

# PRIVATE CLUB TRENDS

“GAUGING THE IMPACT OF EMERGING TRENDS ON  
PRIVATE CLUBS”



**European Golf Course Owners Association – 2012**

**Michael Leemhuis, MA. Ed, CCM, CCE, PGA Professional**

**CEO/General Manager: Congressional Country Club**



**HOT TIRE**

# PRIVATE CLUB TRENDS –

1. Why Strategic Planning (at CCC), when things are okay/good!
2. Survey of Top 25/50 Clubs in the US (Golf)
3. Survey – Very High; High; Low; Very Low; Likert Scale
4. Outside Consultants – Fred and Dale
5. Article in Club Management magazine 2010
6. Capital Projects? Yes/No?
7. Bad Economy – 2009+
8. Member usage down; golf and F&B
9. Membership Retention/Recruitment? 80%
10. Tradition in jeopardy?



# Gauging the Impact of National Trends

As part of a strategic planning process, Mike Leemhuis, CCM, CCE, CEO/GM of Congressional Country Club (CCC), with the help of consultants Fred Laughlin and Dale Lefever, sought to confirm which national trends were having the greatest impact on private clubs. To ensure the credibility of their data, they asked a large group of general managers to first identify the key trends and then rate each trend by its degree of impact on their individual clubs. Not only have the results been helpful to the CCC planning team, in this article Leemhuis makes them available to Club Management readers.

## 12 TRENDS



### 1 Changing diets and food preferences:

There is increasing national interest in healthier, more nutritional diets with menus featuring heart-healthy, locally grown, low-fat, low-carb, gluten-free and other specialty foods.



### 2 Increased interest in fitness:

As part of adopting a healthier lifestyle, club members are looking at a wide range of fitness techniques, such as personal training, pilates, yoga, the Wii, spinning and aerobic dancing.

### Building upon Success

Every aspect of CCC speaks to its prominence in the private club community. From its beautiful setting just outside the Washington, D.C. Beltway to its sizable backlog of applications for new memberships, there are many reasons for the CCC leadership to be content with the club's current situation. So why would such an obviously successful club need a strategic plan? Why wouldn't its leadership simply stay the course that has kept it among the most prestigious clubs in the world?

"While we take great satisfaction in our success to date," said Leemhuis, "we need to invest in ideas that will keep us responsive to our members. A well-developed strategic plan will inform our decisions going forward

### 3 Intergenerational issues:

Longer life spans and the oncoming wave of the baby boomers, now averaging 64 years old, have lengthened the age gap between younger and older members and challenged clubs to serve multiple generations that have quite different perspectives and lifestyles.

### 4 Flat growth in golf:

In contrast to the decade of growth in the number of golfers and rounds of golf, the past few years have seen at best a flattening in both statistics and even a downturn in some areas of the country.


### 5 Emphasis on being green:

Global warming, water quality and conservation, protected wetlands and habitats, use of pesticides and herbicides, and related "green" issues continue to motivate clubs to be more sustainable with their water and energy and to be mindful of their overall environmental impact.



NATIONAL CLUB ASSOCIATION  
**2011 TRENDS & ISSUES**  
A PRIVATE CLUB PERSPECTIVE



  
NATIONAL  
**CLUB**  
ASSOCIATION  
50TH ANNIVERSARY  
1961-2011

# PRIVATE CLUB TRENDS

## Average Club Member Demographics 2010

- 1. Median Age – 58 years**
- 2. Married – 94%**
- 3. Children Under 18 years Old – 22%**
- 4. College Degree or More – 70%**
- 5. Median Household Income - \$170,000**
- 6. Occupation – 55% Management or Professional**
- 7. Median Household Asset Value – 1,850,000**

# PRIVATE CLUB TRENDS

## 1. Intergenerational Issues



# PRIVATE CLUB TRENDS

## Intergenerational Issues – 83%

1. Longer life spans
2. The oncoming wave of the “baby boomers”, now averaging 64 years old
3. Age gap lengthened between younger and older members
4. Clubs are challenged to serve multiple generations that have quite different perspectives and lifestyles.



