



CMAA's Research Initiative

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What is CMAA Research?





CLUB MANAGERS ASSOCIATION OF AMERICA

Research Initiative

External Surveys

Surveys from academia that feed into CMAA communication outlets

Internal Projects

Surveys to gauge interest of CMAA members for conferences, events and association decisions

Member Inquiries

Respond to member information requests with CMAA resources or an external contact who can help

Aggregate data appears in CMAA member products like: *Club Management* magazine, professional development curriculum and other resources.



CLUB MANAGERS ASSOCIATION OF AMERICA

Annual Reports

- Finance and Operations annual release
- Compensation and Benefits bi-annual release
- Economic Impact Report bi-annual release

Survey participants receive a complimentary copy of static reports



Club Resource Center

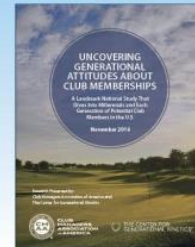
www.clubresourcecenter.org

- Annual club subscription
- CRC subscribers receive industry report whitepapers
- CRC survey participants receive an online interactive tool



Industry Reports

- Niche report on topical information
- Report is complimentary to all CMAA members



Learn more at www.cmaa.org/research



Industry Reports



2016 Generational Insights

Collaborated with **The Center for Generational Kinetics**

- 25 question study administered summer 2016
- **1,003 U.S. adults** (ages 22-70) who are either currently club members or express interest in joining a club in the next 5 years

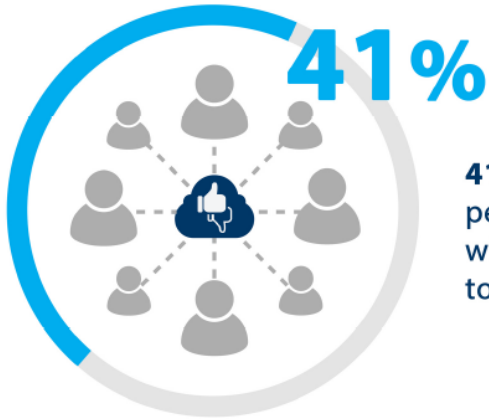
www.cmaa.org/millennials

CMAA University > Resource Library > CMAA Research and Survey Reports



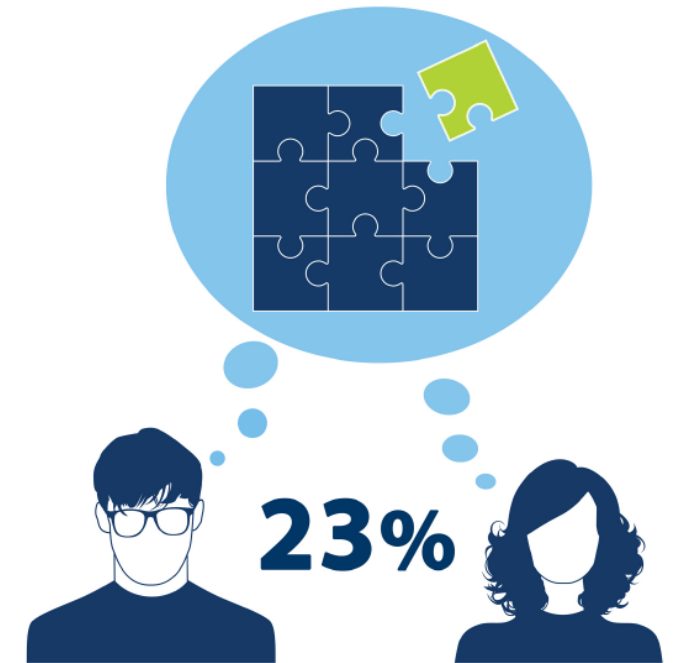
Generational Insights Takeaways

- No one size fits all solution for clubs
- Know your potential member based on life stage
- Allow for a trial period and smooth orientation
- Ask Millennials if they have a friend who might like to join



