3%	24	13.7%	7	12.5%	2	16.4%	9	14.8%	4	18.8%	6	14.3%	5	16.4%	9
Very Dissatisfied	4.9%	10	5.1%	10	0	0	0.0%	0	2.9%	4	11.8%	6	0.0%	0	1.8%	1	3.7%	1	3.1%	1	14.3%	5	3.6%	2
Totals	100.0%	206	100.0%	197	%	0	100.0%	9	100.0%	139	100.0%	51	100.0%	16	100.0%	55	100.0%	27	100.0%	32	100.0%	35	100.0%	55
Mean		3.71		3.69	-	-		4.11		3.73		3.57		3.94		3.67		3.67		3.78		3.49		3.82
Putting greens																								
Very Satisfied	41.3%	88	40.2%	82	0	0	66.7%	6	41.3%	59	37.0%	20	56.3%	9	32.8%	19	46.4%	13	50.0%	16	32.4%	12	46.4%	26
Satisfied	46.5%	99	47.5%	97	0	0	22.2%	2	49.0%	70	44.4%	24	31.3%	5	58.6%	34	42.9%	12	31.3%	10	56.8%	21	39.3%	22
Neutral	8.0%	17	8.3%	17	0	0	0.0%	0	6.3%	9	13.0%	7	6.3%	1	6.9%	4	7.1%	2	9.4%	3	8.1%	3	8.9%	5
Dissatisfied	3.8%	8	3.4%	7	0	0	11.1%	1	2.8%	4	5.6%	3	6.3%	1	1.7%	1	0.0%	0	9.4%	3	2.7%	1	5.4%	3
Very Dissatisfied	0.5%	1	0.5%	1	0	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	3.6%	1	0.0%	0	0.0%	0	0.0%	0
Totals	100.0%	213	100.0%	204	%	0	100.0%	9	100.0%	143	100.0%	54	100.0%	16	100.0%	58	100.0%	28	100.0%	32	100.0%	37	100.0%	56
Mean		4.24		4.24	-	-		4.44		4.27		4.13		4.38		4.22		4.29		4.22		4.19		4.27
Short game																								
Very Satisfied	34.4%	72	34.5%	69	0	0	33.3%	3	36.2%	51	26.9%	14	43.8%	7	27.8%	15	22.2%	6	34.4%	11	37.8%	14	43.9%	25
Satisfied	36.4%	76	36.5%	73	0	0	33.3%	3	36.2%	51	38.5%	20	31.3%	5	40.7%	22	55.6%	15	25.0%	8	37.8%	14	28.1%	16
Neutral	14.8%	31	15.0%	30	0	0	11.1%	1	15.6%	22	15.4%	8	6.3%	1	16.7%	9	14.8%	4	15.6%	5	10.8%	4	15.8%	9
Dissatisfied	13.4%	28	13.0%	26	0	0	22.2%	2	11.3%	16	17.3%	9	18.8%	3	14.8%	8	3.7%	1	25.0%	8	13.5%	5	10.5%	6
Very Dissatisfied	1.0%	2	1.0%	2	0	0	0.0%	0	0.7%	1	1.9%	1	0.0%	0	0.0%	0	3.7%	1	0.0%	0	0.0%	0	1.8%	1
Totals	100.0%	209	100.0%	200	%	0	100.0%	9	100.0%	141	100.0%	52	100.0%	16	100.0%	54	100.0%	27	100.0%	32	100.0%	37	100.0%	57
Mean		3.90		3.90	-	-		3.78		3.96		3.71		4.00		3.81		3.89		3.69		4.00		4.02
Indoor hitting																								
Very Satisfied	31.4%	27	30.5%	25	0	0	50.0%	2	27.5%	14	33.3%	9	50.0%	4	33.3%	6	50.0%	4	21.4%	3	20.0%	3	36.7%	11
Satisfied	19.8%	17	20.7%	17	0	0	0.0%	0	21.6%	11	22.2%	6	0.0%	0	16.7%	3	37.5%	3	21.4%	3	6.7%	1	20.0%	6
Neutral	22.1%	19	22.0%	18	0	0	25.0%	1	23.5%	12	14.8%	4	37.5%	3	33.3%	6	0.0%	0	14.3%	2	26.7%	4	23.3%	7
Dissatisfied	20.9%	18	20.7%	17	0	0	25.0%	1	23.5%	12	18.5%	5	12.5%	1	11.1%	2	12.5%	1	35.7%	5	46.7%	7	10.0%	3
Very Dissatisfied	5.8%	5	6.1%	5	0	0	0.0%	0	3.9%	2	11.1%	3	0.0%	0	5.6%	1	0.0%	0	7.1%	1	0.0%	0	10.0%	3
Totals	100.0%	86	100.0%	82	%	0	100.0%	4	100.0%	51	100.0%	27	100.0%	8	100.0%	18	100.0%	8	100.0%	14	100.0%	15	100.0%	30
Mean		3.50		3.49	-	-		3.75		3.45		3.48		3.88		3.61		4.25		3.14		3.00		3.63
Simulators																								
Very Satisfied	31.4%	22	31.3%	21	0	0	33.3%	1	27.9%	12	34.8%	8	50.0%	2	41.7%	5	80.0%	4	14.3%	1	27.8%	5	25.9%	7
Satisfied	31.4%	22	32.8%	22	0	0	0.0%	0	30.2%	13	34.8%	8	25.0%	1	33.3%	4	20.0%	1	57.1%	4	11.1%	2	37.0%	10
Neutral	20.0%	14	17.9%	12	0	0	66.7%	2	20.9%	9	17.4%	4	25.0%	1	25.0%	3	0.0%	0	14.3%	1	27.8%	5	18.5%	5
Dissatisfied	12.9%	9	13.4%	9	0	0	0.0%	0	20.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.3%	1	33.3%	6	7.4%	2
Very Dissatisfied	4.3%	3	4.5%	3	0	0	0.0%	0	0.0%	0	13.0%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.1%	3
Totals	100.0%	70	100.0%	67	%	0	100.0%	3	100.0%	43	100.0%	23	100.0%	4	100.0%	12	100.0%	5	100.0%	7	100.0%	18	100.0%	27
Mean		3.73		3.73	-	-		3.67		3.65		3.78		4.25		4.17		4.80		3.71		3.33		3.59

Figure 52: 41. Does your club have a dedicated Golf Performance Center for year-round teaching and training?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64										
Yes	33.2%	71	32.7%	67	0	0	44.4%	4	29.9%	43	33.3%	18	62.5%	10	22.4%	13	28.6%	8	34.4%	11	27.0%	10	49.1%	28
No	66.8%	143	67.3%	138	0	0	55.6%	5	70.1%	101	66.7%	36	37.5%	6	77.6%	45	71.4%	20	65.6%	21	73.0%	27	50.9%	29
Totals	100.0%	214	100.0%	205	%	0	%	0	100.0%	9	100.0%	144	100.0%	54	100.0%	16	100.0%	58	100.0%	28	100.0%	32	100.0%	57

Figure 53: 42. Do you have golf/game simulators at your club?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64										
Yes	25.2%	54	25.4%	52	0	0	22.2%	2	24.3%	35	31.5%	17	12.5%	2	19.0%	11	17.9%	5	18.8%	6	37.8%	14	29.8%	17
No	74.8%	160	74.6%	153	0	0	77.8%	7	75.7%	109	68.5%	37	87.5%	14	81.0%	47	82.1%	23	81.3%	26	62.2%	23	70.2%	40
Totals	100.0%	214	100.0%	205	%	0	%	0	100.0%	9	100.0%	144	100.0%	54	100.0%	16	100.0%	58	100.0%	28	100.0%	32	100.0%	57

Figure 54: 45. Is your club planning an improvement project in the next three to five years?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	88.2%	247	87.9%	181	81.5%	22	87.5%	21	100.0%	23	85.8%	145	94.7%	72	85.7%	30	85.7%	72	80.0%	32	88.2%	45	90.5%	38	95.0%	57
No	11.8%	33	12.1%	25	18.5%	5	12.5%	3	0.0%	0	14.2%	24	5.3%	4	14.3%	5	14.3%	12	20.0%	8	11.8%	6	9.5%	4	5.0%	3
Totals	100.0%	280	100.0%	206	100.0%	27	100.0%	24	100.0%	23	100.0%	169	100.0%	76	100.0%	35	100.0%	84	100.0%	40	100.0%	51	100.0%	42	100.0%	60

Figure 55: 46. What areas will you be addressing?

	Overall		CLUB TYPE				MEMBERSHIP SIZE						INITIATION FEE													
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Clubhouse																										
Yes	53.2%	167	50.6%	117	66.7%	18	53.6%	15	60.7%	17	50.8%	94	60.5%	49	64.9%	24	54.1%	46	65.0%	26	53.6%	30	54.5%	24	60.9%	39
No Answer	46.8%	147	49.4%	114	33.3%	9	46.4%	13	39.3%	11	49.2%	91	39.5%	32	35.1%	13	45.9%	39	35.0%	14	46.4%	26	45.5%	20	39.1%	25
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Golf course																										
Yes	42.0%	132	55.0%	127	0.0%	0	0.0%	0	17.9%	5	46.5%	86	44.4%	36	27.0%	10	43.5%	37	30.0%	12	35.7%	20	56.8%	25	57.8%	37
No Answer	58.0%	182	45.0%	104	100.0%	27	100.0%	28	82.1%	23	53.5%	99	55.6%	45	73.0%	27	56.5%	48	70.0%	28	64.3%	36	43.2%	19	42.2%	27
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Pool area																										
Yes	31.5%	99	33.3%	77	18.5%	5	25.0%	7	35.7%	10	31.4%	58	34.6%	28	35.1%	13	32.9%	28	42.5%	17	35.7%	20	27.3%	12	32.8%	21
No Answer	68.5%	215	66.7%	154	81.5%	22	75.0%	21	64.3%	18	68.6%	127	65.4%	53	64.9%	24	67.1%	57	57.5%	23	64.3%	36	72.7%	32	67.2%	43
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Fitness/wellness																										
Yes	26.4%	83	24.7%	57	37.0%	10	17.9%	5	39.3%	11	19.5%	36	34.6%	28	51.4%	19	23.5%	20	32.5%	13	28.6%	16	29.5%	13	31.3%	20
No Answer	73.6%	231	75.3%	174	63.0%	17	82.1%	23	60.7%	17	80.5%	149	65.4%	53	48.6%	18	76.5%	65	67.5%	27	71.4%	40	70.5%	31	68.8%	44
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Tennis/racquets																										
Yes	24.2%	76	26.4%	61	11.1%	3	17.9%	5	25.0%	7	21.6%	40	27.2%	22	37.8%	14	21.2%	18	15.0%	6	32.1%	18	29.5%	13	31.3%	20
No Answer	75.8%	238	73.6%	170	88.9%	24	82.1%	23	75.0%	21	78.4%	145	72.8%	59	62.2%	23	78.8%	67	85.0%	34	67.9%	38	70.5%	31	68.8%	44
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Children's space																										
Yes	18.8%	59	18.6%	43	11.1%	3	28.6%	8	17.9%	5	17.3%	32	22.2%	18	24.3%	9	17.6%	15	25.0%	10	19.6%	11	18.2%	8	23.4%	15
No Answer	81.2%	255	81.4%	188	88.9%	24	71.4%	20	82.1%	23	82.7%	153	77.8%	63	75.7%	28	82.4%	70	75.0%	30	80.4%	45	81.8%	36	76.6%	49
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Spa facilities																										
Yes	8.0%	25	7.8%	18	7.4%	2	0.0%	0	17.9%	5	4.9%	9	12.3%	10	16.2%	6	5.9%	5	2.5%	1	8.9%	5	11.4%	5	12.5%	8
No Answer	92.0%	289	92.2%	213	92.6%	25	100.0%	28	82.1%	23	95.1%	176	87.7%	71	83.8%	31	94.1%	80	97.5%	39	91.1%	51	88.6%	39	87.5%	56
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64
Other																										
Yes	20.1%	63	18.2%	42	18.5%	5	35.7%	10	21.4%	6	19.5%	36	25.9%	21	16.2%	6	21.2%	18	12.5%	5	23.2%	13	25.0%	11	25.0%	16
No Answer	79.9%	251	81.8%	189	81.5%	22	64.3%	18	78.6%	22	80.5%	149	74.1%	60	83.8%	31	78.8%	67	87.5%	35	76.8%	43	75.0%	33	75.0%	48
Totals	100.0%	314	100.0%	231	100.0%	27	100.0%	28	100.0%	28	100.0%	185	100.0%	81	100.0%	37	100.0%	85	100.0%	40	100.0%	56	100.0%	44	100.0%	64

Figure 56: 47. Do you see value in having a Facility Master Plan?

	Overall				CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
	314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64													
Yes	94.9%	263	95.6%	196	84.6%	22	95.8%	23	100.0%	22	93.4%	156	97.4%	74	97.1%	33	92.6%	75	95.0%	38	96.1%	49	95.2%	40	96.7%	58
No	5.1%	14	4.4%	9	15.4%	4	4.2%	1	0.0%	0	6.6%	11	2.6%	2	2.9%	1	7.4%	6	5.0%	2	3.9%	2	4.8%	2	3.3%	2
Totals	100.0%	277	100.0%	205	100.0%	26	100.0%	24	100.0%	22	100.0%	167	100.0%	76	100.0%	34	100.0%	81	100.0%	40	100.0%	51	100.0%	42	100.0%	60

Figure 57: 48. Does your club have a current, long-term Facility Master Plan for the clubhouse and surrounding facilities (not including the golf course)?

	Overall				CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
	314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64													
Yes	59.0%	164	60.0%	123	53.8%	14	45.8%	11	69.6%	16	55.1%	92	64.5%	49	65.7%	23	56.1%	46	50.0%	20	66.7%	34	61.9%	26	61.7%	37
No	41.0%	114	40.0%	82	46.2%	12	54.2%	13	30.4%	7	44.9%	75	35.5%	27	34.3%	12	43.9%	36	50.0%	20	33.3%	17	38.1%	16	38.3%	23
Totals	100.0%	278	100.0%	205	100.0%	26	100.0%	24	100.0%	23	100.0%	167	100.0%	76	100.0%	35	100.0%	82	100.0%	40	100.0%	51	100.0%	42	100.0%	60

Figure 58: 49. Has your club recently (within the last 5 years) completed a facility improvement program?

	Overall				CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE														
	314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64													
Yes	56.0%	155	54.1%	111	64.0%	16	58.3%	14	60.9%	14	47.6%	79	72.4%	55	60.0%	21	48.8%	40	43.6%	17	58.8%	30	61.9%	26	68.3%	41
No	44.0%	122	45.9%	94	36.0%	9	41.7%	10	39.1%	9	52.4%	87	27.6%	21	40.0%	14	51.2%	42	56.4%	22	41.2%	21	38.1%	16	31.7%	19
Totals	100.0%	277	100.0%	205	100.0%	25	100.0%	24	100.0%	23	100.0%	166	100.0%	76	100.0%	35	100.0%	82	100.0%	39	100.0%	51	100.0%	42	100.0%	60

Figure 59: 50. What was the program's overall cost?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
\$1,500,000/less	27.3%	38	28.7%	29	15.4%	2	30.8%	4	25.0%	3	37.5%	27	21.3%	10	5.0%	1	48.5%	16	53.3%	8	27.6%	8	16.7%	4	5.3%	2
\$1,500,001-\$3,500,000	17.3%	24	13.9%	14	38.5%	5	23.1%	3	16.7%	2	18.1%	13	12.8%	6	25.0%	5	18.2%	6	40.0%	6	24.1%	7	4.2%	1	10.5%	4
\$3,500,001-\$5,00000	9.4%	13	7.9%	8	15.4%	2	15.4%	2	8.3%	1	11.1%	8	8.5%	4	5.0%	1	3.0%	1	6.7%	1	17.2%	5	16.7%	4	5.3%	2
\$5,000,001-\$7,500,000	10.8%	15	11.9%	12	7.7%	1	7.7%	1	8.3%	1	8.3%	6	12.8%	6	15.0%	3	12.1%	4	0.0%	0	13.8%	4	12.5%	3	10.5%	4
Above \$7,500,000	35.3%	49	37.6%	38	23.1%	3	23.1%	3	41.7%	5	25.0%	18	44.7%	21	50.0%	10	18.2%	6	0.0%	0	17.2%	5	50.0%	12	68.4%	26
Totals	100.0%	139	100.0%	101	100.0%	13	100.0%	13	100.0%	12	100.0%	72	100.0%	47	100.0%	20	100.0%	33	100.0%	15	100.0%	29	100.0%	24	100.0%	38

Figure 60: 50. What was the program's overall cost?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE				
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64
Mean	7082151.50		7561821.00	4396154.00	4871154.00	8350000.00	4652762.00	9680213.00	9722500.00	4065951.00	1445333.38	4375689.50	7736145.50	13578947.00
Median	4400000.00		5000000.00	3000000.00	3200000.00	5350000.00	3000000.00	6500000.00	7500000.00	2500000.00	1500000.00	3500000.00	7750000.00	10750000.00

Figure 61: 51. Did your club incur debt to finance the facility improvement project?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
	314		Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Yes	56.9%	87	59.5%	66	46.7%	7	57.1%	8	46.2%	6	57.0%	45	63.0%	34	40.0%	8	46.2%	18	23.5%	4	63.3%	19	69.2%	18	68.3%	28
No	43.1%	66	40.5%	45	53.3%	8	42.9%	6	53.8%	7	43.0%	34	37.0%	20	60.0%	12	53.8%	21	76.5%	13	36.7%	11	30.8%	8	31.7%	13
Totals	100.0%	153	100.0%	111	100.0%	15	100.0%	14	100.0%	13	100.0%	79	100.0%	54	100.0%	20	100.0%	39	100.0%	17	100.0%	30	100.0%	26	100.0%	41

Figure 62: 52. Did your club gain or lose members once the project was approved and completed?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Gained	55.5%	86	56.8%	63	62.5%	10	64.3%	9	28.6%	4	62.0%	49	45.5%	25	57.1%	12	62.5%	25	47.1%	8	46.7%	14	61.5%	16	56.1%	23
Lost	7.1%	11	6.3%	7	6.3%	1	7.1%	1	14.3%	2	10.1%	8	3.6%	2	4.8%	1	5.0%	2	11.8%	2	10.0%	3	7.7%	2	4.9%	2
No change	37.4%	58	36.9%	41	31.3%	5	28.6%	4	57.1%	8	27.8%	22	50.9%	28	38.1%	8	32.5%	13	41.2%	7	43.3%	13	30.8%	8	39.0%	16
Totals	100.0%	155	100.0%	111	100.0%	16	100.0%	14	100.0%	14	100.0%	79	100.0%	55	100.0%	21	100.0%	40	100.0%	17	100.0%	30	100.0%	26	100.0%	41

Figure 63: 53. If you gained or lost members, what percentage was it of your total membership?

	Overall		CLUB TYPE				MEMBERSHIP SIZE			INITIATION FEE																
		314	Golf/Country 73.6%, 231	City/Dine/Athletic 8.6%, 27	Yacht Club 8.9%, 28	Other 8.9%, 28	500/Less 61.1%, 185	501 to 1000 26.7%, 81	1001-Moree 12.2%, 37	\$5,000/ Less 29.4%, 85	\$5,001-\$10,000 13.8%, 40	\$10,001-\$25,000 19.4%, 56	\$25,001-\$50,000 15.2%, 44	\$50,001+ 22.1%, 64												
Gained																										
1%	88.8%	87	88.6%	62	90.9%	10	100.0%	11	66.7%	4	87.5%	49	89.3%	25	92.9%	13	89.3%	25	81.8%	9	82.4%	14	94.7%	18	91.3%	21
2%	11.2%	11	11.4%	8	9.1%	1	0.0%	0	33.3%	2	12.5%	7	10.7%	3	7.1%	1	10.7%	3	18.2%	2	17.6%	3	5.3%	1	8.7%	2
Totals	100.0%	98	100.0%	70	100.0%	11	100.0%	11	100.0%	6	100.0%	56	100.0%	28	100.0%	14	100.0%	28	100.0%	11	100.0%	17	100.0%	19	100.0%	23
Lost																										
1-2%	12.9%	11	10.0%	6	0.0%	0	45.5%	5	0.0%	0	6.4%	3	16.0%	4	30.8%	4	12.5%	3	11.1%	1	7.1%	1	11.1%	2	20.0%	4
3 to 5%	32.9%	28	31.7%	19	30.0%	3	45.5%	5	25.0%	1	34.0%	16	36.0%	9	23.1%	3	20.8%	5	44.4%	4	35.7%	5	38.9%	7	35.0%	7
6 to 10%	34.1%	29	36.7%	22	50.0%	5	0.0%	0	50.0%	2	34.0%	16	36.0%	9	30.8%	4	37.5%	9	22.2%	2	50.0%	7	33.3%	6	25.0%	5
Above 10%	20.0%	17	21.7%	13	20.0%	2	9.1%	1	25.0%	1	25.5%	12	12.0%	3	15.4%	2	29.2%	7	22.2%	2	7.1%	1	16.7%	3	20.0%	4
Totals	100.0%	85	100.0%	60	100.0%	10	100.0%	11	100.0%	4	100.0%	47	100.0%	25	100.0%	13	100.0%	24	100.0%	9	100.0%	14	100.0%	18	100.0%	20

MCMAHON PULSE SURVEY

Outlook for 2020

WRITTEN COMMENTS

McMahonGroup 
PRIVATE CLUB PLANNERS & CONSULTANTS

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10. Do you see any financial impact issues which could affect your club in 2020?

1. Decline in the economy. Presidential election result.
2. Possible recession; Presidential election
3. State and Federal wage increases, Salary regulations
4. Government regulation - employee classification and OT rules
5. Aging infrastructure leading to significant drainage repair expense
6. Labor inflation
7. renovations and assessments
8. Not at this time unless the economy turns extremely negative
9. None
10. Financial market change
11. The election....
12. If the economy stays strong, then we will have a good year.
13. No
14. If the economy went into a recession in 2020 it would negatively impact the club. Being a Presidential election year, I predict there will not be a recession.
15. Payroll and finding quality staff
16. Another area Club has been struggling financially and may close. This potential closure could lead to a Membership influx for SGCC.
17. Benefits and Minimum Wage Increases
18. Lack of capital investment and a high debt service.
19. Labor Cost due to DOL rulings
20. Older membership.
21. Continuing increase in wages and benefits
22. Not at this time
23. Arkansas has a high population flee rate and Little Rock has the 15th highest rate off any city in the US. Concern over erratic policy from the Trump administration.
24. Not at this time.
25. no
26. Capital planning
27. aging of members who continue to hang on to memberships but downgrade their classifications/categories
28. Continued economic decline at the local level. Not enough Business and Professional People that enjoy the Country Club Experience or have never experienced the CC Exp.

29. Real Estate Sales
30. Our Club is full with a small waiting list; and member attrition is less than 3% at this time. We are not generating enough initiation fee dollars to support asset replacement. Club leadership will need to decide how to close the gap - capital dues or assessment.
31. No.
32. 2020 Election
33. Membership retention
34. increasing minimum wage
35. Oregon's minimum wage law is certainly impacting our expenses. By law, the Minimum Wages has increased by \$2.00/hour over the last 4 years. Now the increase goes to \$.75/hour for the next 2 years. (all increases are on July 1). This also invariably impacts our other hourly employees that are making a few dollars more than the minimum. The 4 previous increases have increased our payroll expenses by over \$20,000 each year. The \$.75/hour increase will be a \$30,000 increase.
36. No
37. Currently working on funding for club capital improvements
38. Need to raise more capital improvement reserves
39. Labor shortages
40. Membership, minimum wage, additional reporting requirements from government
41. no.
42. Economic
43. Great economy in the US although struggling energy sector will likely impact our business in 2020. Also, tight labor market, raising pay rates, less desire to work more than 40 hours a week will impact labor costs.
44. Currently in the planning process for a ten year strategic and capital budget. We currently do not anticipate any major changes.
45. Rising cost of wages and benefits.
46. Minimum wage increase
47. No
48. Oil and gas prices and the ability to get oil to market
49. Election
50. We will be undergoing a clubhouse renovation
51. Increased national prosperity will trickle down to increased member usage
52. We are intending to upgrade our clubhouse, a \$2.6 million project.
53. Lack of confidence in economy
54. CT minimum wage mandates increases each year.

55. The minimum wage increase as well as the exempt salary increase will affect the Club beginning January 1st. The state of Maryland for the last few years has been discussing the property tax discount provided to private clubs. If this were to go away, MANY clubs would likely close because the tax would be calculated based on best use as opposed to how it is set up currently.
56. Financial Impact is Statutory Wage and Benefit increase and whatever the vendor cost increase will be.
57. The social unrest in Hong Kong has impacted out banquet revenues and while many have been rescheduled for 2020 we hope the streets will be back to normal so that business continues
58. Health Care Costs increasing 38%; Membership attrition
59. In Cook County (Chicago and some surrounding suburbs) clubs are seeing huge property tax increases.
60. No
61. California minimum wage increase. Commercial umbrella coverage, liability.
62. Carbon tax
63. Conn minimum wage increase occurring gradually to \$15 per hour over the next four years.
64. The Presidential Election in 2020
65. Not sure if you're referring tom internal or external. Internal - we offer free memberships to seniors so that is an impact issue. Externally - no.
66. Only wage inflation with labor shortages.
67. General economy slowdown
68. Local economy is beginning to impact new shareholder membership sales
69. Housing Market Crash
70. Stagnant membership; Potential assessment
71. Long term capital planning - ageing infrastructure
72. Election year could shift economy, but not until 2021
73. Increased minimum wage
74. The amount of capital maintenance needs is coming to fruition now that we performed a capital maintenance study. This is taking a higher priority than the larger projects and it's taking money away from the cash reserve and buildup of cash to pay for the larger projects. Long way of saying, our projects are being delayed to pay for upkeep of current assets.
75. We are experiencing positive membership trends.
76. Tax policies negatively impacting our state (SALT changes by this administration) have increased incentives for retirees to move out of CT to FL (or similar), so we're losing more people on backend of their membership
77. Hurricane season is always a concern.