# PRIVATE CLUB TRENDS

## Reasons to Join Private Clubs by Gender Scale from 1-5, 5 most important

<b>1. Women; Dining</b>	<b>4.3</b>
<b>2. Men; Golf</b>	<b>4.3</b>
<b>3. Women; Golf</b>	<b>4.0</b>
<b>4. Men; Dining</b>	<b>4.0</b>
<b>5. Women; Swimming</b>	<b>3.7</b>
<b>6. Women; Social Activities</b>	<b>3.4</b>
<b>7. Women; Private Parties</b>	<b>3.3</b>
<b>8. Men; Swimming</b>	<b>3.3</b>
<b>9. Men; Social Activities</b>	<b>3.1</b>
<b>10. Men; Private Parties</b>	<b>3.0</b>

# PRIVATE CLUB TRENDS

1. Intergenerational Issues
2. Increased Interest in FITNESS

# PRIVATE CLUB TRENDS

## Increased Interest in FITNESS – 79%

1. Members adopting a healthier lifestyle
2. Club members are looking at a wide range of fitness techniques; personal training, Pilates, Yoga, the Wii, PX 90, spinning, Zumba and Aerobic dancing
3. Kids Health and Fitness





**MEN  
WOULDN'T  
LOOK AT ME  
WHEN I WAS  
SKINNY**

**but...**

**Since I Gained 10 Pounds  
This New, Easy Way  
I Have All the Dates I Want**

**N**OW there's no need to be "skinny" and friendless, even if you never could gain an ounce before. Here's a new, easy treatment that is giving thousands attractive flesh—in just a few weeks!

Doctors for years have prescribed yeast to build up health. But now, with this new yeast discovery in little tablets, you can get far greater tonic results—regain health, and also put on pounds of firm flesh, enticing curves—and in a far shorter time.

Not only are thousands quickly gaining beauty-bringing pounds, but also clear skin, freedom from indigestion and constipation, new pep.

#### **Concentrated 7 times**


This amazing new product, Ironized Yeast, is made from specially cultured *brewers' ale yeast* imported from Europe—the richest yeast known—which by a new process is concentrated 7 times—made 7 times more powerful.

But that is not all! This super-rich yeast is ironized with 3 special kinds of iron which strengthen the blood, add energy.

Day after day, as you take Ironized Yeast tablets, watch flat chest develop, skinny limbs round out attractively. Skin clears to beauty, new health comes—you're an entirely new person.

WELL, WELL - IT SEEMS  
YOUR WEIGHT IS PERFECT.  
YOU JUST HAPPEN TO BE  
ELEVEN FEET TOO SHORT.





**WOULD YOU LIKE  
A THOUSAND SIT-UPS  
WITH THAT?**

...to fit by making the smartest.  
With For This.

# calories

*(noun)*

Tiny creatures that live in  
your closet and sew your  
clothes a little bit tighter  
every night.



# PRIVATE CLUB TRENDS

## Top **FITNESS** Trends –

1. Providing age-appropriate offerings
2. Cross promotion with activities like tennis, golf and swimming
3. Spicing up the workout with classic equipment and new innovations
4. Wellness programming at services at fitness locations – Boca West
5. Group exercise classes
6. PX90, Zumba, Insanity, Yoga (hot) etc
7. Personal Training
8. Educated and experienced fitness professionals

