



Golf Salary and Benefits Study 2010

A survey of Club Managers in Europe, Middle East and Africa





It was in the 16th Century Sir Francis Bacon stated that 'Knowledge is Power'. Over the years, companies that have a profound knowledge of their markets typically perform better than those who do not. It is also recognised that another key differentiator for a successful company is the ability to hire and retain superior staff.

Over the last few years, we have discovered many companies have fallen behind the market with their remuneration levels and consequently are putting their key staff at risk. It has also been relatively difficult for them to hire the quality of staff when they are lagging the market financially.

As the golf industry's premier executive search company, Colt Mackenzie McNair decided it was necessary to provide an accurate salary and benefits survey that can be used as a benchmark for hiring strategies as well as appropriate retention programmes. We joined forces with the CMAE as we consider this highly valued and trusted association to represent the broadest range of personnel in the golf industry across Europe. This has consequently enabled us to compile this relevant, current, valuable and dynamic information.

We would like to thank everyone who has participated. You have helped make this the most comprehensive salary and benefits survey ever to have been presented to the Golf Industry in Europe.

With best regards

A handwritten signature in black ink, appearing to read 'S. McNair', with a stylized flourish at the end.

Stewart A McNair
Chairman and CEO

Colt Mackenzie McNair

www.coltmm.com



There is arguably no more important component in a successful club business than the people who work within it – as hospitality and leisure activities are the core services that a club provides to its members and visitors.

This study, produced with the help of several hundred club managers located throughout Europe and the Middle East, is a comprehensive analysis of the remuneration packages and benefits of the key members of a club's management team.

We are indebted to CMAE Corporate Partners Colt Mackenzie McNair for their support and sponsorship of this study, and to IFM Sports Marketing Surveys, one of Europe's most respected market research companies for their management of the survey responses, their analysis of the data and the production of this report.

It is our hope that the information contained herein will assist employers and managers throughout our region in the planning and management of their human resources, and perhaps most especially, it shows that the training and development of management team members is a vital ingredient in a successful club.

The CMAE will continue to assist in this important element of the club industry, providing club managers with the opportunities to learn more about their business, improve and develop their skills and knowledge base and perhaps most importantly, provide the certification programmes that will enable a professional club manager to prove their value to their employer through our Certified Club Manager (CCM) certification programme.

A handwritten signature in black ink, appearing to read 'Jerry Kilby', with a stylized flourish at the end.

Jerry Kilby CCM
Chief Executive Officer

Club Managers Association of Europe

www.cmaeurope.org

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1. Introduction

With much of the world hit by a recession in 2009, Colt Mackenzie McNair (CMM) and The Club Managers Association of Europe (CMAE) have identified the need for a salary and benefits survey to be undertaken on an international basis on behalf of the golf industry.

With the support of the PGAs of Europe, FEGGA and the EGCOA (who endorsed the survey), and using CMAE's database of contacts across EMEA, the survey focused on Golf Clubs and Resorts, though included other types of clubs as well (Yacht, Tennis, City etc.), with a potential to reach out in the future to other areas of the golf business, for example:

↳ **Golf Service Providers – e.g. Golf Equipment Manufacturers**

↳ **Golf Venue Developers – Golf Architects, Course Designers & Developers etc.**

CMAE's CEO, Jerry Kilby, believes that the reduction in new golf projects going ahead is not so much of an issue as the performance of existing golf clubs. He perceives the key to be bringing new blood to the sport, particularly younger and more casual players. With this in mind, it is vital that existing clubs aim to improve performance in all aspects with staff key to ensuring that this happens.

The information gathered from this survey should therefore allow those in the industry to understand how to employ the best people for the business, which will in turn enable golf clubs and venues to run more efficiently and profitably – vital in the present economic climate.



2. Summary

2.1 Executive Summary

- 1 The majority of respondents (85%) held senior positions within their golf facility and for most this was a full-time role. As is to be expected, their seniority carried with it managerial responsibility for other staff – over two thirds had at least six employees under their supervision.
- 1 A degree-level education or professional qualification was not a prerequisite of a senior role, and only half of the respondents had either of these.
- 1 Management roles were clearly a long-term career move, with half of the sample having over ten years' experience in golf club management.
- 1 Salaries reflected the calibre and experience of the respondents, with 40% earning in excess of 60,000 Euros per annum. Bonus schemes were most common in the UK/ Ireland but it was not usual for bonuses above 10,000 Euros to be awarded in any market.
- 1 Although those working in the UK/ Ireland had the most opportunity for earning a bonus, they lost out in terms of annual leave, receiving the lowest levels across all markets. In contrast, over half of those from Germany and Scandinavia were rewarded with at least 30 days' holiday annually.
- 1 Other elements of a typical remuneration package varied across the regions, although it was common for complimentary club membership and payment of fees for professional associations to be included.
- 1 12% of the sample had international experience and were not currently working in their country of natural residence. Furthermore, a quarter showed willingness to move abroad. This decision would depend more upon job satisfaction and work/ life balance than on the location and remuneration involved.
- 1 Amongst other employees, Golf Course Managers (Greenkeepers) earned the highest salaries, with a third paid in excess of 50,000 Euros per annum. Assistant Managers and Golf/ Sports Professionals were most likely to sit within the 20,000-40,000 Euro wage band.
- 1 Further down the hierarchy, approximately 60% of Club House Managers/ F&B Managers/ Stewards and Membership Managers/ Administrators earned less than 30,000 Euros per annum, with 70% of Secretaries / Administrators falling into this category.

- 1 Bonuses for other employees rarely rose above the 5,000 Euro level, and, broadly speaking, only 30-40% of these employees would qualify for a bonus scheme at all.
- 1 On average, over 90% of clubs perceived a need for training their staff. Most had a budget for this, although over a third believed this to be insufficient. Where training did occur, it benefited all employees (with Scandinavia being the most likely to focus on management training).
- 1 Nearly three quarters of the clubs included in the survey had a gross annual revenue under two million Euros. Regional variations were evident, though, and one in ten clubs in the UK/ Ireland boasted a revenue of over five million Euros.
- 1 2009 was stronger than 2008 for many clubs in terms of revenues from membership and from visitors fees. Approximately half saw an increase in each of these aspects year-on-year.
- 1 Over half of the facilities retained the same staffing levels in 2009 as in 2008, and one in five increased their number of employees in this period. This bodes well for clubs' future investment in staff.



2.2 Conclusions

Like other industries, the golf industry has felt the effect of the recession, with the UK and golf holiday destinations such as France, Italy and Spain feeling the impact with employee numbers down in these regions in particular. With less jobs on offer in the industry, it is therefore an "employers' market" with the number of potential employees outnumbering the number of actual jobs available.

Looking at the industry from senior staffs' perspective, 2009 was a relatively good year, with almost half seeing a rise in annual membership and visitor revenues. Outsourcing appears to be a popular way of perhaps reducing overhead costs, with nearly 60% outsourcing their food services and over half outsourcing their coaching services. With the market as it currently stands, outsourcing staff appears to be more popular in some areas than employing permanent/ full time staff.

Current employees are well looked after, with many receiving bonuses/ benefits alongside their salary. Many are also offered training, although in some regions this is restricted to higher graded members of staff.

There are some regional differences though:

- 1 Whilst many have a professional qualification of some kind, the type of qualification (degree, PGA Golf, green keeper course, etc) depended on the region. For example, those in the UK were less likely to hold a university degree compared with all other regions, but had the highest percentage that held a different professional qualification. This may possibly be reflected in salary, with those in the UK receiving a lower basic salary on average than their European counterparts, however, they did tend to receive a higher bonus which levelled out the playing field.
- 1 Scandinavia on the whole was generally different to other regions. Due to their severe winters golf tends to be seasonal and therefore employers tend to concentrate more on seasonal staff rather than permanent staff.
- 1 Germany had the highest level of respondents who had a degree. They were also more likely to receive a higher basic salary. 81% of German respondents received complimentary membership of their club – a figure greater than any other region.

This document holds valuable information about the current market – with information on current salaries per region, other benefits received by staff (by different levels) and offers ideas on what different regions are doing in the midst of this economic crisis. It will also help employers understand what they need to offer to ensure that they employ the best people for the job thereby giving their golf club/ resort a head start in this tough environment.

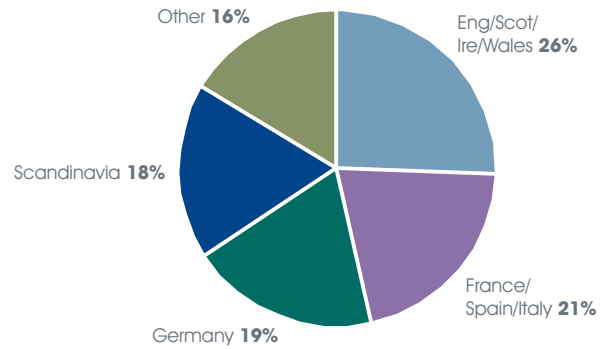
3. Detailed Findings

3.1 Golf Club Overview

GEOGRAPHY

The survey covered a range of countries worldwide, with an emphasis on Europe.

Just over a quarter of respondents were employed by facilities in the UK/Ireland and a fifth worked in France, Italy or Spain. Germany and Scandinavia were each represented by just under a fifth of the sample.

