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SEPTEMBER 2013

The Role of Women In the Success of Private Clubs

Survey Results



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THE ROLE OF WOMEN IN THE SUCCESS OF PRIVATE CLUBS

Many believe that women – who already hold significant decision-making roles in business, industry and politics – will be the key drivers of private clubs' success in the future. To test this belief, Global Golf Advisors (GGA) developed a survey to determine the influence of women on private clubs and to learn what steps clubs are taking to support and grow the number of women club members. This paper highlights the survey results.

PARTICIPANTS

GGA received 222 completed surveys from key executives and managers directly involved with club management.

The participants hold club management positions listed below:

- General Manager
- Chief Executive Officer (CEO)
- Chief Operating Officer (COO)
- Director of Golf
- Key executives of multi-course owner/operator groups

EXECUTIVE SUMMARY

What do women want? Respect...consideration...recognition...and friends. Even without a survey, everyone knows that women wield enormous influence at private clubs. Respondents to the GGA survey observe that women seek a platform for socialization that enables family and friends to have fun together. Managers from many of the finest clubs in North America opine that women want family, friends, fun, fitness and fresh air!

The results of this survey: a) strongly support the belief that women will play a key role in the future success of private clubs, and b) provide club leaders with actionable intelligence to help increase the number of women members at their club. The following trends and key takeaways were unmistakable in the results:

- 1. Men and women join private clubs for very different reasons: women join primarily for the social programming and networking opportunities; men join primarily for golf.**





2. Women have significant influence over the decision to join a private club.
3. Women's influence on the joining decision is increasing.
4. The majority of recent membership sales at participating clubs were directly influenced by women.
5. Only one in four (26%) members at participating clubs are women.
6. While women are under-represented on club Boards of Directors (15%), women's views are fairly represented when it comes to operational, membership, governance and capital decisions.
7. Family memberships are the most effective tool for recruiting women members.
8. Fitness facilities are believed to be the only amenity that will significantly increase club participation among women.
9. A "welcoming club environment" and "overall cleanliness" are more important than any new facility or amenity to women.
10. Programming aimed at beginning women golfers is paramount.
11. Second to Family memberships, Sports and Wellness memberships (with limited golf privileges) will be the most attractive membership option to women in the future.
12. Female club managers believe Pay-for-Use categories and Social memberships will be attractive to women in the near future.

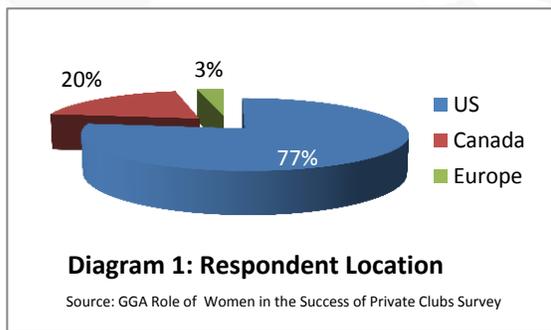




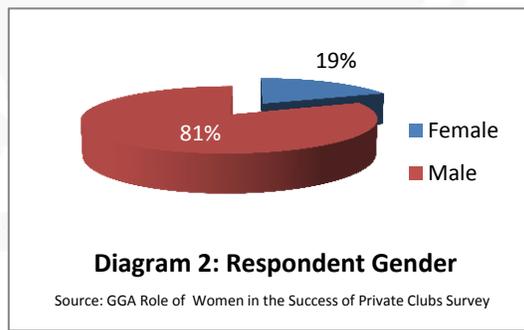
RESPONDENT PROFILE

The majority of respondents (77%) work at clubs located in the United States. One in five (20%) are from clubs in Canada, and 3% are from clubs in Europe. In the United States, 43 of 50 states are represented. Female managers (19% of all respondents) represent such a substantial proportion of the survey responses that GGA has considered variances to each question by gender.