78. Government decisions to negatively affect economy
79. Potential change to the generation of transfer/initiation fee as membership is completely full in all categories with a considerable wait list to get in and very few current members leaving
80. Increasing labor costs due to mandated minimum wage increases
81. Continued entrance into the local market of new restaurants and fitness centers that compete for expendable income in a booming market.
82. Presidential Election, stock market slowdown or decline
83. Downturn in the economy or a big decline in the stock market.
84. Of course a major downturn in the economy in general will affect membership activity but based our location and demographics 2020 looks to be a very good year for us
85. Minimum wage hike and employee shortage.
86. Membership
87. The minimum wage is going up \$3.50 per hour in the next two years
88. Economy
89. The Presidential Election and/or Impeachment
90. We raised our initiation fee in the summer of 2019, which generated a large increase of new members. We will end up with 110 new members this year, an all time record for the AAC. This will impact new members for next year and we will be lowering our forecast, which will negatively impact our initiation fee revenue. Although our dues revenue will be higher to begin the year that will help operations. We are also experiencing much lower member turnover that has increased our wait for golf memberships to over a year now.
91. In my city, we have a huge tax burden that is impacting our club. Taxes were 120,000 in 2014 and are 400,000 in 2020
92. Labor shortage; increase in minimum wage
93. Property tax assessments.
94. Club Renovations
95. Unease over Impeachment, trade and economy. Upcoming election leading to jitters in the economy.
96. Renovations, possible loss of membership, increased base wages causing dues to increase
97. Gradual increase in the state minimum wage to \$15 in 2025. High property taxes
98. Red Tide
99. The financial markets. If there is a downturn this could affect membership because of the uncertainty of the economy.
100. We are under major renovation on two fronts, the clubhouse and the golf course. These factors could have some impact on us, depending on weather and achieving our planned completion dates.

101. Minimum Wage increase
102. Labor Cost continues to rise more than inflationary percentages.
103. Any financial downturn would likely turn our members inwards more, increased use of the club. We have a long waiting list, that would likely shorten
104. The cost of general labour
105. Tariffs may increase some of our cost of goods. makes it harder to compete with online retailers.
106. Continued membership building.
107. Election
108. The Club will be entering a project phase in the spring/early summer timeframe and the impact could be huge for invigorating new member growth, if the project is planned well, funded with minimal assessments and proceeds in a well-managed direction. This is the most important action that will have major impact on this Club.
109. The state of the oil and gas industry
110. Weather; Elections 2020
111. Election years are always interesting in terms of economy, but we really don't see any other influences which would impact us.
112. Membership
113. No
114. None at this time. The weather was the biggest financial impact in 2019.
115. 9.8% dues increase
116. Yes. Course renovation will impact golf revenue and possibly f and b
117. Membership
118. Members are busier than ever, and usage remain stagnant
119. See the economy in our region staying fairly stable
120. Health care costs, property tax increase, increased insurance due to hailstorms
121. Slight increase in interest rates possibly.
122. Yes, the market
123. A change in Interest Rates ort a Stock Market decline would make our membership sales more difficult.
124. the 2020 election will be key
125. Yes, the election. If a democrat is elected President, the economy could crash and membership levels will drop dramatically.
126. Wages - Minimum Wage in 2015 was 8.75, Jan 1, 2020 it will be \$13 per hour, will increase to \$14 in 2021 and \$15 in 2022. Finding qualified employees willing to work weekends and long days is also a challenge.
127. As long as the real estate market is strong we will continue to grow.

128. Increased taxes and insurance
129. We have a tenant improvement allowance with our new lease which included rent abatement which will positively affect club revenue
130. Weather / Hurricanes
131. The economy seems to be stable for now but people agree that the situation is fragile. So I am not certain that next year 2020 will be better. But if we work hard and continue to improve and develop the Club, the revenues should be the same or hopefully better.
132. Based in the Seattle market - Boeing is a significant commercial interest in hospitality
Minimum wage increase; Election cycle normally has clients more hesitant about the future.
133. Higher cost of labor
134. If economy continues to be strong, as predicted, in 2020 election year we should do well. More of our members are moving to area full time which also benefits us.
135. Building new facilities will have positive impact.
136. Labor shortage, increasing wages for staff to remain competitive, property taxes, oil & gas industry
137. We saw an increase in costs on the maintenance side, mainly chemicals and fertilizers. Wages are on the rise in Ohio from the Minimum wage to the salaried minimal wage moving up to \$35,000
138. The election
139. Completion of \$5.5 million renovations including new aquatic complex, new bunkers and bridges, along with clubhouse upgrades should positively impact our revenue in 2020, along with increased activity in the new construction of single family homes and upscale apartment complexes within a 10 mile radius.
140. Locally - no but nationally yes.
141. The election
142. With a slowing in membership we will look to do an aggressive push on membership sales and I anticipate lowering our initiation fee which will impact our CIF.
143. The election, the economy, and an aging membership.
144. Labor cost is going to be the biggest impact due to minimum increases across the state.
145. Presidential Election
146. A downturn as a result of a Democrat as President
147. Optimism about the economy is threatened by uncertainty about our political situation and the upcoming presidential election.
148. Rising labour cost
149. Rising costs of insurance and other goods, mostly food related.
150. Increases in minimum wages, low unemployment leads to difficulty in finding and retaining staff

151. Rising costs of doing business
152. Labor and associated costs will be higher
153. Increase in minimum wage
154. As Dow Chemical goes so does Midland Country Club. Trade wars, global inventories, market share all have an effect on our market.
155. We are completing a dining renovation and anticipate a 30% increase in activities and dining revenues.
156. New minimum wage and minimum salary threshold increases
157. Labor competition and higher wages
158. Although we did not see an impact on membership last year, we continue to be concerned about the cap on the SALT deduction, as we operate in a high real estate region.
159. Membership Recruitment & retention
160. There are many.
161. Wedding business seems to be trending better than prior year
162. NO
163. Labor cost
164. No
165. Housing could become an issue.
166. The election, and possible stock market issues related to the China trade war, impeachment, and 'uncertainty' within real estate.
167. Wage & Benefits
168. No parking, high property taxes, extremely low unemployment rate
169. As long as the stock market stays strong we will be in good shape...the bulk of our membership works in the financial sector.
170. Potential member assessment to improve facilities
171. If a recession hits in 2020 or a large unforeseen circumstance like a natural disaster
172. We are always cautious with our membership projections. Fortunately, we are located in a desirable location (south Florida) and we continue to improve our amenities. We will be renovating our Clubhouse in 2020.
173. Disfavorable - The election, tariffs, civil unrest. Favorable to those in PA - SALT taxes in NJ
174. Reduction in banquet events; new member interest has softened
175. New Bar/ Restaurant Manager and new pool manager
176. No
177. Significant winter course damage that defers our opening and/or affects our conditioning.

178. Membership decline
179. None
180. The 2020 US election
181. We are always concerned about a decline in the Stock Market since our joining costs now equal approximately \$100K but we do not anticipate this happening in 2020.
182. Labor shortage
183. Eroding waterways on property, dredging projects
184. Inability to assess for capital requirements due to economic conditions
185. Declines in economy or housing market always negatively impact Club. We are a second, third, or even fourth Club that our Members belong to. Delayed retirement or hard times for those already retired translates to recruiting and retention challenges. Fingers crossed for a continued strong economy.
186. No
187. Illinois taxes will create more people moving away.
188. The price of diesel impacts food and beverage revenue.
189. Yes, higher income taxes on the wealthy in our state. Higher property taxes for the Club.
190. Local economy and election year
191. Labor costs
192. Yes; Talk of recession and it being an election year
193. Property tax increases
194. November elections, stock market performance
195. Labor Wages
196. Two, confidence will help with member retention/sales and secondly rising wages will make recruiting and maintaining staff more difficult.
197. Downturn in the Economy
198. Continued low unemployment. Driving up labor costs in an effort to attract the best people.
199. Water issues and membership
200. Election year, low available existing home inventory, outstanding record setting year financially in 2019.
201. A severe downturn in the economy -NYSE
202. Labor, COGS
203. Yes. Club may possibly sell small parcels of land which will generate several \$million
204. rising costs will impact discretionary spending
205. The mandated wage increase will have an impact as well as trying to keep qualified team members

206. Raising labor dollars
207. Election years can be difficult to predict new member growth. I think being Conservative on initiation fees is smart.
208. Threat of recession
209. If Trump is re-elected we could be in danger
210. None
211. Potentially significant increase in real estate taxes. Continued upward wage pressure.
212. Difficulty in attracting new members
213. If there is a noticeable downturn in the economy, it would impact on our member renewals and our profitable private function business
214. Seasonal staffing under DOL guidelines
215. Employment
216. Losing money
217. With a Presidential election in 2020 I believe the economy will slow as people take a wait and see approach.
218. NONE
219. Oil and Gas industry needs a boost in Alberta
220. CT economy

23. Do you plan to implement special strategies for member retention in 2020? Please list some of those strategies:

1. Develop new social event programs. Consider spousal options. More reciprocal clubs.
2. Long Range Plan Unveiled to Members
3. Member Ambassador Program
4. Social Upgrade Promotion, Increased Social Programming, Improvements to Social Amenities
5. Rewards programs and Letters and communication quarterly to new members
6. Golf Course Improvements
7. Engage membership with increases social events.
8. Member Referral Incentives
9. More active calling those who are not that active to encourage use.
10. Increased programming - in particular for young families but in general, a "platinum member" category for those Members who are 75 years old and have 20 years of consecutive membership,
11. Theatre / excursions etc. (additional amenities)
12. Building a new pool complex, increased hours of operation, events
13. Heavier discounts for members. Member recruitment incentive (1month) dues for every member who joins.
14. Increased service and amenities
15. Price reset; New Initiation fee strategy
16. Member Surveys, reaching out to members that don't spend their food minimum
17. Continue flight to quality; sitter service continues to increase; GaGa pit, more Wii Programming for children, arcade basketball, etc. for children; outstanding traditional events to create "engaged members"- my mantra is "engaged members are retained members." Continue digital marketing; great cost savings this year--Plastiq for credit cards & instituted mandatory e-billing. Adding pickle ball and more yoga for folks who are graying!
18. Credits for bringing new members to their monthly billings. This is more of a new member strategy.
19. Eliminate capital fees, sell land to allow for capital expenditures
20. New Pickleball Courts, New Fitness Amenity, New Restaurant
21. Usage monitoring /off-season facility planning
22. Family focused events, food & beverage driven social opportunities, and manager/member direct contact
23. Parties, value events, welcoming atmosphere, surveys for facilities renewal, increased communications
24. Moving on the third of 3 capital renovations paid with cash on hand

25. Higher subsidy on F&B to encourage more frequent use.
26. Using Pipeline marketing
27. Loyalty scheme
28. Referral Credits to the members and 20% credit to the new member.
29. Member Mentor program. Broadening the traditional market, (non-boat owners focus on SUP and Kayak)
30. Increased communications, addition of indoor hitting bays, hiring of Creative Golf Marketing
31. Reinvestment in facilities.
32. Social media campaign pre-season
33. Value Add programs to membership offerings
34. More active recruiting strategies. Have worked proactively to reduce financial cliff associated with graduating from junior to senior membership. Instituted more accommodating initiation fee payment schedule.
35. Expanding facilities including new fitness center, fitness studio, ladies locker room, massage room, grab & go, childcare, etc.
36. TBD
37. Member referral bonus; staged initiation fee payment
38. Use capital funds for: Updated patio furniture, New Pool furniture, Interior painting (Clubhouse), Bocce court, Fire pit area Vision: To create a more "Resort" feel for our membership Focus will be on Staff training, creating a better "Experience" for the member.
39. Member engagement although we currently have a five = year wait list for Full Play - a little attrition is not a bad thing - attrition rate for 2019 was sub 2 %
40. Membership referral incentives; clubs within the club; social events
41. Value added offerings for different affinity groups, more recognition, more quality events.
42. More social events and options to have 3rd party excursions.
43. Increase in junior golf and entertainment programs. Member to member touch-in.
44. Enhancements in the decor; new bocce courts; new pickle ball courts; golf simulator; Ambassador program with senior members of the club who engage with existing members to recruit new members and retain existing; Member surveys
45. 20 selected current members each to bring in 1 new member in January.
46. Membership Committee Members assigned to integrate new members to the club.
47. Appreciation/recognition member events
48. Increase communication, Increase diverse programming
49. External marketing, target market, direct marketing
50. We plan to engage a golf marketing firm

51. Raffle Auction event to raise funds for Capital Improvements, to include credit towards dues, weeklong vacation stays, etc.
52. Discounted guest pass fees. Referral credits for bringing in new members.
53. Provide higher quality service. House improvements to facilities and dining areas
54. Surveys, upgrades to facilities, communications
55. Free golf lessons; Increased club reciprocal agreements; Introduction of year-round golf simulators
56. Ongoing social events aimed at new members including their sponsors/ambassadors, making sure they are integrated into the club. We are also upgrading our facilities to serve the needs of our current membership, based on a recent survey and study of our members.
57. Create improved member events - focus on value add to social programs
Focus Group sessions with different demographics and member use
58. Software, CRM, digital marketing
59. Preview program
60. Hired a marketing firm
61. New F&B offerings; More "Eater-tainment" with food and music/theme. More value added amenities
62. A major project to update the lower part of the Club, plus updating the Fitness area with new flooring and equipment. Additionally, member incentives will be offered to encourage members to invite friends and business associates to the Club.
63. TBD
64. Introducing some new small events with a special focus.
65. Ambassador; Loyalty; Outreach; Relevancy; Surveys; Committee Activism
66. Formation of a Member Engagement committee, more non-golf activities, Member surveys.
67. SEO, Organic search, Blog post, CRM & automation etc..
68. Increased value; more experiences; increased diversity of programming
69. Communication is something we are working on with a new website and app. We are also changing up our social events with some fresh ideas.
70. Incentives for intermediate members to upgrade to full categories
71. Creating and implementing a pickle ball program. Creating a Social Membership to attract full members.
72. Facility Upgrade to Fitness Center; New Splash Zone area at the Pool; Trial Summer Membership; Creative Member Social events
73. Adding social events to the calendar that are open to all membership categories. Improving food service. Offering more fun and less competitive club activities.
74. Awards and discounts for time in the club

75. Increase Initiation fees based on number sold. Ex: 10 remain at \$40,000 then to \$45 for the next 15 Memberships
76. On-Boarding - - follow up calls at 90 days / 180 days and 240 days - One year Anniversary Call -- new dashboard from Jonas just purchased to identify at risk members to contact and steward
77. A concerted effort to look at the leaders of the city and see who is not a current club member and then target those people through relationships with existing members, nothing publicly stated or announced and no incentives are provided for sponsoring new members.
78. Increase our services offer : for example : concierge services, possibility to buy a variable quantity of tickets in the Saint James's VIP suite at the Bell Center during the hockey season or attend a tennis game at the Rogers Cup in the summer, Small Business Center, partnerships with 3 golf Clubs, and private fishing Club etc. Automatic satisfaction survey is send after every events organized or attended by members. Our Business development manager calls the members regularly to keep in touch and make sure that they are satisfied with the Club's services.
79. Contact and incentives for low use members, Fostering connections with other members
80. Value based to increase club utilization
81. Capital investment in facilities; unique and different experiences and services; continued attraction of top talent in staff leadership
82. New ownership since 2017, last 3 years saw capital renovation on buildings and golf course. The new fee structure will attract more golfers
83. Focus club activities on entertaining the whole family; Less golf activities, more activities in dining and at pool.
84. We have a number of introductory programs that act as bridge categories to full membership. Most of these programs are max 1 year, however we have increased this to two years. We have found a greater increase of conversion from these programs to full membership with a two year window versus one.
85. Our membership chair with communications will be launching new marketing materials
86. Using Clubessential's Member Retention Management system, identify at risk members and implement procedures to reach out to them personally in several different ways. Offer many new aquatic programs along with the grand opening of the new pool complex. Encourage the growth of pickleball. Complete bunker and bridge replacements on the championship golf course.
87. Tracking utilization / encouraging participation / ambassador program for new members / etc.
88. Membership drive with aggressive IF / Clubhouse upgrades including interior paint, carpeting. and dining room tables & chairs / new bocce courts / aggressive marketing to outside events
89. Continue to work with the chamber and local young professional organizations.
90. Offering more membership benefits.

91. Pay as you play category; corporate plan category
92. Value added events; use of Activity Level Indicator Reporting; Reward for top spenders and focus groups on low spend
93. Conducting membership survey (McMahon group) to determine items of importance to current membership
94. We worked with Frank Vain to develop our Vision 2025 plan. Strategic on boarding, philanthropic offerings, and programming are factor into our retention strategies
95. Member engagement, new events, personalized recognition of needs
96. Continued investment in facilities
97. After the renovation is completed, we will have a larger casual dining room, smaller quiet dining, and a new pool bar.
98. New member receptions. Member recognition - birthday calls and invite to club for complimentary birthday dinner. Member reconnect program - identify low spending members
99. New Amenities and experiences - additional classes, expanded hours of operation
100. Master Plan, various projects
101. 3 month no dues during winter months
102. SOCIAL EVENTS, OFFER TRIAL MEMBSHIP TO GUESTS OF MEMBER/ GUEST EVENTS, REFERRAL BENEFITS TO MEMBERS THAT BRING NEW MEMBERS
103. New member referral program; increased family programming
104. Reinvesting in the Club's facilities
105. They have not been decided yet but we are looking at doing some improvements to the pool complex (new bar etc.) as well as some new family activities.
106. Special discounts for bringing in new members up to 24 months.
107. Focus on engaging members who don't frequent the facilities at regular levels
108. Implement the steps identified in the recent McMahon survey. Focus on improved golf programs. More technology used in teaching. A simulator, trackman bay, fire pit, better staff attention to partners, modify two holes on the course. Work on wine pricing, corkage fees, healthier meal options and better service.
109. Continue to evolve and offer new programs. Complete our Master Plan to have an updated Club.
110. Limit Downgrade Opportunities
111. Payment Terms; discounts when paid in full
112. Special member events, addition of golf simulators, enhanced dining
113. Offer additional amenities, saunas, spa, pub
114. Clubhouse renovation and new member initiation discounting
115. Additional amenities; Pickle Ball; Extended Dining schedule; Upgrades to technology; Engaged Scheduling
116. Hi value experience; Varied successful programming; Enforce reinstatement strategy

117. Legacy Program (Recognition of Members of 15+ Years); Targeted Lifestyle and Social Programs; Subsidized Wellness Programs
118. Increased activities for members only. Higher values in food and beverage. Increased amenities substantially at a moderate charge
119. Ongoing increase to social activities away from the golf course, (of note Junior Membership here is under 21 years of age as it relates to previous questions)
120. Increasing satisfaction, updating special event spaces and course bunkers, identifying at risk members and engaging them
121. Hired Creative Golf Marketing to aid in our membership recruitment
122. Undetermined at this time
123. Nearing Cap, Switching to Monthly Dues, More amenities to keep member engaged
124. "Friends", (we work hard to get them to make friends at the club that they will be reluctant to leave.), Social Events that combine golf and dining, Family activities and events.
125. Forming a Marketing Committee and having more advertising in the market.
126. Sponsor credits, social media
127. Offering conversions from Full to Sports member for those who have aged out of playing golf. Sport level permits all social, fitness, aquatic, tennis and croquet.
128. Enhanced programming - hire member relations director - improve golf course/product/services
129. Enhanced value in offerings; lunch and learn series; movie nights for kids, pool programs, etc.
130. Capital improvements, added amenities
131. Increased member engagement.
132. We have a combined program, of increasing the member benefit value proposition and increasing services, as well as creating newer contemporary space that appeals to the next generation of members.
133. Membership awareness; brand determination; marketing plan

25. Will you be offering special membership programs to attract new members in 2020?

1. Join at the Philadelphia Golf Show in February 2020 and receive March, April May dues waived. Join in October 2020 and dues are waived through March 2021 "Fall Special" All new golf members join as an "ENVOY" First year dues reduced by 50% if they remain the second year dues are reduced by 20%. Third year they pay full dues and are now equity members.
2. Reduced Initiation Fee, 2019 Rates if joining by March 1st, Free Annual Cart Fee if join by Dec. 31
3. Join by certain date receive complimentary offer to certain events. Small referral program
4. Local Associate Membership; Many qualifications
5. Current members" incentives
6. Prospective member socials
7. First year's dues free
8. 15 months for price of 12. Discount for younger members
9. Seasonal Trial
10. Reduced Initiation Fee or Part Back in Club Credit - Stepped Up Dues over 3 Years
11. A 90 day "trial". Try the club out for 90 days and just pay dues and appropriate user fees. At the end of 90 days if they choose to stay and become a member, they must pay the appropriate initiation fee.
12. New Ambassador Program; Clubs within the Club; Redesigned referral program
13. Trial membership; Initiation Fee Payment Plan; No dues (Jan, Feb, Mar);
14. We would like to grow our family membership so will be offering more family related programs, not just mom, dad & the kids, but including grandparents and aunts/uncles. We will also offer more events that cater to the intermediate (<35 years) categories.
15. Good neighbor program for people in the development. All club use will be applied to initiation fee for a period of a year--it's a type of preview membership.
16. \$75 / month credit for full pay memberships (new) Less for lower tiers. Discount the initiation fee if paid by July 31st.
17. Preview Membership
18. Full credit of trial fee to be applied against entrance fee
19. We offer a Limited 4 membership - 72 holes per month - dues are \$165/month - good way to get younger people involved - several Limited 4s have upgraded to either junior or full membership. We also plan to offer full membership with only one golfer in the family for \$275/month - this may or may not have a limited time frame (i.e.: 2 years) then a mandatory upgrade to full dues.
20. Discounts based on age (under 45), networking for the younger set, mentoring program to integrate members faster using members of the Club,
21. Extended payment terms on initiation (2yrs). Incentives to sponsoring members.

22. In December we do a no dues until April campaign. We have a one day sale in March where we give \$1000 in swag, must sign that day.
23. Annual trial membership and unattached Intermediate
24. Discounted dues for some period.
25. Still in development. Probably reducing initiation fees during renovation construction and prior to increasing upon completion of the clubhouse renovation.
26. Season pass, sail pass, pay monthly
27. Social with XX rounds of golf as an introduction to the Club. Details are still being developed.
28. Rebate initiation fees with monthly credit for utilizing the Clubhouse in the first six months. Promotion on hard to fill small berths. Broker referral program
29. Waive Share and Entrance Fee. Special pricing in first year
30. Working with CGM on this
31. Summer Trial
32. Discounting initiation fees
33. Buy share, pay entrance fee and you and your family pay no dues in year 1
34. Staged initiation fee payments; member referral bonuses
35. Trial
36. Trial Programme
37. Incentives for Intermediates. Incentives for groups of 3 or more
38. Discounted initiation fees; discounted monthly dues; referral credits for new members
39. Value added program for regular membership. Dues will remain the same, new members will receive 15-guest passes, 2-year annual cart rental, 2-year complimentary locker, 2-year complimentary cart & club storage. Mill River program, Zero corkage fee, room rental discounts
40. We have begun to offer open house tours of the facilities to members who have friends, work colleagues who are interested in the club but the member may be reluctant to ask if they would like to join, so we have bridged this "ask" by allowing the member to introduce their membership candidate to the club through this program.
41. Value added packages, trial programs
42. \$500 for two months of green fees, discounted dues for one year.
43. Reduced initiation fee and monthly credit to dues
44. Preview program, incentive for local builders and realtors to recommend new home sales
45. Legacy campaigns, re-engaging past members, membership drive initiation fee waivers
46. Reduce initiation fee by 2500. until May 31. Offer a discounted initiation if a group of 3 or more join together

47. Payment plans and family membership introduction, social membership
48. Five year tiered pricing programs. New members do not pay full dues until year five.
49. Reduced initiation fee. Trial membership. Referral incentives
50. Trial membership - 3 months for a flat rate ~ = 3 months dues. Upon conversion to full membership, initiation fee credit.
51. Dues free options, reducing initiation fee options
52. Member referral program (receive credits towards their dues). Waived entrance fees for returning members.
53. 3 month trial program
54. Special Incentives for those purchasing a home inside our gated community
55. Off peak membership
56. It is our 55-year anniversary so we are offering 55% off initiation and F&B credits for 1 year for people joining.
57. Credits/Incentives
58. Updating the Club and Fitness center and offering member incentives to bring in new members.
59. We typically allow the admission/initiation fee to be paid over a period of time in our programs.
60. GPS (Golf, Play, Social) - aimed at beginners, kids, limited time auids. Super Saturdays - one per month / kids games, contests, entertainment, low cost food, prizes. RHCC Cares - internal outings that garner contributions for local service provides (schools, fire, police, culture). Three free golf clinics per week. One free tennis clinic per week. Subsidized swim lessons cost
61. Mostly having to do with initiation financing and some new Membership categories
62. 1year contract 10% discount,2year contract 15% discount,3yearcontract 20% discount. free family cart and no food and beverage minimum
63. Social Membership
64. Trial Summer Membership
65. Each winter, the club offers differed initiation fees until May of the new golf season. Introduced new Dining Membership in 2019. Added access to the golf course during the off season to our Sports Membership.
66. And incentive program with lower dues and no initiation
67. Trial golf membership. 2 months for \$800. When upgrade the \$800 goes against initiation fee.
68. Time sensitive based on Spring
69. Companion Program (Reduced Initiation Fees for multiple members joining at the same time), Reactivation Incentives for past members to return
70. Summer-Guest Program offering use of all a club facilities between Memorial Day and Labor Day for dues of \$8,000