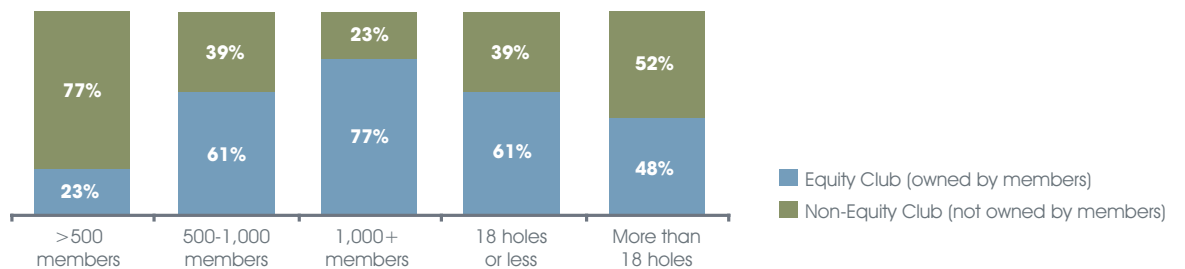
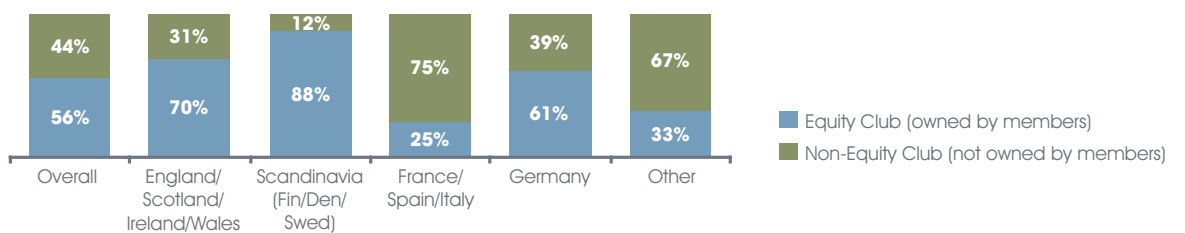


The 16% from "other" markets included respondents from Belgium, Switzerland, Portugal, the Netherlands and the United Arab Emirates (UAE).

OWNERSHIP

Overall, 56% of clubs included in the sample were equity clubs but the proportion varied from region to region. In Scandinavia, equity clubs accounted for 88%, whereas in France/ Spain/ Italy the majority were not owned by members (75%).

The larger the club (in terms of membership), the more likely it was to be an equity club. The trend was reversed with regards to size in terms of number of holes – facilities with more than 18 holes were more likely to be non-equity.

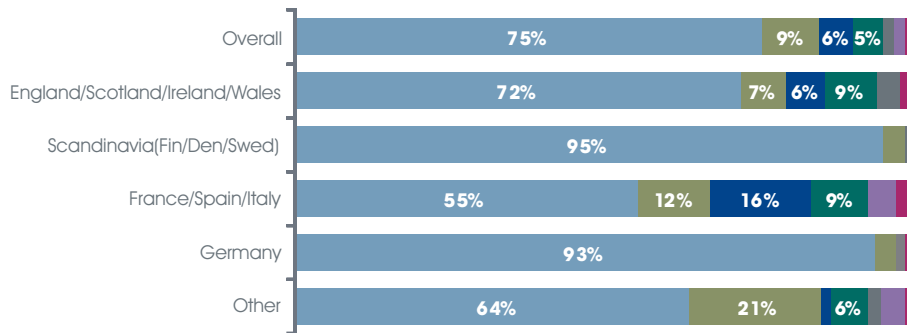


TYPE OF FACILITY

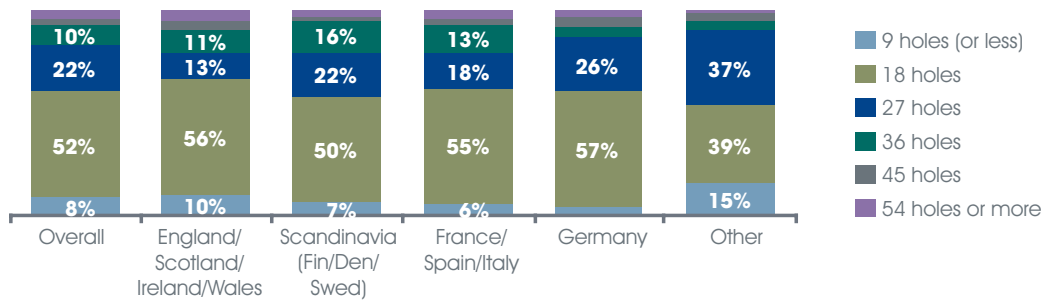
The majority of golfing facilities in the sample were semi-private, but golf hotels/resorts and daily fee/pay and play facilities were well represented in many regions. The exceptions to this were Scandinavia and Germany, where over 90% of facilities were semi-private.

SIZE OF FACILITY - COURSES

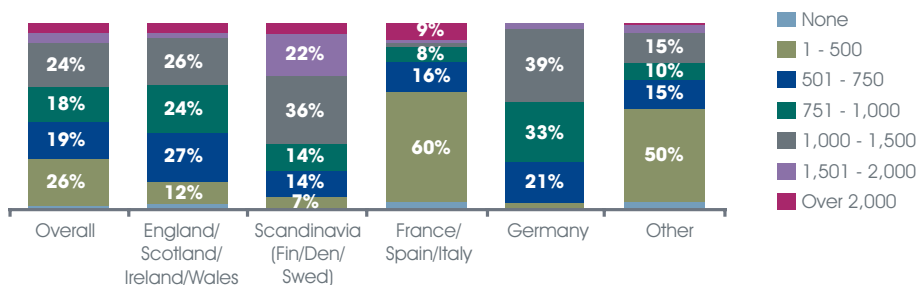
- Golf club with members where visitors are welcomed (semi-private)
- Golf hotel or resort facility (with a club membership)
- Daily Fee or Pay and Play golf facility (no members)
- Exclusive private members golf club (no visitors other than members' guests)
- City or business club (no golf)
- Golf hotel or resort facility (no membership)
- Other



60% of facilities included in the survey had 18 holes or less. This was fairly consistent across all markets.



SIZE OF FACILITY - MEMBERSHIP



The size of the facilities in terms of membership was markedly different across the regions. In France/Spain/Italy, three in five clubs had a membership of 500 or less, whereas in Scandinavia less than one in ten had memberships of this size. This region was most likely to consist of facilities with memberships in excess of 1,000, with almost two thirds of the clubs falling into this category.

SIZE OF FACILITY – STAFFING

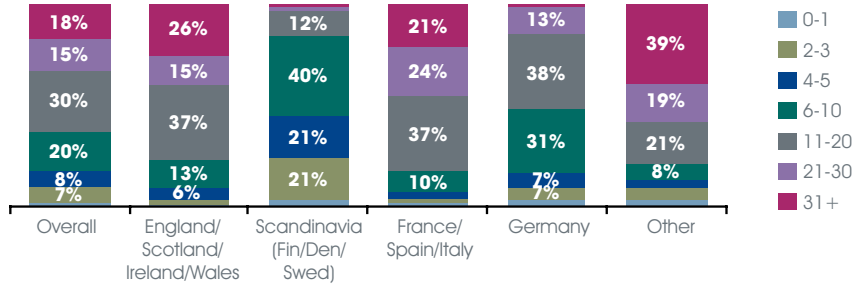
Half of the golf facilities employed 6-20 full-time staff. A similar proportion employed a maximum of three part-time or seasonal employees.

No. of members of staff	Permanent full-time employees	Permanent part-time employees	Seasonal employees
0-1	3%	35%	33%
2-3	7%	21%	21%
4-5	8%	16%	13%
6-10	20%	14%	17%
11-20	30%	10%	9%
21-30	15%	1%	3%
31+	18%	3%	4%

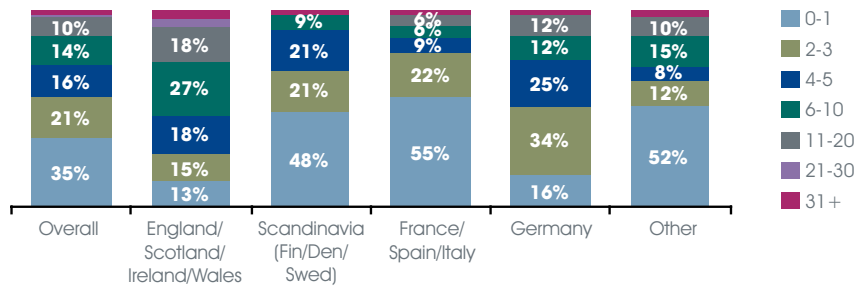
Although the Scandinavian golf facilities had the highest average membership, they employed the fewest full-time employees, favouring seasonal employment instead.

In contrast, over 40% of clubs in the UK/Ireland and France/Spain/Italy employed over 20 full-time members of staff.

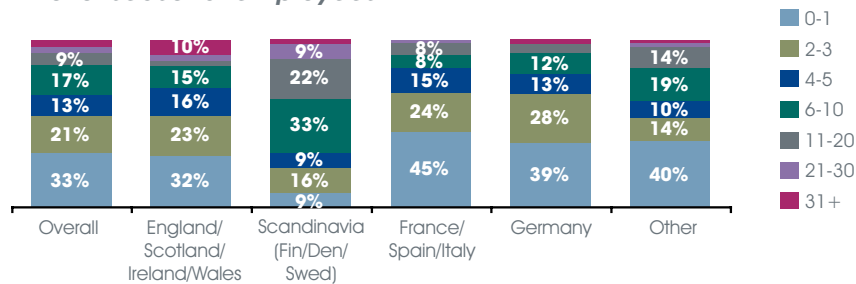
No. of permanent full-time employees



No. of permanent part-time employees



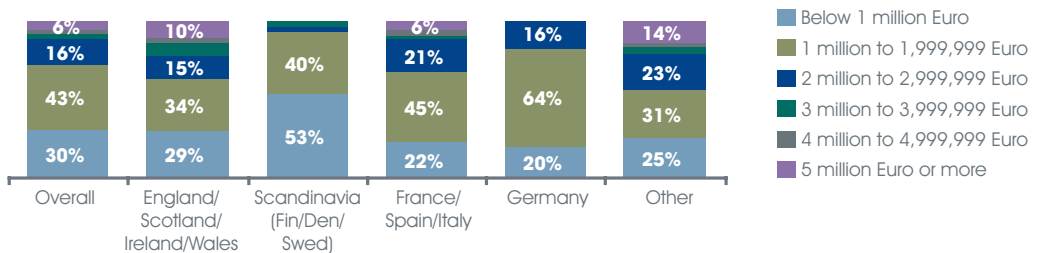
No. of seasonal employees



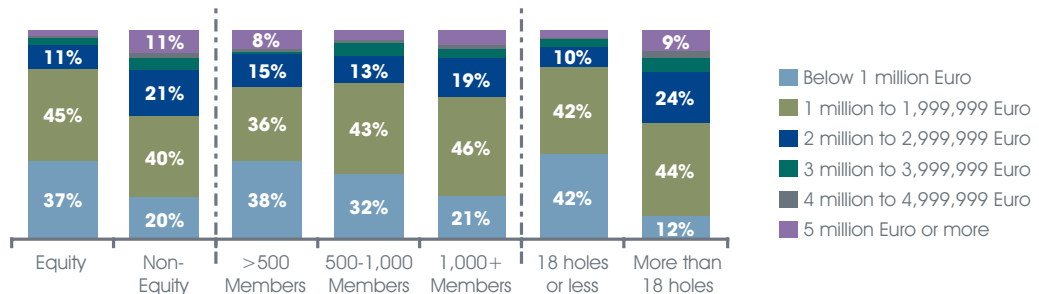
3.2 Revenue

GROSS ANNUAL REVENUE

Although golf facilities in Scandinavia were more likely to have higher memberships than clubs in other regions, this did not translate into higher revenue. Over 90% of clubs in Scandinavia had a gross annual revenue of less than two million Euros. This compares to an average of 73% across all countries.