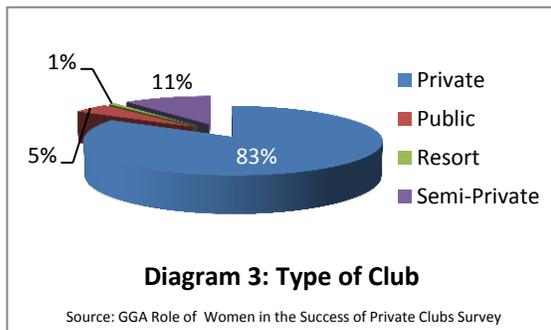
RESPONDENT LOCATION:



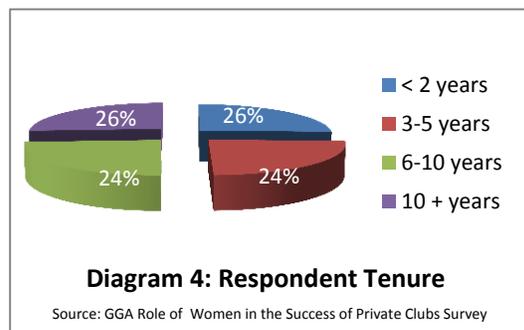
RESPONDENT GENDER:



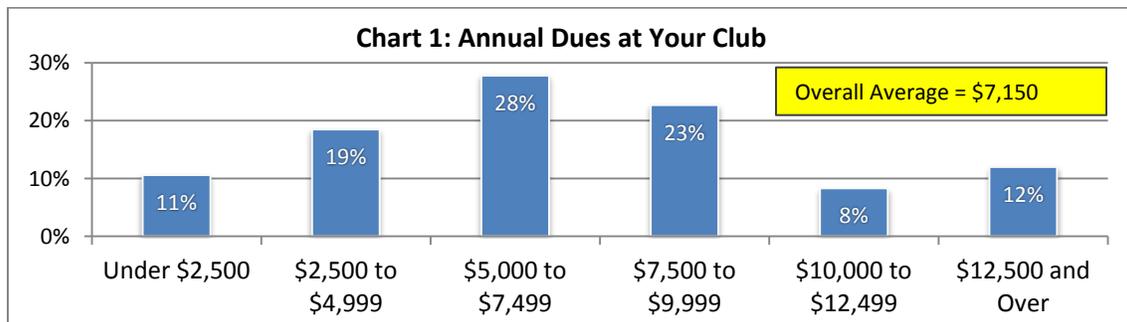
Q: AT WHICH TYPE OF CLUB DO YOU WORK?



Q: HOW LONG HAVE YOU BEEN EMPLOYED IN THIS ROLE AT YOUR CURRENT FACILITY?



Q: WHAT ARE THE ANNUAL DUES FOR THE HIGHEST CATEGORY OF MEMBERSHIP AT YOUR CLUB?



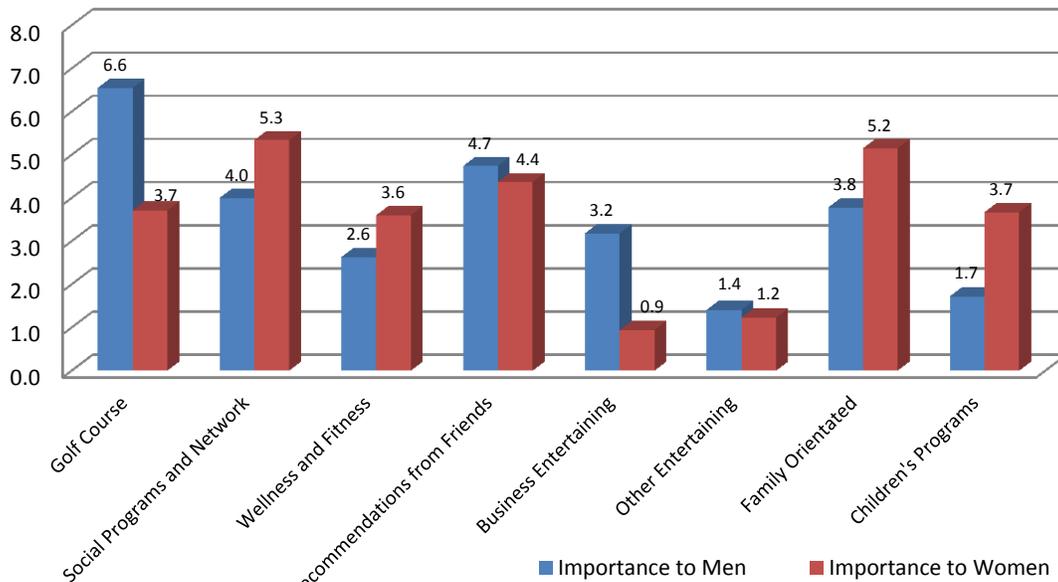
SURVEY QUESTIONS

Q. WHAT ARE THE PRIMARY FACTORS THAT INFLUENCE GOLF CLUB OR COUNTRY CLUB MEMBERSHIP?

Club managers consider the primary factors influencing golf club or country club membership to be very different for men and women. Men are more influenced by the golf course and overall golf experience while women are more interested in the social programming and how welcoming the club is to their family. Listed below are the factors cited by club managers with the most significant variance by gender:

- The golf course is far and away the most important factor for men, but not nearly as important for women (variance in average rating of 2.8).
- “Children’s programs” and a “family environment” are much more important to women than men (with a variance in the average rating of 2.0 and 1.4, respectively).