71. To fill the needs of the golfers in our areas we will be offering memberships limited to a specific number or rounds
72. We structure a first year program with reduced fees and payment options. We create an incentive program within our membership through low cost give backs
73. Trial program for full membership - for a set fee, a person can join as a trial for one year, prior to committing to the Club and payment of entrance fees.
74. Referral program.
75. Trial Memberships. Membership incentives
76. Under 40 program (discount)
77. Creative Golf Marketing Program
78. To be determined as we are nearing the point of establishing a waiting list.
79. We are finalizing at this time - looking at increased member referral, tiered incentive on IF for all categories (1st five %50 off, next 5 %30 off, etc.)
80. Current \$10,000 Initiation Fee. Program: \$7,500 Initiation Fee paid in full, Social dues for first six months with full club privileges.
81. Our current membership year runs from April to end of March of the next year. We will offer the first 3 months of 2020 at no cost to individuals who commit to the 2020 membership year. We also have a Non-Equity Golf Pass as our Membership Drive to bring in new value conscious individuals at a significantly discounted monthly dues.
82. Summer trial membership
83. Spring Promotion: no dues until June 1st. Fall Promo: free membership (after Sept. 1) for remainder of year with partial pre=payment of next year's dues.
84. Summer pool membership with opportunity to convert at conclusion of period Friends/family discounted initiation fees
85. Member financial incentive
86. We offer a discount for the first 50 members to join in 2020 (up to 15%) and we also offer MCC "Deluxe bucks" work \$1,000 to introduce them to all the amenities the Club offers
87. Friends and Family - No initiation fee if 4 or more join at the same time Swing into Spring - 20% IF down payment with remainder paid down with food and beverage purchases made over a 2 year period
88. Shorter term "test" memberships with potential Entrance Fee discounting
89. F&B CREDIT, COMP DUES MONTH
90. 1/2 off initiation fees, new member discount incentives and complimentary use of a golf cart for one season.
91. We are considering the summer preview membership.
92. TOWN MEMBERSHIP.....TOWN SOCIAL, MILITARY AND TOWN NON RESIDENT.FOCUS ON OUR TOWN FACILITY FOR FURTHER GROWTH
93. Non-related women \$20,000

94. Complimentary junior membership with new Regular/Full members; group joining programs to provide added value
95. Spa.
96. Discounting multiple member initiation discounts
97. Dining and Golf Experience: Limited Trial Program for 1 year
98. DELAY IN INITIATION FEE
99. 2k discount friends and neighbors (referral); initiation paid over 2 years for those under 55
100. Continuation of our discovery program, which has been very effective.
101. Don't know at this time
102. Undetermined at this time
103. Introductory - dues only - Entrance Fee and Share purchase after year one
104. Preview membership at lower price for 2 year term
105. Trial membership, sponsor credits
106. Equivalent of 1 to 2 free months of dues.
107. Reduce initiation fee
108. 30 in 30. We are trying to inspire our membership to bring in their friends and colleagues with a 30 new members program in 30 days, that we will roll out to start the new year
109. Trial membership

28. What are some strategies/programs you are using to attract new, younger members to your club?

1. Continue to offer age based reduced dues program
2. facility and programming enhancements
3. Reduced dues for certain age groups
4. Addition of new Kids Club Facility offering babysitting services. Addition of Fitness Center. Addition of two Trackman Golf Simulators
5. Staggered dues/initiation fees, word of mouth to friends, access to boats/racing
6. Family facilities, youth coaching
7. Initiation fee payment Plan, reduced dues/increase as age, Full service Youth activities department, expanded Family programs
8. Childcare services during events, new/improved social amenities
9. Investing in facilities, youth and family programs
10. Social media and year-round programs and amenities
11. Types of events we run
12. Junior Associate Membership
13. Naples is attracting somewhat younger residents, many of whom still are working to some degree. They are being proposed by their friends who are members here already.
14. Promoting our legacy program
15. Offer rounded programming for all ages and generation
16. Enhancing the physical facilities. Making sure the Club offers the high quality food and beverage operation. Enhance the boating opportunities. Continual improvement of the programs offered to the membership. Member surveys on a regular basis. Review and update the 5 year plan annually
17. Payment options, staggered membership categories leading to full membership, family focused programming (date nights, outdoor movie night, Santa Claus parade, etc.)
18. Increase in family activities, and more low cost options for socializing
19. Debt free
20. Lower Fees - Better Family Programming
21. CCF continues to add and improve children's programs and special family dining options.
22. Junior activities
23. Family & Junior programming. More free social events
24. Being more family and social focused
25. Guest discounts, events for their demographic, F&B menus designed with them in mind.
26. Staggering monthly dues by age

27. Strong family/Jr. programming in recreation outlets and socially, referral programs
28. Friday night music in Tavern (every Friday night); sitter service is huge; swim team; PGA junior league, existing young members encouraging their friends to close the circle.
29. Kid's Club, Increased youth activity at swimming pool.
30. Lower initiation fee and no upgrade fee if still a member when turning 40
31. programming for the whole family. activities where people of similar ages and likes can gather together.
32. no initiation until age 36. earn credit towards initiation every year as an intermediate and/or junior member.
33. New Charter School, Kids Lake activities
34. Hosting prospective member events; donating "Day at the Club"; Referral program
35. Planning a new pool with slide, sprayground and other amenities
36. As mentioned the Limited 4 membership offering has been very successful. Average age of this membership is 43.
37. Engaging our Young Professionals to be active prospective member sponsors by providing them opportunities to invite prospective members to the Club
38. Currently working on improved wellness/fitness facilities and adding poolside casual dining outlet
39. Pricing, cool events, safety of women, not the old boys club anymore communications, weddings and temporary membership, drink programs and pricing
40. Our Sailing recreational program continues to be nationally and internationally recognized while sailing is a slowing trend, we maintain a waitlist into our programs. We are also hosting another World Championship with a Junior Awards class. Consistency is credibility!
41. Complimentary weekly happy hours, reduced initiation, prestige
42. Don't have any
43. Reduced dues and initiation fee deferral
44. Continual updates to facilities, focus on family, family programming, updating aquatics areas, addition of FT youth activities coordinator
45. We are very much a legacy Club with long traditions of families joining to continue the traditions of the Circus Club.
46. Our Children's programming is robust
47. Expanding youth programming.
48. Discounted dues for a period of time, children's programs, great pace of play, no tee times
49. Unattached intermediate and Annual trial
50. Have quality programs, facilities

51. Emphasis on new fitness facility and programming in renovation. New grille/sports bar and casual dining facility. More children/family activities. Club events and experiences.
52. Tremendous capital investment in diversification of facilities; Deferred stock purchase program
53. Club Events, Wine Program, Camaraderie
54. No joining fees, access to boats
55. Junior Legacy Membership at a discount to Non-Legacy Junior
56. Graduated fee structure for intermediate members
57. Family Programming, Expanding Facility to including fitness, casual dining, childcare
58. Reduced expenses, family focused programming, expanded junior sports offerings
59. Pricing
60. More family activities on a year-round basis
61. Clubhouse renovation and modern food service concepts
62. Contemporizing fitness facilities and programming
63. Expanded intermediate ages, but we are a second membership in lake country so intermediates really are not a critical focus for us, simply very rare to be able to join at that age on their own
64. Summer memberships
65. Just renovated our Pool and Pool House
66. Enhancing family and youth programming.
67. Started a summer program
68. Offering young professional mix and mingle plus many family focused events
69. Staged initiation fee payments; we have a junior and Associate membership category; special events for new members; referral bonuses
70. Discounts, Free Instruction, Live Music, Wine & Beer Tastings
71. Discounts for under 40 years old. Fitness programs. Family programs. Junior camps.
72. We are very family focused and are continuing to develop facilities that will attract young families.
73. Reduced entry fee for Intermediates - smooth transition from Junior to Intermediate - Intermediate has a 2 + year wait list
74. None
75. More family events, more events for children
76. Prorated initiation fees, more family programming, casual dining offering
77. Started up a "Kids Club" every Friday Night, Increased events and programming at the Pool during the summer.

78. Affordability.
79. Family programming and being relevant to them.
80. Programming, new Clubhouse, social events
81. Allow payment of initiation fee over time, lower initiation fee for younger people
82. Expansion of sports center, bocce, pickleball, strategic plan and long range capital planning
83. hired an under 40 professional to reach out to their network, family events and our junior programming is with the goal of attracting the young families to see the club
84. increased children and family programming, complimentary activities when feasible
85. Incentives to bring in friends and family. Young member advisory group.
86. We aren't necessarily targeting "younger" members as much as we are targeting members from 45-60 years of age.
87. Continue to offer programs that appeal to families and children. More activities scheduled at youth complex
88. Member Programming, renovations, added amenities & services
89. Reduced fees
90. We currently have a wait list of 109 and normal attrition is 12.
91. None
92. none we are a second home empty nester club
93. Young Exec. Program- pay initiation fee over time
94. Childcare facility also many more family friendly social activities.
95. Reduced fees, networking opportunities, family programming
96. Looking to add a youth center
97. Strong Jr. Golf, Tennis, Swim, and Dive programs. Excellent Spa Facility and children programming to allow parents to use our terrific facilities and services. Continue to improve dining rooms and bar areas as well as golf practice facilities.
98. Diverse programming through mentorship and clubs within clubs
99. Increase in Club dinner events for families
100. Establishment of a Task Force Membership Committee
101. Excellent Junior membership program. Low initiation fee and dues.
102. Discounts, additional Family programming, new technology, easier access to sports
103. Junior golf membership referral incentives
104. Fitness Center, fitness programs, great food
105. More programs for children; diverse menu options
106. We are in a retirement community, so drawing young members is difficult. We continue to develop Vertical memberships in an effort to entice families to become involved, and eventually join.

107. Just finished restaurant renovation
108. We are not using any programs.
109. Club sponsored credits towards their entrance fees. New Intermediate programs such as golf events and tastings
110. Family programming, daycare
111. Marketing Firm
112. More family structured programs.
113. Pop up events centered around F&B
114. More social media use and reaching out to platforms in the community where younger members interact. Also pricing strategies along with more family orientated offerings.
115. Member Referral programs, Internet campaign, word of mouth
116. Using the Clubs within a Club to offer seminars on relative business topics, plus inviting significant speakers to these seminars.
117. Using our younger members to recruit their friends. In the past we have hosted open houses for prospective members. This year looking at more of a voucher system whereby if the member brings guests to the Club and they end up joining any guest fees are waived.
118. Updated clubhouse facility. New small group events.
119. We are full with a waiting list
120. Junior Executive Golf, GPS Program, kids and family programming, outreach, camps
121. Member ship discount drives
122. Amenities
123. We are very much a destination Club serving a more mature demographic. Corporate Memberships are our primary way to attract younger Members.
124. Providing more dinner specials currently we only serve lunch
125. Reduced under 35 and under 40 initiation fees
126. Couples fun golf a couple of times a month and social events for the non-golfers
127. Increased presence on social media
128. Marketing, internet
129. Open houses with select targets under the age of 40 to increase our long term base of members
130. Implementing new on the water activities
131. Implementing a Social Membership as a trial program
132. Reduced Initiation Fees and Dues for under 30 (one level) and under 40 (another level); "millennial" events for in our sports and social programs
133. Giving more access to the club's amenities (fee based) to our lower membership categories.

134. None. We have the best golf course and are the most affordable club in our area
135. Lodo's for juniors from 26 to 30 then they go into a step up program from 31 to 39 then they become a full member
136. Offering programs and programming that appeals to younger members. Non-golf activities for families
137. Relevant Programming
138. Family tournaments, Summer Winter Camps, Discounted fees, NO cart fees for children of members, many children's parties for Halloween, Christmas etc.
139. We have a significant waitlist
140. Happening with the new home construction.
141. Family event. Family size boats available for charter. New playground. Lots of family workshops
142. We have a young members committee that is very active and actively encouraging their friends to join the club. The club does events to target the desires of the young members, some of which are rod and gun events that take place offsite, we do a yearly "mixer" at the home of one of our members and prospective members are guests of current members. The club does about 65 events per year sponsored by the club or by specific committees. We are a very active club and that adds value for the younger members we are targeting
143. Family focus and children's programming, more casual dining options, wi-fi access
144. Networking activities: roundtables, cocktails, scotch and wine tasting dinners etc.
145. They are referral based
146. Offering a reduced initiation fee to Juniors under the age of 35.
147. Fascinating experiences, exposing private school children and parents to Club, reducing all children's event and camp pricing
148. Price of membership with no restrictions on tee times
149. Offering the best food and reciprocal program along with younger events
150. Reasonable initiation and dues
151. Significant discount on initiation for anyone under the age of 40
152. Started a Junior and National legacy program and providing a 5 year initiation fee payment plan for between the ages of 35-40, no interest.
153. Unfortunately, we are not allowed to advertise our club due to the Elks Organization, all word of mouth, but we strongly use social media to help with younger members.
154. Discounted initiation fees. Referral program for current members
155. Happy Hours/ Cocktail Receptions
156. Family Programming, Clubs within Clubs
157. Focus on Family Golf and Social Programs
158. Comprehensive Youth Programming

159. Discounted Membership / targeting younger members
160. Incentives
161. More family-oriented events such as Trunk or Treat. Parents' Night Out, and outside oyster roasts with games and rides. Creating member-driven groups for those under 45.
162. Junior Golf, Junior Camps, availability of tee times, shortened rounds
163. Invite them to participate in a family event. We host junior guest days. One for the golf course. One for Tennis. Both end with a social event at the pool.
164. Reduced rates and extending the age from 35 to 40
165. Lower Cost, junior golf instructional programs, beginner golfer instructional programs.
166. Family focused activities, reduced initiation fees for younger members, accessibility
167. Targeted social events
168. Superior facilities and program offerings focused on families with children
169. Focus on family and youth programming, fitness and wellness, spa services/amenities, fresh dining
170. Price per age grid
171. Targeting families from the grammar and nursery schools
172. Focused on quality of service as well as developing a master plan for our golf course.
173. Family events, such as camp outs, beginning golf program for all ages,
174. Family events and younger events
175. Word of mouth, quality of experience
176. Outreach, continuous engagement
177. Family programming, Kid's Corner expansion, Teen Room expansion, uber service
178. Member Ambassador Program - referral
179. "Legacy program" for decedents of members
180. In 2019, we enacted a membership drive that significantly lowered initiation fees. We are also currently evaluating significant renovations to our pool amenities, the addition of a Fitness Center and the addition of a Golf Simulator center, with three full-up simulators, lounge and putting area. We continue to evaluate and improve our offerings for families with young children, including babysitting, movie nights, family events, etc.
181. Additional family events and programming - monthly festivals, late happy hour events tied to kids activities
182. Membership discounting. Special designated leagues and programs.
183. LESS AMOUNT OF INITIATION FEES AND DUES BY AGE CATEGORY
184. Adding amenities that they desire
185. Remodel of facilities

186. Engaged family offering and programming. Kid center, family nights, themed parties, live music
187. Improved off-season offerings; golf simulator, new pool enhancements, happy hour programs.
188. Payment plan for Initiation Fee, and lower dues for the 1st 5 years of membership
189. We are in the process of looking at the fees to make sure that we are priced fairly but still attractive. Focusing on legacy membership currently and if we can grow that category we should be able to attract their friends as well.
190. Programming, ladies and junior targeting, special junior pricing
191. We do offer an Executive Membership. Dues are 67% of the full membership class.
192. OUR JUNIOR MEMBERSHIP IS FULL
193. Forward tees, clinics, developing more
194. Legacy Program. The Board is not in line with Junior/Executive Programs. But would consider family members joining at a reduced rate.
195. Legacy Members, potential of pool upgrade and some capital improvements
196. Reputation
197. Age discounts, family credits, voting rights
198. Loyalty programs for returning year over year towards future initiation; social media 'proof' of club lifestyle; technology upgrades
199. Saunas, spa, pub, parents' night out
200. We recently build a children's room, offer summer camps, family events - holidays, campouts, movie nights, bounce houses.
201. Payment plans, children's programs, new tennis facility
202. We have a reduced annual dues structure as well as a reduced initiation offering.
203. We have a kids area in which we offer babysitting every day of the week with parents on property. We offer kids only events and family events. We focus on Junior member events.
204. PROVIDING A FAMILY ENVIRONMENT WITH PROGRAMS OUTSIDE OF TRADITIONAL
205. Three Categories of age group: 25 -29 5000 Initiation Fee spread over 5 years. \$ 5000 in dues; 30-35 7500 Initiation Fee paid upfront or 10000 in 5 years. 6000 in dues; 36-40 15000 initiation fee paid upfront or 20000 in 4 years. 7500 promotional dues for the first year. 9500 thereafter.
206. Discounted initiation fee, paid over time
207. Changing dining options, additional events for families and children, new golf events for non-golfers or beginners
208. Community outreach to professional and executive groups, targeted marketing (including images of demographic we want to attract) strong referral program with emphasis on demographic

209. Family Programming. Renovation to Pool. Family dining. Online everything
210. Initiation payable over 2 seasons with no finance charges
211. Flexible Memberships
212. Very attractive dues
213. Significant investment with a marketing firm
214. will be presenting a capital plan to the members within a year that proposes a major renovation to add addition F&B opportunities to the club, casual sports bar, cafe, upscale casual, improved women's facilities
215. Enhancing our family and children's programming, relaxing dress code, improving the pool experience
216. We have new bar, new drinks. Activities like trivia night, etc.
217. Upgraded Pool, Child Care, Family Activities
218. Referrals (with incentives for more and more referrals)
219. Lower dues, social media campaigns
220. Club awareness programs, updated public website
221. Children's programming - golf - tennis - summer camps - Social family events
222. Investing heavily in digital marketing and social media programs; creating "buzz" around its activities
223. Offer a variety of options for golf, fitness, tennis and pickleball
224. Family programs, amenities
225. Currently we are full, because we built new pool, fitness, casual dining, etc... in 2015
226. Sponsored intermediate program
227. We have struck a committee headed filled out by our younger members, as they know best what appeals to their friends and colleagues
228. Video marketing, improved junior programming,

43. To help increase golf play at your club, what are some of the programs/events you have implemented for all members (men, women, children)?

1. Increase clinics and junior program offerings. Dedicated teaching pro as well as head pro and assistant pro
2. "Brew at the Range" event with brewery and food truck. More dynamic junior golf programming. 9 and Wine women's league. 15 minute lesson in simulators with a glass of wine for women.
3. "Welcome to Golf" - beginner clinics. "Little Links" - Jr league. "Jr. Interclub" - Jr tournaments. Free Ladies Clinics. 9 hole ladies golf groups. 9 & Dine - 9 hole fun scramble tournaments w/ dining after.
4. Not looking to increase, but manage access
5. Parent/Child events, Shorter tee options, Couples events
6. 9 hole events; weekly leagues for men and women; junior PGA program
7. Not seeking to increase play
8. Less competition, more regular play
9. Increase number of groups
10. Family tees program; league play for seniors; simulator league; kids camps
11. 9 holes; 12 holes -18 holes; All sorts of programs
12. Nine and dine, dependent family golf, access to the golf course is more open, lower cost events
13. Leagues - Family Tees - More Access for Kids (Less Restrictive)
14. Junior Golf, Couples Golf, Ladies Day, Men's Day, busy tournament schedule, Twilight Golf, Three Hole beginner class.
15. Junior camps/tournaments; parent/child tournaments; golf league; disc golf
16. We have started seminars for beginners to introduce to the game of golf. We are looking at creating alternate leagues that are focused on Ryder style play or fitness (walking leagues)
17. Added simulator. Change in current programs. Enhanced instructional program. Range access. New late afternoon programming and guest rates
18. PGA Jr. League is a big program; Parent/Child events; Night golf; Social golf for adults
19. Leagues, guaranteed tee times
20. Kids Golf Camps and leagues; Tennis camps; Monthly kids events
21. Hired a Director of Women's Golf to enhance women's programming as well as a dedicated female pro for the growing number of 9-hole ladies.
22. Great events- Match Play events; Trackman has been a phenomenal investment- staff did 40 fittings with closed sales in 2019
23. Junior Golf Camp

24. We are very exclusive club averaging 40 rounds a day, not looking for increase in rounds
25. Fun golf outings/tournaments. Better member/guest events. Weekly 9 hole leagues. Family golf days.
26. 12 hole events or 3 hour timed events
27. 4 Hole League, Quick Six
28. Holiday tournaments. One special guest day each month (Wednesday or Sunday). Discounted guest fee (about 50%) and a complimentary beverage in the lounge for member and guest. Strong junior camp in the summers
29. Junior program for all ages and skill sets. Girls only golf camp week. Ladies small group clinics'
30. Free clinics, big push on ladies' programs has really paid off over past 3 years
31. More focus on family/children programming. Addition of dedicated teaching professional, organized golf trips
32. Clinics; Junior League; Women's golf league
33. Jr. League & Clinics; Sip & Swing clinic for ladies; SWInG (Starting women in Golf) Clinic; Tuesday Men's league
34. Not trying to increase play
35. New tournaments, clinics, etc. to stimulate golf play. More golf experiences.
36. Less traditional; more fun. Night golf; cross country golf; Etc.
37. Op36 Junior Program; Evening Women's League for working women' Evening Men's League
38. Free Coaching programs
39. committee driven, same annual events, nothing new!
40. Family Friendly Golf Programs
41. Nine/Dines, Tuesday Night Men's League, Wednesday Night Ladies Golf...
42. Children's league play (compete against other area clubs).
43. No Holers program, Junior golf program
44. 10 month junior program. Year-round golf conditions
45. Widened offerings in all areas
46. Mixers and instructional programming
47. Junior Certification program has increased junior play.
48. We have just broken ground on state-of-the-art indoor teaching facility with simulators.
49. Family rounds; new tee boxes; themed events including golf
50. Leagues; 9 hole Golf followed by Social event
51. More focus on camaraderie for leagues. Various levels of junior teams
52. Our first tee is too busy.....

53. Couples golf; 9 hole golf for ladies
54. Ladies swing and wine clinics.
55. Junior clinics; special tournaments
56. More fun social events, night golf, twilight leagues, etc.
57. Family programming for children. parents to use the golf facilities in the afternoons which is not tied to F&B -
58. Improved our outdoor practice facilities
59. New teaching pro hired in late 2018. Capital project proposed to enhance teaching center for year-round programming.
60. Introduction of leagues for women. Looking at adding for men next year. 10 and dines for women. Our increase in play is in women, men play down slightly.
61. Double tee shotgun on weekends; increased focus on junior golf; Operation36 program highly successful
62. Family pop-ups and golf, themed twilight golf, new tournaments
63. We have seen steady increases in golf play, weather permitting, over the last 5 years. We've executed SNAG programs, Jr golf clinics, Jr PGA, and a Women's 3-hole instructional league that have all been successful.
64. Approved to build golf performance center in summer 2020. Hired a top teaching professional. Junior Golf league. More beginner or junior golf programming
65. Improved branding
66. Top Golf on the range
67. Clinics, Complimentary teaching sessions / Wine & Wisdom series, golf mixers, allow Social Class more rounds
68. Twilight golf for couples. Fall two-day Member/Guest
69. Beginner groups for women/swingin for 7; Operation 36 for youth
70. We have 28 affinity golf groups that includes a strong 9 and 18 hole women's golf associations and Sr. Men's Golf Association. We also have 400 children in our youth golf program and many will be offered college scholarships to play golf.
71. Looking to build a full-length driving range. 3 is for me - geared towards beginning female golfers.
72. Once-a-month themed Friday Night 9-Hole Scotches; Night Golf; Monthly Member Guest; Couples Tournaments; Five and Dine Events
73. Demo days. Fitting days. Golf clinics. Family forward tees. Parent/Child golf events
74. Junior interclub play, couples social play, men's and women's interclub, season long member-member match play. Fun tournaments as well as full schedule of competitive tournaments.
75. Snag golf, drinking golf events, just for fun, 9 hole and smaller events, evening and weekend women's events
76. 9 hole special rates

77. We have added a lot of instruction including clinics for women, men and children (during our summer camp). We are considering adding complimentary lessons to new incoming members
78. None
79. Member-Member; Divorce Open; President & 1st Lady; Ladies 18 Hole League; Men's League; 9-Hole Fun Ladies League; Jr. Golf Program; Parent-Child tournament; Member Guest - men & women; Tombstone Tournament; Opening Day Tournament closing day tournament
80. We will be finishing construction of a new golf centre with, new pro shop, 4 indoor simulators and bar/kitchen for food & beverage.
81. Ladies 101 program; Jr. Golf
82. More clinics for beginners and novices
83. Introduced more "fun" golf events. Participation in competitive golf is down
84. We increased dues 3 years ago enough to cover cart fees and no longer charge for golf cart usage.
85. Being an underutilized Club, we have created reciprocal relationships with several Clubs and have gone after tournaments and events to supplement rounds.
86. GPS; Free clinics; Travel groups; Family scrambles; Village (22) League
87. Jr golf, 2 club sponsored tournaments BBQ and booze and wild turkey shoot out, ladies golf Wednesday night, senior golf Wednesday morning men's stag Thursday night
88. Focus on women and children
89. Nothing
90. Trying to decrease play. Course is too busy.
91. Additional Leagues for couples, men and women; Jr golf
92. For men: tournaments, Boys night outs, cigar golf nights, country golf.
93. Glow golf; Big Hole Golf; nine-hole evening scramble golf events
94. We have had a full tee sheet and active golf membership for 25+ years
95. We have a junior golf school we have twilight golf for men and women
96. More casual non-competitive events for golf. Beginner ladies' program with a strong social focus.
97. Couples golf, family golf events, member guest events, night golf, cross country golf.
98. Events for all ages and level of play - December 7 we hosted a Cross Country Event - two 5 hole courses - combing holes so we had one hole on each course that was over 800 Yards - 250 Members played
99. Programmed events; Trunk / Vendor days; Club fittings; Associations; Home / Home & home series; Men's club week away HI or CA
100. Provide more fun activities for non-serious golfers
101. Junior Golf Programs for after school.