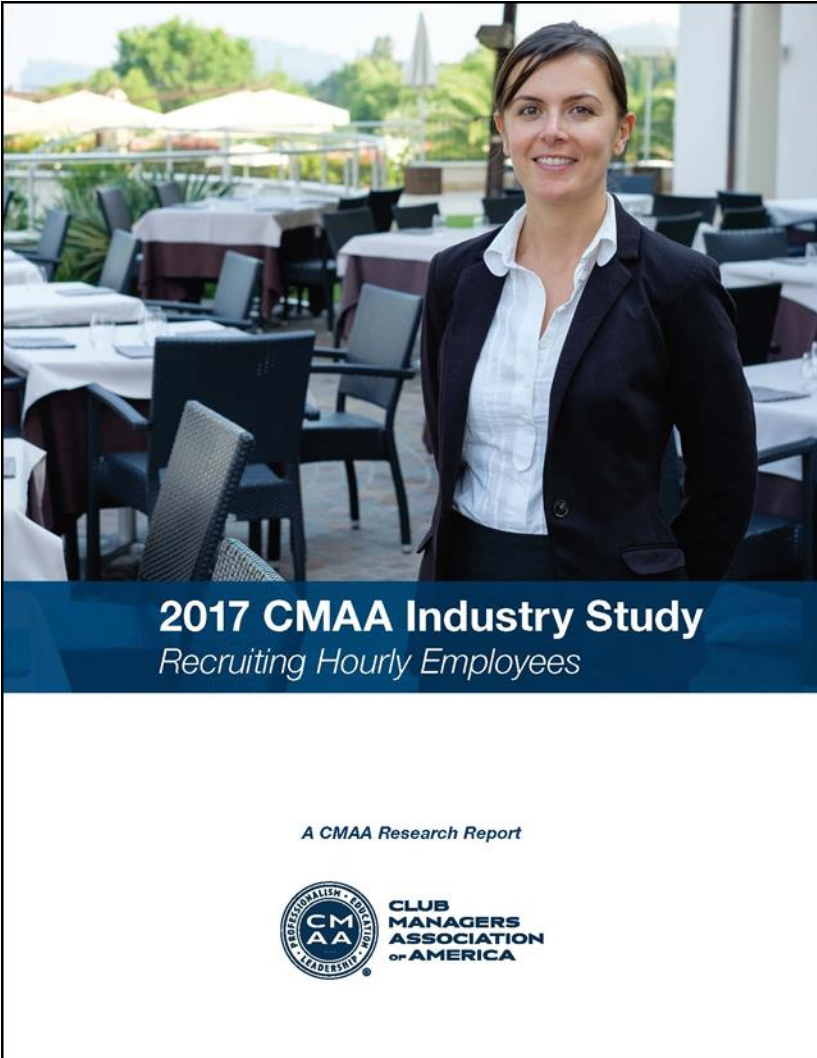
41% of Millennials say personal recommendations are what would most cause them to consider club membership.

The club industry is well positioned to welcome Millennials but it starts with understanding them!



23% of Millennials cite lifestyle fit as the top objection to club membership.

2017 Recruiting Hourly Employees



Survey conducted in house

Data collected from late summer 2017

360 respondents from 323 clubs, CMAA member managers invited to respond

www.cmaa.org/recruiting

CMAA University > Resource Library > CMAA Research and Survey Reports

According to the [Bureau of Labor Statistics](#), the national unemployment rate is at a 10-year low of 4.1 percent.

(February 2018)

Recruiting Hourly Employee Takeaways

- Most clubs evaluate hourly staffing needs on an **annual basis**
- **Top challenges:** Experience **74%**, Cultural Fit **68%**, Local Competition **6%**
- **Top recruiting source:** Job search engines **50%**, Current employees **29%**
- **Employee referral program** are valuable to clubs
- Factors contributing to successful recruitment are some of the same challenges clubs face.

Compensation: Recruiting Hourly Employee

HOURLY STAFF					
	Responses	Average	Median	25th Percentile	75th Percentile
Course/Grounds Maintenance Personnel (skilled)	40	\$16.95	\$15.00	\$14.00	\$19.00
Course/Grounds Maintenance Personnel (laborer)	251	\$12.77	\$12.50	\$11.42	\$14.27
Lifeguard	81	\$11.56	\$11.00	\$10.00	\$13.00
Bartender	267	\$15.13	\$15.00	\$12.00	\$17.50
Housekeeping Staff	245	\$13.66	\$13.10	\$12.00	\$15.00
Wait Staff	255	\$13.38	\$13.00	\$10.33	\$16.00
Bus Staff	161	\$11.56	\$11.18	\$10.00	\$12.73
Cook	294	\$15.32	\$15.00	\$13.50	\$16.83
Golf Operations Staff	195	\$12.06	\$11.92	\$10.00	\$13.02
Personal Trainer	25	\$17.64	\$15.08	\$12.50	\$18.30
Group Fitness Instructor	19	\$18.71	\$15.00	\$13.24	\$25.00
Pilates Instructor	9	\$18.61	\$14.56	\$10.00	\$24.27
Massage Therapist	12	\$18.26	\$20.62	\$10.59	\$24.61
Esthetician	7	\$10.85	\$9.00	\$8.00	\$11.18
Nail Technician	6	\$11.27	\$9.63	\$9.07	\$10.58
Reception Staff	107	\$15.76	\$15.00	\$13.45	\$17.50