Chart 2: Primary Factors Influencing Golf Club or Country Club Membership
(8= most important, 1 = least important)



Source: GGA Role of Women in the Success of Private Clubs Survey



Listed below are the primary factors influencing club membership:

Importance to Men:

1. Golf Course
2. Recommendations from Friends
3. Social Programs and Network
4. Family Orientated
5. Business Entertaining
6. Wellness and Fitness
7. Children’s Programs
8. Other Entertaining

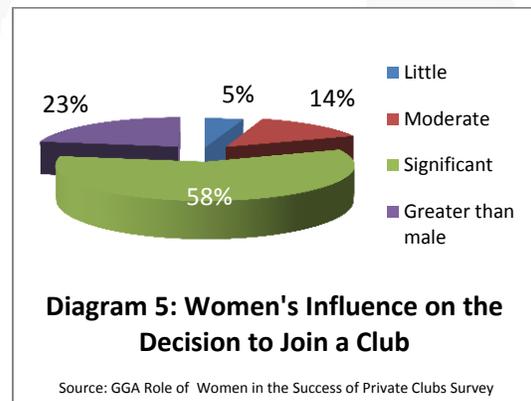
Importance to Women:

1. Social Programs and Network
2. Family Orientated
3. Recommendations from Friends
4. Golf Course
5. Children’s Programs
6. Wellness and Fitness
7. Other Entertaining
8. Business Entertaining

Q. TO WHAT EXTENT DO WOMEN INFLUENCE THE DECISION TO JOIN YOUR CLUB?

Eight in ten (81%) of club managers believe that women have “significant” or “greater influence than male” over the joining decision.

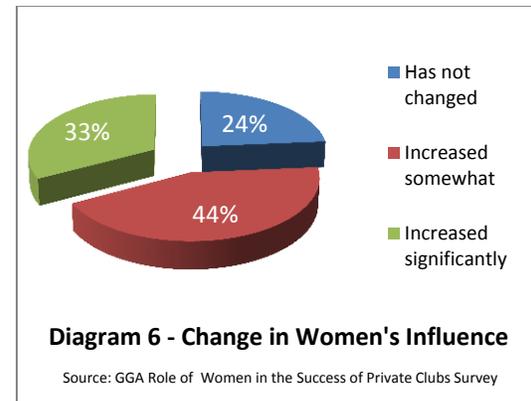
Nearly one in four (23%) believe that women have greater influence than the male member of the family.



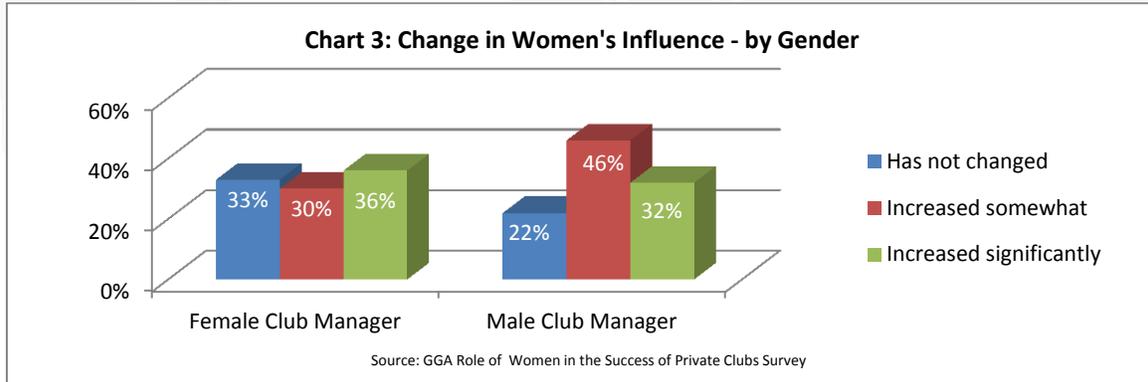
Q. HOW HAS WOMEN’S INFLUENCE CHANGED SINCE YOU HAVE BEEN IN YOUR CURRENT POSITION IN REGARD TO THE DECISION TO JOIN THE CLUB?