102. Night golf on range with large, lit targets; group play facilitated by Club with help from group leaders who are recognized and orientated; ladies play a major focus (3 hole, 6 hole, 9 hole and 18 hole options)
103. Re-organizing Club events, change the format of old event which are not answering to 2020 needs
104. No specific programs but have added events. More fun couples' events.
105. Beginner women's clinics, year-round junior golf programming for 10- 15yr olds- "learn, play, win." Junior combine - using technology, video analysis for teenagers match play championship using the golf simulator during the winter month
Have 3-5 top 50 golf instructors come teach clinics to our members
106. Juniors: PGA Jr League, weekly camps & family events. Women: Created 2 new leagues, one social & fun, other competitive, more couple events (themed) and plenty of clinics on our new short game area. Men: Created new events, par 3 tournaments, more weekend games and created a men's golf association
107. Revamp of couples' twilight.
108. Ladies "Chip and Sip" - Introductory Lessons on Putting Green; Men's League - Weekday 9-Hole League
109. Men's Competitions, Friday night mixed events, women's nine and dine, PGA Junior League and Drive, Chip and Putt
110. Comprehensive Junior Instruction, Expanded Ladies programming (sip and chip), Senior Men's Association
111. Increased tournaments; Clinics
112. Turkey Shoot Three club event; Night Glow Golf; Nine and Dine, three couple scramble; Updated format for Men's Member/Guest
113. Junior Golf, committees for MGA & WGA
114. Inexpensive guest days. Lunch only. No dinner or formal awards. Evening ladies play - no scoring! 100 to 150 yard per hole (approx.) 9 hole couples events. Competitions vs. other clubs. Both adult and juniors (PGA Jr. League.) Big! Promote healthy golf with push / pull cart allowance.
115. Evening events for the ladies who work. Young professional mixers.
116. Active Men's and Women's Club as well as scheduled Major Tournaments.
117. Growing the game of golf is a big focus for our junior programs. We currently have two golf instructors that primarily focus on junior/kids golf. We plan on breaking ground on a new practice facility over the next year to include enhance short-game and indoor golf training/fitting.
118. More fun couples' events
119. Create additional teeing options. Expanded junior programming to include PGA golf teams and Ops 36 "grow the game" programs. Now renovating our best driving range (of 3) and building a six bay golf performance center
120. Junior Golf Academy, PGA Jr. League, Ryder Cup type event versus two other courses in the region.

121. Women's beginners; Women's 9 after 5; Re-Tooled Junior Golf Program completely; Organized beat the pro program
122. PGA Jr. League
123. Sip and swing for beginner woman; Junior Academy and travel team; Couples League; Men's Tuesday Night 9 hole league; Parent Child events
124. Family events
125. More accessible times convenient to them
126. On the course, we have significantly increased our investment in maintenance and are continually improving areas like bunker complexes, etc. Off the course, we have instituted more women's clinics, more 9 hole events (9 and Dine type), enhanced our junior events.
127. Additional couples events with F & B components, expanded group play
128. Monthly nine & dines; couples Sunday play; Men v's Women Ryder Cup style event for better players
129. Provide 7 sets of tees on one course
130. COUPLES EVENTS/ FAMILY EVENTS
131. Better usage of GPS system.
132. More social play, or tournaments that have other components, such as BBQs, friendly competitions, etc.
133. We are busy as is.
134. More couple programming ...wine and 9, glow ball, 9 and dine
135. Special tees; (Family, age related & improvement tees). of 5 sets of tees allow people to play so they can enjoy the game, not fight it.
136. Twilight events are becoming popular again. We hold them on Friday evenings...9 holes, cocktails and dinner. For children we run the Jr PGA as well as our golf team that competes against other clubs in the area. Our Day and Sports camp saw an increase in enrollment this year.
137. Afternoon casual 9 hole events for ladies and men. Expanded junior clinics for children. creating a special program for juniors which encourage improvement in scoring
138. Practice Club - Group Lesson Offerings. Establish Men's Golf Association. Guest Days.
139. Increased attention from the professional staff; training center; kids' tees; 9 hole events
140. Wine and Nine for Women; Junior Team Golf; Boys Night Out
141. We have a junior program, but are trying to grow it
142. More open play
143. League programs where members are on teams

144. Leagues, special formats of play, 9 & dines, match play events for many different categories
145. Simulators will be added in 2022.
146. We have a very robust junior program that attracts families. We also do not charge members kids under the age of 16. We have 240 men playing in our Men's League on Wednesdays.
147. FAMILY EVENTS, MEN'S AND LADIES EVENING LEAGUES
148. Enhanced and upgraded couples golf programming; golf course renovations and conditions; successful tournaments with great food, friends and fun
149. Additional golf events for juniors, created putt-putt course on the putting green for families, adjusted tees for a short course
150. More events for men. Junior Golf is steady. women reaching out to have more join the league
151. We are at capacity for golf during peak season, so it is more about managing access to the tee, most days see 200+ rounds of golf played
152. Expanded children's programs, Fore Woman Only Golf, more afternoon/evening woman's golf programming, social golf like 9 and dines.
153. More social golf events, 9 hole leagues, junior inter club events
154. 9 & Dine (Couples, 9 holes and dinner); Club sponsored events
155. Junior Golf Camps; Demo Days; Nine and Dine; More Couples events
156. Strong junior program, ladies' clinics and lots of member tournaments
157. New men's league; glow ball golf, mixed events
158. Community involvement
159. Current levels are ideal
160. Member events; parent/child events

44. What do you see happening in golf activity for members under age 50?

1. Continue use of the golf facility more than the dining facility.
2. Junior members play a lot of golf, but price sensitive. Bristle at taking caddies...
3. We have seen an increase and expect to see it continue
4. At our Club I expect them to remain fairly flat, Men will play more with family/spouse...maybe a little less with "the Boys"
5. Staying the same
6. With an average age of member being 72, we only see under 50 golf during family periods such as holidays and Spring Break
7. Increasing; stronger family emphasis, playing together - parents and children
8. More tennis
9. Has to be an activity to keep this segment growing in rounds of golf
10. Don't have time with all of the family activities, sports and work commitments.
11. The members we have under 50 are active. However, most new members under 50 use the Fitness Center, the Pool, and the tennis courts.
12. Our course is mainly played by under 50yrs.
13. More practice; reduced time commitment on the golf course.
14. Growing
15. Will be a continuing challenge to engage younger golfers that will require program changes. Look for rounds to either remain flat or decline on a per member basis.
16. Due to the nature of our course, members under 50 are enjoying golf with their children
17. More fun events as opposed to the traditional "serious" tournaments. Also, I'd like to add a simulator to enhance member value and increase winter activity.
18. They like to play in their groups...so 5 years ago we started the Founders Cup. 12 teams of 8 who play 4 nine hole matches---cross pollinating the membership. Saturday night social and Shoot Out with top 3 teams for a finale.
19. Less play
20. Less time, more 9-hole rounds
21. Continue to be flat with a little uptick perhaps due to growth in our Junior memberships.
22. We don't have enough members under age 50 to comment
23. Shorter time commitment; need to create quicker events.
24. Steady but it is always a challenge to keep them engaged.
25. Since we are increasing membership especially in the under 50 bracket or activity is up. Granted most of this comes from our Limited 4 program as the demand for full golf in the under 50 bracket is soft

26. Our activity level is increasing.
27. We are in SW Florida, only a handful of members under 50 at our club.
28. A very active group at our club. So, at least staying the same if not increasing.
29. Playing less frequent and practicing on the range more often.
30. Couples golf and social golf are growing
31. More 9 hole groups
32. An increase due to more intermediate members joining the club.
33. Make it fun and they will participate. Make it competitive and they won't
34. We are very golf centric and so are seeing many younger people, particularly very good golfers join. Additionally, several younger females have started to play and are playing frequently. Due to work schedules, they are not joining the traditional 9 or 18 hole ladies day groups but are finding opportunities for a Twilight Group and to play in pick-up games that they arrange.
35. Activity remains strong in this demographic
36. Aiming to Family activities
37. Same as 2019
38. Working on practice facility enhancement such as short game facility
39. Increasing
40. Staying the same
41. Trying to get Fling Golf going.
42. Less golf being played; they are with family obligations first - kid's sports programs
43. Continuing to slowly increase
44. Increasing slightly
45. Play is the same as the previous year.
46. Slight increase year to year; increased use of practice area during the weekdays
47. Leagues
48. They do not have much time to play. They love to play in 9 hole golf leagues on weekday evenings
49. Access to the tee.
50. We have built up our Thursday Night Men's league over the past 4-years. We started with 6-12 participants and now we have 25 - 35 participating. The golf shop staff helps with unique events and participating with the guys as well.
51. Increasing.
52. Seems to be more interest in improving their game and playing in events
53. Increasing.
54. Continued development of programs and events.

55. Increased 9 hole play, increased family play
56. Continued growth.
57. Less time for 18 holes, so like to practice more. Want to be able to play 9 with kids on weekend afternoons
58. An increasing group of younger players.
59. We see consistent play with our members under the age of 50 but at unusual times which benefits the members that want to get out Saturday and Sunday mornings.
60. Staying the same
61. Increasing due to improved service and programming
62. May lessen due to conflicting life demands
63. Not much; our average age is 56
64. More Social Mixers
65. Short game area usage increase, lessons
66. It is still very active, but once they have children it does slow down the number of rounds they can play until the children get older and can join the Jr. Golf Program. Then we see the parents begin to play more often.
67. Frequent use of Practice Facilities. Afternoon Golf Play. Early morning weekend play - family meets at pool in afternoon
68. Need a more vibrant short game facility
69. They want to have more access to the course with less planning.
70. Less time spent playing golf than previous generations.
71. Keep bringing the fun, creating equal access for both adults in the family, less competition - just have fun
72. Declining, too busy with children and raising a family.
73. I see a decrease in golf activity as members under the age of 50 struggle with the time commitment for golf
74. Our average age is over 70 so these trends are not yet impacting us. I am seeing somewhat of a renewed interest in golf for our member's grown children.
75. Less play
76. Families playing together in the evenings
77. Although members under 50 make up a very small percentage of our membership we see think this area will increase moderately.
78. Less time to play on weekend, want to play with their young kids
79. Much more practice and the use of simulators for year-round play
80. They want to have fun social golf
81. Continued heavy use both personal and business
82. Increase due to relevancy and differentiation

83. Declining
84. Family golf
85. More playing with the pros.
86. It has slowed down with this new generation.
87. Staying the same
88. Remain the same
89. Do not expect to see growth in golf activity under 50.
90. It will increase for us this year
91. Walking the course for exercise rather than using a card
92. The activity has to be more social, time centric as opposed to number of holes, Inclusive of spouses and kids, and be later in the day after other planned family activities.
93. Pretty much the same as above. No special treatment or activities planned for that age group
94. Lots of social play - couple getting together for 9 holes. We also have Members that entertain guests
95. Increasing the variety & flexibility of soft competition days
96. More practice than play; shorter rounds; occupy the children while couples play
97. Continue to be challenged as younger golfers are less focused on golf these days.
98. An increase as we have more members / owners in that group age wanting to organize and be part of these new events aiming at couples and families
99. Continue to be more social.
100. Though the level of golf activity may remain unchanged, the how and who will change. If the typical 45 year old plays twice per week, one will round with always be with friends (men's league) or business colleagues, etc. However, the second round will become more family oriented - be it with kids, or spouse or combo of both, that (we hope!) includes some form of family meal afterwards (or before).
101. It is fine at our club, but times changed, more early mornings on the weekend and definitely after work. 9 holes seems to be the key for them.
102. Not so much into spending 4+ hours on the golf course anymore. More into family golf on a Sunday afternoon for 9 holes.
103. Anything you can do to attract the children; the parents will follow and attend! More junior programming and getting parents involved late in the day or on weekends.
104. Increasing. Our Junior categories grew by 25% last year. Many of our younger members are scratch golfers and join with the intention of playing/competing with the best in Cleveland. Our family programming and supporting amenities allow the entire family to enjoy the club, albeit in different settings.
105. Very supportive at our club

106. 9 hole and early morning rounds -- will likely be significant supporters of Simulator Teaching Center once completed
107. More practice - less golf
108. Because of our aggressive membership offering for younger members, we're seeing more young Members joining and playing golf
109. Increasing. We have a Gentlemen's First Wednesday group of young men that meet monthly and play golf together. So successful that the wives are considering setting up a Ladies version.
110. It has increased over past years
111. They enjoy competitive play and want more of it. Expect higher standards of golf course conditions.
112. Our fastest-growing demographic and they are supporting the club via rounds, F&B, and events.
113. Not much.
114. Golf continues to stay strong at our club for all ages.
115. Remaining steady
116. For men, play is holding steady though concentrated on the weekends. For women, the traditional Ladies Day group is growing old, so we've developed an OPS 36 program for women new to golf.
117. Pace of Play is very important. Dress code communication important. Golf etiquette important. Pairing people to play-drop in leagues beneficial
118. Continues to be strong in our area. This accounts for at least 40% of our rounds played, perhaps more. We anticipate it to remain strong.
119. Social themed activities combined with golf
120. More abbreviated events and play. After work/Twilight golf. Family events
121. Increase by 10%
122. Heavier concentration of practice and teaching facilities
123. We have not done projections on this but based on current history and membership changes I expect it to rise.
124. Increase
125. Playing at different times - Saturday late mornings and afternoons
126. INCREASE
127. Range usage.
128. Staying the same for now
129. Hurt by family activities
130. High golf activity, low spend in food and beverage...busier schedules...unless it is more family centric
131. Will go up...more play

132. Family play is important. Allow for play with fewer holes and faster play times.
133. Our younger members tend to play at different times. They will come out later in the afternoon on the weekends and play with their spouse or children.
134. Increasing.
135. More family activity. Faster rounds. Data driven schedules - compared to verbal. Cigars. Less caddy interest
136. Stays same. Average member age is 72.
137. I see golf for this segment of population to continue to decline in activity.
138. Growing
139. No change
140. Non-traditional fun golf events.
141. Less time as they have more family commitments, so may reduce play and make addition of family friendly amenities very important.
142. Using our short course (6 holes).
143. Attracting them to join the club to set up a future family involvement with not charging their kids to be members. Creating more social opportunities to engage with other members.
144. PRIORITY ON OTHER THINGS INCLUDING WORK AND FAMILY
145. The long-term trend for golf at all ages is difficult to ignore! We hope to grow our younger membership through value and experiences
146. Limited rounds are being played by this age group. Busy with children with soccer/dance/sports etc. on weekends and evenings. Most under this age still have full time jobs in our area.
147. We keep seeing more interest and more play
148. Increasing
149. It has remained constant, early morning weekend golf and some mid-week golf
150. Shorter rounds, more social golf, more family related events
151. Same number of rounds, more focused on early weekend mornings, increase in client golf
152. Social Golf. More 9 and Dine Programs with a variety of games including making the course all par 3's for a day.
153. They are playing much less
154. Growing - we have experienced big growth in 40 and under recently. The key is referrals because people play in groups, when they have one coming in, it helps.
155. Staying steady or growing. We are a seasonal club in the mountains, so we continue to see people escaping the heat in the southeast. Rounds should continue to increase.
156. Not much; efforts in place now to reduce rounds of play

- 157. Relatively stable
- 158. Not applicable for us

46. Is your Club planning an improvement project in the next three to five years? What areas will you be addressing? Other:

1. Maintenance Items--HVAC, etc.
2. Croquet and pickleball
3. Not specific at this time
4. Golf Maintenance Building
5. Junior Sailing Clubhouse
6. First tee, range all season golf practice
7. Golf and Facilities Maintenance compounds
8. Outdoor Dining/Bar
9. Golf Simulators
10. Outdoor bar
11. Beach Club
12. Year-round teaching facility
13. Exterior - curb appeal, lawn areas
14. Men's and ladies' locker room - pool deck
15. Club grounds, lifting due to rising tides
16. Practice Range
17. Golf course restoration
18. New harbor
19. Year-Round Golf Learning Center
20. Back shop building expansion
21. Member dining areas
22. Snack Bar Patio Area renovation
23. Seawalls
24. Parking, Maintenance, Laundry
25. Practice facilities
26. Adding Bocce courts and Pickleball courts
27. Golf learning, and multipurpose space for non-sporting activities
28. Marina
29. Pickle Ball
30. Driving range improvements
31. Walking trails, residential housing
32. Golf Training Center and Driving Range
33. Beach

34. Practice Facilities
35. Platform Tennis Lounge, Maintenance Building, Business Office
36. Primarily kitchen renovation
37. Adding Simulators
38. Kitchen
39. We are adding simulators to the Clubhouse somewhere
40. Redefining committees, Programming, Strategic Planning
41. Boat storage
42. Private rooms and especially our largest conference room
43. Indoor golf teaching bays
44. Event venue
45. Piers
46. Common workspace
47. F&B
48. Golf Practice Facilities
49. Staff locker room
50. F&B
51. Golf Simulators, New Outdoor Patio, Pool Improvements
52. Training facility
53. ROOFTOP
54. Dining venues
55. Simulators
56. New dining facility
57. Short game area
58. Range
59. Lakes
60. Grounds maintenance facility
61. New golfers mixed grille, pro shop
62. Maintenance Facility

54. Today we are seeing six major trends affecting society and clubs. Can you briefly comment on how you see each of the following trends affecting your club? - Communications & Technology

1. Might develop a website
2. Members are bombarded by emails, too many from the Club will get lost with the rest
3. Somewhat important
4. Yes, we use an app for members and also upgrading to Jonas
5. Huge! Need to reach current and potential members new ways and more effective ways
6. Currently looking at significant upgrades to this area
7. Moves too fast, difficult to manage
8. Will need significant capital/staffing investment...now!
9. Significant impact
10. Clubs are behind, need to catch up
11. App and email along with communication in the club is important
12. Moderate Impact
13. We are pretty savvy with technology but many of our members still want printed things and phone calls
14. Stay in tune
15. Demand for increase amount of timely communications
16. AGREE AND RELEVANT
17. Members want to be in touch constantly, ease of use
18. Technology is what new members are looking for. Instance gratification
19. Have it or be left behind
20. Dedicated to remaining current.
21. We have made several upgrades
22. Being on the same page as outside corporations is important
23. Highly Important
24. Instantaneous communication is key
25. Focused use of media targeting handheld devices
26. Since opening our coffee shop, we see @ 20 members each day working from the club
27. These trends are being excepted but most member demographic but are especially productive with communicating to the younger generations.
28. Somewhat important

29. Vital to keep up with technology balanced with expectations of older members
30. Digital re-marketing; landing pages, e-billing, plastiQ, FB, Instagram
31. We are working to improve our communications
32. No as important as it used to be, communications are key
33. Modest increase in use
34. Members want targeted and instant communication.
35. minor impact
36. Communication needs to be to the point. Way too much out there.
37. In July, we launched a new app with Pacesetter; members love it and have responded well to the increased level of technology
38. We are constantly communicating events, dining specials, sales, members using club, etc. to keep people engaged. Members can make dining reservations/register for golf and social events/view and pay their bill with our app.
39. Somewhat important - we are focusing on improving our activities calendar on our website as well as our presence on Facebook and Instagram
40. Members desire timely updates on all activities
41. Considering hiring full time communications person, currently responsibilities are handled by membership dept
42. Need more and better, but with flexibility built in
43. Still years behind the real world
44. Trying to keep up! Texting groups works better than email. Newsletter have gone exclusively electronic
45. Introducing a new integrated website has increased member awareness and advertising ability, we are looking into growing our social media presence
46. More complex than ever and ever more important
47. Members expect the same experience here as non-club businesses. We need to remain relevant.
48. We are behind in social media and struggling to gain acceptance at the Board level that this is right for our club.
49. Ever growing element of daily management focus and time. Membership demand for more timely communication.
50. Stay on top of solid trends
51. We just approved a re-vamp of our website and will be adding an app as well.
52. Important
53. Better websites and apps
54. Very important. Much more attention needed in this area.
55. Changing daily

56. Hard to keep up with. Communication has to be up to the minute and very pertinent
57. Slowly starting to matter
58. Much more electronic communication
59. Constantly evolving
60. Need to embrace it more.
61. Improving or enhanced with society pace
62. Very Important - especially remote access
63. Average age of our membership is 63 years old, but we are considering deploying an app for members to connect better with the Club
64. Very important, to stay current
65. We added RFID gate capability, Wi-Fi renovation
66. Significant Impact
67. Is email no longer a relevant way to communicate?
68. Not a major role in clubhouse members prefer less tech here
69. Added resources and professional staff additions
70. Our members want to get away from this when at the club
71. Increase technology in all areas
72. Will need to stay on top of changing technology and communication methods.
73. Very pertinent
74. Less of an issue but communications can always be improved
75. Everything around club getting enhanced by and use of video up
76. Factor.
77. Easy is best
78. In some ways, we are a refuge from technology for many of our members. Being at the Club is an opportunity to have real interactions.
79. Big in our future
80. Everything must be mobile phone ready-text messaging is the future
81. current improvements need to continue
82. People want to get away from it but want the benefits of it.
83. Moving at a fast pace, Club's must get engaged with tech to stay relevant
84. No effect
85. Members expect to have top notch in this area
86. Developing new website and mobile app.
87. Investing in a better Wi-Fi club wide, online booking of tee times, tennis
88. Continued efforts to improve IT and network speeds

89. Greater use of text messaging, email blasts starting to be outdated
90. Apps are essential
91. Becoming bigger and bigger every day
92. More adept at technology.
93. Beacon technology, mobile apps that are uniform with the website.
94. Ever changing
95. Too much use of electronics in dining rooms
96. Need to have good WIFI and moved to text as a primary way of reaching members
97. Paramount
98. Important
99. Not a huge issue, we use ForeTees and email & text to communicate
100. Important
101. Increasing
102. We use all sources of tech that are accepted by our members
103. Growing very fast in importance.
104. Website will be updated again in Dec, and plug in areas for personal devices
105. Going paperless in all aspects
106. Adding our 2nd employee to this department after hiring the first 3 years ago, can't keep up.
107. Very important to reach all members
108. Members love having their statements emailed to them
109. Requires us to explore how modern tech and software can help us interact with members
110. Update web access
111. I can't keep up with the cost of technology changes - the comment is always, "it only costs a little more"
112. Push technology is very instrumental in communicating with the members
113. important
114. Need to embrace technology and make it available to the younger members
115. Use of technology will have impacts in the next 5 years
116. Inevitably, this will continue to change the way we do business in clubs.
117. We are way behind trends
118. Members live by the minute. If the phone pings, they respond.
119. Will continue to focus more resources to this area
120. We tend to be first adopters

121. Looking closer at upping our usage other than traditional website, email and facebook
122. I don't see our club being too impacted by any trends although we are upgrading some of our systems.
123. Undergoing a review of website and club app technology
124. REQUIRED consistently
125. Younger members wanting this all the time
126. Very important
127. Members want more and more of it
128. We cannot seem to be connected enough
129. Always important
130. We are seeing more and better ways to stay connected
131. Have upgraded all computers and wi-fi in club
132. Evolving, we use dashboards, CRM, automated surveys, custom app and online ordering, I am sure most are doing this
133. Social media
134. We are trying to keep up with all the technology
135. High priority for most members
136. Always working on improvement
137. Club is upgrading all forms of comm
138. Very important
139. Do our best to provide everything our Members want in this area
140. Important.
141. Important and will continue to be that way. It was always that way--for some reason because people are impatient and have phones, we think it is more important now?!
142. Our 4 year old app needs to be upgraded
143. Internet based 100% with email, Facebook, twitter. Electronic signs through the property instead of the old-fashioned posters.
144. Huge.
145. Apps for tee times etc.
146. Very important.
147. Continuing to evolve at rapid pace
148. We constantly upgrade our technology
149. Must continue to stay current and use avenues of communication to reach all demographics
150. Need to have the fastest Wi-Fi and available everywhere
151. How we connect & collaborate

152. Up to date technology is expected
153. Must make it easier to use the club -secret sauce
154. Somewhat important
155. Important
156. This is very important and part of our strategies
157. Very important and we try to improve in that field every year
158. Somewhat
159. Need to be measured.
160. A necessary evil - perhaps a personal bias here, however as much good as IT and communications can provide, it is a constant source of criticism and never short on members who can do it better
161. Need to keep members informed, Member App has been a huge success, using social media - Instagram has helped
162. A big push at our club, updating to texting from email and online is important
163. Members want more technology faster than we can give it to them
164. We are in the midst of updating our software so that members will be able to make reservations via an app
165. We are launching a new website and mobile app next week. Our members would like us to decrease the number of emails we send and increase the content on the mobile app.
166. Higher push for communication to the membership
167. Conducted technology study have invested strategically into new infrastructure (meshed WIFI) and new CMS
168. need for younger members
169. This will continue to evolve, and we need to understand how our Members best want and receive communication
170. Investing annually
171. Social media is on the increase, but we have a ways to go
172. Continue to upgrade annually.
173. We need to step up our game.
174. Can be very beneficial.
175. Members are constantly changing the avenues in which they like to be communicated to.
176. Important as long as it doesn't become impersonal
177. Younger members demanding online ordering via mobile ap
178. Members looking for faster, easier ways to connect with the club

179. This is overwhelming many of us with the rapid changes. Having experts on staff to keep up is very difficult.
180. We do well in this area
181. Average
182. Clearly, this is important. Due to our internet speed shortage, we cannot do any more at this time
183. Yes
184. Mobile apps in demand
185. Growing
186. Need to improve club options
187. Somewhat
188. Continually improving- making it easier for members
189. Respectful and modest use
190. A few years back, we added a communications and technology committee to our board, which has created many changes. On the technology front, we amended our electronic device policy to reflect current times, have made significant upgrades to the mbps speeds we offer members, and added many wireless access points to ensure members can connect seamlessly. On the communications front we fielded a member survey this year and have instituted a series of informal chats with the board to create a forum for sharing ideas, concerns and issues.
191. Website only no Social Media
192. Increased needs
193. Much better but ongoing
194. They expect it.
195. So tough to stay up, let alone get ahead
196. Yes, need to continue to improve
197. Social media has been a key to our growth
198. Very important to club growth
199. Up to date with today's technologies.
200. We are almost entirely paperless for all of our communications. Members are allowed to use smartphones for text and email as long as silent.
201. Continuing to expand use in all areas
202. always evolving
203. Recently updated club software and mobile app
204. A given
205. The members want communication timely and via text or email.
206. Already implemented

207. Always needs to be at the forefront
208. Upgrade to financial software and manage costing
209. Absolutely critical to have a qualified professional, not just a communications coordinator.
210. Looking at mobile app; communications over various mediums
211. Very important to create the camaraderie and in club network that can connect members and staff.
212. Ever evolving
213. We have a website and app for our members, however we do not take reservations through the app. I see online reservations becoming more important to members
214. App based ordering; iPhone used for everything
215. Simpler and mainstream. Not over communicate
216. IMPORTANT TO BE ON CUTTING EDGE WITH NEW GENERATION
217. Important
218. After years of antiquated systems, we are moving to online info next year and members are excited
219. Yes, from tableside ordering to website to interactive digital signage and children's play areas
220. Tough to keep up and very costly
221. Need to keep up with technology - communication is key in order to be successful
222. Somewhat
223. Increase in demand for more effective communication
224. Very important
225. We should be careful not to overdo it.
226. More information requested for their club phone app
227. We are keeping up
228. We struggle to keep up
229. Continue to advance and make everything easier from a member perspective
230. Got have it now
231. Much more important than ever before
232. Growing demand.
233. We are keeping current with the way we communicate with our members and have a presence on most major social media platforms
234. Significant changes to what our P & P allow now
235. Important.