2018/2019 Focus on Innovation

On average, club managers rate innovation as

4.52 out of **5.00**

in importance to their long-term success and sustainability of their clubs.

Innovation Labs – hands on workshop style presentations



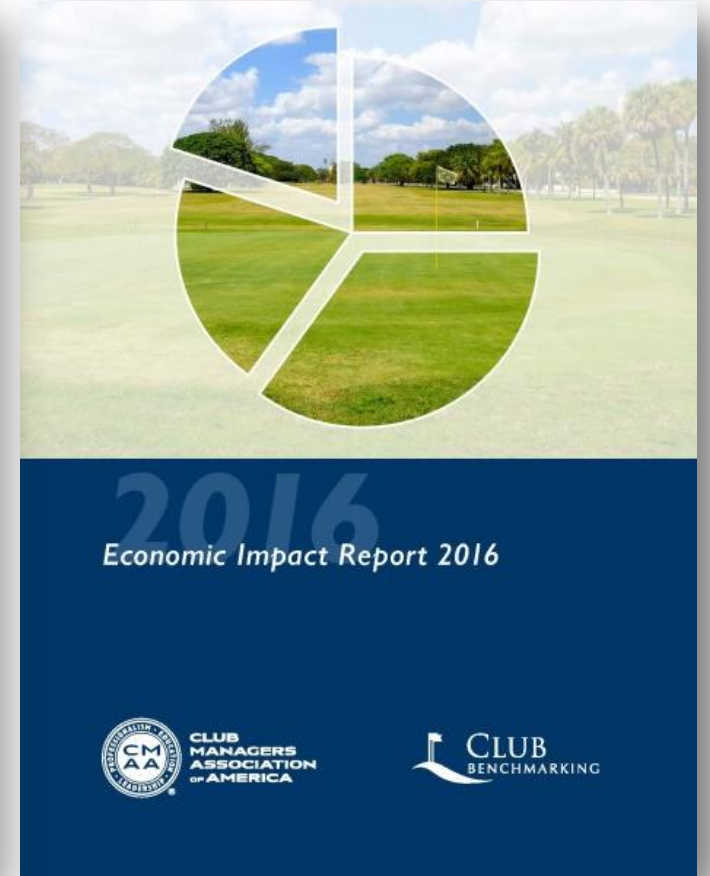
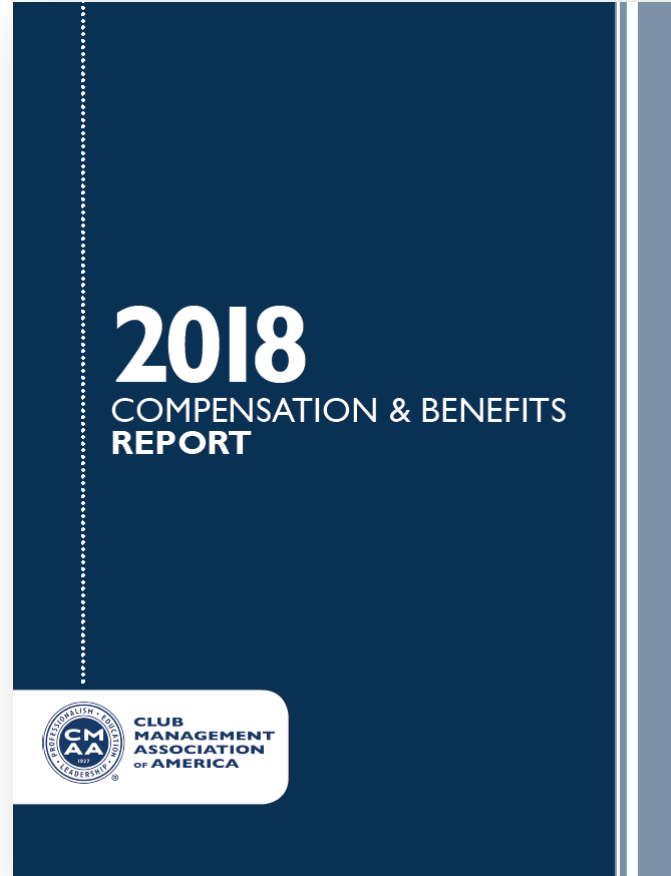
Annual Reports