More than three out of four (77%) club managers believe women’s influence with regard to the decision to join the club has increased since they have been at the club. One-third (33%) of these respondents indicated that women’s influence has increased significantly.

None of the respondents indicated that women’s influence has decreased over their tenure.



It is interesting to note that female club managers reported a smaller increase in the influence of women at their respective club compared to that reported by male club managers.

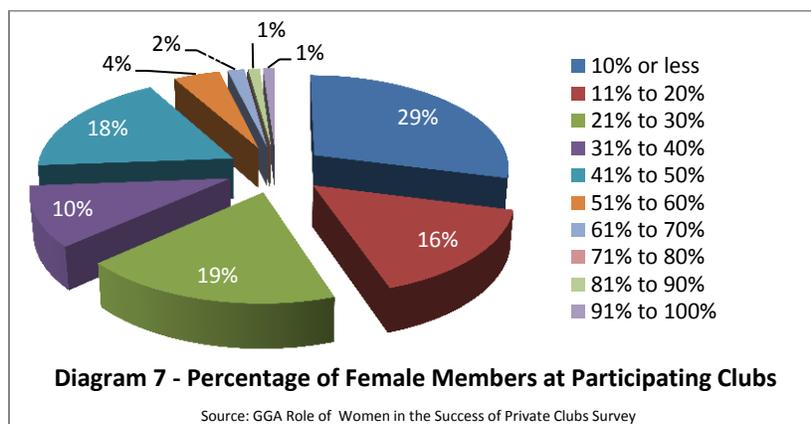


Q: HOW MANY MEMBERSHIPS DID YOUR CLUB SELL LAST YEAR?

Respondents' golf clubs sold an average of 57 memberships during their most recent full fiscal year. Approximately 63% of sales were directly influenced by women.

Q: WHAT PERCENTAGE OF YOUR MEMBERSHIP IS FEMALE?

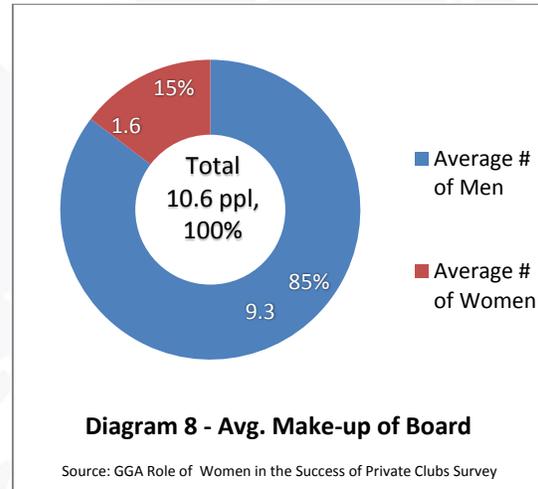
More than one-quarter (26%) of current members of the participating clubs are female. Interesting to note, clubs with female club managers have a slightly higher proportion of female members (27%), compared to clubs with male club managers (25%).



Q: HOW MANY BOARD MEMBERS SERVE YOUR CLUB? HOW MANY BOARD MEMBERS ARE FEMALE?

The size of the average board of participating clubs is 10.6 members – comprised of 1.6 (15%) women and 9.3 (85%) men. Women appear to be under-represented on boards, relative to the percentage of women members.

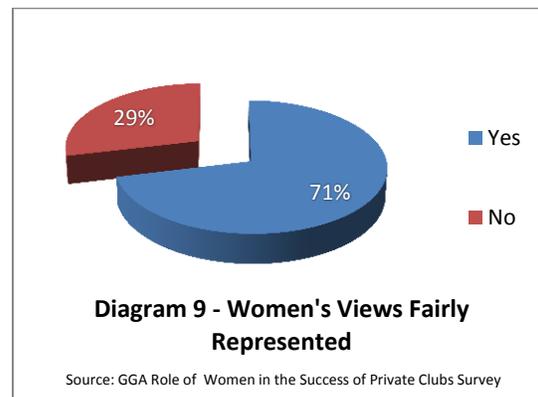
More than half (51%) of clubs have a Board of Directors of 10 or fewer members, with the most common size of Board being nine members (32%). The largest Board size reported was 22 and the smallest was 3.