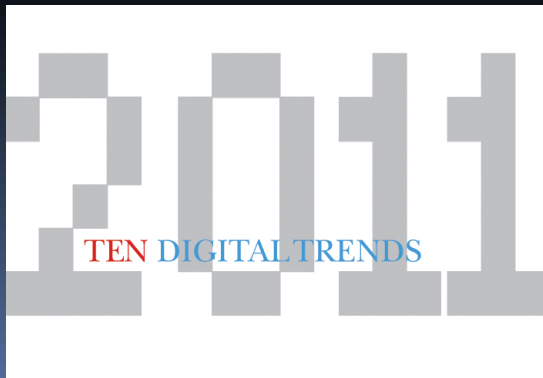
# PRIVATE CLUB TRENDS

1. Intergenerational Issues
2. Increased Interest in FITNESS
3. Impact of Technology

# PRIVATE CLUB TRENDS

## Impact of Technology – 71%

1. Especially among younger members
2. Cell phones, texting, PDAs and social media are causing clubs to change their club rules regarding the use of such devices in the club area.
3. Members are also more comfortable with use of the Internet for paperless billing, announcements and other communications.



# PRIVATE CLUB TRENDS

**Sites most used by Private Clubs using  
Social Media**



**Facebook – 68%**



**Twitter – 32%**



**LinkedIn – 25%**



**Other – 25%**

# PRIVATE CLUB TRENDS

## Mobile Device Usage by Club Website Visitors



**iPad - 42%**

**iPhone - 35%**



**Android - 14%**



**Blackberry - 6%**

**Other - 3%**

# Core Golfer – Digital Activity

14.8 million CORE GOLFERS

**25%** read golf articles on their mobile phone



**4.6 million** regularly read blogs about golf brands, courses or travel

**68%** maintain a profile on a social network



**8.3 million** visit their primary SN page at least weekly



**41%** have 100 or more contacts on social networks (SN)

**4.4 million** bought a golf item in past 12 months

**84%** researched golf equipment online in the last 12 months (30% purchased)



**2.4 million** downloaded a golf-related App

**5.9 million** booked a tee time via a third-party website

Source: NGF 2011 Core Golfers & Technology Study

# PRIVATE CLUB TRENDS

1. Intergenerational Issues
2. Increased Interest in FITNESS
3. Impact of Technology
4. Improving Management and Governance

# PRIVATE CLUB TRENDS

## Improving Management and Governance – 70%

Larger and more complex clubs call for;

1. More efficient and effective management of facilities and resources
2. More responsive, transparent governance models and techniques.





# PRIVATE CLUB TRENDS

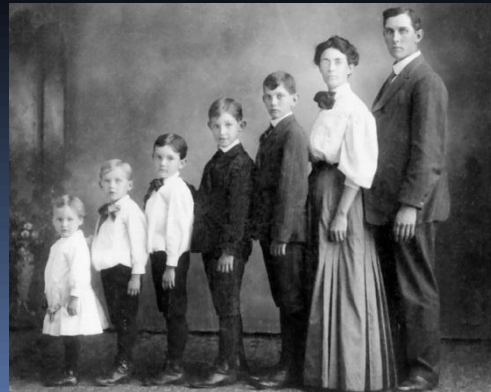
1. Intergenerational Issues
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4. Improving Management and Governance
5. Emphasis on Family Programming

# PRIVATE CLUB TRENDS

## Emphasis on Family Programming - 61%

Attracting younger families often requires;

1. An increase in the services to all ages and family types
2. Child care
3. Special areas for youth and children's clinics
4. Special programs for women
5. Sports camps and the like.



# PRIVATE CLUB TRENDS

1. Intergenerational Issues
2. Increased Interest in FITNESS
3. Impact of Technology
4. Improving Management and Governance
5. Emphasis on Family Programming
6. Demand for Casual Environment

# PRIVATE CLUB TRENDS

## Demand for Casual Environment – 59%

1. Businesses of all types have modified standards of dress to meet the growing demand for a casual, more relaxing environment.
2. The trend extends to dining with, the emergence of sports bars, bistros and the like.



# PRIVATE CLUB TRENDS

1. Intergenerational Issues
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3. Impact of Technology
4. Improving Management and Governance
5. Emphasis on Family Programming
6. Demand for Casual Environment
7. Changing Menu's - Diets and Food Preferences

# PRIVATE CLUB TRENDS

## Changing Diets and Food Preferences – 53%

1. There is increasing national interest in healthier, more nutritional diets
2. Menus featuring heart-healthy, locally grown, low-fat, low-carb, gluten-free and other specialty foods.