Annual Reports

Annual

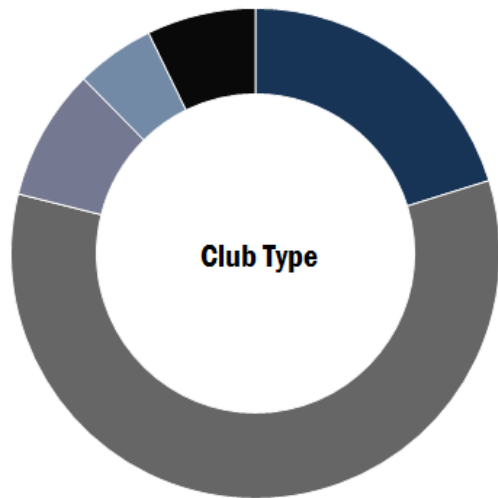


Biennial

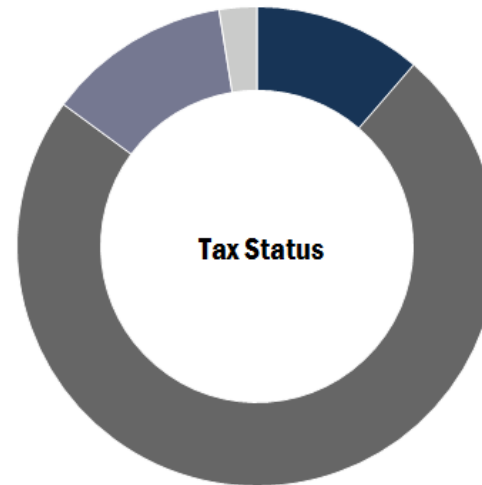


2018 Finance and Operations Report

- Online confidential survey conducted by objective, third-party
- Available on CMAA Research Portal (cmaa-research.org)
- 426 Clubs Participated
- Only aggregated results reported in the final report



22.5% Golf
58.0% Country
10.1% City/Athletic
4.2% Yacht
5.2% Other



7.8% **Membership organization - 277 Taxable**
(ownership is in the hands of the club members)

78.0% **Membership organization - 501(c)(7) tax-exempt**
(ownership is in the hands of the club members)

11.6% **Regular business - taxable**
(typically includes municipal golf courses, clubs owned by one or a number of investors and developer-owned clubs.)

2.6% Other

2018 Compensation and Benefits Report

- Online confidential survey conducted by objective, third-party
- Available on CMAA Research Portal (cmaa-research.org)
- 419 Clubs Participated
- Only aggregated results reported in the final report

NUMBER OF CLUB MEMBERS	
	All Respondents
Average	1,016
Median	580
25th Percentile	400
75th Percentile	939

NUMBER OF EMPLOYEES AT CLUB	
	All Respondents
FULL-TIME	
Average	64
Median	48
PART-TIME	
Average	38
Median	30
SEASONAL	
Average	50
Median	40

Steps to Best Utilize Reports

1

Gather all your financial and operating figures for your latest fiscal year.

2

Calculate the various measures for your club that are used in the report.

3

Determine data comparisons most applicable to your club.

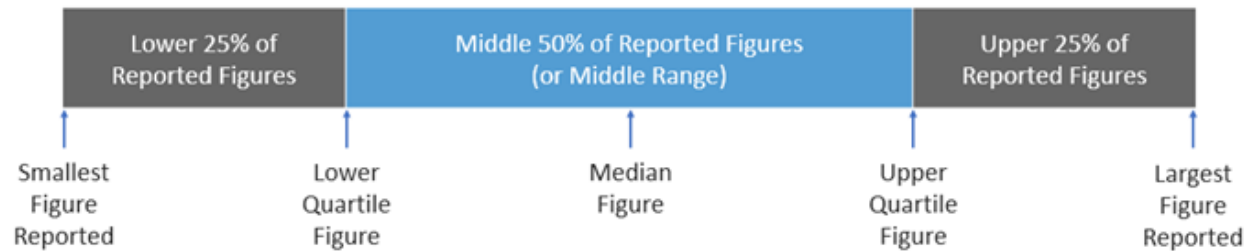
4

Identify your club's strengths and weaknesses.