Q: DO YOU FEEL WOMEN’S VIEWS ARE FAIRLY REPRESENTED AT YOUR CLUB WHEN IT COMES TO OPERATIONAL, MEMBERSHIP, GOVERNANCE AND CAPITAL DECISIONS?

The majority (71%) of participating managers believe that women’s views are fairly represented at their club.

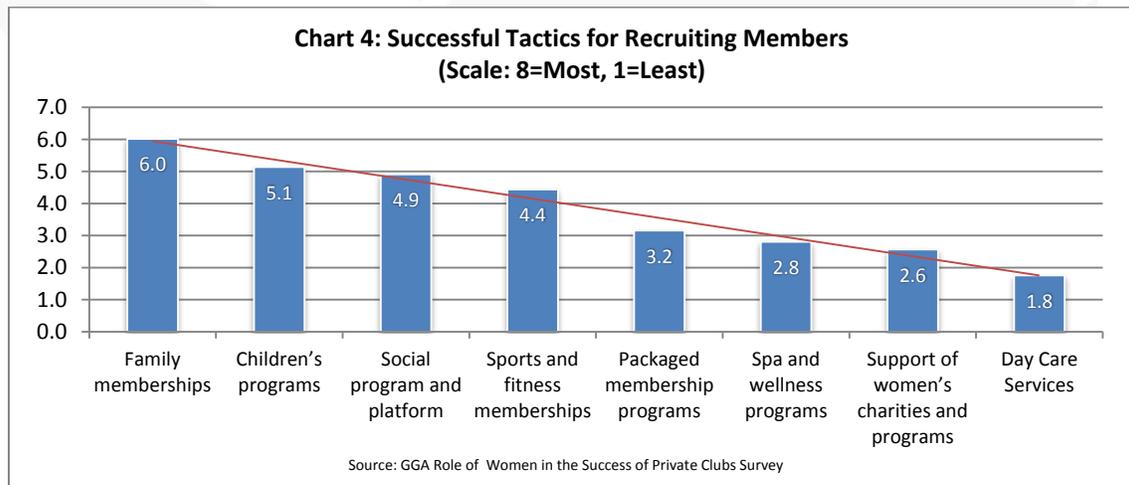
The detailed results varied marginally by gender of participating manager: 72% of male club managers versus 69% of female club managers indicated the views of women are fairly represented when it comes to important club decisions.





Q. WHAT TACTICS HAVE BEEN MOST SUCCESSFUL IN RECRUITING FEMALE MEMBERS AT YOUR CLUB?

Overall, respondents indicated that Family memberships have been the most successful for recruiting female members, with nearly half (46%) of respondents ranking this as the most successful. Listed below is the average rating (out of 8) of tactics used to recruit female members



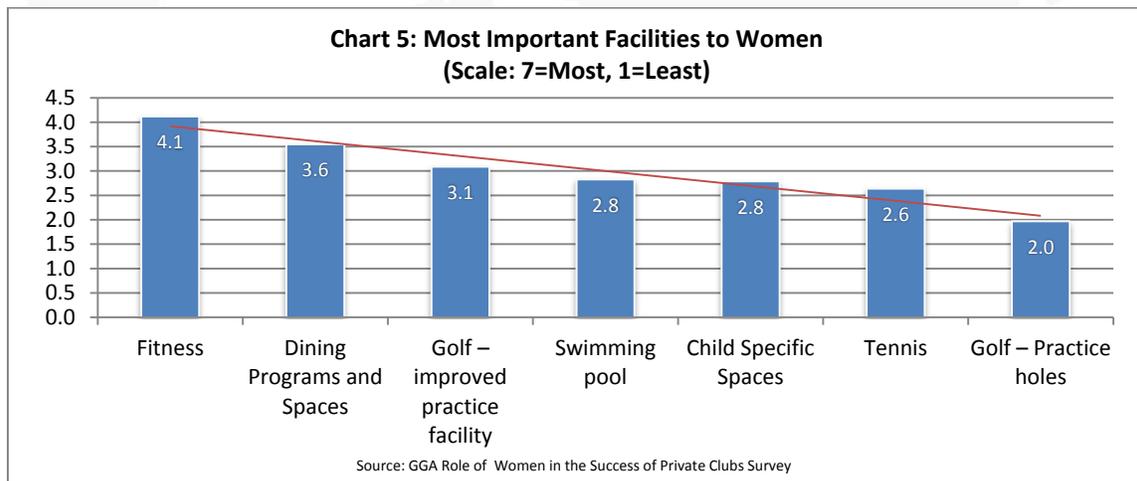
The most frequent responses regarding other successful tactics were:

- Introduction to the game programs (free trial days, promoting the practice facilities/short course, events that reduce intimidation).
- Women's leagues.
- Programs specifically planned for women.