In contrast, one in ten clubs in the UK/ Ireland saw annual revenues in excess of five million Euros.

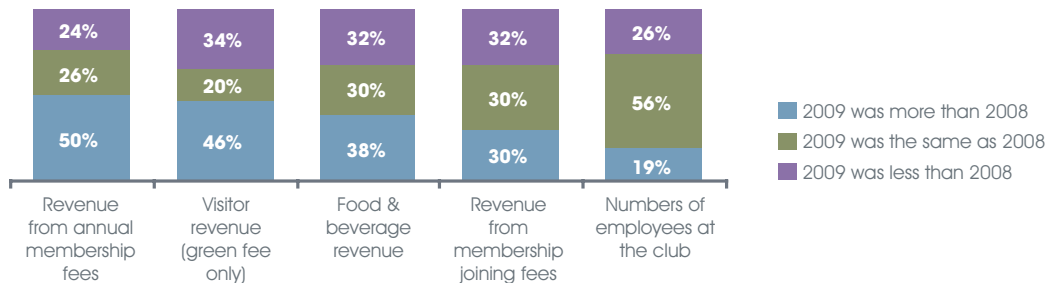


Equity clubs generated lower revenues on average than non-equity facilities.

Looking at revenue based on size of facility, there was a general trend that revenue grew in relation to number of members and number of courses.

YEAR-ON-YEAR COMPARISON

Data suggests that approximately half the clubs surveyed increased membership fees and green fees in 2009 as a means of generating higher revenues than the previous year. Conversely, between a quarter and a third of clubs saw a decrease from 2008's figures.



Looking at food and beverages and joining fees, there is a fairly even split between facilities that saw an increase in revenue in 2009 and those who saw a decrease or saw no change.

For more than half of the clubs, employee numbers remained stable across the two years. Unfortunately, signs of the continuing economic crisis are evident in the fact that a quarter of facilities reduced their number of employees in 2009.

More clubs in Scandinavia and Germany saw an increase in revenue from membership and visitors fees than any other country. These markets were also the most likely to have grown their employee base in 2009.

Conversely, visitor revenue in the UK/ Ireland and across France, Italy and Spain decreased in 2009 in nearly half of all clubs. The UK/ Ireland was also hit hardest in terms of staffing, with 37% of clubs employing fewer people in 2009 than in 2008.

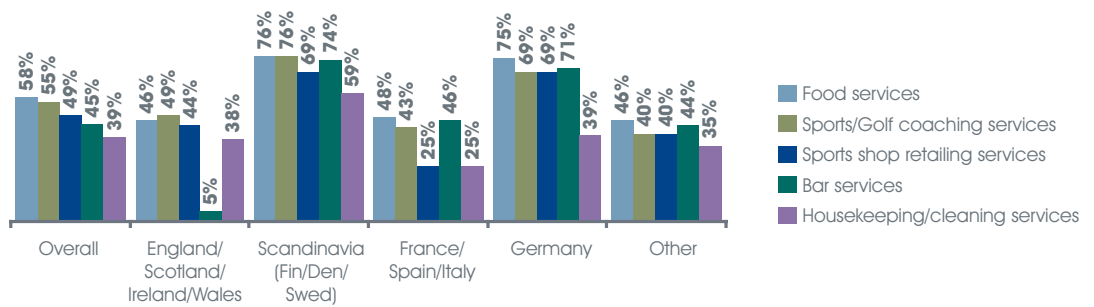
2009 MORE than 2008	Overall	England/ Scotland/Ireland/Wales	Scandinavia (Fin/Den/Swed)	France/ Spain/Italy	Germany	Other
Revenue from annual membership fees	50%	55%	57%	42%	44%	50%
Visitor revenue (green fee only)	46%	34%	67%	36%	54%	44%
Food & beverage revenue	38%	45%	45%	33%	30%	35%
Revenue from membership joining fees	30%	27%	31%	24%	34%	37%
Numbers of employees at the club	19%	13%	21%	15%	28%	19%

2009 LESS than 2008	Overall	England/ Scotland/Ireland/Wales	Scandinavia (Fin/Den/Swed)	France/ Spain/Italy	Germany	Other
Visitor revenue (green fee only)	34%	46%	14%	48%	18%	38%
Food & beverage revenue	32%	35%	16%	45%	25%	39%
Revenue from membership joining fees	32%	51%	29%	36%	18%	17%
Numbers of employees at the club	26%	37%	16%	31%	10%	31%
Revenue from annual membership fees	24%	28%	16%	37%	15%	21%

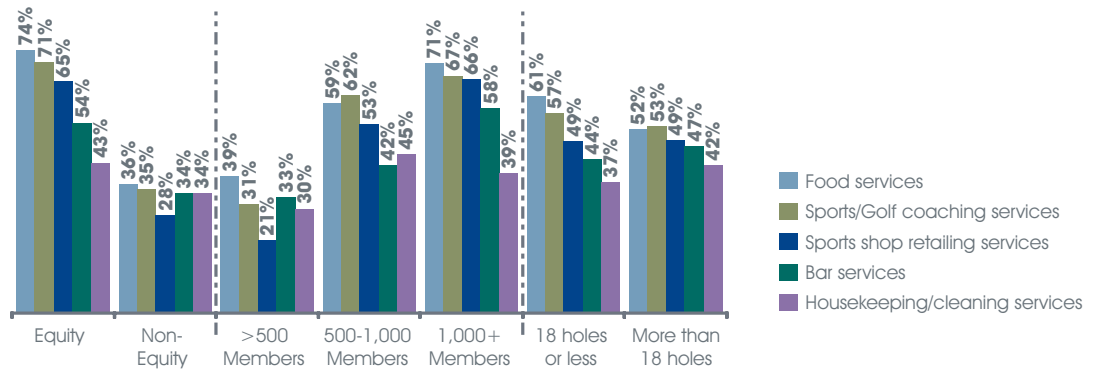
OUTSOURCING

Overall, nearly 60% of golf clubs outsourced food services and over half outsourced coaching services.

Outsourcing of any service was most common in the Scandinavian markets and in Germany.



Equity clubs were far more likely to outsource their services than non-equity clubs. Golf clubs that catered for larger memberships were also more likely to outsource.

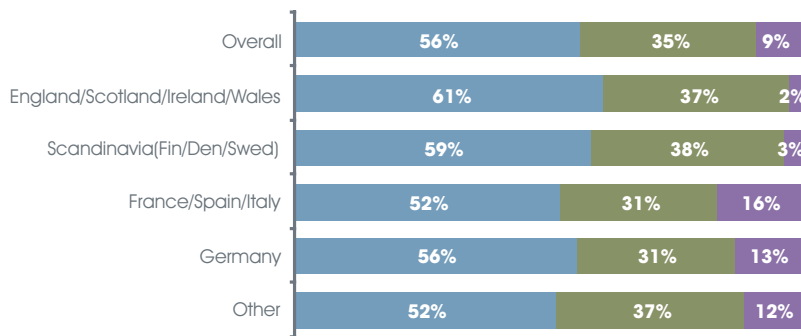


3.3 Training

Over half of those surveyed believed that their club was committed to staff training and had sufficient budget to develop it.

Nearly all clubs in the UK/ Ireland and Scandinavia had at least some budget for training. In comparison, at least one in ten clubs in France, Spain, Italy and Germany did not invest in training.

- Yes my club is committed to staff training and development and has a sufficient budget for this
- Yes, my club is interested in staff training and development but the budget is too small
- No, my club is not interested in staff training and development and there is no budget



Training programmes were widely implemented across the board, with all levels of staff benefiting to some degree.

This was less common in Scandinavia and Germany, however, where there was more of a focus on senior management training, with junior management least likely to receive training.

The UK was the most focused on junior training and general training.

Who benefits from training programmes funded by the club	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/Swed)	France/ Spain/Italy	Germany	Other
General staff	76%	46%	14%	48%	18%	38%
Senior management	48%	35%	16%	45%	25%	39%
Middle management	32%	51%	29%	36%	18%	17%
Junior management	26%	37%	16%	31%	10%	31%

3.4 Respondent Profiling

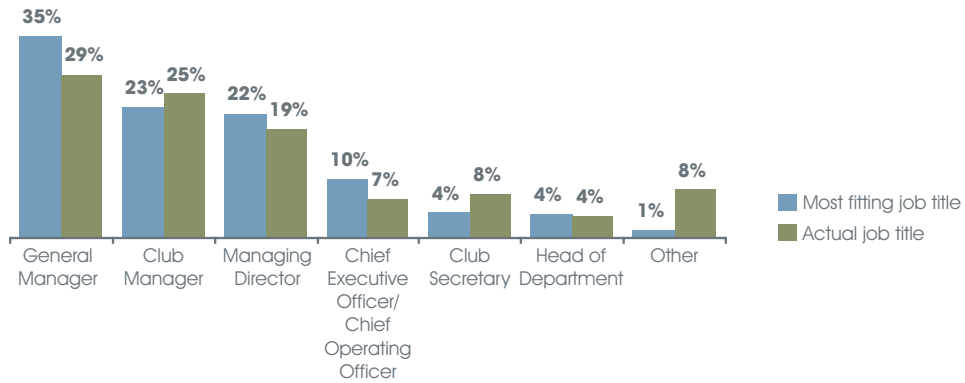
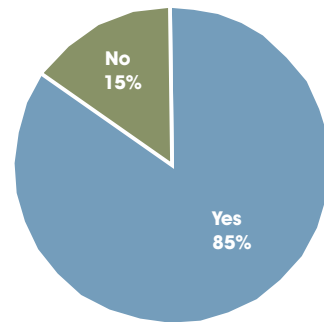
EMPLOYMENT STATUS

On average, 85% of respondents held the most senior position within their golf facility.