Interpreting the Data

Means vs. Medians

Payroll expenses per G&A employee	All Responding Clubs	Total Operating Revenue				
		Less Than \$3.0 Million	\$3.0 - \$4.9 Million	\$5.0 - \$7.49 Million	\$7.5 - \$9.9 Million	\$10.0 Million or More
Average	\$100,804	\$65,661	\$85,359	\$100,289	\$107,363	\$118,780
Median	\$98,704	\$58,197	\$83,332	\$98,906	\$103,560	\$119,981
Lower Quartile	\$77,280	\$49,275	\$68,714	\$77,937	\$90,115	\$94,843
Upper Quartile	\$118,347	\$81,182	\$99,279	\$115,000	\$121,217	\$140,156

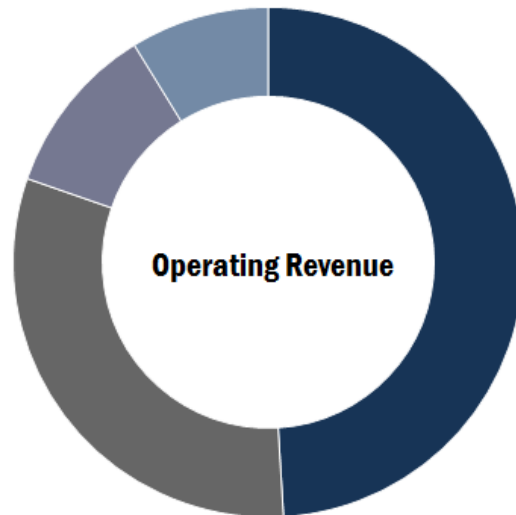
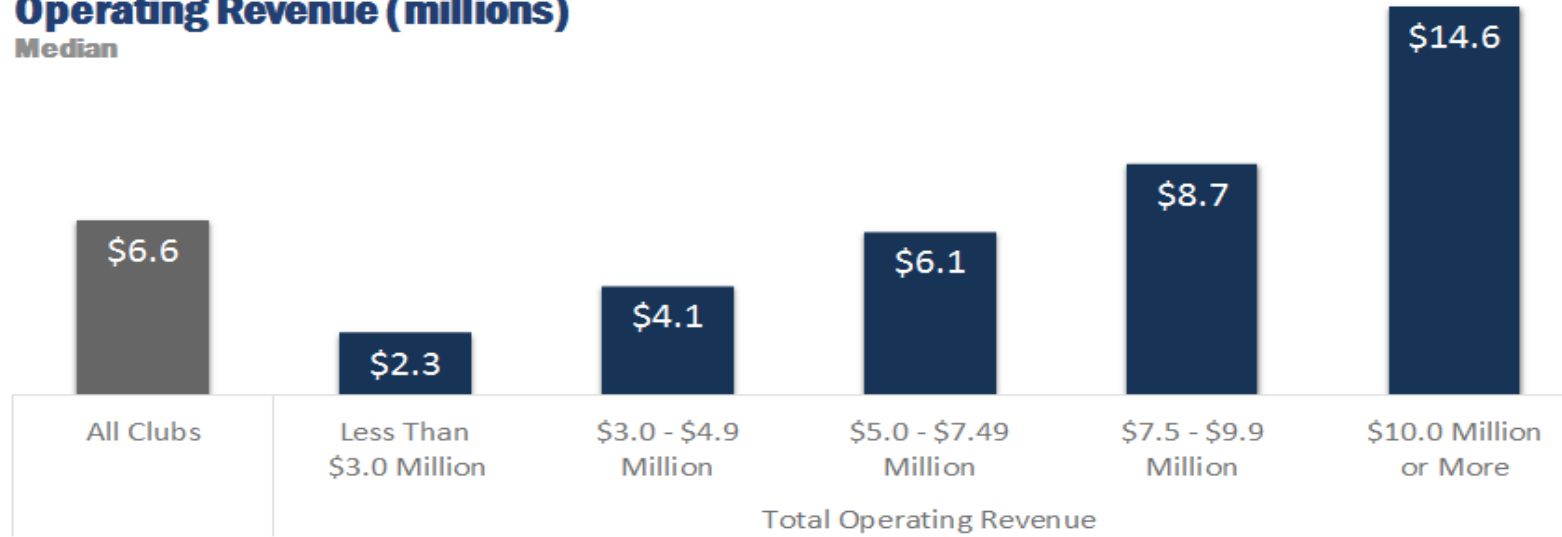