54. Today we are seeing six major trends affecting society and clubs. Can you briefly comment on how you see each of the following trends affecting your club? - Green Movement (environmentally responsible)

1. None
2. More money spent on conservation, less for daily activities
3. Very important
4. Minimal., however we are focusing on marketing steps we are taking to make improvements
5. Our members are continually asking to move to be as sustainable as possible. green spaces, regattas, environmental impact improvements, etc.
6. Everyone expects recycling while most waste is burned (renewable)
7. No significant impact...slight expense increase for green initiatives
8. No significant
9. Have to do it
10. Important to lead in this area
11. Highly Impacting
12. Water conservation is important to yacht clubs
13. We have a "Green Team" Committee
14. Club continues to push, Portions of membership not supportive
15. Efforts are being made to communicate the green efforts Club is a making
16. AGREE AND RELEVANT
17. Reduction of the use of chemicals and pesticides, environmental stewardship
18. We are moving away from disposable paper products in as many areas as possible
19. Will take a few more years, but it's coming
20. CCF recycles and uses eco-friendly products.
21. We have a green committee. new changes each year
22. It feels good as long as it does not cost them more money in dues
23. Important
24. Again, this is about lifestyle
25. Will need to develop a communication plan to identify green initiatives
26. Recycling program would be great along with elimination of plastic cups
27. I do not see this as a concern.
28. Somewhat important
29. Members looking for more of this; recently switched to paper straws on request indoors, recyclable to go containers and wood stirrers
30. Not huge---LED lighting and energy audits are key to saving \$\$\$\$

31. We have engaged an architect to develop a master plan for Clubhouse. We are committed to developing a Long-Range Plan for Facilities, Services, and Programs
32. Gaining momentum
33. Not much affect
34. Strong push from members to be more green
35. Not as important
36. We try to recycle as much as possible, but it isn't a big factor for our members
37. No
38. More for staff than current members; working on future members as it will be more important to them as they join; want the old club to be careful with the world
39. Extremely important to yacht clubs and will get even more important
40. Going plastic free, clean harbor programs, working closely with local government
41. So-so of an issue. We do our 'thing'
42. Member and prospective member expectations
43. Yes and we continue efforts in this area. Recycling efforts, more energy efficient and composting all hot topics
44. Desire to remove plasticware from F&B and water bottles from sailing programs.
45. Recycle everything
46. Our Chef is setting a trend for green as well as holistic and safe well raised organic meats.
47. Somewhat important
48. Limit use of plastic
49. No effect.
50. They want it but aren't willing to pay for it or be inconvenienced for it
51. Not much membership push but we are trying to be responsible regarding recycling and on the course with spraying
52. Club has a history of stewardship so not much change here
53. Very important
54. Increasingly important and forefront in culture
55. Very Important - created a Sustainability Committee
56. No more single use plastic items and Chef sourcing foods from responsible farmers and growers
57. Important to show the Club is a good partner
58. Important, but not a decision maker for members
59. Moderate Impact
60. Trying to eliminate disposable water bottles on the course.

61. Very important to move into green movement responsibility
62. Not a whole lot.
63. Yes, no plastic bottles in 2020
64. Already an emphasis at the club
65. We have yet to approach
66. Very important the club stays in front of the green movement.
67. Very pertinent
68. More and more of a focus for the club
69. Everywhere
70. Factor.
71. Not overly important, but I suspect it's just around the corner
72. Will cost us financially as we try to implement more in this area.
73. Doing some effort
74. Members want to be responsible, but it is hard to implement no plastics, etc.
75. Current improvements need to continue
76. Hard to prioritize, but we are taking steps.
77. No effect
78. Some interest but not a huge impact at this point
79. Some
80. Removed plastic straws, thinking about removing water bottles on property
81. Continuing to develop new initiatives for our green movement
82. This will become an increased focus particularly in reducing plastic use
83. We like to be leaders in this area.
84. Not as big as you may think in what you read in the media
85. Slow to pick up here
86. Increased expense in take-out packaging.
87. Recycle, reduce waste, sustainability
88. Always an important consideration
89. Demand from members and staff
90. Minimal
91. Not important
92. It's one of our core values
93. Not as important
94. Increasing

95. Recycle programs - staff and members
96. Not as important as in the past.
97. Organics being recycled, green packaging, farm to table suppliers, bees on roof, garden on roof
98. Trying to implement but it seems to be the first budget cut when we need to tighten the \$.
99. Very important to membership
100. On the Horizon
101. Requires us to strike a balance between being environmentally sensitive while also avoiding inconveniencing our members (example, our members do not like paper straws)
102. Focusing on this.
103. Only from our Tennis Ladies do we hear the need to be greener - our staff is also keenly aware of this.
104. Have not seen much interest in this trend at our club
105. Our members like to see us being environmentally proactive
106. Somewhat affects the club but not as much at the first 5 trends
107. Improvements are slow but becoming more focused
108. This will continue to work into our best practices for club operations.
109. It is an expensive movement.
110. It is a priority for us, more resources going to this area
111. More awareness and member acceptance of policy changes to accommodate
112. In process
113. Very little effect at our club. We are already pretty eco-friendly.
114. We are trying, limited space to comply
115. Not much effect
116. Not as strong as people think
117. Our community offers lots of services to encourage recycling
118. Agree but not to extreme measures
119. This is part of our Mission Statement
120. Moderate
121. No effect
122. This should continue to be a hot topic and it is our responsibility to continue to foster sustainability in all we do
123. We are an Audubon Society golf property -
124. We are as green as we can be.

125. Moderate priority for most members
126. This is a low level of priority but recognized as important to members
127. Club is looking at options on green amenities
128. Somewhat
129. Try to be as green as possible -- herb garden; have our own chickens for organic eggs; recycle trash, etc.
130. Neutral.
131. Very important and will become even more important over the next few years. Courses have been incredibly irresponsible in this area.
132. Full recycling program for property. Certified Audubon.
133. Not so much
134. Eliminate all but biodegradable products
135. In all areas!!
136. In all operations, especially marinas
137. Very important.
138. Becoming more important in all areas of clubs
139. Not really at this point
140. Increased cost, but of great value to members - especially younger populations
141. Very positive from how we recycle, dine, & manage the clubs footprint
142. Incremental improvements each year are important
143. People feel good about eco-friendly especially when their organization does it for them and also makes it easy for them to participate
144. Somewhat important
145. Important
146. We are proactive which helps in reducing usage
147. We make efforts to recycle, and be paperless- very important
148. Not at all
149. Feel good but not overly valued.
150. Don't see this gaining in importance, but it's not going away either!
151. We are green now, but for us it depends on the costs.
152. We need to do a better job of informing members what we are doing to improve the green footprint
153. We have changed all the light bulbs in our clubhouse
154. We often talk about what is being applied to golf course in our newsletter.
155. No impact

156. We continue to migrate to green environmentally friendly supplies and recycling methods (which have driven costs higher)
157. Not much there
158. I don't think it matters much to our Membership because they know much of it is hype / feel-good window-dressing kind of stuff. We are sensitive to this and think about it in terms of F&B service vessels and packaging, but it is not nearly important as great golf courses, fitness and dining
159. Larger impact every year
160. We can get better but try hard to convert our membership - older demographics are the hardest
161. Continue to improve. This year we will drop Styrofoam.
162. We need to step up our game.
163. Can be expensive, however extremely necessary.
164. There is a demand from the membership however not everyone is behind the movement.
165. Simply the right thing to do
166. Not much - expectations for recycling have increased
167. A factor but not a large one. It is becoming more expensive to be green.
168. This is an important topic that the Club industry must lead and shine as the best example of sustainable environmental practices. We as an industry have allowed others to portray Clubs as terrible for the environment.
169. Getting there. proves of no value to members
170. While we are mindful, this doesn't seem to have any impact on our club/membership
171. Somewhat
172. Members want to have a "green" club and be proud of that fact
173. Neutral
174. Lots of talk, not much progress in industry
175. Somewhat
176. We are certified and responsible
177. Not that important
178. Implemented a number of initiatives
179. We are in early stages of this but are evaluating things like our use of plastics and whether we can reduce same.
180. Moving to more green products
181. Growing concern
182. Need to do a better job here
183. Prospects are starting to ask questions.

184. Expensive, but worth it!
185. Yes somewhat
186. Great marketing tool
187. Very important to club growth
188. Currently recycle
189. We will likely have a subcommittee this year to address it. We did away with the plastic cups and straws in the clubhouse.
190. Getting stronger
191. Important
192. Not even mentioned
193. Water resource is critical, and we must communicate how golf courses are great stewards of this resource.
194. No major concern as implemented
195. Seemed to be more important 5 years ago, now just rely on club to make these decisions
196. Water Surveys
197. Yes
198. Ongoing and important.
199. Environmental committee; interest in Audubon; many on-course projects like bee hives, maple syrup, monarch programs, etc.
200. Ongoing
201. It hasn't impacted us too much yet, but we do get comments regarding plastic straws and the to-go containers
202. New Sustainability Committee looking for results
203. We are almost completely green especially being on the beach
204. TRYING TO BE BETTER EVERY DAY
205. Neutral
206. We have removed all plastic cups from the club with zero pushback
207. Honestly, I don't see this as prominent as I did a few years back. We still try (recycle, change light bulbs, etc.)
208. Some...- farm to table - recycling/no Styrofoam/ etc.
209. Very important to members and community, as we are a seaside location
210. Becoming more important
211. Not at all
212. Has been for a while
213. Gaining steam. Must be able to demonstrate sustainability

214. It is the norm now
215. Cost to start programs but receiving more consideration.
216. Doing our part
217. We are nowhere on this yet.
218. Not seeing much traction with this at our current location
219. We are as green as expected today
220. Higher consciousness...members embrace initiatives
221. Little impact.
222. Also becoming more important and are getting away from use of plastic bottles and non-recycle products. Also we buy local whenever possible
223. Minimal impact
224. Somewhat important

54. Today we are seeing six major trends affecting society and clubs. Can you briefly comment on how you see each of the following trends affecting your club? - Health & Wellness

1. None
2. Not having a center hurts usage
3. Very important
4. Minimal; new fitness center in club will assist. Plan to implement more personal training options.
5. Does not apply
6. Training must be top level
7. Major draw for our Club...we will have to invest in facilities again
8. Significant.
9. Becoming more and more important
10. Important factor
11. Low Impact
12. We don't have space for it and most of our members live in gated communities that do have it
13. We are making minor improvements but not an issue for us
14. Continues to grow and evolve
15. Very active program
16. AGREE AND RELEVANT
17. Becoming essential for a club to compete
18. We currently do not have any set wellness areas.
19. Yes
20. Important, but unable to be the one stop shop for all
21. Very popular.
22. Moderate
23. Must have amenity
24. Important
25. This is a focus of our society and has to be as a club; it is about lifestyle
26. Will need to expand offering of fitness and wellness programs, adding golf centric fitness training and rehabilitation programs.
27. We have a new fitness center and offer group classes/personal training
28. Many older members so health is an issue on how long many will continue to play
29. Somewhat important
30. Important to expand beyond renovation completed five years ago

31. We have a huge program--60,000+ visits per year 4 full time trainers
32. We are not in that arena but need to find a way. Our area has many good choices already for fitness.
33. Need one and is a FAQ
34. Contributor
35. Becomes more important each year
36. Minor impact
37. Top on the list
38. We just hired a Wellness Coordinator to lead us in new efforts
39. This is huge for the lifestyle of our community and club. It is also a great way for people to connect.
40. Not much of a factor for us - we have a fairly well attended yoga session once per week but our workout area is not use much
41. Currently working on plans for major expansion
42. Becoming more important with younger families joining
43. More versatile programs on the water
44. Slow to take up this one; facilities do not currently have any fitness; will we go forward; too soon to say in master plan creation process now
45. Yes, fitness center gets more and more use
46. Greater interest in adding golf conditioning and fitness
47. Added 20,000 square foot facility a decade ago and continues to be well utilized with 61,000 plus visits per year. Must maintain fresh and creative programming
48. Growing interest in club fitness programs
49. Offer more
50. We outsourced management last year and the model is working far better. It is very important to stay relevant with our changing membership.
51. Brand new facility we just built
52. Very important. New facilities being constructed.
53. Working at it daily
54. While we do not have any facilities for this, we have held some swing speed classes which has shown interest
55. Increased activity in our performance center
56. Increasingly popular
57. Increasing consideration
58. We currently do not have a fitness center but has been a constant request. We are start construction in 2021

59. Yes and yes, healthy eating, lower salt/sugar, leaner meals, more vegetarian/vegan options a must
60. Must be incorporate into the Club's operation
61. Significant Impact
62. Add or increase fitness offerings
63. Not that important at my club
64. Total program overhaul
65. Growing in importance, but we don't have the facilities or demand
66. Increase use
67. We added a F.I.T.ness room in our last renovation
68. Will play a key role in the club's success.
69. Pertinent
70. Fitness is a big draw for us
71. Factor
72. Expanding fitness outside the fitness walls
73. Higher demand but still lacks staying power
74. Increasing. Looking to expand
75. It's what we do.
76. It is starting to be an issue that more space will satisfy
77. Older members understand they need to stay fit and healthy
78. must increase
79. Starting to take a place of interest. New Wellness Group formed this past year
80. No effect
81. Very important aspect in members lives and continuing to grow
82. Growing in importance
83. Health conscience menu selections
84. Healthier food options
85. Developing plans for wellness center in the future
86. Continues to be an important feature at our club
87. Very important
88. Becoming bigger and bigger every day
89. More conscious of health
90. Fast growing area need to keep up with the trends
91. No space or would have added facility
92. Somewhat

93. Some increased demand
94. Gaining steam
95. Will need to improve
96. Very important to our members and demographics
97. Important
98. Increasing
99. We increased staff, programming, equipment - usage up 7 %
100. Important to all ages.
101. Wellness series created
102. Increase Club fitness areas
103. More important for the older demographic
104. Requires us to explore better use of existing space for such activities
105. Important
106. We need more, costs too much money to enhance our facilities
107. Members are using the fitness center more and more each year. However, I feel the amenity still underutilized
108. Very important
109. Does not really affect our club
110. Continuing to grow, more emphasis on wellness
111. This is a trend that is going to continue. Even our oldest members make use of our fitness facility
112. We could provide better services
113. More dietary menu concerns / issues than ever before.
114. Will continue to get busier
115. We are a health wellness/racquets facility
116. Looking closer at adding facilities
117. Will not affect us
118. Picking up more people in this category. It will be the next area we use capex in, to expand and improve our fitness center.
119. Very important
120. Much more interest
121. We have a walkable course, so we play that up to new members
122. Very important
123. Fitness/wellness programming is important to us
124. Moderate at this time

125. No effect
126. Will continue to be forefront as people live longer
127. Not much here
128. It's important
129. High priority for most members
130. This is an area we need to build on
131. Space prohibits expansion
132. Very important
133. Continually more and more Members are using the facilities -- leading us to do a capital improvement in this area
134. Important.
135. Not our role. We are golf.
136. Huge part of our offerings including physical therapy, massage, spa services, nutritionist, and professional trainers
137. This is our bread and butter
138. Top Priority
139. More room is needed - Members of all ages work out
140. Very important.
141. Most important activity to continue to expand
142. Very important but we don't space to offer services in that area
143. Continue importance with opportunities for partnerships with complementing services (rehabilitation, chiropractic, alternative therapies)
144. Core training & mindfulness
145. A first-rate fitness offering is expected
146. only a growth area. Trainers must make people fascinating and they will continue to return and invest abundantly in themselves
147. Important
148. Important
149. Not important for our club
150. Strengthen the club
151. Not at all
152. Good for Clubs, but lots of options on the market.
153. Only going to continue to gain in importance - as a service to members and as a revenue stream to Club
154. We are a golf club, walking is there fitness
155. Fitness is big!

156. We offer more programs that talk about health & wellness as well as offering menus that reflect a lighter fare
157. Not as important at our clubs as some of the larger clubs in the area. We offer fitness and healthier dining options.
158. No impact
159. Expanded four times in last fourteen years - long range Master Facility Plan calls for entirely new Fitness Facility
160. Increasing in importance
161. This has now become a vital element of our Club...it has to be best of breed.
162. Small impact in the immediate future
163. Anything we can do to add to membership offerings help add new members
164. Has not been a big push at this club.
165. Neutral
166. Something that our club needs to look into further and provide.
167. Booming. We have not scratched the surface as to what our fitness operation could become moving forward. Club management education needs to focus on this more.
168. A current and future priority
169. We just finished a \$19.6M addition and renovation of our spa and fitness center.
170. HUGE - must be a primary focus/factor
171. We have a Wellness Program and are tripling the footprint of the facility
172. All have this in their community
173. We do not have a gym, but our racquet sports are year round
174. We play a very small part in this but wish to do more
175. Somewhat
176. Members and prospective want quality workout facilities including group fitness
177. Growing
178. Not a factor, huge YMCA near club that many are involved with
179. Not a fad, wonderful selling /retention point for all ages
180. Very Important for membership growth (retention and new members)
181. Second most utilized facility behind dining
182. After a member survey, it's obvious that our membership wants a more holistic club experience and we are in the planning process to add Fitness facilities.
183. Increased
184. Need to expand
185. Becoming a must have
186. We will be adding these facilities in the near future

187. Yes. High value
188. Dining room / menu considerations only.
189. Small Club, no real space for a fitness area
190. We have a fitness facility that gets used but never crowded. People seem excited to see it on the tour but tend not to use it all that much. The Peloton bikes and treadmill have been popular.
191. Our fitness operation creates similar income of golf
192. Increased
193. High Importance
194. Very important
195. We know the next generation of members see this area as highly important. We have a plan to build an entire spa and health/wellness center
196. Longevity, blue zone diets, Alzheimer's
197. Increased opportunities and improved facilities
198. Lack of
199. Senior Water Aerobics
200. No.
201. Yes... we need more of it.
202. Menu offerings held to different standards; off season fitness options being offered
203. Our new facility will be online 2022
204. Our fitness center is very popular with our members
205. Will need expanded facilities within 5-10 years
206. No need for a gym. Focus on health and wellness in other ways such as menus, swimming
207. HAVE NOT SERIOUSLY CONSIDERED PROGRAMS HERE
208. Somewhat
209. Does not impact our facility but should be implemented.
210. Quite a bit of chatter about it here, but we currently don't have much. Walking trails, outdoor exercise equipment. Would like more
211. So far, the lack of this has not affected us. 2019 largest total membership in club's history
212. Limited fitness facilities - would like to offer more but space restrictions
213. Important - most members are living healthier lifestyles
214. Somewhat
215. We do not have health and wellness facilities- many members belong to a private athletic club a mile away

216. More focus on the wellness side
217. I personally think it might be short lived within club walls
218. Very important in a community with a high percentage of retired members.
219. More activity
220. They don't think we need it
221. Growing fast
222. First and foremost on members' minds
223. Got have it
224. No comments
225. Slow growing demand.
226. This area is becoming increasingly more important to our members and we will be expanding services to meet our members needs
227. Huge upswing and relative to our Club
228. Somewhat important

54. Today we are seeing six major trends affecting society and clubs. Can you briefly comment on how you see each of the following trends affecting your club? - Role of Women

1. Need more in business leadership
2. Will help with women's leagues but see less usage by men
3. Very important. In line for our first female club president
4. Greater role over the past many years
5. Critical. If women are not engaged, the club will not succeed.
6. We have great support of women in our club, governance and volunteer support
7. Women's facilities must be superb
8. We have to invest capital in services and facilities for women
9. Significant impact
10. Key decision maker in household
11. Growing area of our membership
12. Highly Impacting
13. More single women are joining
14. Our BOG is now 6 men and 6 women
15. Continues to increase- especially in governance and women's golf
16. Active on Board and Committee structure
17. AGREE AND RELEVANT
18. Increasing participation on Committees and Board
19. The club currently has 4 women on the Board
20. Yes
21. Increasing and important
22. Growing and gaining influence.
23. Increased
24. Vital as timekeepers
25. Important
26. Women are the decision makers in our society with regards to discretionary income
27. Increased presence in club leadership, greater emphasis on programs to engage women, modification on marketing strategies that focus on women's role in the decision-making process.
28. Membership is owned jointly; women can serve on the board; programs needed for working women
29. Women are becoming more involved and I am very pleased with that trend
30. Important
31. Involved in club governance

32. We do not provide enough 'women specific' programs
33. We now have two and will soon have three women on our BOD
34. Roles as committee chairs and Pres of BOG
35. Modest increase
36. More women making the final decision to join. greater say in finances.
37. Our club is all women
38. They're making the financial decision for our buyers.
39. We are rewriting our bylaws to include spouses as members; no longer will there be a separation between male and female spouses
40. Very important to offer something for them and family. Very few memberships are just about the men.
41. Increasing - more women on our BOD and more single women in our Club.
42. Increased of women working with committees.
43. 2 women on the Master Board for the first time this year and 2 women committee chairs. Club is moving in the right direction.
44. Moving up. We will have our third female Commodore in 7 years
45. Onward and upward in club governance
46. Women focused events like fashion shows have grown over the past years
47. Neutral. Not an issue either way
48. Less gender specific golf events
49. Working on this one - growth of membership is in this key area
50. Has been active at our club and continues to, and is increasing at the governance level.
51. Increasing number of women in club leadership
52. Equal amenities and equal vote
53. No issues - women have always been a large part of the governance at the Circus Club.
54. Important
55. More 9 hole players
56. Increasingly important. Adding women (spouses) to committees.
57. Growing daily
58. Ever increasing. More desire to become involved on the committee and Board level
59. We are a gentlemen's club.
60. Stronger participation by women in all sporting areas
61. Increasingly important
62. More decision makers; focus on them to join.