Across the markets surveyed, this ranged from 78% in France/Spain/Italy to 90% in Scandinavia.

Over half held the job title of General Manager or Club Manager, with nearly one in five appointed the Managing Director.

Are you the most senior employee of the golf facility?

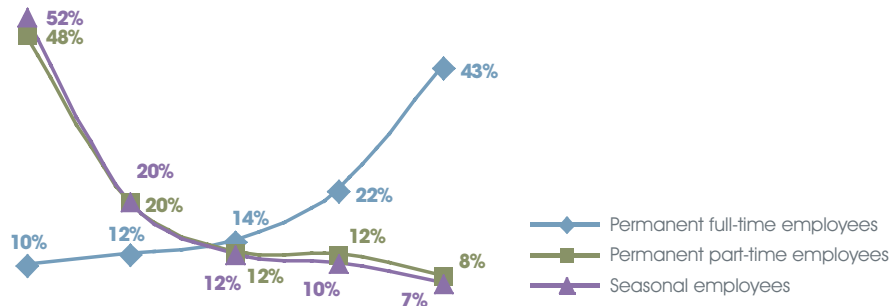


Just over a third perceived the title of General Manager as being the most fitting to describe their duties.

Over 85% of respondents per market were employed full-time in their current role.

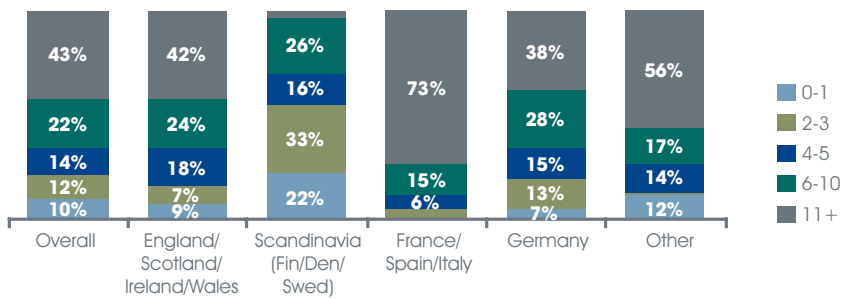
In keeping with the fact that the majority of respondents held senior positions within their golf facility, most had managerial responsibility for other members of staff.

Overall, two thirds of the sample had at least six members of full-time staff under their supervision.

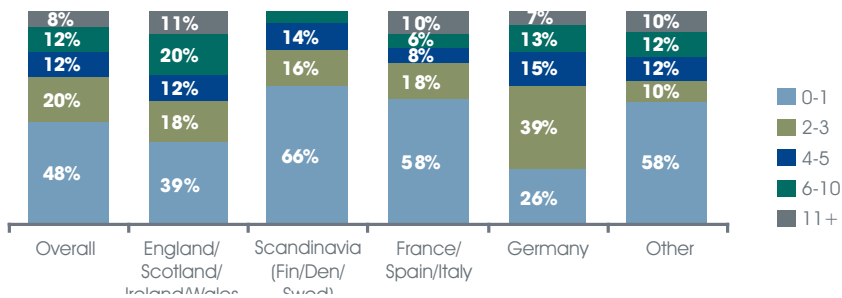


Regional differences were evident, however. For example, respondents from France, Spain and Italy tended to have over ten full-time employees in their charge, whereas it was rare for those working in Scandinavian facilities to manage this many full-time members of staff.

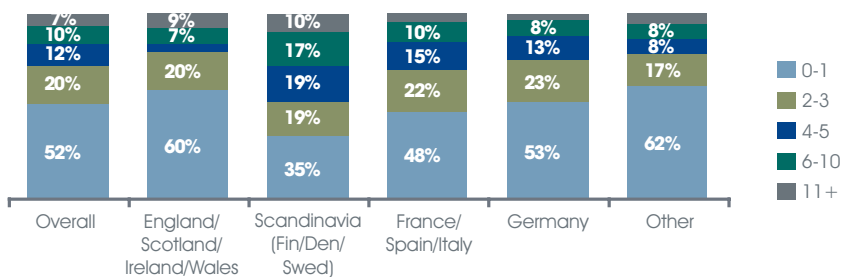
No. of permanent full-time employees reporting to respondent



No. of permanent part-time employees reporting to respondent

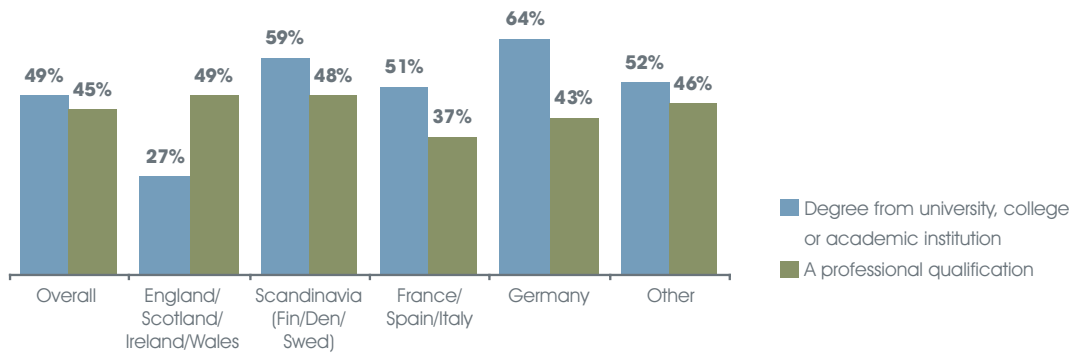


No. of seasonal employees reporting to respondent



QUALIFICATIONS

Nearly half of the sample was educated to degree level, although this varied greatly from region to region, with just over a quarter attaining degrees in the UK/ Ireland compared to nearly two thirds in Germany.



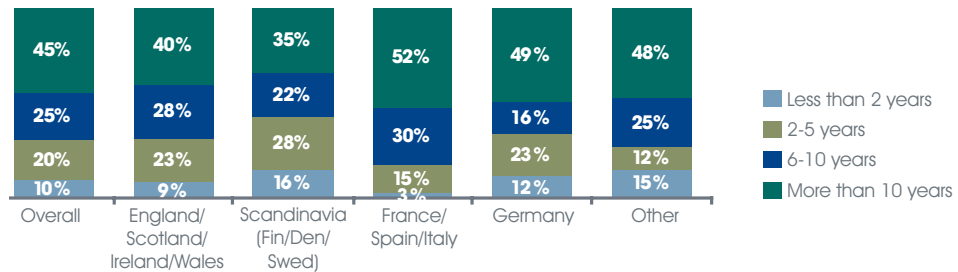
45% held a professional qualification, with those from the UK/ Ireland and Scandinavia most likely to have gained these.

Over half of those from France/ Spain/ Italy or Germany had a degree in golf or sports management. In comparison, just one in ten from the UK/ Ireland held this type of professional qualification.

	Overall	England/Scotland/Ireland/Wales	Scandinavia (Fin/Den/Swed)	France/Spain/Italy	Germany	Other
Golf or sports management degree	33%	10%	28%	52%	57%	25%
PGA Golf Professional, Tennis professional or other sports professional	14%	12%	9%	13%	15%	25%
Hospitality or hotel management degree	9%	12%	5%	5%	10%	12%
Qualified head greenkeeper or course manager	5%	7%	3%	8%	5%	-
Other qualification	33%	29%	50%	28%	38%	23%

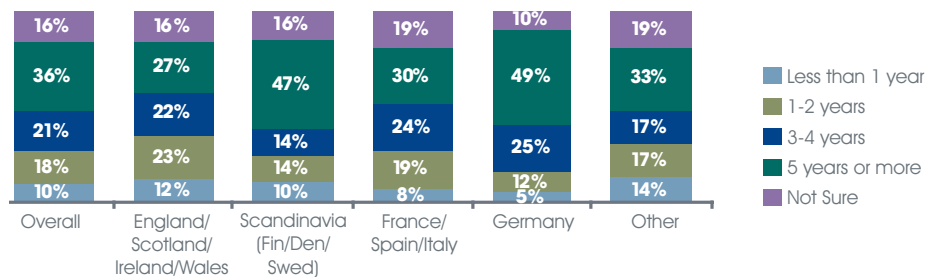
LENGTH OF SERVICE

Length of time in golf club management



Nearly half of the respondents had worked in golf club management for more than ten years. The most practised managers were found in France/ Spain/ Italy, with those from Scandinavia having the least number of years experience.

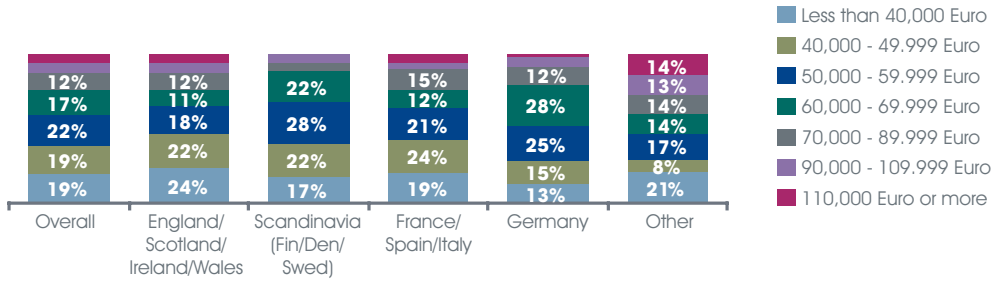
Length of time anticipate remaining in current role



Over half saw their current role as a long-term position, envisaging that they would remain in the job for at least three more years. Nearly half from Scandinavia and Germany anticipated remaining in their current position for at least another five years.