Ratios

- create a common platform for reviewing information and basing decisions

Operating Revenue

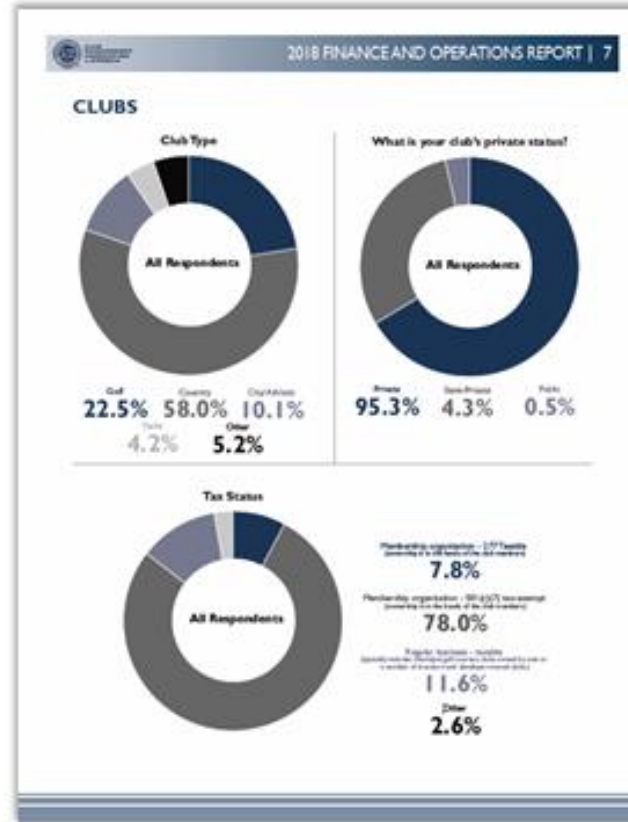
Operating Revenue (millions)
Median



- 49.1%** Membership dues
- 31.3%** Food, beverage, and social events
- 10.9%** Golf operations and golf shop
- 8.8%** All other operating revenue

Participant Benefits

Full Industry Report



2018 FINANCE AND OPERATIONS REPORT | 15

TOTAL OPERATING REVENUE

	All Respondents	Last Year	2017-2018	2016-2017	2015-2016	2014-2015
	Number of Responses	Revenue	Revenue	Revenue	Revenue	Revenue
CLUBS						
Does your club use and follow the Uniform System of Financial Reporting for Clubs (USFC)?						
Number of Responses	412	27	74	83	33	79
Yes	47.0%	51.9%	54.0%	47.7%	74.4%	45.1%
No	53.0%	48.1%	46.0%	52.3%	25.6%	54.9%
Number of years club has been in operation	76	91	45	93	91	93
Month						
Number of Responses	424	29	79	92	33	80
January	1.7%	0.0%	1.3%	2.3%	2.4%	1.3%
February	1.4%	0.0%	1.3%	3.3%	3.4%	1.0%
March	1.7%	0.0%	4.4%	14.7%	16.4%	1.0%
April	2.6%	2.3%	0.0%	1.7%	1.0%	1.0%
May	1.7%	0.0%	1.3%	0.0%	1.0%	1.3%
June	4.0%	10.3%	4.0%	3.3%	1.0%	5.0%
July	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
August	2.1%	0.0%	2.6%	0.0%	1.0%	1.0%
September	13.7%	17.2%	10.0%	13.3%	30.0%	11.3%
October	1.0%	10.7%	4.0%	10.7%	3.0%	10.0%
November	1.4%	0.0%	2.0%	1.7%	0.0%	1.3%
December	49.6%	48.2%	54.0%	47.0%	45.0%	50.0%
Club type						
Number of Responses	424	29	79	92	33	81
Golf	22.3%	27.4%	23.0%	28.2%	26.8%	14.0%
Country	38.0%	44.0%	51.3%	40.7%	57.1%	49.1%
City/Address	10.1%	13.0%	10.0%	4.3%	5.4%	11.4%
Tennis	4.2%	4.3%	4.4%	4.4%	3.0%	0.0%
Other	1.2%	4.3%	4.4%	0.0%	7.7%	2.7%
What is your club's private status?						
Number of Responses	421	29	73	81	28	80
Private	95.3%	99.7%	97.2%	95.4%	96.2%	97.3%
Non-profit	4.3%	0.0%	1.3%	4.4%	1.0%	1.3%
Public	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tax status						
Number of Responses	422	29	74	81	34	80
Membership organization - 501(c)(7) taxable	7.8%	4.9%	4.1%	7.3%	10.7%	4.7%
Membership organization - 501(c)(7) non-exempt	78.0%	86.2%	80.1%	79.1%	71.4%	80.0%
Regular business - taxable	11.6%	4.9%	5.3%	11.7%	10.7%	7.3%
Other	2.6%	0.0%	1.4%	1.4%	7.7%	1.0%