63. Increasing and culturally elevating
64. Always important - Women have become the decision maker for private clubs, activities, etc.
65. Not relevant to our setting in Asia
66. Must keep growing
67. Small factor
68. We already have this as a significant issue at the Club and I do not see it expanding. Our Board is 7 out of 10 members being female.
69. Increased amount of play by women
70. Very important in membership decision
71. Increased focus on women in governance, visibility of women at club
72. Slowly growing
73. No difference
74. Our women's program is growing, particularly beginners
75. The role of women in our club will increase.
76. Women are playing less golf - we are concerned
77. VIP. We look for diversity across all committees/Board
78. Many in Club Governance
79. Slight factor
80. Increased. Women's leagues are thriving, as well as presence in governance
81. Current economic conditions in our area are sending more women back to work, which may decrease utilization of some of our daytime programs. We have enough diversity in programming to shift.
82. It is growing in our club
83. We see less interest from women to play golf as takes too much time, but we see many young women playing tennis
84. Moving towards true gender neutrality
85. Women are active leaders in our Club, continues to be relevant
86. Effecting
87. Increasing in all decisions related to the club
88. Becoming bigger and bigger every day
89. A more diverse leadership model
90. Expanded social clubs heavily participated in by women.
91. This has increased significantly, particularly with younger members
92. Decision makers in the family
93. Extremely important. We have largest women's group around

94. Had 2 out of 4 Presidents be women
95. Very involved and doing many activities
96. Strong and positive positioning at the Club
97. Increasing
98. Gaining popularity
99. Important
100. We continue to try to grow this
101. Important
102. Increasing
103. Actively involved in club, committees, have a voice in club
104. Women definitely are a big part of decision making within families today, and this is why
105. 50% board representation and more programming targeted to this audience
106. Women playing more in the evening and on weekends with family and children
107. Our bylaws need updated to address this.
108. Increase involvement, positive affect
109. Increasing role. Recommend active Women's Associations
110. Requires us to provide more ladies' golf programs
111. \Important
112. YES! They are feeling not valued at the Club and therefore not using the club.
113. Woman (spouses of the golf member) are wanting equal access to the first tee.
114. There is no difference in the roles either sex plays
115. Need to create more women only programs/events
116. More involvement over the last couple of years
117. Women's roles in clubs are expanding dramatically, in leadership roles and as decision makers
118. Women are very active at our club
119. Select where / when participation takes place
120. We have 50% membership women and it is reflected by 50% board members and committee members
121. More active in governance
122. 40% of our membership are female...so very important. This is reflected in the make-up of our Board and various committees
123. Definitely strong and we have an equal mix of usage across the board.
124. Increasing, mainly in golf
125. Very important

126. Much more active
127. Women are working not available in the day to participate in league play
128. Important
129. EXTREMELY important
130. No effect
131. 2019 we added our first female board member
132. Increasing - on all committees and Board soon
133. It is shrinking at our club
134. Key decision makers in families
135. Women in leadership is a concept we embrace
136. Club encourages and applauds women in boating
137. No impact
138. As important as the role of Men -- and can be seen in our Board make-up
139. Important. The club has four women on the Board of Directors
140. Our club has been non-discriminatory since its founding. We never had a culture of exclusion so have never had to catch up like others. We are considered very "women friendly"
141. Women have always played a significant role at the Club
142. 40% of our golf is ladies. We have a strong focus on ladies' satisfaction.
143. Very important
144. Very Strong, they make the decisions now
145. Yes - Board is 50% women
146. Very involved with the decision process.
147. Becoming more important in governance
148. We have great women leaders in club management but not much of a presence on committee and the board
149. Becoming more of the decision maker in social options
150. Women represent 21% of our membership. They don't use the Club's facilities as much as the men do.
151. Greater need for inclusion in programming - not just exclusive programs
152. The whole family is involved
153. Focus on ladies and occupy yourselves gentlemen while we do it
154. Equity issue / Me too movement
155. Important
156. We have women as owners and on the board of directors
157. No effect

158. Not at all
159. Growing!
160. Tough one - unless Clubs adopt a family type initiation fee, I believe it is too much of a hurdle for a family to put down a second initiation fee for spouse. However, Club must find unique ways to keep the matriarch of family active in the Club.
161. An area to focus on, leagues, events and programs to keep them at the club
162. Women run the family and what the family does at the club
163. We are a woman's club and have been around since 1903
164. Get women involved. Committees/clubs. We have a Women's Club of Canterbury that meets once a month and organizes events that are not centered around golf.
165. Younger Mothers are not playing golf
166. Just elected first Female Vice President
167. Decision makers
168. They deserve a seat at the Boardroom table and must be considered the same way we think about male members and even more so since they are the real decision makers in the household
169. Increasing as the decision maker
170. We are ahead of the game; women are involved in all areas including governance
171. Added spouse able to serve on the board to our by-laws. Goal is to not have a Board without at least one woman.
172. 40% of our Board is female.
173. Women are more organized than Men.
174. We are seeing an increase in demand for upgraded female spaces. This includes facilities for professionals to conduct business at the club.
175. Too slow in coming
176. This is not new - we've invested heavily in fitness, spa and racquet sports
177. If we don't find ways to get women on the board, it will hurt us long term
178. We must continue to harness the brain power of both sexes. Studies have been made in our business, however women at the top leadership level is rare. It continues to be difficult to shatter the glass ceiling.
179. They are not engaged
180. Most women here work
181. Our club sees this on the downhill slide, and we are actively trying to combat this issue.
182. Somewhat
183. Women are driving decisions in the family, many working so less time for the tradition country club programs, we need to be creative
184. Neutral

185. Increasing
186. Completely diverse and open
187. Equality is very important
188. Always involved here
189. We have amended our bylaws to allow spouses on the board and have recruited more women for our committees. The effect on the club has been significant, helping us to change programs to make the club more attractive to women.
190. More women in leadership roles
191. Increased
192. Very positive
193. Very few men can write a big check without the approval from their spouse.
194. Encourage women to participate in leadership roles
195. Much more prominent
196. Younger women are not as active in leagues
197. Very important to club growth
198. Very limited, mainly bridge clubs and some golf
199. Much more involved in where to join and a stronger committee involvement
200. Active growth of ladies' sports programs
201. Increased.
202. Encouraged in committees and governance
203. Growing
204. Already in place
205. Always been strong here
206. Women's Golf League, Bridge Club, Tennis League
207. Critical to make the club inclusive and gender blind.
208. More and more involved on committees & board
209. Increasing at individual, committee and board level
210. Women are more involved in making decisions regarding whether to join, involvement on committees, wanting more activities for themselves and their family
211. Equal # on BOG, 2 Presidents so far, 1 VP
212. More women playing then game brings more family involvement and creates equality in the game.
213. More women as primary member
214. MORE WOMEN DECISION MAKERS SO WE NEED TO MAKE SURE WE ARE INVITING TO WOMEN AND FAMILIES
215. Important

216. They will purchase food and beverage if its good, merchandise if you ask them
217. Yes, though I think role of children even more important. Critical to engaging the family dollar
218. We have an active women's membership and it keeps increasing
219. Implementing new programs to attract women
220. Women more involved in membership decision
221. Extremely important
222. Behind the times
223. Women are very active in the community, including in governance
224. Increasing
225. Very active here
226. We are already over 51% or our rounds played by women
227. Growing in number and importance
228. Minimally affecting us
229. Somewhat negative...declining women's section
230. Very important.
231. It is important that women play a key role on boards, committees and have a say in club's activities
232. Very important and growing aspect of game
233. Important

54. Today we are seeing six major trends affecting society and clubs. Can you briefly comment on how you see each of the following trends affecting your club? - Sense of Community

1. They want to be with their fellows
2. No group activities, all individualized
3. Very important for us in a gated community
4. Still strong
5. More important than ever. It's all about the member experience. The greater the experience, the greater member retention.
6. No affect here, our community is strong
7. Contentedness, need to be a social network
8. Helping our Club as we are a multi-generational Club
9. Significant impact
10. Reason to join and stay
11. Very important to stay relevant
12. Highly Impacting
13. We build our club around the feeling of community
14. Not an issue
15. Club retains and attracts by offering a sense of community
16. Key
17. AGREE AND RELEVANT
18. Social responsibility - charitable work
19. A good gathering place is important to help grow
20. Yes
21. Only for the elite
22. There is a very strong sense of community at CCF.
23. Very important
24. This is what keeps members engaged
25. Highly important
26. Clubs have to be inclusive to be a part of the community
27. We are a golf Club with no housing, so community impact is low
28. Greater use of social media, programing that seeks to engage members in groups.
29. Support of local school and church fundraising events keeps us present in community
30. Club is very much has a community dynamic and I see that continuing
31. Very important

32. Important as it supports our Vision, Mission and Core Values
33. This is growing.
34. Social aspect is very important, and the reason people join here
35. Major contributor
36. Important but not a deciding factor to many who are joining.
37. Huge component for us selling memberships to females
38. Agree, it needs to feel like home.
39. We just launched a service club that goes into the community to serve the less fortunate; this has given our members a better sense of community stemming from their club
40. Difficult with a transient residential golf community, but we invest greatly in social opportunities for our members to get to know each other.
41. We have strong community involvement
42. We are experiencing an increased desire by members to get plugged into small groups.
43. Bundled community so members are very involved
44. Will bode well for us. We do community well
45. Very strong, many families have been members for 50+ years
46. Consistency, club volunteer programs
47. Building our membership culture is a big priority
48. Not the most important here
49. Need for more "common" areas that members can mix and meet
50. Yes, and we have a strong sense here
51. Community is very important at Circus Club not just for members it is as important for staff
52. The club is where members want meet, make and enjoy friendships
53. Important
54. Very important here and always has been.
55. second most important. Don't discount CHEERS! (everybody knows your name)
56. Probably decreasing although people are still finding groups to associate with and get integrated in the Club
57. It is important to attract members who want the camaraderie we offer
58. Stronger membership pipeline
59. 80% of our services are available to members (extra fees)
60. Increasing consideration
61. Very important in our club - people join clubs because they want belonging

62. This is the most important, people queue up to 20 years to join this community
63. Very important value to retain members
64. Significant Impact
65. Increase need to be part of the local community
66. Creating programs that bring people together
67. Agreed, it's been a very close-knit club
68. Must be town resident to belong to RH
69. We are seeing more members join in closer proximity to our Club
70. Do not see this affecting our club.
71. Pertinent
72. VIP for club
73. Not a factor
74. Definitely working with local groups more
75. People are socializing more in small groups
76. This has increased year over year due to efforts to achieve this
77. Positive motivating factor for private club membership - new members are seeking a safe, engaging community.
78. Continues to grow in importance
79. This helps our club as members like to gather with their friends
80. Lacking
81. Needs to be a focus moving forward
82. More important than ever during this polarized time.
83. Effecting
84. Very important to have that culture
85. This is one of the main attractions for members at my club
86. We are growing 20% per year. Little drop off during construction
87. More social functions at club
88. Very involved membership and increasing participation
89. This is highly important to our members
90. More focused on family
91. Always has been important
92. A strong selling point for our Club.
93. Important in today's society
94. Not an issue at RYC
95. Always available

96. Getting worse
97. Important
98. Yes, very important
99. Being a gated, friendly, 50 years club is a benefit
100. This is a strong point for our Club and is very important to members retaining their membership.
101. More giving back events
102. We are the only club in a small town that also has the only liquor license, we are fairly lucky here.
103. No affect
104. The Club is your Home Away From Home
105. Important - need a feeling of ownership and loyalty
106. We aren't struggling when people are here, getting them here is the challenge
107. People want a sense of community, club events, activities & dining are instrumental in attracting some members
108. Yes, our members like a sense of community
109. Need to build and make new members understand the value of club community
110. A big part of our culture at the club is community driven
111. This is at the core of what we offer, a sense of community/family
112. We try to be the community gather place
113. Community is important.
114. We have a strong sense here; it is very important
115. More interest in membership
116. We are located in a very tight knit community which is important to our members and also attracts new members in our area
117. Working on strengthening that to also assist in membership retention.
118. Somewhat
119. Very important
120. Members bringing in their friends as members
121. Tends to be less time available to be committed to the community
122. At my club this is important
123. This has become more of a central theme
124. EXTREMELY important
125. We have tons of that
126. The hallmark of any great club, fortunately very strong, focusing on Jrs to grow with the club

127. This is a family club
128. It's huge at our club
129. Helps attract members
130. Members want to be involved within the greater community as well as within the club
131. Very important
132. Somewhat
133. One of our greatest attributes is being the "Cheers" Club where everyone knows your name
134. Not as important to generation x; Make up 60% of membership.
135. Very important and will be more so in years to come.
136. We are hauling around the golf for four hours and 10 minutes
137. Events that focus on bringing members together in a community.
138. Very important
139. Very strong particularly in support of local charities
140. Home from home
141. About the same.
142. Most important for retaining current members
143. Our biggest membership draw is camaraderie and we focus on that at all times
144. Developing clubs within the club to enhance the community feel
145. Sadly, we don't feel that sense of community amongst members
146. More activities that involve the whole family
147. Very important
148. Critically important - connections
149. Slight impact
150. Somewhat affected
151. We are a small club in a bedroom community
152. Provide more social casual events
153. Not at all
154. Wanted but undervalued on a in person leave.
155. This has taken much longer in Canada to develop at Clubs, however slowly it is increasing with current and potential members looking for that feeling of Community
156. We are an Elks Club, so community is very important
157. Members here love that they walk into the restaurant and the staff knows them by name
158. One of the main reasons we exist

159. We host a happy hour every Friday with door prizes. The idea is simply to get everyone together. The bar is small and at capacity, making the energy in the room contagious.
160. Many social groups in the club leads to overall exclusion
161. Safe haven -- larger percentage of membership lives even closer
162. Important
163. Everyone wants to be part of a "tribe" - we need to create ways to bond Members together
164. Growing. We hold several charity events that contribute thousands of dollars to local charities
165. Increasing in issue - need to get word out about all we do
166. Built a fire pit that has adults and families year-round. Bean Bags added to family dining room makes this area a must come for families to connect.
167. Neutral
168. Not enough golfers in our community.
169. We are continually pushing the mindset that members are owners rather than users of the club and that everyone needs to carry their fair share of costs for projects.
170. Invaluable for most clubs
171. Increased desire for member events and programming
172. Focus on building a culture of camaraderie will be a focus
173. This is the most important consideration for joining a club
174. We are accepting non-traditional cultures
175. This works to our advantage
176. I believe it to be more important than most people realize or understand
177. Somewhat
178. Positive
179. Big reason for our continued success
180. Yes.
181. Philanthropy will play a big role for the club in next 5 years
182. Strong sense of community and becoming more appreciated and enhanced
183. Our club recently came out of a renovation due to a natural disaster. One happy byproduct is that our membership rallied around the renovation process and we have a stronger sense of community now
184. Very applicable
185. Very positive
186. More and more important. However, they can't articulate it adequately.
187. We create events for both the immediate community, and the county

188. I think this helps clubs
189. Very important for a sense of belonging and creating friendships
190. Club culture / service is vital to future success
191. Still has some old school traditions but not as much as in the past.
192. Men's golf leagues and women's events have become very popular for just that reason
193. We offer events which encourage multigenerational participation
194. Stronger
195. High Importance
196. Important!
197. Clubs within the Club are growing
198. Another critical element as we discover longevity this is a major key
199. Continues to be strong
200. We host many Non-Profit events for the community
201. Important.
202. Social events are increasing in attendance and popularity
203. Very important
204. Members want to feel connected with the other members and staff
205. New Informal enlarged grille room a success
206. Our Club is a family. Everyone wants to be in the family.
207. NOT CERTAIN ON IMPORTANCE
208. Important
209. We are a very socially active club. With more kids taking up the game, brings more family involvement.
210. Older neighborhood, used to be gated, rolling out a '50 years' program next year
211. Important but not critical here in conservative central PA
212. Important to be thought of as a contributor by outside community
213. Very important - it's all about the experience of belonging
214. Not much
215. Younger members looking for more social reasons to come to the club
216. Extremely important
217. It is why clubs are thriving again
218. Very important in a private community
219. Increasing
220. It's strong here

- 221. BIG
- 222. We are a small Club which has a strong community feel
- 223. Very important for the recreation areas
- 224. Significant...club is currently divided on whether or not to sell
- 225. Growing in importance.
- 226. It is very relevant, as people join clubs to nurture and develop new relationships
- 227. Not as prevalent as one was
- 228. Important

54. Today we are seeing six major trends affecting society and clubs. Can you briefly comment on how you see each of the following trends affecting your club? - Scarcity of Time

1. Impact on dining
2. Less younger people dining at the Club
3. Not applicable. Most of our members are retired
4. Yes more take-out food
5. Affecting the club the greatest. Need to improve value of time at club through personalized experiences and service excellence.
6. Affects our race programs
7. Competition w/ everything, must be easy to use
8. More 9 hole events needed
9. Helping our Club as we are a Convenient place for multiple services
10. Significant impact
11. More scarce than money
12. Members time is my competition
13. Highly impacting
14. Not a lot of affect
15. Need to be open to pop up events and last-minute decision making by members
16. No issue
17. Retirement community, just have to find programs to match the wants
18. AGREE AND RELEVANT
19. Must be able to mix business with leisure - ability to do business at the Club
20. Have to provide more reasons for the members to come to the club
21. Need to find value for lack of time at Club
22. Especially for young families.
23. Busy young families have less time for the club
24. Very important
25. Time is the most important value proposition for a club
26. Pace of play at our club is 3.5 hours. It's key to our growth
27. Will have to focus on programing of shorter duration time, upgrade WiFi access and lounge areas conducive to remote working, and will need to modify F&B services
28. Our club currently fits with busy lifestyle-quick game of golf, quick dinner service, relaxed dress code
29. Always a concern these days however we encourage 9-hole rounds and have a few weekday twilight 9-hole leagues

30. Irrelevant
31. Helping since members are less likely to leave the property
32. Family, baseball, hunting, beach, mountains, lake compete
33. Younger families have less time for leisure at Club
34. Young families are always struggling for time
35. Continues to affect us in golf
36. definitely a barrier for attracting younger members
37. Agree, need programming that's time sensitive
38. Member events are selling out; members want to spend quality time at the club with fellow members and families
39. Since 75% of our members live a mile from the club, we try to capitalize on the convenience of the club.
40. Yes - impacts all of our members
41. Difficult for members to find time to play, with an increase in nine hole rounds.
42. Most members are retired with plenty of time
43. Not to a great degree, our members always find time to sail
44. More flexibility in dining hours, breakout office space for member use
45. Competition increasing
46. Very important to understand
47. Dining preferences and using practice range more often
48. Yes, especially in golf and fast casual dining with families
49. Difficult to capture young families for weekday dining.
50. The club better have something for everyone in the family so that they spend their limited free time with us
51. We are not a traditional Club so the time factor does not really play into our scenario like it would with a golf club.
52. A problem
53. More compacted golf times on Friday and Saturday
54. Clearly affecting most members, especially new intermediate members.
55. The most important. That is why we need to become a one stop shop.
56. Our pace of play ties in nicely with this. Rounds are often less than 3 hours
57. Use of members time is important, use it wisely
58. Less weekend rounds
59. Agree - so we run shorter races
60. Noticed, more 9 hole rounds
61. Yes and location becomes an elevated consideration

62. Currently not too much of an issue because we have HOA which members automatic belong to the club
63. Our Club is a sanctuary and used very frequently by families
64. Member have to choose where to spend the leisure time
65. Major factor
66. Minimal Impact
67. More 9 hole rounds of golf
68. Big impact on club
69. Changing programs and offerings to match lifestyles
70. We are a retirement and weekend club, so no issues here
71. Affects golf play
72. Pace of play is an asset of our, 4 hours or less is standard
73. Will be an issue for us as the club competes with non-club activities.
74. Very pertinent
75. Issue for society but not the club
76. More quality over quantity of programs
77. Family time pressures related to kids activities
78. Less time for golf, want quicker service in restaurants
79. Big factor
80. No effect
81. No impact, our members highly utilize the Club.
82. This hurts our club as members spend less time at the club
83. Significant impact
84. True, it's a fast-paced world
85. Definitely a negative factor for traditional clubs
86. Effecting
87. Definitely competing for members time
88. Members are using the club more often.
89. Enhanced practice facility, grab and go food options in summer
90. No change
91. Impacts younger members, particularly those still working
92. 18 holes isn't as important to the younger generation
93. This continues to be a pinch point in all activities at the club
94. For those with kids for the most part

95. False narrative in my opinion. We have been more flexible with our hours and adapted to changing schedules
96. Big challenge, need to make everything easier
97. Less sail boating more power
98. Minimal effect, weekends at the Jersey Shore Time is made
99. We have seen some of this
100. Getting worse
101. Not important
102. We are a second home, vacation club so members have time
103. No affect - we are in a retirement community
104. Negatively affects golf
105. We are seasonal club, older demographics, usage up
106. Members seem to be working more around the club than in the past. Traffic in the city is an issue.
107. Added a grab and go area
108. Improving short game/practice facility
109. Developing more and more new events to keep the membership engaged.
110. No affect
111. Themed Kids Activities on the Weekend increase Member Dining
112. Requires us to emphasize pace of play
113. Impacts members
114. Our members want faster dining, faster fun, faster activities
115. Probably the biggest problem in retaining and attracting new members, don't have the time to fully enjoy the club and it's amenities
116. Our members are mostly retired so this does not affect us
117. Definitely affecting the club in recruiting new members
118. Volunteerism is down as members want more club time
119. Impacts golf, primarily.
120. Negatively affects us
121. Members want it faster than ever.
122. Not effecting our club as racquet sports doesn't take a lot of time
123. Less volunteers
124. We are a 9 hole course which is proving to be beneficial
125. Fortunately, we are doing ok with this. All of our facilities are well used.
126. Spending it wisely

127. Very important
128. Fewer visits to the Club
129. We remind potential members that they don't have to play 18 holes, just enjoy the time available.
130. Agree completely
131. Most of our Members are retired so less concerned with time
132. Requires relevancy to use of areas to attract
133. Hard to get young families to join
134. Continue to struggle, we focus on the whole family so the experience albeit shorter needs to be better
135. Not sure
136. Members practice more and play less
137. Keeping younger members away
138. There's no scarcity of time if programs have value
139. Comes into play, but majority of our membership is retired
140. Major element
141. Most of our activities are 120 minutes or less, so not much effect
142. Important factor on how members use the club amenities.
143. Bullshit. People make time for what is important. Lazy excuse for operators
144. We are hauling around the golf for four hours and 10 minutes
145. Hurts the four hour golf round.
146. Programs have to be Relevant
147. Try to maximize the experiences while we have them
148. Members are busy with work and Children
149. Feedback from members tells us we have too much going on.
150. Becoming even more time deprived
151. We do a variety of events at varying lengths of time commitment from an hour to four hours, also we focus on ticket times during lunch service with great scrutiny
152. Need to continue recognizing importance of time value of members
153. Lack of volunteers
154. More a case of how you use it & who you include / exclude
155. Members are busy and very solicited
156. Less about scarcity - we will always do what we value
157. Big impact
158. Somewhat affected

159. We have 27 holes with the time of play being at +/- 4 hours
160. Have to develop programs and amenities that require less time
161. Not at all
162. Need to make each moment meaningful.
163. Only going to continue
164. Driving range has become more popular as well as more 9 hole rounds.
165. Very much, we focus more on 9 hole events and pace of play is #1
166. Families are in so many different activities outside of the club.
167. This is a huge issue for us and that is why we try to be more strategic of when we have programs and the topics
168. It is our job to be relevant and convenient. Provide services that save our members time.
169. No impact
170. Nine hole rounds - to go "blue apron" food and beverage programming - youth programming explosion
171. Yes.
172. We are predominantly a retiree-oriented Club so it's less of an issue for a large segment of our Members. However, younger families, they are all time-starved, sleep-deprived and over-scheduled - for working families, this is a big issue
173. Up to us to make club activity a priority
174. Major issue as both parents are more involved in parenting
175. The practice range is getting more use. We are also seeing an increase in 3, 6 and 9 hole rounds.
176. Negatively
177. There is never enough time.
178. Members are working more from the club and fitting activities in where applicable.
179. Increasingly an issue for busy members
180. This is not new - fewer 18 hole rounds played, more "to go" food
181. Members will choose faster, more convenient options
182. Time is not money; you cannot earn more once you spend it. Make it count.
183. Especially with younger members
184. Members using facilities less
185. We tend to lose members from their perceived lack of value due to their personal schedules
186. Yes
187. Fewer members have the time to play golf

188. Negative impact
189. Not a factor
190. Yes.
191. Pace of Play, to go meals, Kids Corner, lunch-dinner service pace
192. Serious issue
193. Mostly retired or soon to be retired membership; time issues are from which house are they taking their jet to?
194. We are seeing a per capita drop in full 18 hole rounds
195. Non applicable
196. Young families are extremely busy
197. They want all activities to take place in one or two places.
198. Having to create events that take this into consideration
199. Yes, an issue
200. Younger family, less time at club
201. Important but not mission critical
202. Millennials do not want to spend a lot of time doing things at a Club.
203. Absolutely impacts the club but as long as they see value and can enjoy quality family time, they will keep their membership. It seems that they value their time more now since it is so scarce.
204. We have to offer more varied programs
205. Busier members, less available
206. Non-issue
207. Most important to those employed and younger folks
208. Food service must be timely and without reservations
209. Critical in giving people their time back
210. Predominantly as it relates to dining
211. Managing younger members hours so they can use it
212. Yes.
213. This is changing a little more, I see more people looking to enjoy the club time as precious time.
214. Has forced creation of limited play memberships, less interest in full membership
215. Not as important as expected
216. Members dining less often than in the past.
217. I see more people making time to play the game than in years past.
218. Today's kids are extremely busy with outside activities. We have to learn to plan around their busy schedules.

219. PRIORITY ON FAMILY AND WORK
220. Somewhat
221. Important. Family golf options? Golf activity center? Grab and go food...
222. True for most people. Even I don't play much golf due to work
223. Crucial - we are 9 holes, so that plays into our niche
224. Members like golf but don't want it to take all their time
225. Somewhat
226. Younger members playing early and getting back to families
227. Moderating.
228. Quick Events, Pop Ups
229. A major issue for playing golf
230. Affecting it
231. It's important, but the residential nature of the club helps
232. Always an issue, especially with an average age of 71
233. This is probably most important trend. Club needs have something for entire family
234. somewhat negative impact...everyone has time constraints
235. Major factor. Limits Club usage.
236. There is a lot of competition for members time, work, family other, members appreciate one stop shopping
237. Very true and relevant
238. Important.

55. What do you see for the future of the urban country club--which offers everything but golf--to the next generation of members?

1. No opinion
2. They will have their niche and be successful. There is a need for all types of facilities. These facilities will replace the old amusement parks. AS long as they continue to adapt to the changing world they will continue to be successful.
3. In the downtown market, very important. In the rural market, if would have to be geared toward family fun with convenience foods that are quick, fresh and reasonably priced.
4. No real comment here
5. Appears to be viable...build a social community for urban market.
6. Steady
7. Likely we'll position for success if amenities and service are done at a high level.
8. Ensure you listen to your members and know your target age and support this group.
9. What else do you offer? Golf is a time-consuming passion so other activities can overcome that.
10. I think it could work.
11. Appears to be a growing trend that should have success.
12. Growth. I believe that that the offerings of these Clubs strategically align with what the next generation of Club Members are looking for.
13. A hard road to succeed as the time and value proposition are evaluated by all families.
14. That appears to be where all the growth is occurring. I think they will continue to thrive.
15. We are a yacht club with a pool and tennis courts
16. Unless you are an avid golfer, I think the connectivity to community, experience and family time are driving the younger members who join. Golf is time consuming and may not appeal to all family members and can be bought outside of the Club if needed.
17. I think that there will always be a place for an upscale, private club.
18. Clubs are about sociability and lifestyle. Any club can flourish with that focus.
19. I would see no growth
20. Highly dependent on scope of amenities/facilities and programing. If the right mix exists, I think they can be very successful.
21. Programming for all membership ages throughout the year (juniors to seniors; tots to 20-something dependents).
22. Promising, especially without golf

23. There will be challenges---attrition and mortality of existing cadre of members; yet the future will be bright for those who embrace it --pretty simple FLIGHT TO QUALITY. Keep the core engaged; it's a herd mentality out there. Identify the leader of the herd and LISTEN---focus groups can add great information.
24. Social aspect, a place to gather,
25. Going to be hard to compete in the market
26. I think they will be a very viable option
27. As urban population increases, city clubs with full offerings will be very attractive to the next generation.
28. I think it has strong possibilities.
29. I feel we are seeing a resurgence of the private Club life. Clubs in general are grasping the need to engage the whole family and see success's from doing so.
30. I watch the growth of the multi-sport facilities, and their size, scope and level of interest by the market says that we have our work cut out for us as a simple dining and business club
31. I see this type of club. People are not able to set aside 6 hours for a weekend round of golf. Family activity will become more important.
32. Find your center and do not try to please every vocal minority, you cant afford, nor can you maintain knee jerk individual agenda initiatives. Value Legacies but initiate new traditions and programs!
33. Our city club has been growing based on the special dinner events such as wine dinners and personalized planned custom small events for members.
34. Stay relevant
35. Highly active family programming and must be creative at attracting and maintaining members. Excellent F&B and service a must.
36. Need for convenience to members' home and work to combat busy lifestyles of younger professionals.
37. If it has a resort feel like most Vegas hotels. It should be a hit
38. For Circus Club our goal is to get the Club back to where it should be regarding maintenance and the little touches that make a club special. With our new facilities director we are addressing years of neglect and poor maintenance practices that have taken a toll on the look and feel of the Club. Members are noticing the changes and feel better about the direction of the Club.
39. Golf is still king here even though we have awesome facilities for other athletics and social events.
40. Not in a position to judge.
41. I believe that many clubs can be successful with this so long as they are offering children/family programs on a frequent basis. If there can be some alternatives for the golf such as simulators and other physical game activities, that will provide options that will draw members.