SALARY & REMUNERATION

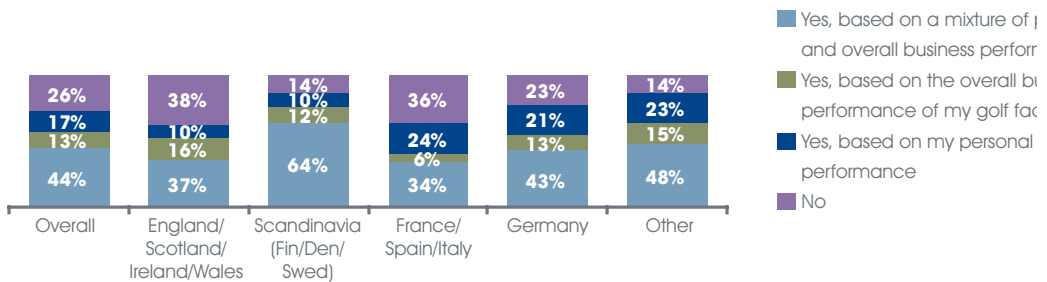
The most common wage band in which the respondents fell was an annual gross salary of 50,000 - 59,999 Euros.



47% of respondents from Germany earned in excess of 60,000 Euros, however.

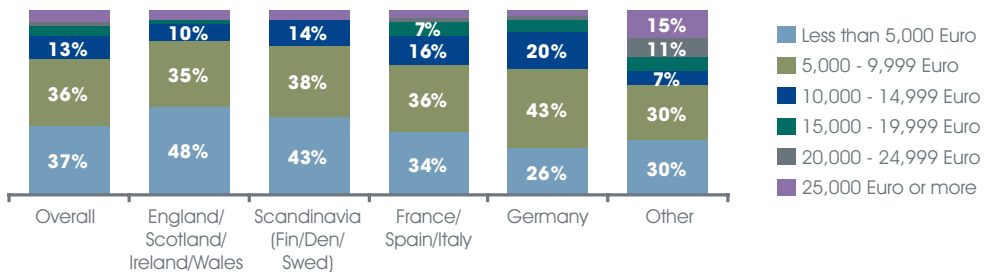
Over half the sample participated in some kind of bonus scheme, rising to over 60% of those based in the UK/ Ireland and France/ Italy/ Spain.

For most, bonuses were based on a mixture of personal and overall business performance.

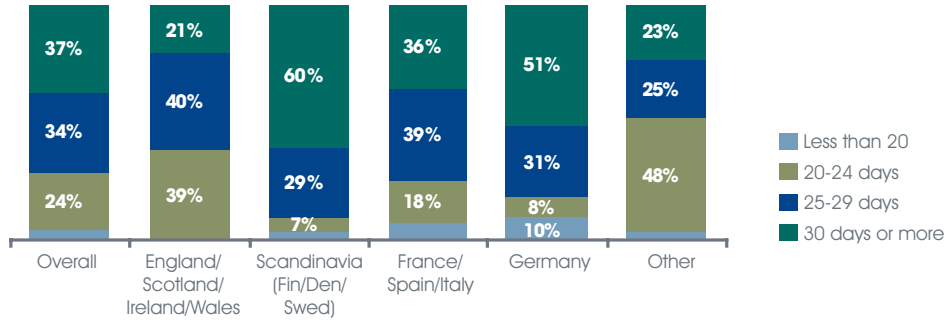


Bonus levels were not dissimilar across the European regions, with nearly three quarters receiving an estimated bonus below 10,000 Euros per annum.

Outside of the main European markets, bonuses were far higher.

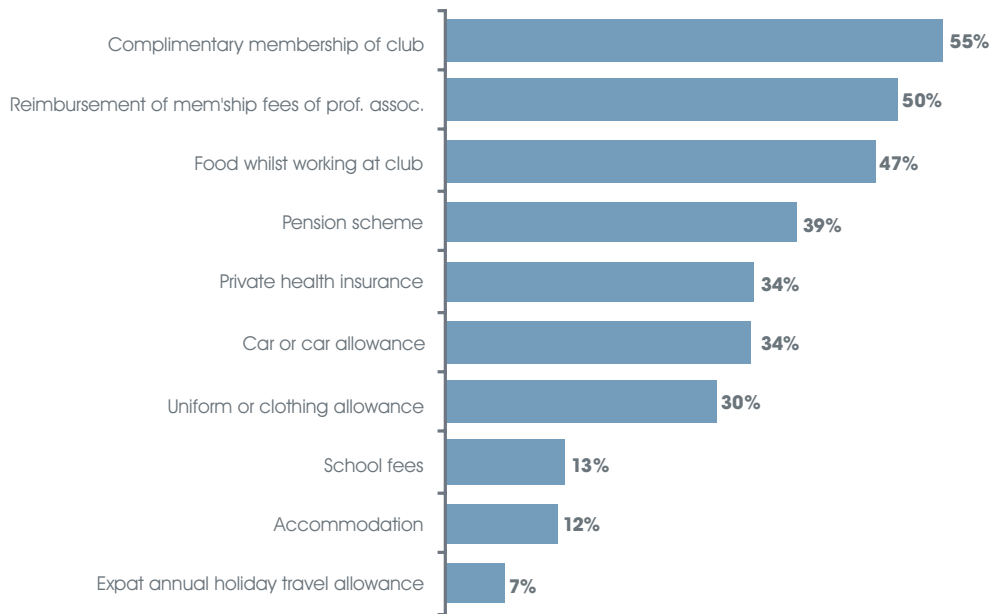


60% of the respondents working in Scandinavia and over 50% in Germany benefited from at least 30 days annual leave. In contrast, only one in five of those based in the UK/ Ireland enjoyed the same level of annual leave.



In terms of other benefits, over half of the sample received complimentary membership of their club and half had any membership fees for professional associations reimbursed.

Less than 40% benefited from a pension scheme and approximately a third from private health insurance or a car/ car allowance.

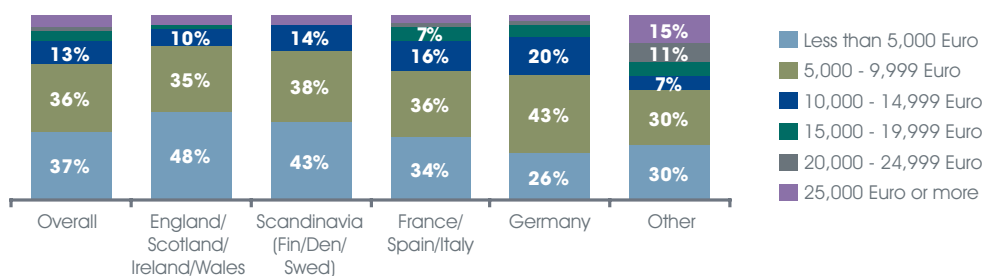


The additional benefits on offer to employees varied across the regions. For example, those in the UK/ Ireland were far more likely to benefit from a pension scheme than their counterparts in other regions.

Which benefits do you receive in addition to your gross salary?	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Complimentary membership of club	55%	55%	66%	29%	81%	49%
Reimbursement of membership fees of prof. association	50%	70%	64%	39%	19%	49%
Food whilst working at club	47%	60%	27%	60%	25%	57%
Pension scheme	39%	69%	47%	13%	17%	37%
Private health insurance	34%	35%	49%	36%	15%	35%
Car or car allowance	34%	25%	18%	37%	44%	51%
Uniform or clothing allowance	30%	21%	38%	40%	31%	20%
School fees	13%	-	27%	3%	23%	20%
Accommodation	12%	10%	-	16%	6%	33%
Expat annual holiday travel allowance	7%	-	9%	-	10%	20%

When questioned as to their satisfaction with their overall remuneration package, less than half the respondents answered positively, although this rose to 58% in Scandinavia.

Just over a quarter (28%) claimed that they were not satisfied, with nearly a third of those in the UK/ Ireland and France/ Spain/ Italy sharing this view.



GEOGRAPHICAL MOBILITY

The vast majority of those working in the main regions covered in the survey were employed in the country of their natural residence. Many were willing to move abroad to further their career, however.

In contrast, 56% of those working in other markets were not living in their country of natural residence. These respondents were mainly based in Portugal and the UAE.

	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Do you currently work in the country of your natural residence?	88%	94%	100%	88%	93%	56%
Would you be willing to move abroad in order to progress your career?	74%	63%	74%	81%	77%	81%

Improved job satisfaction was cited as a motivating factor in considering a move abroad by over 90% of respondents. Work/ life balance and work place culture were also valued, particularly by the Scandinavians.

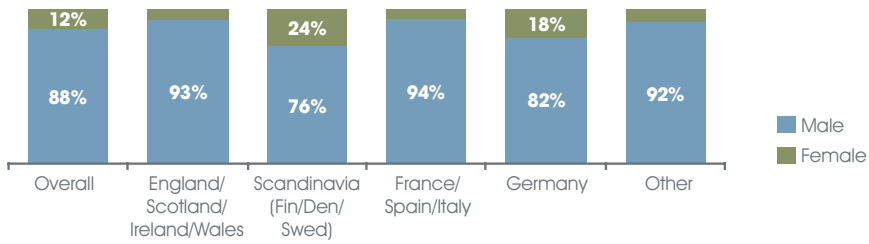
Over three quarters of those in the UK/ Ireland and France/ Spain/ Italy would be driven by remuneration. This was much less important to those in Scandinavia and Germany.



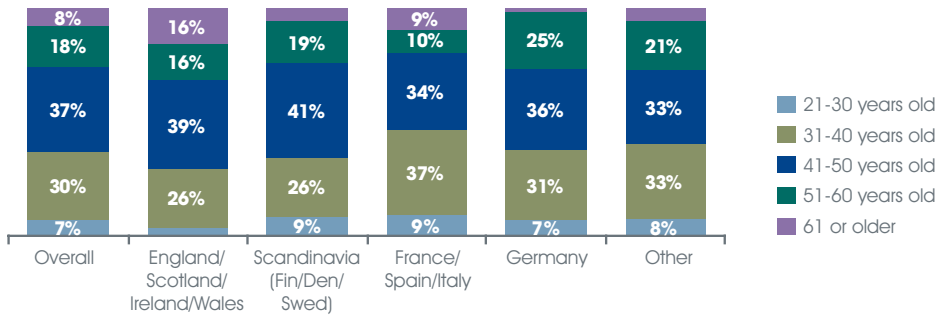
	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Job satisfaction	91%	89%	91%	96%	92%	87%
work/life balance	78%	74%	86%	79%	80%	67%
work place culture	68%	71%	81%	54%	66%	71%
Attractive location	65%	61%	69%	66%	67%	62%
remuneration	64%	76%	45%	79%	51%	63%
Career progression	61%	67%	59%	67%	54%	56%

DEMOGRAPHIC PROFILE

The golf industry is dominated by men (88% of the whole sample). However, markets with higher female golf participation levels (Scandinavia and Germany) enjoyed higher levels of club management by women (24% and 18% respectively)



The age profile was similar across all regions, with most people falling into the 31-50 year-old range.