Q. WHAT FACILITIES ARE MOST IMPORTANT TO INCREASING PRIVATE CLUB PARTICIPATION AMONG WOMEN?

Participating club managers ranked Fitness as the most important facility to increasing private club participation among women. More than half (51%) ranked fitness in the Top-2 (30% as #1 and 21% as #2) most important facilities to women. Dining programs and spaces were ranked as the second-most important facility among women (with an average rating slightly above the baseline average of 3.5). The ratings for all other facilities were below the baseline average of 3.5.



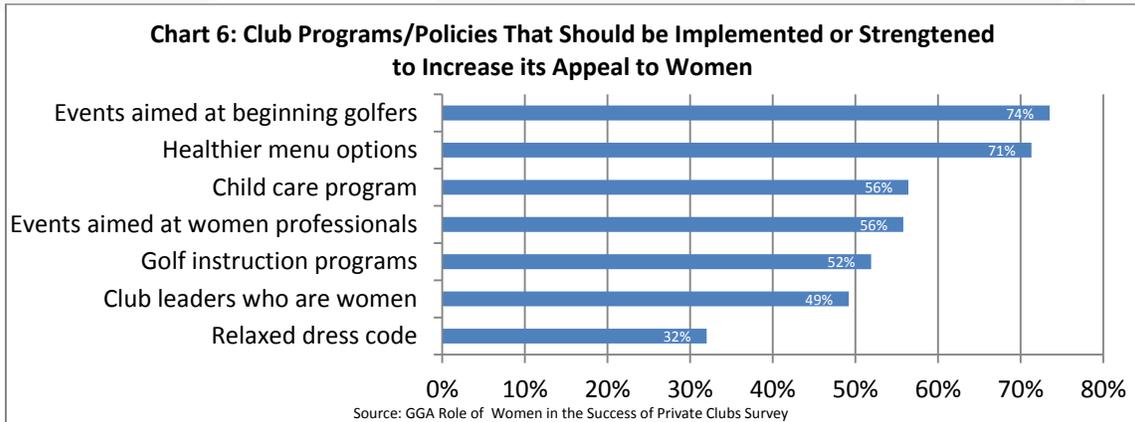
Of the club managers who provided a comment regarding the most important facilities, the most frequent responses were:

- More important than facilities is a welcoming environment.
- Overall condition and cleanliness of facilities.
- Rooms dedicated to arts and crafts, nature and education.

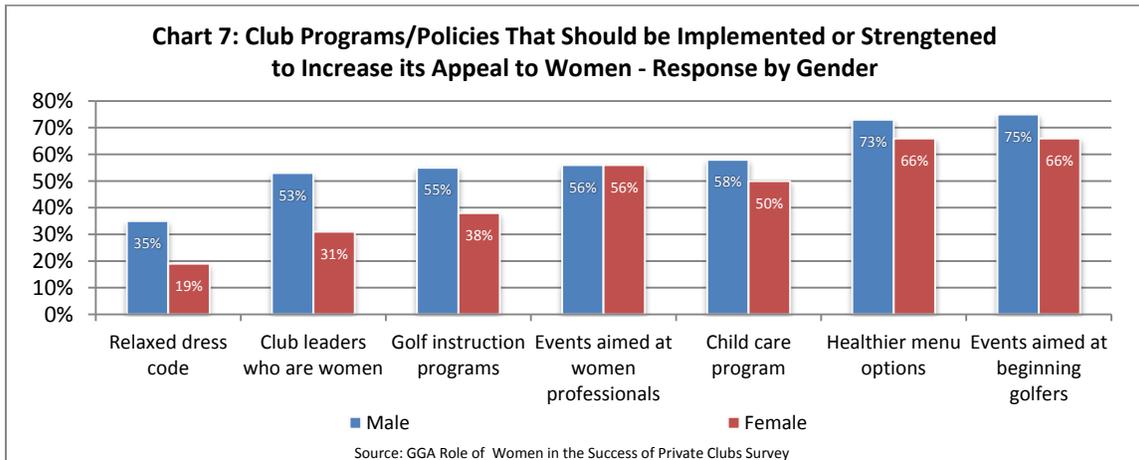


Q. WHICH OF THE FOLLOWING PROGRAMS OR POLICIES SHOULD BE IMPLEMENTED OR STRENGTHENED AT YOUR CLUB TO INCREASE ITS APPEAL TO WOMEN?