42. A place that is an extension of the member's home, a place to entertain without the hassle, a place that provides the "box of ingredients" but allows the member to take credit for the work. People want to entertain, but no longer have the time to do so.
43. Golf will always have strong demand, but the multi-club members will select which club to leave to join these new urban clubs
44. I see them becoming hospitality centres
45. As long as they create belonging, community and family activities they still can be strong
46. Movie theater, Indoor sky simulators, kiddie pools with slides & waves, the "death" of the DVD rental business, grab & go food options, healthier eating, paddle tennis.
47. Facing lots of challenges as the expectation change of what membership means to the future urban dwellers
48. Needs to offer year-round and very diverse amenities.
49. Golf simulators, a resurgence of racquet ball/squash, classes in beer/wine making, cooking classes.
50. Need to reinvigorate offerings for busy families
51. Needs to combine contemporary activities and offerings, technology for members to easily connect.
52. We are Rural
53. Well managed clubs with no debt and strong community ties will thrive
54. Will need to provide programming catering to a younger clientele with shorter time availability.
55. That's not who we are - good luck
56. Success because time for golf is an issue
57. No comment - no experience
58. Attractive option because it is an exclusive / special offering
59. Don't feel such a Club will be successful
60. I believe they will do well because golf is a major consumption of time, real estate, labour and cost. Diverse alternatives may cater more to the whole family.
61. We are very stable and as long as there is a level of prosperity in our City, there will be strong demand for what we offer. The next generation is having a harder time committing to a lifetime of club membership though. At some point, we may need to consider premium-priced membership opportunities with shorter terms of commitment. People are more likely now to change career paths and cities - it is hard for young people to buy-in to a non-equity club, knowing that they may not stay in our city.
62. Fitness clubs are filling that role. I see the future great club being like a Lifetime fitness with a golf course on property.
63. Very Bright - strictly golf only clubs (like ours) must expand facilities to attract more members / higher percentage of our community
64. Community building, creating the new neighborhood as important as ever.

65. Decline in use
66. Seems to be growing as the trend is with people moving back downtown. That trends seems to swing back from time to time but seems to fit the lifestyle of many right now
67. Club's that offer "Experiences"
68. Social aspects of the club have become more important to our members than sports activities. It used to be that golf was the #1 most important department at the club. Dining and social aspects have now jumped to #1. I believe this will continue with the time crunch we are seeing around in society. Still have to have the other sports activities but it isn't the main driver anymore.
69. Definitely.
70. Not sure how it survives without amenities or spots and recreation.
71. This could very well be the next trend for clubs. Younger members prefer a well-rounded offering of amenities that include hiking, biking, fitness, aquatics, wellness, etc. However, while the national trend for golf rounds is down, our club is seeing a fairly steady trend of consistent rounds year-over-year. We continue to encourage new golfers to start playing the game and offer more opportunities to play shorter rounds (3, 6 or 9 holes). Participation in the Operation36 program that we started last year grew significantly this year and we expect it to grow in participation levels again next year.
72. A positive trend here with so many golf options.
73. The value of a private club is a sense of belonging which has more competition with on-line options. With that being said, although technology is not going away, I think more and more people will want to be "disconnected" and will crave human interaction.
74. I was concerned 5 to 8 years ago, but with proper service, programming, & branding, we are doing well
75. Could take the place of fitness memberships
76. Next generation will want better fitness facilities and more activities that create a more unique experience.
77. Not for us we are land locked and a golf club
78. Focus on lifestyle, includes all amenities and services catering to your club demographic.
79. I think these clubs will have good success
80. Make it Family Friendly with lots of activities for the Children
81. I can see it being a strong possibility; attract young generations now; make it more than dining; create social atmosphere and sense of belonging.
82. Probably it would be very successful!
83. They will have to place a lot of focus on fitness and a great dining experience with a lot of casual offering also
84. It will remain stable as golf creates a time scarcity issue while activities at urban clubs does not - members can go for short periods of time

85. This area is becoming more in demand as more options available at a shorter time commitment, as well closer to home and work
86. I think with Top Golf's success, more young people will migrate back to golf. Top Golf has put fun back in the game and introduced young women to the game. I think clubs without golf will have some success in large cities, but so much in the urban areas.
87. We are doing just fine without golf, maybe even better than clubs that offer golf. I don't see that changing with the next generation.
88. that is us now...3 year waiting list, very busy engaged membership. have worked in golf my entire life and can say it takes up too many resources (costs to provide the experience) and takes up too much time for our members to enjoy.
89. So BRC is that club. We have stayed pretty consistent. To be competitive we will have to provide a higher level of service and always be show ready without being stiff. I think that the future of these clubs will be offering great dining, being in tune with trends while keeping traditions and being forward focused on how the next generation of members communicate and spend their free time. I truly believe we could be a great option to them if we can get away from the idea that we are "stuffy" and antiquated.
90. Probably more affordable and appealing for typical family
91. Entertainment. Family oriented. Tech Savvy. Interactive
92. Struggling unless they have all the other amenities and no debt
93. no real opinion.
94. Think it's has legs but it has to be very nurturing. The generation coming into club membership is a very entitled bunch.
95. It is harder to convince younger groups of people to be committed to anything!
96. Not sure on this
97. An interesting question...for a country club sans golf I would see a difficult time figuring out what the unique selling proposition would be.
98. Can't see it
99. Depends on too many variables, that said I don't see golf being a necessary activity to drive a club's success
100. Positive.
101. Since we are a golf only club, I don't see them as competition. Our members don't care about having fitness at the club according to our surveys.
102. Limited future. Perhaps more 9 hole courses.
103. Growth
104. Very unstable future
105. If done right, can be successful.
106. The club that can offer convenience of use; childcare; fitness and racket sports will do well.
107. Not my cup of tea. Everything but golf? Good luck.

108. We must be lifestyle clubs. We have to include every possible service and amenity including physicians and therapists. Total wellness with a great Social flare. It is necessary to get away from the traditional offerings and have a great restaurant, not just the restaurant at the club. Hire top shelf professional chefs, fitness professionals, and managers that think outside the normal operating box. Know that you make your money in dues and all else the club offers are amenities. Push F&B quality, not bottom line to help sell more memberships and make more on the food or drink you sell. Think Amenities!
109. Very good depending on management and board leadership
110. Competition is fierce and all clubs will have to innovate and work hard to deliver the best quality products and services. However, people (members) will always pay more for a better service and recognition.
111. Continued growth.
112. You need to offer family activities and varied activities to keep members interested.
113. Our club does not have golf or wellness, we focus on doing what we do, which is food and beverage, and we are the best at it, the next generation of members still want a refined place to entertain and a place they can bring their guests to and be proud. Excellent service and culinary standards are still relevant.
114. A social place for gathering, networking and relaxing
115. Could survive based on their positioning in their marketplace. Golf is becoming less of a draw when couples make the decision to join.
116. At our club, golf is still the major motivator to join, without it, we wouldn't have a club
117. The decline of golf will occur and there are too many golf course per capita in some regions of Canada. Some clubs will be closing.
118. Not sure
119. Promising
120. Not much for me to comment on here as this is something that hasn't really taken off here in Ontario (Western Canada would be a different story).
121. No strong feeling either way
122. Social clubs like the Soho House in Chicago are a step ahead of traditional city clubs.
123. Can't comment
124. Not our model
125. They already have them, Athletic Clubs. Golf is our core but we are transforming the Club with new aquatics and fitness. Need to improve our tennis.
126. I think it will have a significant impact on our club. We are already seeing a resurgence in our local market.
127. Possibly a more arcade style approach.
128. Health and wellness remain to be a big focus for growing clubs. I also believe that racquet sport growth is important as well.

129. Wellness and family focused programming, sense of community, convenience, security, and fun!
130. If done well and has a good location, it should prosper - see the Briar Club in Houston.
131. Fitness, wellness, open casual work spaces, fast grab and go items, simulators and electronic games, casual dress.
132. You must have first rate facilities and cater to families
133. Would not fly at all in our area.
134. Depends on what other Clubs are available in the market and what amenities they offer
135. Don't know
136. Family focus, technology friendly, dining focus, community focus, fitness focus
137. No comment
138. No real opinion
139. I'm not sure I'm smart enough or informed enough to have a fully developed opinion, but I think this is an area that could be a growing one in the future. But I would not limit it to Urban areas. I believe there are many people who are not activity minded but who would welcome the sense of community and entertainment a private club offers.
140. No opinion
141. May grow if there are enough new activities and amenities to compete with public offerings
142. It will be the formula of the future. Families want a sense of community where they can develop relationships. The lack of golf is not a deal-breaker. They can play at many daily fee courses.
143. NO IDEA
144. Unique opportunity to be an anchor in the community, and not just an elite entity.
145. Either need to be a super club or a high specialty club.
146. I believe that city and social club will continue to survive, they create a safe place and culture for tis ever changing environment we live in. There is comfort in that which create the value to the members.
147. Family events and activities will continue to draw people to the club. Parents want their children to be social and interact with other children while leaning a sport or new skill (cooking classes etc.). Our pool complex saw a large spike in usage this past summer and I believe that will continue to be the trend.
148. We are already experiencing that with members joining who don't play golf, and we don't offer social memberships. We are continuing to grow use of non-golf activities and focus on building community within the club
149. There is a demand for professionals who desire a place to be with similar folks.
150. Very important with the millennials. So long as you integrate technology and career networking events

151. I think that is a huge opportunity for the industry and certainly will entice the next generation of members to join a club like that instead of the traditional country club with golf.
152. People looking to live longed. Read the book Brain Power...community, events, food, interest
153. Heavy technology, sense of community, ease of access to fitness and dining
154. Zero Growth
155. A haven away from smaller residences. I see city clubs as critical to this for work health and pleasure.
156. Haven't really considered
157. Very important which is why we have a new short game practice area, second putting green and wellness/fitness center all coming online in the next 2 1/2 years.
158. We do not have golf and we have a full membership with a waiting list. I think offering activities offered across the whole membership demographic (retirees, working, singles, empty nesters, young families, children, etc.) is key to attracting and retaining members.
159. That is a different proposition that doesn't attract the golfer and separate needs outside the game. I don't think facilities of that nature take away from those that want to either join a club or take up the game.
160. I'm fortunate to work at a beach/yacht club which does not have golf, so we have to think outside the box on attracting the next generation. Lots of family and kid focused activities. We are a casual club. Our members like the fact that they do not have to dress up to come to dinner.
161. I BELIEVE IT WILL BE AN ATTRACTIVE VENUE; WHILE GOLF STILL IMPORTANT TO MANY, NOT A CRITICAL AMENITY FOR THE NEXT GENERATION
162. I see that as a limited, short term opportunity. very small niche and must be very unique in offerings, but will work for those passionate about their common interests
163. There is a lot of potential here. Valley Lo in Glenview and Michigan Shores in Wilmette are great examples of vibrant urban clubs without golf.
164. A viable option.
165. We are tried to get the membership to pay for new non golfing amenities but they voted it down. This golf only club is dying!!!! Have to have the other amenities to get the young families to join.
166. They will be at the mercy of the vitality of the urban area itself. If it's vibrant, they will appeal to potential members when they focus on upscale dining and fitness services.
167. I would assume with amenities that match desires these clubs would grow
168. Do not think it will work
169. I still think golf is going to be a major driver for country clubs. a country club without golf will be tough to compete from a dues stand point.
170. These clubs are positioned well for success.

171. Being a city club which is based in the business community, it is only my opinion, but I think there is a need for this type of a club, as I think our next generation is really looking for a place where there is a sense of community that provides them and their families with one stop shopping to meet their families very busy lives.

56. Where do you see private clubs going in the future with membership growth, especially in light of increasing competition from places like Lifetime Fitness, golf's decline, high costs, management companies and continuing country club closures?

1. Challenges. More clubs closing, amalgamation of memberships.
2. If marketed correctly all facilities can survive if they adapt and change. Club's that continue to do things because "that's how we've always done it" will die. More and more clubs will close leaving the strong ones to survive.
3. Our club is located in a fast growing Township 30 miles west of Philadelphia. We only have two other private clubs in our area, but we are the only membership owned club of these three. Our membership is "down to earth" and not the "stuffy" type of club. Very reflective of our area comprised of Limerick, Royersford and Colleegeville PA
4. It is all about improving the member experience. We HAVE to make it nearly impossible for members to leave. We HAVE to determine what each members triggers are that will make them NEED to be a member.
5. The ailing community is losing strength, same as golf. we need to make it more accessible and affordable. purchasing a sailboat is not cheap!
6. Our market is overdue for a correction, but I believe there will always be a place for a premium, private experience. If you don't provide one you are toast
7. Clubs need to rebrand themselves to become the Community Hub for social events, dining, business meetings, banquets, fitness and also golf. Golf doesn't have to be 18 hole competitions all of the time!
8. I see quality Clubs that are well positioned, properly located, well managed and governed and progressive thinking to continue to thrive, while Clubs in poor markets or with bad governance will continue to struggle.
9. Compete with year-round amenities and awesome service.
10. Clubs need to operate in a high level in all areas to drive value and position themselves to attract and retain quality members.
11. Few clubs are growing but costs and experiences are both expected to increase. Like any business know your target member. Focus on pleasing them. Age, education, location and ensure events, activities and experience exceeds their expectation.
12. The industry was overbuilt anyway, so this is just rightsizing. Clubs will have to do more with less and offer the best in the amenities they do offer.
13. Club's that have a clear identity and mission will continue to be successful. The mid-range and low-end clubs will fail.
14. I see well financed and supported clubs continuing to be in demand. The market for a "one-stop" lifestyle community (Club) will remain strong at the luxury level.
15. A more all-encompassing program that the entire family can enjoy. if everyone can be in the space at the same time but not necessarily enjoying the same activity a club will thrive.
16. Clubs still have the ability to be the members home away from home. We must create new and exciting ways to add value to memberships.

17. Membership growth will be stagnant unless club is relevant and with the times. Need to do more with less.
18. Top 5 % will excellent. Bottom 20% will survive. In between, have to be creative to survive
19. I believe in this market by focusing on non-golf amenities the clubs in this area will thrive. However, golf still plays a critical role in Northern Virginia.
20. We are almost at capacity
21. Keeping up with the outside market is important to attraction, now we are dealing with a generation that expects the latest and greatest in amenities and experience. If they do not use it, they don't want to pay for it, so programming is critical to keep them engaged. It is difficult to offer a cost-effective alternative to a single source business model such as a fitness center etc. I think we need to be more creative and diligent in our planning processes to stay ahead of curve and breaking down barriers of a private club.
22. I think that there will certainly be fewer clubs in the future, but the strong, traditional clubs will continue to strive.
23. Again, focusing on what is at the core of Club's; sociability and lifestyle will allow the model to continue to flourish.
24. Flat
25. The number of private clubs will continue to decline. Envision a product that would be semi-private and highly amenitized taking the middle market and fewer exclusive private clubs in larger metropolitan areas.
26. I am confident that if private clubs remain relevant and of value in their target market, they will continue to attract/retain members.
27. Private clubs will survive in the bigger centres providing they stay current, are innovative and proactive, you gotta be looking in the mirror every day whereas when I started in 1989 an annual mirror check was sufficient.
28. Too broad to comment, so dependent on location and relevance to marketplace
29. Must appeal to younger members. In a residential community the maintenance and improvements to common grounds is vital to keep new buyers coming in.
30. John Maynard Keynes--the big fish eat the little fish. The strong will survive. The human spirit will always have a craving to belong---Mickey Mouse Club, YMCA, Fraternity, health clubs, etc. Private clubs must strive to stay current; be vigilant in funding capex--deferred maintenance is the killer (the vortex which defines the Law of the Hole). Quality and a competitive value proposition.
31. We are trying to figure out what the Country Club of Terre Haute can be in the 2020's in Terre Haute, IN. What do our members and potential members want and what are they willing to pay?
32. Social and dining will be the key as well as providing good facilities at a fair price. The conception of value to the membership no matter what the price.
33. Less affluent country clubs will continue to struggle and close or be purchased by a management company

34. I see no growth and some shrinkage. Country clubs will have to be able to offer a wide variety of activities to attract and retain members.
35. I think there will always be a need for private clubs. People like the sense of community they bring. For many members, they don't have a lot of friends outside of the private club. There will still be some closures as the market got saturated but there will always be a need for good private clubs.
36. Were headed back to the 1950's. Private clubs will truly be for the rich.
37. Must increase attractiveness to a greater group of prospects so the club can have more members than before. Gone are the days of staying inside your box and having a limited membership. What is relevant to families in today's age and drives value? Packaged to-go meals, pizza delivery, inexpensive family fun, off-season amenities, etc. More flexible membership options. More casual feeling. Way more focused on socialization and connection.
38. It's a tough business - established Clubs in urban areas are going to survive but many smaller town rural clubs are going to (or already have) make changes in order to survive. i.e.: Private until 1:00pm, semi-private, open dining, etc.
39. In our particular area Clubs are growing. While the growth rate maybe small the years of decline have dissipated.
40. An opportunity for the business club, particularly with the cost effectiveness and willingness of dining/banquet to go farther and do more for less revenue. challenge is the 'knowledge' base and sharing between business executives; am I willing to share my club with my junior executives.
41. Clubs will need to continually reinvent themselves in order to stay relevant. They will need to create clubs within the club-we just added a runabout fleet and a book club
42. Focus on your core and grow from there, when a club starts offering a la carte membership programs it is time to cut out amenities that aren't being used and you can't afford to maintain.
43. Building on culture, prestige, and networking to make the Members feel like they are a part of something greater than what they had before.
44. With more and more people with wealth, I'd assume that the near future looks good. people have \$ and not time, so private clubs offer that save quick close to home haven
45. I think the quality clubs that offer excellent service and build upon traditions will continue to survive and thrive. Lower ends club will also survive, and the middle group will struggle.
46. Continued thinning of the industry. Increased local dining competition will also put tremendous pressure on clubs' competitiveness in F&B offerings.
47. Offer great amenities to compliment the golf course. The club will be fine.
48. Clubs will need to stay cutting edge and offer more at a reasonable price. Our Club is in a bubble we are 97 years old with lots of tradition and legacies. However, we still need to maintain the Club to a high standard that the members expect for this area. For golf courses it is about thinking outside the box -create new activities that do not have to take 4.5 hours, update the driving range to incorporate that Top Golf feel and approach - be different.

49. I see a good future for golf. Believe that Top Golf and places like Top Golf will introduce young people to the game and then they will want real golf
50. Clubs are about social engagement. you don't get that from facilities
51. There will always be a demand for elite, high touch, service oriented private environments. Wouldn't want to be a second or third tier club . . .
52. There is still some market for private clubs. They have to hit a specific niche and be able to produce a high-quality product for the member to justify. Additionally, in most clubs, they will need to realize more efficiencies. Just like the boom of club and courses being built, there needs to be some natural selection with more closures to put the supply/demand ratio back in order.
53. Clubs will need to define who their audience is and cater to that audience. It is a mistake to try to be all things to all people. It is especially important to know what job members have hired their club to fulfill. I recommend reading "Competing Against Luck" by Clayton Christensen. Clubs have always competed, not everyone sees that. But we compete with every restaurant in town and every private course. Our members have always had choices; there is not a product or a service that we provide that our members cannot purchase elsewhere - we need to understand who we are and compete on those terms.
54. Strong Clubs that adapt to trends, commit funding to stay fresh and offer programming that fits all demographics will thrive as those that don't fall to the wayside
55. I see them becoming far more flexible with introductory memberships, try before you buy schemes etc.
56. Need to focus on family recreation and first choice to dine at.
57. Long term membership will be a struggle in the years to come. At this point the upcoming generation like flexibility.
58. Soho House is a good example of a new trend of club concepts, clubs will always be important as a base for people to connect, and also as the family nucleus tends to be difficult to gel as people/family members relocate to other states/countries.
59. I feel club will reflect the rest of society and be left with either High end "status" clubs and small member "run" clubs with the middle clubs being to consolidate to survey and become all in one type clubs. (i.e. "one stop shopping - Walmart Club")
60. Clubs need to continue focusing on amenities and also experiences. Programming is vital to long-term success.
61. Need to find and define the Club's niche in the marketplace.
62. I believe there will always be a market for clubs in the future.
63. Private clubs will need to be a one stop shop for future members offering many amenities and unique experiences to membership.
64. We will hang in there. Sense of community and member ownership is a long play, not flash in the pan.

65. We are a unique property in the Country and thus far none of these issues have impacted us in any significant way, we have no debt so can scale back at any time if necessary, our focus is mainly on the quality of the golf course, that's what the members want, everything else is secondary, limited dining, virtually no outside functions, no weddings, etc.
66. Clubs set in community surroundings will continue, while other clubs, especially those with high dues will continue to decline. Cultural status of Clubs will continue to draw members in the 45-75 age groups. Clubs that broaden their appeal with increased amenities and services will be fine
67. We provide year-round golf and club experience. Without that - we would not have a competitive advantage in the marketplace.
68. Will need to be high touch with the membership, up to date facilities, amenities that cater to less time availability with the members.
69. If you're not improving, you are going backwards but unsustainable debt is a death sentence. Only the strongest will survive.
70. So long as clubs focus on the community and experiential aspects things will continue to thrive.
71. The more varied service offering clubs will be fine.
72. Private Club growth will remain flat - there is still interest but as many are leaving as joining
73. The strong will survive. The weaker will drop off.
74. Possibly considering shorter-term commitments, but at a premium price. Private clubs that have diversity of programming and facilities are doing just fine in Canada. Family-focused programming and facilities keep us relevant. For a similar price tag to a golf-club, we offer much more and for the entire family. In tight economic times, someone might give up golf or travel, but they won't give up swim, skating, music, racquet and sport opportunities for their kids. Those lessons and opportunities for their kids are considered necessities for our membership, not discretionary.
75. Definitely moving into the direction of a "Resort" type of experience. Wellness programs. Exceptional F&B, must be in the top 3 in the area with the best pricing
76. We will continue to see less private club. We still will have the high prestige, clubs in each market. But more golf will be public access with maybe more semi-private membership programs at your average golf club.
77. We are one of the very few clubs wait listed in every category - including Juniors - however - we need to expand and offer additional recreation facilities
78. Family friendly and female focus. Driven by experiences.
79. Decline in use
80. Strong clubs that continue to provide the offerings and sense of community that younger members are looking for
81. We must remain relevant to our members, but we can't try to be all things to all people. The convenience of having more amenities under the same roof will save time for members. If they want specialty treatments, they will go there, and we should not try to offer all of them. This is a fool's errand.

82. Clubs seem to be more important than ever.
83. Private Clubs must develop, adapt and enhance the Member experience through new amenities, activities and events.
84. The reason someone joins a club is more than just for the amenities. The amenities have to be attractive, but the real reason is for the sense of community and safety that a club provides. Our members arrive at our club and breathe a sigh of relief because they know that their children and grandchildren have a safe environment to play in and that the activities are well-run by highly dedicated and professional staff. That peace of mind is not the kind of thing you can get just anywhere.
85. we have skipped a generation and now trying to sell to millennials. I don't think the generation of 40-50 year olds have a positive experience to clubs and a harder sell.
86. I see smaller clubs like ours going away. We have Lifetime, VillaSports and California Fitness and four other courses within 10 minutes of the club.
87. I think the strong will continue to survive and thrive but the weak will go away as people have other options that offer good value.
88. We see a bright future but it will take continued planning, investment and training of staff to remain successful
89. May decline with Gen X and Y who are non-committal. I see clubs joining forces and the development of multi-club offerings for a single fee.
90. It will decline.
91. I think private clubs may continue to decline and golf entertainment will continue to grow
92. Good question; must understand and drive value of membership on a consistent basis, out of the box thinking- for example, we are a gated community and began delivering pizza and Roasted Chicken meals to the membership.
93. It is a complete landscape, clubs need to keep current, keep renovated, have diverse programming and aggressive marketing strategies
94. Clubs must focus on what the membership enjoys about their Club and strive to continue to get better in every way.
95. Make it affordable in the beginning and attractive enough to join. Once in the Club, the value established is directly linked to Membership Attrition. It needs to be fun to be belong with a sense of belonging a key factor.
96. Continued pressure. Clubs are still over saturated in our area.
97. The more amenities and connections, the better. ClubCorp, Union League of Philadelphia seem to have strong models. Create a circle where you are everywhere, they need to be.
98. I see club's membership growth continuing to decline
99. As we have a waitlist at our Club it is hard to comment on such declines
100. There has been an overbuilding of golf courses and once the market readjusts itself with the current trends I see that private clubs will flourish as members will be looking for the safety that private clubs offer.