# PRIVATE CLUB TRENDS

## **Changing Diets and Food Preferences – 53%**

1. Locally Sourced meats and seafood
2. Locally grown produce
3. Nutritionally Balanced Children's dishes
4. Nutrition/Health
5. Sustainable Seafood
6. Gluten Free/Food Allergy Conscious
7. Simplicity/Back to Basics
8. Locally Produced Wine and Beer
9. Half/Smaller portions for a smaller price
10. Organic Produce



NATURAL FOOD *Kombucha*  
Prebiotics & TRENDS 2012  
coconut  
GLUTEN-FREE CONVENIENCE  
FOODS greek yogurt





At my age  
I need glasses.



~~Do not let this bottle  
serve as an inspiration  
to call your ex in a  
pathetic attempt to  
get back together.  
Some very fine grapes  
have died in the  
making of this wine.  
Show some respect.~~

*Soggy Bottom Boys*  
Sauvignon Blanc 2012



**KEEP  
CALM  
IT'S  
WINE  
O'CLOCK**

LIVE · SHOP · **DINE** · RELAX

*By Barbara Hay, Certified Sommelier*

*Wine*

TRENDS

2011: THE YEAR OF THE COMEBACK



# PRIVATE CLUB TRENDS

Changing Diets and Food Preferences – 53%

Wine Idea ..... Pro Golfers Wines!!



# Beer Idea ... Branded Glasses!



# PRIVATE CLUB TRENDS

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6. Demand for Casual Environment
7. Changing Menu's - Diets and Food Preferences
8. Emphasis on Being Green

# PRIVATE CLUB TRENDS

## Emphasis on Being Green – 53%

1. Global warming
2. Water quality and conservation
3. Protected wetlands and habitats
4. Use of pesticides and herbicides
5. Related "green" issues continue to motivate clubs to be more sustainable with their water and energy and to be mindful of their overall environmental impact.



# PRIVATE CLUB TRENDS

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9. Popularity of Non Golfing Activities

# PRIVATE CLUB TRENDS

## Popularity of Non Golfing Activities – 36%

1. The Quick-Start tennis program and other USTA programs have substantially increased the number of kids and young adults playing tennis, increasing the popularity of the sport.
2. Other sports and games are also attracting participants who want an alternative to golf; **Swimming, Fitness, Croquet; Squash, Racquetball, Badminton etc.**



# PRIVATE CLUB TRENDS

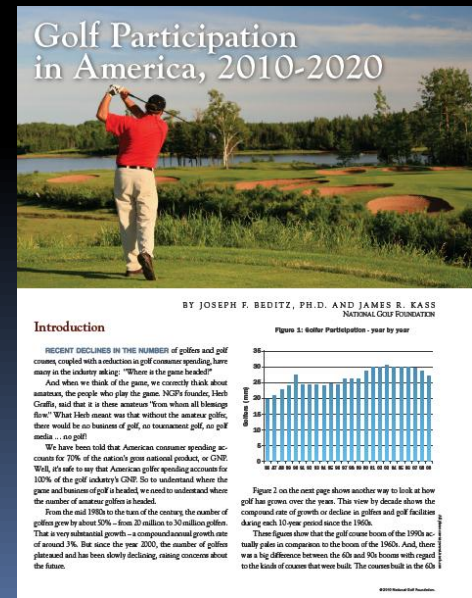
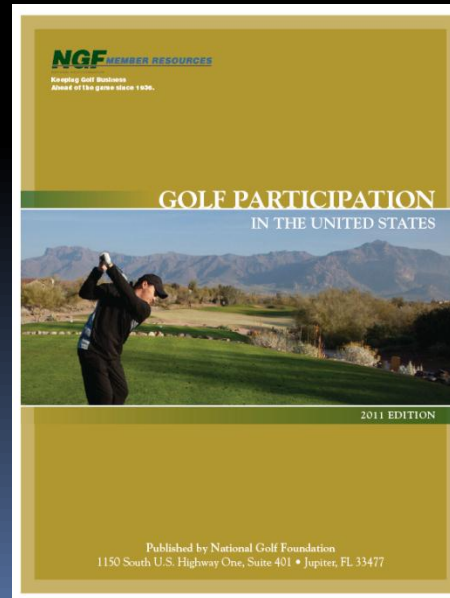
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8. Emphasis on Being Green
9. Popularity of Non Golfing Activities
10. Flat Growth in Golf