Almost three in four (74%) respondents indicated that events aimed at beginning golfers need to be implemented or strengthened to increase the club’s appeal to women. Other programs and policies that received 50% support or more were healthier menu options (71%), child care programs (56%), events aimed at professional women (56%) and golf instruction programs (52%).



The results to this question varied among male and female club managers.



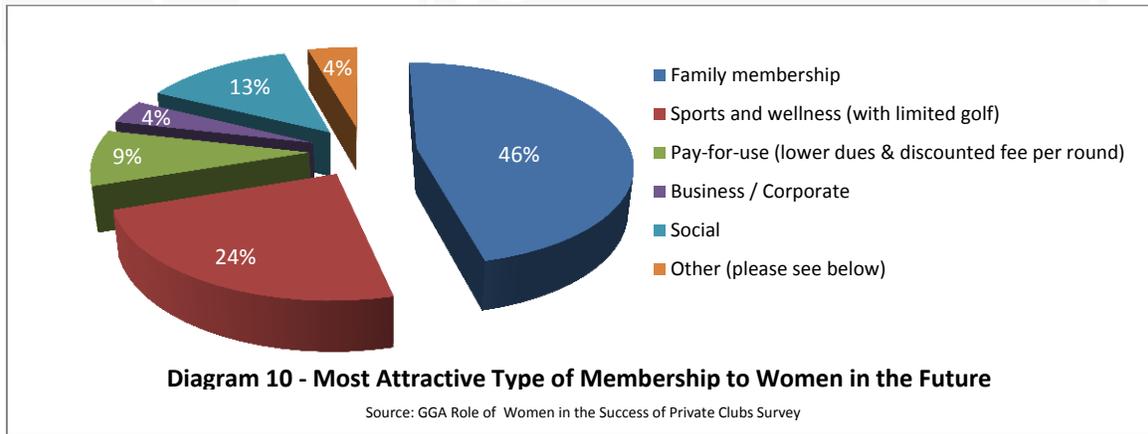
Overall, a smaller percentage of female club managers believe each program or policy should be implemented or improved to appeal to women. GGA believes this can be interpreted two ways:

- i. Female club managers have a better understanding of what appeals to women. As such, this is the more accurate figure to analyze.
- ii. Female club managers have already addressed these programs or policies at their club to appeal to women; and as a result, fewer responded to this.

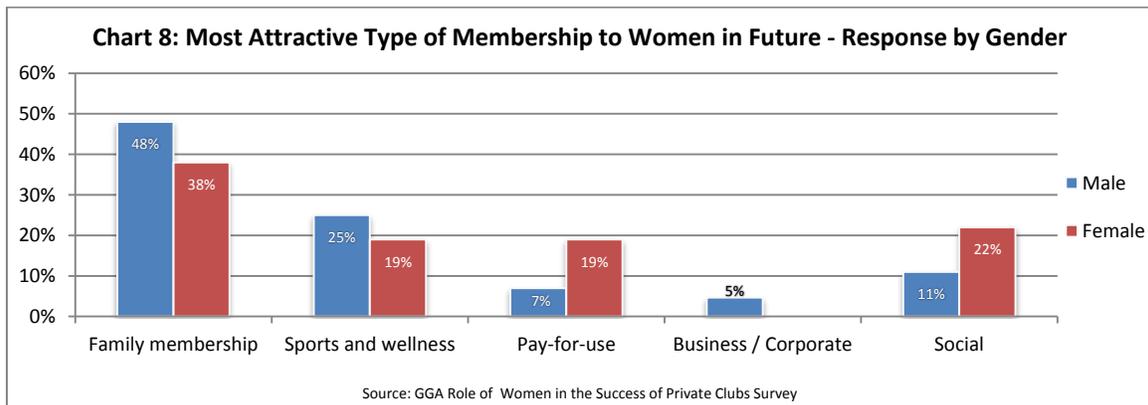


Q. WHICH TYPE OF MEMBERSHIP DO YOU THINK WILL BE THE MOST ATTRACTIVE TO WOMEN IN THE NEAR FUTURE?

The majority of respondents (46%) believe Family memberships will be the most appealing to women in the future. Sports and Wellness memberships with limited golfing privileges received the second-most support (24%), followed by Social memberships (13%). All other memberships received less than 10% support.