Respondents who held senior positions were asked to submit information regarding their most senior six colleagues. The results from this are shown in the following sections.

4. Other Employees

Respondents were asked to provide details on salaries and benefits of six employees. Below are the topline results with more in-depth results available in the subsequent sections:

- ↳ Assistant Managers/Deputies
- ↳ Golf/Sports Professionals
- ↳ Golf Course Managers (Greenkeepers)
- ↳ Clubhouse or F&B Managers/Stewards
- ↳ Membership Managers/Administrators
- ↳ Secretaries/Administrators

In the UAE – a market that was represented in the region category of “other” by six respondents – salaries were far higher than average, skewing the figures. Two overall columns have therefore been included – one including all regions whilst the other excludes “other” regions.

Average Salary (rounded to nearest '00)							
	Overall	Overall (exc. Other)	England/ Scotland/ Ireland/Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/ Italy	Germany	Other
Assistant Manager	€29,900	€29,200	€26,600	€28,100	€32,500	€30,500	€33,400
Golf sports professional/Manager	€32,400	€31,700	€27,900	€33,800	€32,200	€35,300	€35,600
Golf Course Manager (Greenkeeper)	€43,000	€43,100	€43,400	€40,800	€40,700	€47,400	€42,500
Clubhouse Manager/F&B Manager/ Steward	€28,300	€27,400	€27,200	€23,900	€30,900	€25,400	€32,400
Membership Manager/Administrator	€25,300	€24,900	€21,900	€23,800	€27,000	€27,500	€26,900
Secretary/Administrator	€25,300	€24,600	€20,200	€23,000	€29,100	€26,400	€26,900

Bonuses (% who receive a bonus)							
	Overall	Overall (exc. Other)	England/ Scotland/ Ireland/Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/ Italy	Germany	Other
Assistant Manager	36%	36%	48%	19%	58%	17%	36%
Golf sports professional/Manager	38%	35%	37%	35%	50%	18%	49%
Golf Course Manager (Greenkeeper)	36%	35%	49%	21%	46%	20%	41%
Clubhouse Manager/F&B Manager/ Steward	40%	39%	54%	16%	35%	24%	45%
Membership Manager/Administrator	31%	29%	42%	7%	38%	16%	41%
Secretary/Administrator	25%	24%	24%	12%	50%	7%	33%

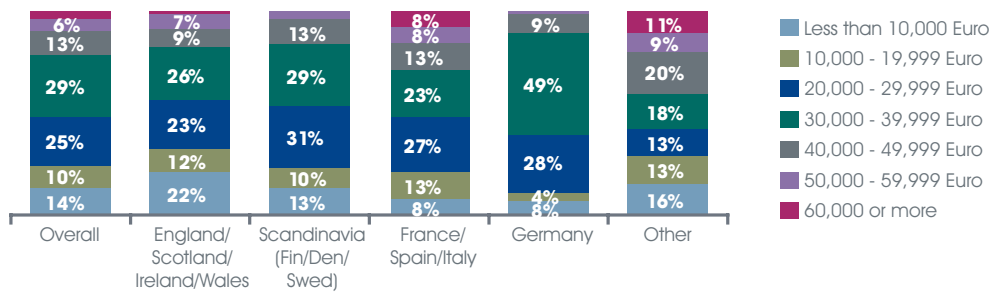
Average Bonus (€)							
	Overall	Overall (exc. Other)	England/ Scotland/ Ireland/Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/ Italy	Germany	Other
Assistant Manager	€4,200	€3,500	€2,500	€3,500	€4,200	€4,200	€7,800
Golf sports professional/Manager	€5,900	€5,400	€3,100	€7,100	€6,000	€6,500	€7,500
Golf Course Manager (Greenkeeper)	€4,800	€3,800	€3,900	€3,000	€1,100	€4,000	€8,600
Clubhouse Manager/F&B Manager/ Steward	€4,100	€3,500	€2,800	€4,200	€4,600	€5,000	€6,100
Membership Manager/Administrator	€4,800	€4,400	€3,400	€2,500	€3,700	€10,800	€6,000
Secretary/Administrator	€3,800	€3,900	€2,900	€2,500	€4,900	€2,500	€3,750

% who have accommodation included							
	Overall	Overall (exc. Other)	England/ Scotland/ Ireland/Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/ Italy	Germany	Other
Assistant Manager	14%	10%	7%	2%	15%	17%	31%
Golf sports professional/Manager	13%	9%	8%	-	17%	12%	28%
Golf Course Manager (Greenkeeper)	20%	16%	21%	4%	22%	13%	39%
Clubhouse Manager/F&B Manager/ Steward	22%	20%	28%	-	15%	24%	30%
Membership Manager/Administrator	5%	3%	2%	-	-	8%	15%
Secretary/Administrator	6%	3%	-	-	5%	7%	17%

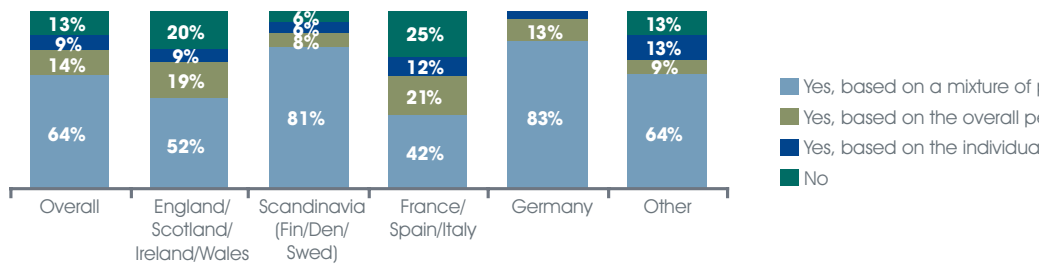
% who receive other benefits							
	Overall	Overall (exc. Other)	England/ Scotland/ Ireland/Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/ Italy	Germany	Other
Assistant Manager	38%	36%	41%	40%	31%	32%	47%
Golf sports professional/Manager	30%	26%	24%	32%	29%	21%	46%
Golf Course Manager (Greenkeeper)	48%	48%	52%	50%	48%	40%	50%
Clubhouse Manager/F&B Manager/ Steward	41%	37%	45%	32%	35%	24%	58%
Membership Manager/Administrator	29%	26%	32%	19%	20%	33%	38%
Secretary/Administrator	32%	31%	27%	36%	36%	29%	36%

4.1 Assistant Managers/Deputies

Over half of Assistant Managers / Deputies earned 20,000-40,000 Euros per year.



Overall, over a third received a bonus, although there were notable differences across the regions. Eligibility for a bonus ranged from 19% in Scandinavia to 58% in France/ Italy/ Spain.



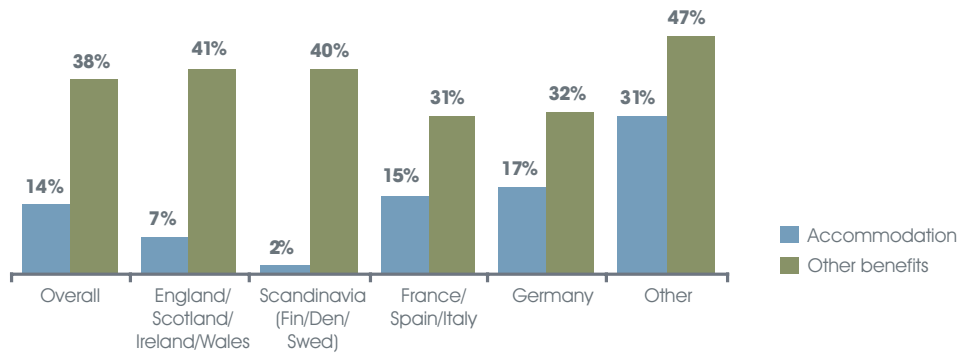
Amongst those who qualified for a bonus, levels were low (less than 5,000 Euros for the majority).

Larger bonuses were evident in other markets, most notably the UAE.

*Please treat the table below as an indicator only, as base sizes in each region are small.

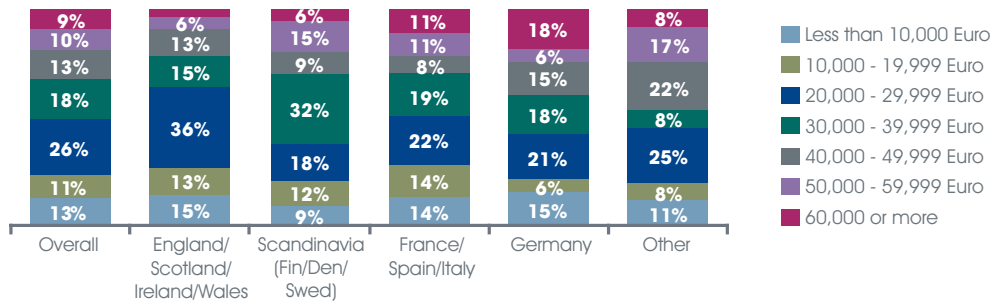
Bonus	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Less than 5,000 Euro	80%	100%	80%	76%	67%	56%
5,000 - 9,999 Euro	13%	0%	20%	14%	33%	19%
10,000 - 14,999 Euro	4%	0%	0%	10%	0%	6%
15,000 - 19,999 Euro	1%	0%	0%	0%	0%	6%
20,000 - 24,999 Euro	1%	0%	45%	0%	0%	6%
25,000 Euro or more	1%	0%	0%	0%	0%	6%

It was unusual for accommodation to be provided as part of the Assistant Manager position and between 31-47% received other benefits as part of their package.