# PRIVATE CLUB TRENDS

## Flat/Slow Growth in Golf – 35%

1. In contrast to the decade of growth in the **number of golfers and rounds of golf**, the past few year's have seen at best a **flattening** in both statistics and even a **downturn** in some areas of the country
2. PGA Programs to grown the game – Golf 2.0, Play Golf America etc.





# PRIVATE CLUB TRENDS

## Golf Trends - 2011

- 1. Rounds are Flat or Down – Tennis up 43%**
- 2. Women the fastest growing segment in Golf**
- 3. Golf Course Conditioning – “Augusta Effect”**
- 4. Budgets – Expecting more for less**
- 5. Golf Pro’s vs. Independent Contractors**
- 6. Caddies**
- 7. Pull Carts**
- 8. Staffing – Quality; Availability; Wages**
- 9. Pace of Play/Slow Plat – 4 hour round**
- 10. Cost of Merchandise – Edwin Watts, Golfdom**

# **Top 5 things Core Golfers have done in 2012 to improve their games!**

- 1. Practiced more (52%)**
- 2. Purchased new equipment (42%)**
- 3. Took an individual lesson(s) with a golf professional (25%)**
- 4. Got custom fit for equipment (15%)**
- 5. Purchased a training aid(s)/teaching aid(s) (10%)**

# THE AUGUSTA SYNDROME REVISITED

Over the years exquisite course conditions at the Masters made life difficult for superintendents throughout the U.S., but that is changing—and here's why

**BY GEOFF SHACKELFORD**  
**PHOTOGRAPHS BY DOM FURORE**





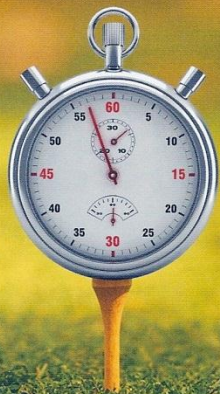
# PGA MAGAZINE

Volume 93, No. 2

February 2012

PGAmagazine.com

Five Dollars



## PACE OF PLAY

A TIME(LESS) ISSUE



# PGA MAGAZINE

Volume 93, No. 11

November 2012

PGAmagazine.com

Five Dollars

## THE PURPLE PEOPLE CONNECTING WITH HER



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9. Popularity of Non Golfing Activities
10. Flat Growth in Golf
11. Tailoring Membership & Fee Structure

# PRIVATE CLUB TRENDS

## Tailoring Membership & Fee Structure – 33%

1. Clubs are adjusting membership definitions and associated fees to reach a wider market and increase the usage of their facilities for revenue generation
2. Adjustments may affect the mix of equity in the fees, nonresidential memberships, increasing reciprocity with other clubs, and more focused usage fees.