The results to this question varied by gender as shown below:



Both male and female club managers believe family memberships will be the most attractive type of membership, although female managers showed less support. It is interesting to note that female managers showed much stronger support (19% vs. 7%) for a pay-for-use category with lower dues and a discounted green fee per round. Social memberships also received stronger support from female than male managers (22% vs. 11%).

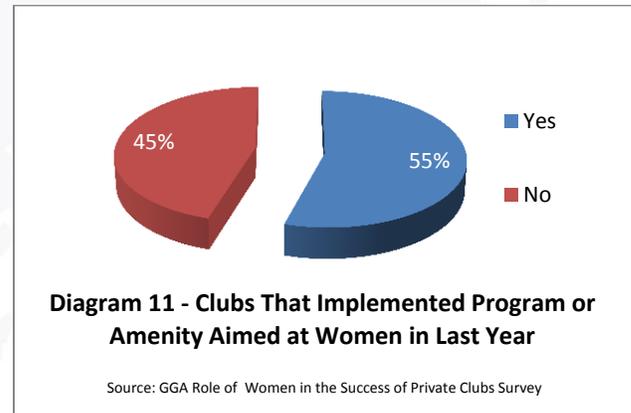


Of the club managers who selected "Other" (4%), the most frequent responses were related to a “packaged” membership that combines family, sports and wellness.

Q. HAVE YOU IMPLEMENTED A PROGRAM OR AMENITY AT YOUR CLUB IN THE LAST YEAR AIMED AT INCREASING ITS APPEAL TO WOMEN?

More than half (55%) of respondents have implemented a program or amenity in the last year aimed at increasing its appeal to women.

It is interesting to note that responses varied by gender. A higher percentage of male managers (56%) have implemented such programs or amenities, compared to female club managers (47%).



The following is a description of the most frequent responses by club managers regarding programs, amenities or initiatives to increase appeal to women:

1. Beginner golf programs (including Get Golf Ready, group lessons, 4-hole leagues, free clinics for women only).
2. Special events (such as nine-and-dine, special drink nights, morning and after-work leagues, and singles events).
3. Vibrant children’s program (with a recreational area, golf camps, etc.).
4. Additional facilities (such as pool, fitness and tennis).
5. Memberships and programs designed at women who play less golf (such as pay-as-you-play categories, limited play and other value programs).
6. Increased representation of women (on the board, committees and key staff).
7. Service initiatives.
8. Healthier menu choices and food programming.
9. Family dining areas and social events designed for young families.
10. Day Care Programs.
11. Multiple tee options
12. Updated women’s locker room to make them on par with men’s locker room.



INSIGHTS AND GUIDANCE

The survey results confirm the hypothesis that women will play a key role in the future success of private clubs, through a significant and growing influence on membership sales.

People have been talking about the importance of women to private clubs for years, and with increasing frequency as of late. However, with existing board participation still heavily weighted towards male members, it can be difficult to know how best to appeal to this audience.

The survey results demonstrate important understandings and help to provide the input clubs need in order to benefit from this emerging trend. Private clubs that understand their market area, and what members want, tend to always have a significant competitive advantage. Clubs should consider re-evaluating their market offerings and communication plan to ensure that 'key messaging' aligns with the survey results.

Guidance:

1. First, share these survey findings at your next board meeting with a reference to your club's current position.
2. Before investing in new facilities, consider some cost effective solutions to increase participation among women. As an example, the survey indicates that "a welcoming club environment" and "overall cleanliness" is more important than any new facility or amenity to women. Ensure any assumptions supporting changes in club direction or club investment are verified and tested with the primary target audience.
3. Leverage the fact that men and women join private clubs for very different reasons, and cater to each group in all club communications and programming.
4. Be proactive and take the necessary steps to get women engaged in the joining process.

If you need some help in determining how to turn the results of the survey into an actionable strategy, please feel welcome to contact the GGA Team.





ABOUT GLOBAL GOLF ADVISORS

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

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