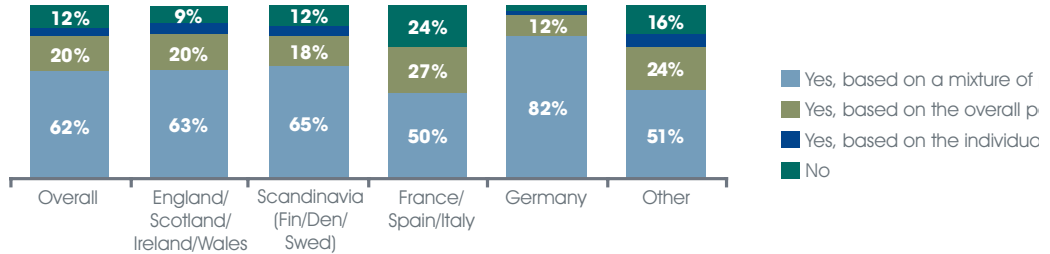


4.2 Golf/Sports Professionals

Golf/Sports Professionals in the UK/ Ireland earned the lowest average annual salary across the main European markets included in this survey.



38% qualified for a bonus, usually based upon individual performance. Those employed in France/ Italy/ Spain were the most likely to benefit from a bonus.

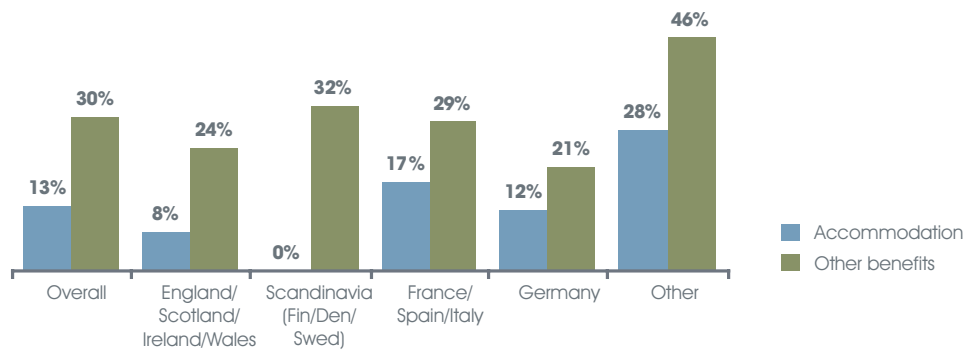


The majority received annual bonuses up to 10,000 Euros.

*Please treat the table below as an indicator only, as base sizes in each region are small.

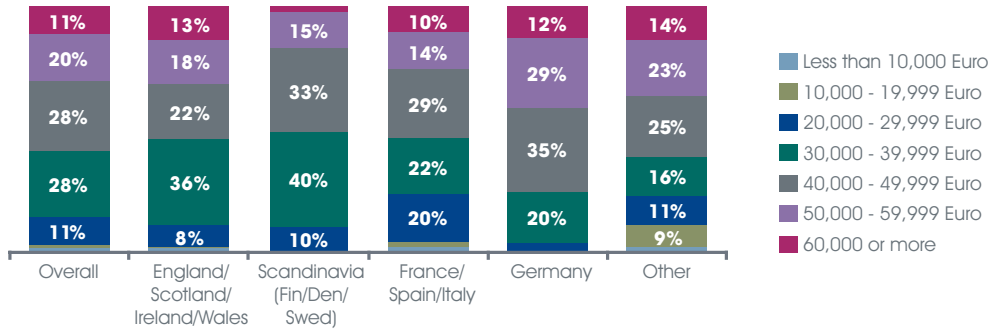
Bonus	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Less than 5,000 Euro	59%	88%	55%	59%	40%	41%
5,000 - 9,999 Euro	27%	13%	27%	29%	40%	35%
10,000 - 14,999 Euro	8%	0%	9%	6%	20%	12%
15,000 - 19,999 Euro	2%	0%	0%	0%	0%	6%
20,000 - 24,999 Euro	2%	6%	9%	6%	20%	6%
25,000 Euro or more	3%	0%	9%	6%	0%	0%

In the main European markets, less than a third of Golf/ Sports Professionals received any other benefits as part of their remuneration, while the average across other markets was nearer half.

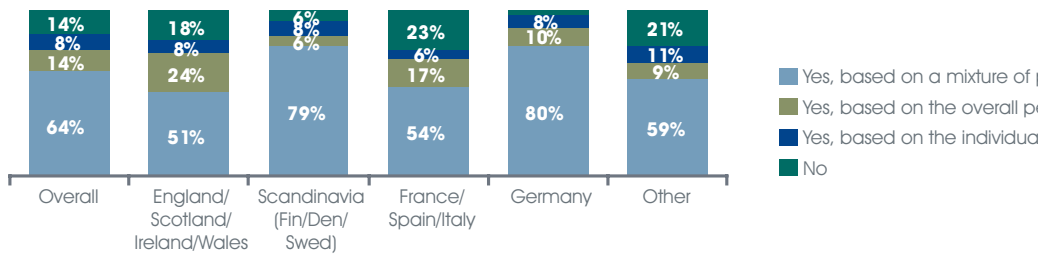


4.3 Golf Course Managers (Greenkeepers)

Golf Course Managers (Greenkeepers) were amongst the highest earners of the senior employees at golf facilities. Overall, nearly a third had an annual salary in excess of 50,000 Euros.



Bonuses were rewarded to almost half the employees in the UK/ Ireland and France/ Italy/ Spain. In contrast, only about one in five enjoyed this benefit in Scandinavia and Germany.



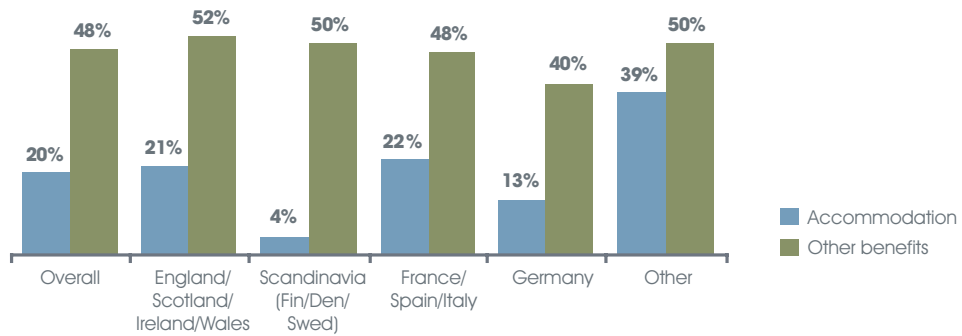
The majority of those who earned a bonus received less than 5,000 Euros, although over 30% in France/ Spain/ Italy and Germany received up to 10,000 Euros.

Again, it was the UAE that accounted for the high bonuses recorded in other markets.

*Please treat the table below as an indicator only, as base sizes in each region are small.

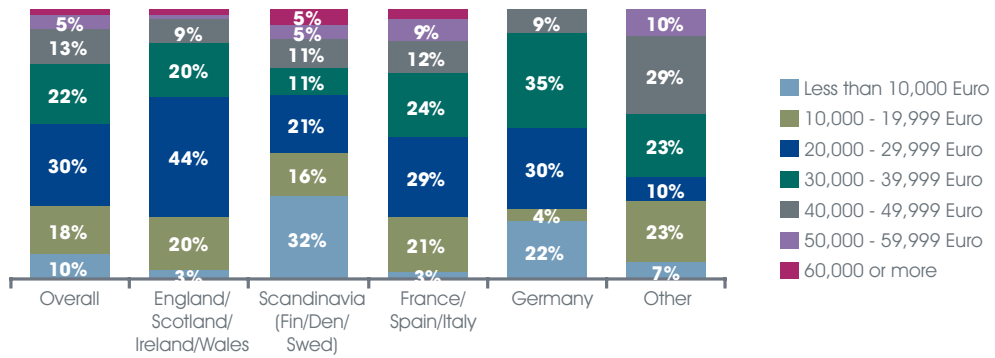
Bonus	Overall	England/ Scotland/Ireland/Wales	Scandinavia (Fin/Den/Swed)	France/ Spain/Italy	Germany	Other
Less than 5,000 Euro	70%	79%	90%	68%	70%	44%
5,000 - 9,999 Euro	23%	15%	10%	32%	30%	28%
10,000 - 14,999 Euro	3%	6%	0%	0%	0%	6%
15,000 - 19,999 Euro	1%	0%	0%	0%	0%	6%
20,000 - 24,999 Euro	3%	0%	0%	0%	0%	17%
25,000 Euro or more	0%	0%	0%	0%	0%	0%

Approximately half of Golf Course Managers (Greenkeepers) had other benefits included in their package.

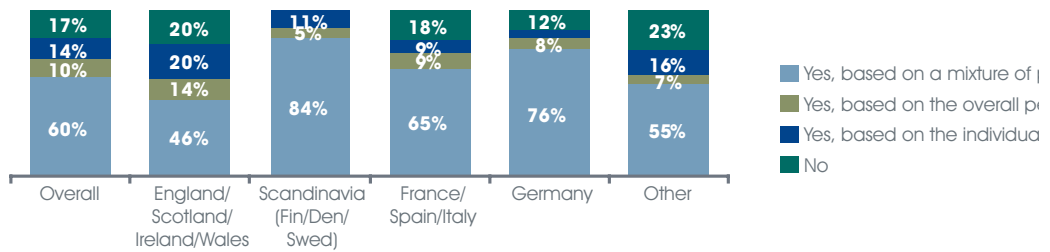


4.4 Clubhouse Managers/F&B Managers/Stewards

Salaries for Club Managers/F&B Managers/Stewards were lower in Scandinavia and Germany than in the other main European markets.



Those from the UK/Ireland were most likely to qualify for a bonus (54%), whereas this was the case for just 16% in Scandinavia.

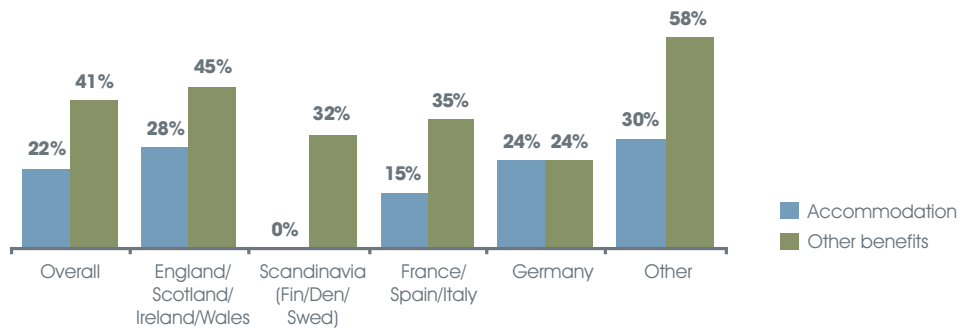


As has been the case with all positions, those in the UK/Ireland received lower bonuses than their counterparts in continental Europe.