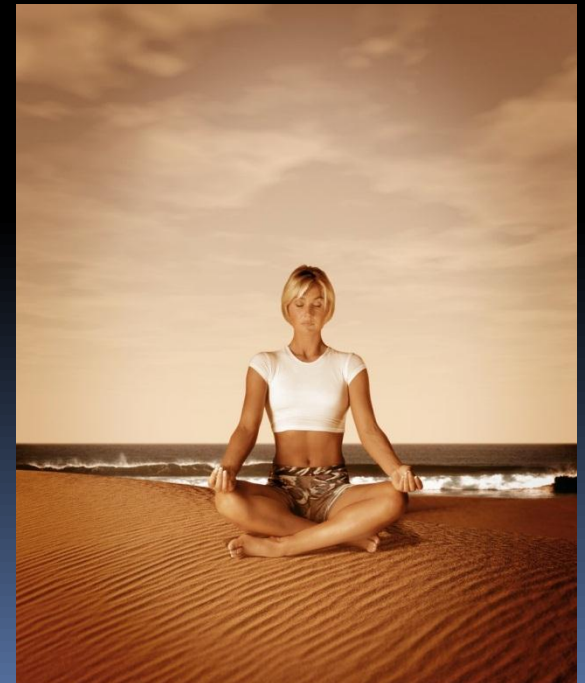
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10. Flat Growth in Golf
11. Tailoring Membership & Fee Structure
12. Non Traditional Services and Amenities

# PRIVATE CLUB TRENDS

## Non Traditional Services and Amenities – 24%

1. Spa services, manicures and pedicures, massages
2. Hair salons and Barbers
3. Concierge services, Vacation Planning, Golf Trips etc.
4. Many other non-traditional services to entice members.



# PRIVATE CLUB TRENDS

## **Round Table Discussions**

**What's happening in Europe?**

THANK-YOU FOR YOUR  
ATTENTION!



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# **Ratings of National Trends by Panel of US General Managers - 2010**

- 1. Intergenerational Issues**
- 2. Increased Interest in Fitness**
- 3. Impact of technology**
- 4. Improving management & governance**
- 5. Emphasis on family programming**
- 6. Demand for casual environment**
- 7. Changing Menus**
- 8. Emphasis on being green**
- 9. Popularity of non-golf activities**
- 10. Flat growth in golf**
- 11. Tailoring membership & fee structures**
- 12. Non-traditional services & amenities**

# Golf Trends/Challenges in the US - 2011

- **Rounds are Down or Flat**
- **Women** are the fastest growing segment in golf today. Doesn't always make the Men happy!
- **Golf Course Conditioning – 'Augusta' Effect**
- **Budgets: expecting more with less**
- **Golf Pro's as Independent Contractors**
- **Caddies**
- **Staffing – Quality, Availability, Wages**
- **Pace of Play/Slow Play – 4 hour round?**
- **Cost of Merchandise – Edwin Watts**



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**MUSCLE & FITNESS**

**WANT TO BURN MORE CALORIES?**  
3 Super Routines to Melt Off the Pounds p50

**HERS**

For Women Who Want More Out of Fitness

**NO ME?**

THE WORKOUTS TO LEAN & ENERGIZED  
e Programs

**ives for gle-Free**

LOOK GREAT IN A TANK TOP

**YENTION**  
RAIN SAFE

**POWER UP YOUR DIET**  
QUICK & EASY PROTEINS

©COURTESY OF WEIDER PUBLICATIONS FOR HARDBODY.COM

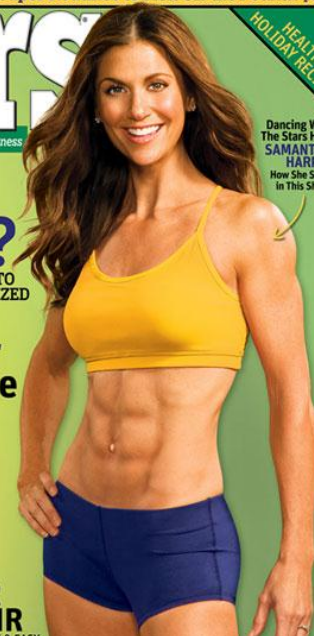
Healthy Holiday Recipes

Dancing With The Stars Host SAMANTHA HARRIS How She Stays In This Shape

# calories

(noun)

Tiny creatures that live in your closet and sew your clothes a little bit tighter every night.



# PRIVATE CLUB TRENDS

## **Round Table Discussions**

**What's happening at your Club?**



# PRIVATE CLUB TRENDS

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