Participant Benefits

Finance and Operations: Individual Club Report

Individual Club Report

*** CONFIDENTIAL ***

Club Code #: SAMPLE

	Your Club	All Clubs	Oper. Rev. \$3.0 - \$4.9 Million	Club Type Golf/Country
CLUB PROFILE				
Does your club use and follow the Uniform System of Financial Reporting for Clubs (USFRC)?				
<i>Number of Responses</i>		412	74	330
Yes	X	67.0%	56.8%	67.3%
No		33.0%	43.2%	32.7%
Number of years club has been in operation				
	86	78	68	72
Fiscal year end (month)				
<i>Number of Responses</i>		424	76	341
January		3.3%	5.3%	4.1%
February		2.4%	1.3%	2.6%
March		9.7%	6.6%	11.7%
April		2.6%	0.0%	2.6%
May		1.7%	1.3%	1.5%
June		4.5%	4.0%	3.8%
July		0.9%	0.0%	1.2%
August		2.1%	2.6%	1.5%
September	X	13.7%	15.8%	13.5%
October		8.0%	6.6%	8.2%
November		1.4%	2.6%	1.8%
December		49.8%	54.0%	47.5%

Participant Benefits

Compensation and Benefits: Chapter Printout

Upper Midwest							
	Responses	Base Hourly Rate				Average Bonus	Average Commission
		Average	Median	25th Percentile	75th Percentile		
Course/Grounds Maintenance Personnel (skilled)	0						
Course/Grounds Maintenance Personnel (laborer)	8	\$10.53	\$11.63	\$9.38	\$12.13	\$450	\$0
Lifeguard	3						
Bartender	7	\$15.63	\$15.00	\$13.00	\$18.75	\$2,350	\$0
Housekeeping Staff	5	\$15.15	\$15.00	\$14.50	\$16.00	\$2,180	\$0
Wait Staff	8	\$13.01	\$12.88	\$10.03	\$15.50	\$2,180	\$0
Bus Staff	4						
Cook	9	\$15.67	\$15.00	\$14.75	\$16.00	\$2,280	\$0

Club Resource Center



Welcome to the Club Resource Center!

The 2017 Finance and Operations Survey full report is now available EXCLUSIVELY for CRC subscribers. Found in the Resource Library, download your copy today.

RESOURCE LIBRARY
This section includes access to all purchased resources as well as those included with your club subscription.
Select

STAFF TRAINING COURSES
Club employees may access all training courses here.
Select

MEMBER EDUCATION
Professional education with education by CMAA
Select



Welcome Levendis Alexa.
We're glad to have you with us.

- My Report Card
- My Usage Report
- My Favorites
- Calendar
- My Notes
- File Vault
- My Certifications
- My Profile



Welcome to the Main Menu. This is your personal dashboard.

Club Resource Center Participant Benefits

Searchable Results

The purpose of the tool is to allow you to create customized aggregations of the survey results. To use this tool, simply select the desired search criteria and then click "Build Report". Created reports can be exported to Excel once they have been built.

Note: to protect the confidentiality of individual respondent data, results will not be displayed when the sample size of a chosen search is less than five responses.

Fiscal Year: 2017 ▼

Number of Responses Matching Search Criteria : 24

Total Operating Revenue ▼

\$3.0 - \$4.9 Million, \$5.0 - \$7.49 Million

Club Type ▼

Golf, Country

Tax Status ▼

All

Course operations ▼

All

Number of Holes ▼

All

Facilities/Amenities ▼

All

Regions ▼

Region 5: Alabama, Carolinas, Georgia,
Florida, Volunteer

Show My Club

Research Department:

Research on CMAA.org: www.cmaa.org/research/

Annual Survey Portal: www.cmaa-research.org

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