*Please treat the table below as an indicator only, as base sizes in each region are small.

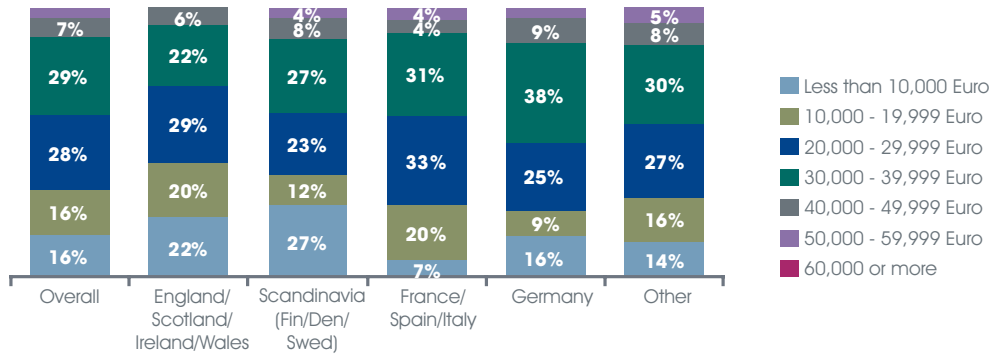
Bonus	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Less than 5,000 Euro	77%	94%	67%	67%	50%	57%
5,000 - 9,999 Euro	17%	6%	33%	25%	50%	21%
10,000 - 14,999 Euro	5%	0%	0%	1%	0%	14%
15,000 - 19,999 Euro	2%	0%	0%	0%	0%	7%
20,000 - 24,999 Euro	0%	0%	0%	0%	0%	0%
25,000 Euro or more	0%	0%	0%	0%	0%	0%

The proportion who received other benefits varied across the markets, from approximately a quarter in Germany to 45% in the UK/ Ireland.

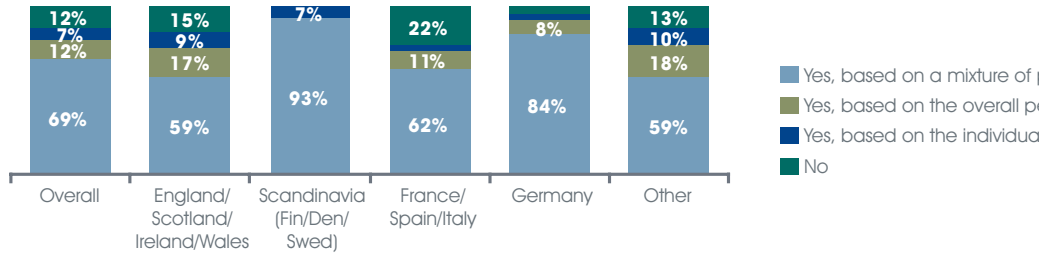


4.5 Membership Managers/Administrators

Nearly 60% of Membership Managers/Administrators earned 20,000-40,000 Euros per annum. Levels were similar across all markets.



Again, those from the UK/Ireland were the most likely to be eligible for a bonus (41%), with their Scandinavian counterparts most likely to be missing out.

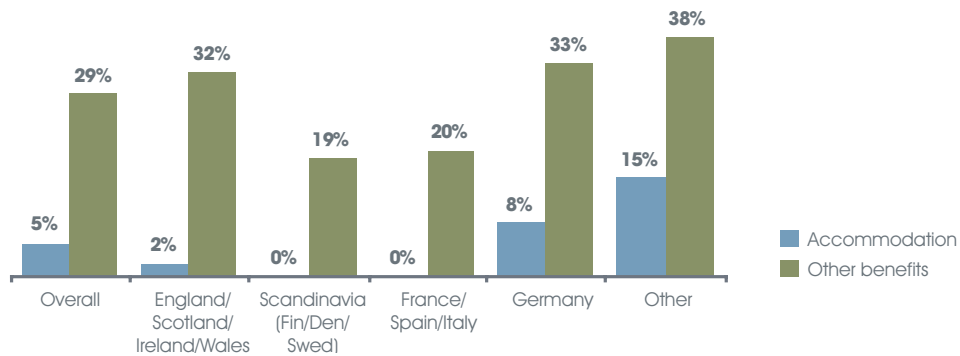


Bonus levels tended to be set at under 5,000 Euros.

*Please treat the table below as an indicator only, as base sizes in each region are small.

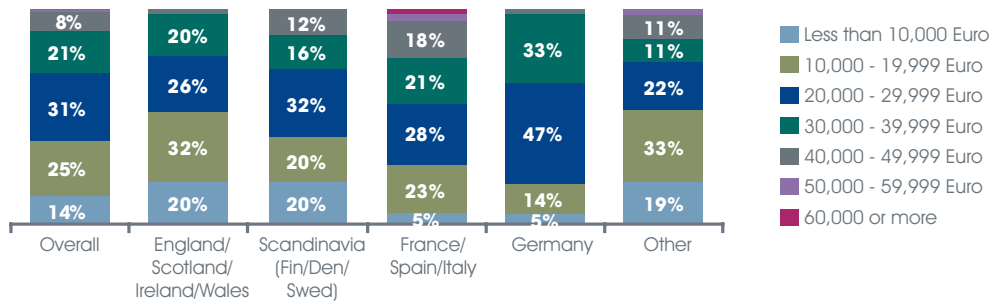
Bonus	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Less than 5,000 Euro	80%	96%	100%	82%	50%	63%
5,000 - 9,999 Euro	8%	0%	0%	12%	17%	13%
10,000 - 14,999 Euro	6%	0%	0%	6%	0%	19%
15,000 - 19,999 Euro	2%	0%	0%	0%	0%	6%
20,000 - 24,999 Euro	3%	4%	0%	0%	17%	0%
25,000 Euro or more	2%	0%	0%	0%	17%	0%

Membership Managers/ Administrators in the UK/ Ireland and Germany were the most likely of those employed in the main European markets to receive any other benefits.

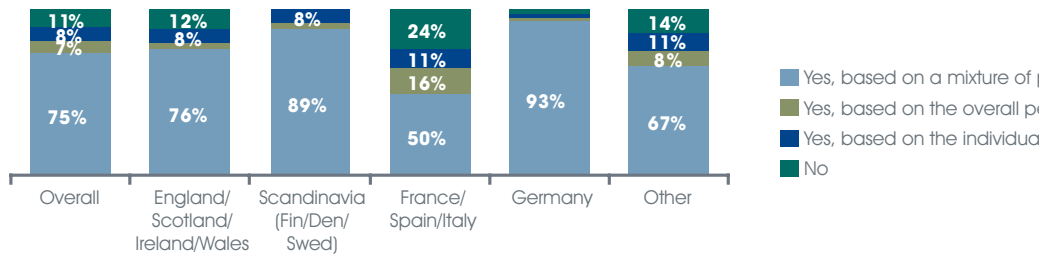


4.6 Secretaries/Administrators

Over half of Secretaries/Administrators earned 10,000-30,000 Euros per year.



The majority did not receive a bonus, with the exception being France/Italy/Spain, where half qualified for this benefit.

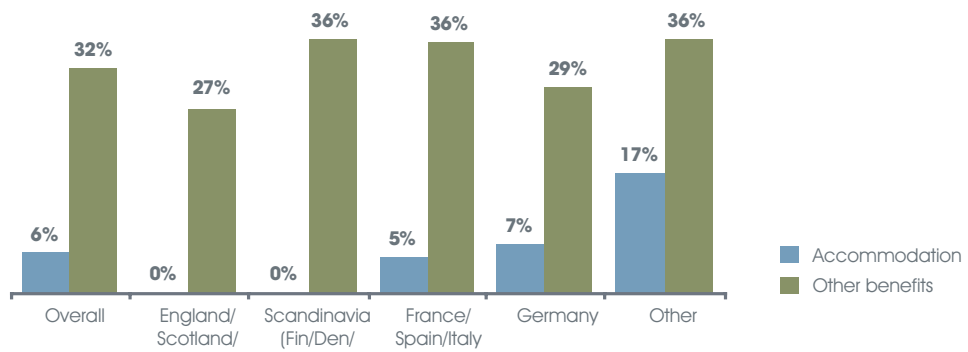


Bonus levels were low across the board, again with the exception of France/Italy/Spain

*Please treat the table below as an indicator only, as base sizes in each region are small.

Bonus	Overall	England/ Scotland/Ireland/ Wales	Scandinavia (Fin/Den/ Swed)	France/ Spain/Italy	Germany	Other
Less than 5,000 Euro	82%	92%	100%	68%	100%	83%
5,000 - 9,999 Euro	12%	8%	0%	21%	0%	8%
10,000 - 14,999 Euro	4%	0%	0%	5%	0%	8%
15,000 - 19,999 Euro	2%	2%	0%	5%	0%	0%
20,000 - 24,999 Euro	0%	0%	0%	0%	0%	0%
25,000 Euro or more	0%	0%	0%	0%	0%	0%

On average, just under a third of employees in the role of Secretary/ Administrator qualified for other benefits.



5. Methodology

Managers at selected golf facilities throughout EMEA were invited to participate in the research, with a view to providing information on the venue itself and up to six employees at the club.

Potential respondents were identified using the CMAE's database.

The questionnaire was hosted on the CMM website and completed online. Completed surveys were returned immediately to IFM Sports Marketing Surveys for analysis.

In total, 320 questionnaires were completed across a number of markets, as detailed in the following table.

	No. of respondents	% of sample
England/Scotland/Ireland/Wales	82	26%
France/Spain/Italy	67	21%
Germany	61	19%
Scandinavia	59	18%
Other	51	16%
Total	320	100%

Amongst the "other" markets, were respondents who worked in Belgium (10 respondents), Portugal (7), Switzerland (7), the United Arab Emirates (6) and the Netherlands (5).



Cover photograph, kindly provided by Dubai Creek Golf & Yacht Club



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