101. I still see a demand, more from a place of belonging and community. Public sector continues to provide other options and will be the main competition, so club need to focus on member value to set themselves ahead.
102. Membership growth will happen in well know, well financed clubs, but at relatively small rates on an annual basis. I believe the community aspect and social inclusiveness of country clubs will eventually draw more people back to club life.
103. As long as the club offers value and provides for the needs of the members, they will remain strong and continue to be in demand.
104. If it fits the value for members they will do well, focus on culture and sense of community and those clubs succeed continue to provide ways to socialize, as more often than not this is what is missing in society
105. Non-golf clubs that meet family needs will be more appealing.
106. At this time our club is in a fortunate position as a club of 'choice' and attracts a more senior affluent demographic because we are a walkable 9 hole course in a fantastic location...with superb dining.
107. Personally, management companies and Daily fees will be a challenge. Although small, I believe venues like TopGolf may help bring some people into the fold. But I think we will get back to the Pre-Tiger era and Pre Developer Era where there will be fewer clubs, but they will be healthier due to decreased competition. People still want or desire a place where they are known. Where the other members are vetted. Golf will have a bigger adjustment as time will always be an issue but a part of that is also the changing lifestyles of people. With people living to 80 and beyond 40 is now young. Management companies will be something different. They can offer several clubs for "one price", offer more "cookie cutter" services, have more centralized services (billing, AR/AP, reservations, tee times) and carry less inventory.
108. Depending on the area. I would not recommend my kids to get into the private CC business.
109. As long as the management remains in close communication with the members and the community, most clubs should remain in a growing posture. The important fey factor is remaining in close communication with the members and the community. The manager has to know and feel the pulse of the members and the community.
110. Competition is brutal, attracting and retaining staff is nearly impossible and costs continue to rise so only the strongest will survive.
111. Lots of young people have been raised in the environment so they seek it when they can make those choices
112. Definitely an issue in big cities
113. Differentiation and programs that compete with disposable income and time being utilized by millennials. BREAKING THE MOLD of what a private country club is historically perceived as being - create network value
114. We are seeing the consolidation of the industry now with management companies giving owners what they feel like is either economies of scale for expenses and or marketing reach and operational oversight and accountability. Our Club has recently been taken over by Troon and mostly for the reasons I mention.
115. Membership will decline

116. We will continue to see closures as the industry finds its level, with that community is everything and with that, the industry will only get stronger in such a divided environment
117. Skokie is a very special place. Focus on family and women going forward
118. I don't see places that don't have a championship golf course (top 200 courses in the country) any kind of competition for us. All our members want are perfect playing conditions and fast greens.
119. Private clubs are going to have to be increasingly more creative with attracting new members.
120. Re-invention
121. We are a yacht club, and new boating memberships are neutral or declining
122. Private clubs have to offer members a value for their membership
123. The quality Clubs will continue to attract Members.
124. Private clubs will continue to decline because of the above factors.
125. The market will stabilize. Those that should never have been in the golf business will close which is good. Leave good, healthy courses to those that know how to run them. Management companies will continue to operate things like fast food restaurants and genuinely private, stand-alone clubs will find a market for those that truly understand club membership.
126. I would repeat the above stated...
127. This is always competition and always will be - - Your programs, facilities, membership and staff all have to be outstanding and you must differentiate yourself from the competition - - Raving fans (members) are the keys to success
128. The lower quality clubs may have to be closed. This month's Club and Resort Magazine features a club that proposes to sell off 50 acres of land and they are trying to brag about it like a great idea. See page 5. This may be the first step toward eventual closure but may buy them a few more years before disaster. Sometimes you have to create what you want to be a part of. Make something that people with money will want to support. Clubs should be buying property not selling it.
129. Supply and demand are a very hard equation at this time. Maintaining the Club properties and amenities is very expensive. Society as a whole wants everything NOW. My 20 year old children do not go to stores. Everything is purchased online and delivered in a day or two. We serve 250 dinners on Friday and Saturday evening and 200 are served from 7pm-8pm. The conditions of the course have to be an extremely high level. We are now even maintaining fescue areas. Buildings, like homes, are getting old and need repair. Houses in this area sit on the market while townhomes sell as soon as they are placed on the market. Low maintenance!
130. I think community clubs will continue to prosper. Stand-alone clubs are harder to predict.
131. Yacht Clubs biggest competition are other marinas. They compare the rates before buying a club membership. There are generally a lack of slips around so our position is still strong in the market place.

132. Focusing on bringing in the right members, young members, legacy members (club people) and the up and coming leaders in the city or community will ensure the future for our particular club and I would think club's in general
133. As long as clubs recognize what members are looking for in their club setting, there are opportunities to meet the expectations of the membership. Review of costs and providing a reasonable value for the level of service will be an ongoing expectation.
134. Less City Clubs but the best ones will survive and will carry on their mission of serving its members and guests, giving them an experience tailored to their needs. The City Clubs will: 1. improve the multimedia's equipment and facilities; 2. facilitate the accessibility to the Club's services; 3. ease the old club rules to keep up with the rising generations; 4. be and look more modern and up to date (keep a nice balance between tradition and modernism); 5. become the member's own business district and their favorite place in downtown Montreal, etc.
135. The business model needs to change - inclusion is the way forward
136. The strength of the community is as important to the next generation as it was for Baby Boomers. The next generation are seeking the same membership feeling of family as previous generations. Membership will remain strong as long as the club continues to evolve.
137. Overbuilt industry and only the strong (unique and value-drivers) will thrive
138. The strong and vibrant clubs will survive. The marginal clubs will either join forces with another club, or establish an alliance, or cease to exist.
139. The large initiation fees have become problematic for many.
140. Like I said, I believe that there will be less golf Club. There will always be some high-end private golf clubs for the people with more money. There will also always be public golf course (or semi-private golf clubs) but there will be a lot of closure as at this time, there are more golf courses than there is a demand for it.
141. There will always be room for quality private clubs providing amenities that are relative to the member and their families.
142. Member owned country clubs will have a difficult time with the next generation
143. Focus on family and networking, it is key to retaining staff.
144. Unfortunately, due to the costs of joining and maintaining a private club membership, that creates a different and higher set of expectations of members. Therefore, we cannot simply be good all-around at what we provide, we have to be the best. It's not just our golf course - our coffee has to be as good (or better) than Starbucks, our steaks need to be better than Keg, our fitness better than LA fitness... I could go on, but guessing you get the picture. Being the best at 4 things is a much taller task than being the best at 1, which (IMO) really puts us at an unfair competitive advantage. The local steakhouse or Starbucks are not concerned about having the best lawn on the block. However, it's the landscape we are in and we have to play within those parameters. The better we can be at that; we can claw back that competitive edge and be the success story versus the "property sold for housing development" story. just my 2 cents.

145. I believe you have to focus on what you do well, don't try to be or do everything. The private clubs that stay focused on their mission will always do well and should see growth in the future.
146. I believe we will continue to see private club's closing due to different priorities for younger generation. Club's will have to offer more value, enhance the family component to fit into their life style.
147. I think clubs need to reflect on why they exist and how they can possibly be more inclusive rather than exclusive. If they don't stay relevant, then they will not exist.
148. Continue closures of the low to middle country clubs
149. I feel the club's that are run like a business, they can deliver a consistent experience and evolve as quickly as the public competition will continue to be successful. It is about creating value, and in today's world there is just as much value in the experience as there is in the product. If your members trust your staff, fiscally and operationally, they will remain loyal. There are a lot of clubs still being managed by members (Boards and Committees) that are taking shortcuts to save themselves money while tripping over a club's legacy/tradition that won't survive the next 10 years.
150. I hope there will always be a place for clubs because of the sense of community which is unique
151. We have to be better than Lifetime and other alternatives. The best always win and we have to create space and experiences Members can't get outside of our community gates...where we know who they are, what they want and how they want it before they even ask for it. We have to be so good that life without our Club is inconceivable.
152. A generational change from older to younger members will necessitate more family programming and facilities. As golf becomes less of an overall priority aquatics, pickleball, and family event planning become more important to member retention and recruitment
153. I think there will be a place for Country Clubs years to come, the key is to market a number of offerings, inclusiveness, and a home away from home. All we can do to create experiences for our members and guests is what will continue to draw new members.
154. I'm finding members of those clubs wanting to come to a member owned club to have a voice in their club. They want the social connection. I think they will always have the financial leg up, but the members want more and we are seeing them come to us from corporate clubs.
155. They will continue to decline and die a slow death. I just need to ride this pony for the next nine years and then it is the next guy's problem.
156. Golf needs to become more fun with less emphasis on traditional nuances.
157. Societal needs for privacy will continue to grow. I think that we will become a more expensive club with a smaller membership going forward.
158. A high level of recognition and personal touch is very important for most private club members, and yet difficult for most companies. Focusing on this and being progressive in terms of quality amenities and programming will be key.

159. Larger well-maintained clubs with good locations will prosper. Others will suffer, merge, close or being taken over by management companies (and this isn't necessarily bad).
160. Those who invest in capital planning and facility upgrades/improvement with a focus on family centered amenities will grow and survive. Those that do not will not be able to hold on to their "old culture" and still survive.
161. Clubs will remain relevant if we continue to foster great relationships and provide quality member experiences. Social interactions will be the backbone of our business.
162. I think except for community based clubs, they will continue to decline
163. I see the market share thinning out but the better/best clubs remaining for near eternity. In our region (north central) golf seems to be extremely popular due to us having such a short period of time to enjoy the outdoors. However, only the clubs and businesses that offer exceptional service and quick response will succeed because society is becoming very impatient and people want results and want them now.
164. We anticipate a leveling off of membership growth
165. The number of clubs will shrink. The strongest will survive.
166. There will ALWAYS be a place for all kinds of clubs. UNDERSTAND who you are and who you are not. Know your place in the market and do everything not to keep up with the Jones but to fortify your market position
167. Being integrated into community key
168. Clubs need to change their mentality, offerings and cultures to keep up with the trends of the Millennials and value systems of today's society
169. Very few will succeed unless major investments are made to retain and attract new younger members
170. Community... sense of belonging... safety... all will continue to be appreciated and paid for by the 1%
171. Private clubs must address the changing tastes and demographics by evolving towards being more all-inclusive family clubs where golf is a critical core, but where things like Fitness, youth and women's programs and faster and more fun rounds of golf are available. Financially, clubs need to address every aspect of their operations and not accept old norms like "dining can't make money."
172. As long as there is wealth and exclusivity, Clubs will thrive
173. Flat to small increase over the next ten years- beyond that it will become more challenging
174. City Club's will continue to prosper
175. We have to take care of all generations - including our seniors. While we have focused on families, this group feels neglected and is not happy. The reality is that is group is only going to get larger in clubs and we have to figure out how to take care of them. Ultimately some clubs will become defacto retirement communities where we will offer full geriatric services to our aging membership.
176. IT'S A TOUGH SELL! TO MANY OTHER OPORTUNITIES- SOCCER, ETC. AT SPANISH TRAIL, THE CLUB IS THE HUB OF THE COMMUNITY.

177. I see the recent trend of middle class erosion continuing in society, as well as Clubs. There will always be a desire for privileged individuals to have a place that is secure, enjoyable, and exclusive. It is the responsibility of Club Leadership to recognize the patterns and adapt in a time manner. Those that do, will survive and thrive. Those that do not...well, we know what will happen.
178. More business and family trends. A sense of community is a big positive.
179. Continue to be forward thinking and continue to add member value will allow clubs to impact the market. Members need to feel that their expectations are exceeded when they come to their club. If that doesn't happen they will not utilize the club and therefore take their business elsewhere.
180. Supply needs to match demand in this current cycle. Alternative golf such as Top-Golf, offer great entry into the game that will / can lead to new golfers in clubs in the future.
181. Must stay relevant providing more than just golf. Millennial's would rather spend the time with their families. If you are not looking to improve on family type activities, your Club will likely not survive. Year round activities especially in mid-west where the weather is typically only good for 7 - 8 months must find things to keep members occupied. They do not want to pay for something they cannot use.
182. It seems that the younger members (or potential members) want to try out the club before they are ready to commit. The summer preview has been a great way to attract members as it gives them the opportunity to see how much they will be able to use the club before paying an initiation fee. Events for the entire family and staying relevant in their lives is what I believe will help us stay ahead of the competition.
183. I think those focusing on a high quality experience will continue to thrive.
184. Market is getting crowded, have to grow with demands
185. Clubs will continue to be a desirable lifestyle here in South Florida as the next generation begins to retire. We gladly welcome our friends from the North, we have two simple rules....1. don't bring your high taxes here; 2. don't bring your northern politics either!
186. Clubs are declining in popularity due to cost and time. I believe those that offer quality services and premium prices and are positioned in markets that support spending will survive. Otherwise seems low cost and volume may be the only way to survive. This model seems to lend itself to clubs that will disappear in time.
187. I think clubs will adapt to the change in the market. However, the most successful clubs will anticipate the changes adapt and implement new membership offerings quickly. The Clubs that try to stay the same or that get stuck in the tradition of who they have always been, will eventually have to close the doors.
188. Trends continue
189. We don't have a fitness facility so we don't have huge competition in that market. There are 3 golf courses plus our course in town, ours by far is in the best condition.
190. They need to adapt and have the same amenity offerings
191. The offering needs to be unique, inviting yet exclusive and fun.

192. With clubs providing exceptional social offerings and a great sense of community, their will still be a spot for private clubs if they offer appropriate amenities and provide a safe, social, responsible and high quality environment.
193. Creating additional non-traditional revenue streams
194. Still strong. Club is full and we expect it to stay that way but we are still adding facilities to stay relevant and ahead of the competition
195. I think with so many entertainment and dining options available and more coming all the time, there is less a sense of the need to join a club. I think that the strongest, more exclusive clubs with good reputations and selective membership will continue to do well, while weaker clubs will have a harder time attracting/retaining members.
196. The breadth of services is important. Pool, Racquets, Winter Golf, and Kids programs have become more important than golf for attracting members. Our location (wealthy area) puts us in a strong position with 110 applicants on wait list. Keeping facilities updated and fresh is extremely important.
197. I feel the industry is correcting itself from a ridiculous growth in the development of clubs due to great wealth in the 90's and early 2000's. Those that have been around and can survive will see great attraction back to the game. We need to change the financial model of how clubs are managed to attract the younger member. Club culture is the key to sustaining long-term member engagement.
198. The value proposition is key. Each club has to evaluate what they offer to the future member. If a club is basically an all-in-one amenity for a family then that is an added value. Clubs are going to evaluate how the generations to come have changed with technology and lifestyle.
199. THE ESTABLISHED CLUBS THAT CONTINUE TO EVOLVE AND REACT WILL SURVIVE, PARTICULARLY THOSE LOCATED CONVENIENTLY TO THE MORE AFFLUENT COMMUNITIES
200. Private clubs of the future must have: Great Swimming Pool; Great Family programming and dining and events that Lifetime Fitness (the competition killer!) can't do. Other Family offerings - Camps, Fun; Reduce debt to prepare for the next economic downturn, to avoid possible large dues increases.
201. Consolidation of courses will keep happening and management companies will continue to assume control of weaker clubs. Golf participation will be cyclable, as the core values of golf will keep new blood coming back and people will want the respite golf offers. Labor market will continue to be very tight so the importance of retaining and attracting good help will be crucial
202. Lower cost to belong with higher flexibility
203. The strong clubs will survive and the weak ones will end.
204. Each club needs to continue to assess their individual situation, location, competition, demographics, etc. and plan strategically for their future.
205. It will become harder to attract the next generation of club members. Clubs must define their brand and identity and be able to execute the differentiating qualities that make their club special. Club closures help and management companies are not a threat. Our blue state will focus on taxing the wealthy and thus more current and future club members will leave.

206. Focus has to be on Family. We are in the memory business. Not Golf, Wellness, Dining Etc. Each of those touch points has to also include a memory that sets it apart.
207. Clubs will have to seek outside membership to stay ahead of the cost projections.
208. It will have to be about the food and beverage experience and family activities.
209. I think the old school dynamic will slowly go away. Equity/Fraternal clubs may seem risky to future members (current millennial's) pushing more people toward management companies and privately owned entities.
210. I think Clubs will have a rebirth in the future
211. Stable.
212. The high end country club will continue to prosper. It's one stop shopping for so many activities for the family, generally in a safe beautiful environment.
213. Successful clubs will continue to evolve to meet changing demands as they have been doing all along.
214. The clubs that continue to make changes in the way they operate to maintain their relevancy for their members and strike a balance of respecting their heritage and traditions are the ones that are most likely to be successful. find your niche and exploit it and be better than the competition.
215. Flat. Need to have year long activities and multipurpose.
216. Challenging every year

Clubs Participating

Alta Club
 Altadena Town & Country Club
 Apawamis Club
 Ardsley Country Club
 Arid Club
 Atlanta Athletic Club
 Austin Country Club
 Bald Peak Colony Club
 Baltimore Country Club
 Baltimore Yacht Club
 Bay Hill Club & Lodge
 Bayview Golf & Country Club
 Beacon Hall Golf Club
 Bear Lakes Country Club Inc.
 Belle Meade Country Club
 Belleair Country Club
 Beloit Club
 Beverly Yacht Club
 Big Canyon Country Club
 Black Creek Club
 Black Rock Yacht Club
 Bloomfield Hills Country Club
 Blue Hills Country Club
 Boca Bay Pass Club
 Boca Grande Club, Inc
 Boca Royale Golf & Country Club
 Boca Woods Country Club
 Bocage Racquet Club
 Bogey Hills Golf & Country Club
 Boonsboro Country Club
 Boulder Country Club
 Boulder Ridge Country Club
 Brampton Golf Club Ltd
 Briarwood Country Club
 Brightwood Golf & Country Club
 Brookside Golf & Country Club
 Burlingame Country Club
 Butler Country Club
 Calgary Petroleum Club
 Calgary Winter Club
 Camelot Golf & Country Club
 Canoe Brook Country Club
 Canterbury Golf Club
 Capilano Golf & Country Club
 Capital City Club
 Carlouel Beach & Yacht Club
 Carolina Country Club
 Cascade Hills Country Club
 Catarauqui Golf & Country Club
 Cedar Brae Golf Club
 Cedar Point Country Club
 Cedarwood Country Club
 Century Country Club
 Chatterbox Club of Rochester
 Chenal Country Club
 Cherokee Town & Country Club

Cheyenne Country Club
 Claremont Country Club
 Collier's Reserve Country Club
 Columbia Edgewater Country Club
 Columbine Country Club
 Coosaw Creek Country Club
 Coral Reef Yacht Club
 Coral Ridge Yacht Club
 Corral de Tierra Country Club
 Cosmos Club
 Country Club of Charleston
 Country Club of Darien
 Country Club of Decatur
 Country Club of Detroit
 Country Club of Fairfax
 Country Club of Lincoln
 Country Club of Roswell
 Country Club of Terre Haute
 Country Club of Waterbury
 Cullasaja Club
 Cumberland Club
 Cypress Woods Golf Club
 Deal Golf & Country Club
 Del Rey Yacht Club
 Delray Dunes
 Des Moines Golf & Country Club
 Druid Hills Golf Club
 Eagle's Bluff Country Club
 Earl Grey Golf Club
 Echo Lake Country Club
 Edgewood Country Club
 El Paso Club
 Elkins Lake Recreation Corporation
 Elm Ridge Country Club
 Exmoor Country Club
 Fairlawn Country Club
 Farmington Country Club
 Figure 8 Island Yacht Club
 Flagstaff Ranch
 Forest Highlands Golf Club
 Forsyth Country Club
 Fox Hill Country Club
 Franklin Country Club
 Franklin Country Club
 Frenchman's creek
 Fripp Island Club
 Genesee Valley Club
 Germantown Cricket Club
 Glenmaura National Golf Club
 Glenwild Golf Club
 Gold Canyon Resort
 Gorge Vale Golf Club
 Grand Forks Country Club
 Grandfather Golf & Country Club
 Green Tree Country Club
 Greenville Country Club

Grey Oaks Country Club
 Hamilton Elks Golf Club
 Hammock Dunes Club
 Hazeltine National Golf Club
 Headliners Club
 Heritage Oaks Golf & Country Club
 Highlands Falls Country Club
 Hollywood Golf Club
 Hong Kong Country Club
 Hyperion Field Club
 Illahe Hills Country Club
 Indian Hill Club
 Interlachen Country Club
 Interlachen Country Club
 International Country Club
 IronOaks of Sun Lakes
 Isles Yacht Club
 John's Island Club
 Jonathan Club
 Kalamazoo Country Club
 Kennett Square Golf & Country Club
 Keowee Key
 Key Biscayne Yacht Club
 Ladies' Golf Club of Toronto
 La Playa Golf Club
 Leewood Golf Club
 Lewes Yacht Club
 London Hunt & Country Club
 Long Beach Yacht Club
 Long Cove Club
 Longue Vue Club
 Lookaway Golf Club
 Lost Tree Club
 Manasquan River Golf Club
 Manor Country Club
 Markland Wood Golf Club
 Marrakesh Country Club
 Maryland Club
 Maryland Golf & Country Clubs
 Meadow Brook Club
 Meadowbrook Country Club
 Medinah Country Club
 Menlo Circus Club
 Mesa Country Club
 Michelbook Country Club
 Midland Country Club
 Midvale Country Club
 Minneapolis Club
 Mission Viejo Country Club
 Missouri Athletic Club
 Moraga Country Club
 Moss Creek Owners Association
 Mountain Lake
 Naples Lakes Country Club
 Naples Yacht Club
 National Club (The)

North Carolina State University Club
 North Shore Golf Club
 Oahu Country Club
 Oakdale Golf and Country Club
 Oakland Yacht Club
 Oakridge Country Club
 Ocean Beach Club
 Odessa Country Club
 Old Marsh Golf Club
 Ontario Racquet Club
 Orchard Lake Country Club
 Palm Beach Country Club
 Palm Beach Yacht Club
 Pelican Isle Yacht Club
 Petoskey-Bay View Country Club
 Philadelphia Country Club
 Pine Mountain Lake Country Club
 Pinebrook Golf & Country Club
 Pleasant Valley Country Club
 Point Grey Golf & Country Club
 Portland Country Club
 Princess Anne Country Club
 Pueblo Country Club
 Red Rocks Country Club
 Reserve at Lake Keowee
 Reynolds Lake Oconee
 Richmond County Country Club
 Rideau View Golf Club
 Ridgemoor Country Club
 River Hills Country Club
 River Oaks Country Club
 RiverBend Golf Community
 Rivermont Golf Club
 Riverside Yacht Club
 Roaring Gap club
 Rochester Golf & Country Club
 Rockland Golf Club
 Rolling Road Golf Club
 Round Hill Club
 Royal Canadian Yacht Club
 Royal Melbourne Country Club
 Royal Oaks Country Club
 Royal Victoria Yacht Club
 Ruth Lake Country Club
 Rye Golf Club
 Sahalee Country Club
 Saint James's Club of Montreal
 San Diego Yacht Club
 Sandringham Yacht Club
 Sandusky Yacht Club
 Sarnia Golf & Curling Club
 Savannah Yacht Club
 Scioto Country Club
 Seattle Tennis Club
 Seattle Yacht Club
 Serenata Beach Club

Seven Canyons
 Seven Oaks Country Club
 Shadow Glen Golf Club
 Shenorock Shore Club
 Sierra View Country Club
 Silver Spring Country Club
 Siwanoy Country Club
 Skokie Country Club
 Smoky Hill Country Club
 South Fork Country Club
 South Side Country Club
 Southern Hills Country Club
 SouthShore Country Club
 Southwood Golf & Country Club
 Spanish Trail Country Club
 Spouting Rock Beach Association
 Spring Ford Country Club
 St. Charles Country Club
 St. Charles Country Club
 St. Davids Golf Club
 St. Louis Country Club
 St. Petersburg Yacht Club
 Stone Oak Country Club
 Stonebridge Country Club
 Summit Golf Club
 Sunland Golf & Country Club
 Sunningdale Golf & Country Club
 Sunnyside Country Club
 Sunset Ridge Country Club
 Superstition Mountain Golf & Country Club
 Tamarack Country Club
 Tampa Yacht & Country Club
 Tavistock Country Club
 Terminal City Club
 Terrace Park Country Club
 Texas Corinthian Yacht Club
 The Athletic Club of Columbus
 The Bridges at Rancho Santa Fe
 The Carolina Country Club
 The Chicago Club
 The Club at Old Hawthorne
 The Club at Prescott Lakes
 The Club at Ravenna
 The Coronado Club
 The Country Club
 The Country Club at Castle Pines
 The Country Club at DC Ranch
 The Country Club at Mirasol
 The Country Club of Virginia
 The Credit Valley Golf & Country Club
 The Estancia Club
 The Field Club, Inc.
 The Golf Club at Newcastle
 The Kirtland Country Club

The Lakes Golf and Country Club
 The Landings Club
 The Mad River Golf Club
 The Oak Park Country Club
 The Oaks Club
 The Oakville Club
 The Olympic Club
 The Palmetto Club
 The Quarry at La Quinta
 The Racquets Club of Short Hills
 The Ranch Country Club
 The Ranchmen's Club
 The Saint Louis Woman's Club
 The Thornhill Club
 The Toronto Hunt
 The University Club
 The University Club of San Francisco
 The University Club of Seattle
 The Vancouver Golf Club
 The Venice Golf and Country Club
 Timuquana Country Club
 Toronto Club
 Toronto Cricket Skating & Curling Club
 Toronto Lawn Tennis Club
 TPC Toronto at Osprey Valley
 Travis Pointe Country Club
 Troy Country Club
 Turtle Point Yacht & Country Club
 Valley Country Club
 Valley Lo Club
 Venice Yacht Club
 Vicmead Hunt Club
 Victoria Golf Club
 Washington Golf & Country Club
 Waverley Country Club
 Waynesborough Country Club
 Weekapaug Golf Club
 Wellesley Country Club
 West Shore Country Club
 Westchester Country Club
 Westmoreland Country Club
 Weston Golf & Country Club
 Wexford Plantation
 Whitmoor Country Club
 Wildcat Cliffs
 Wildcat Run Golf & Country Club
 Willoughby Golf Club
 Wilmington Country Club
 Women's City Club of Grand Rapids
 Woodside Plantation Country Club
 Woodstock Club
 Wooster Country Club
 Wynlakes Golf & Country Club



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