During the week of March 16, CMAA fielded a survey to our member-managed clubs to gauge the impact of the coronavirus pandemic at clubs across our membership.

Approximately 362 clubs responded to this survey, including Golf, Country, City/Athletic, Yacht, POA/HOA, CIRA, and other types of clubs. The clubs that responded are geographically representative of the CMAA membership across the country. When it comes to total operating revenue, the responding clubs are on par with each other for each category from less than $3.5 million (18.6%) to $3.5-$4.9 million (19.1%) to $5.0-$7.49 million (23.3%) to $7.5-$9.9 million (17.7%) to $10-$14.9 million (11.6%) to $15.0 million or more (9.7%).

Communications
- The majority of responding clubs are keeping the frequency of communications to members and staff on an “as-needed” basis (48.2%) as opposed to weekly (27.7%) or daily (24.1%).

Operational Status
- Out of the 362 clubs that responded, there are 14 completely open (3.9%), 229 with reduced operations (63.2%), and 119 completely closed (32.9%).
- For the clubs with reduced operations, the top five facilities that are open include food and beverage - takeout only (50.7%), golf courses (47.5%), outdoor tennis courts (27.4%), locker rooms (18.2%), and pickleball courts (17.3%).
- Finally, the top five facilities that are closed for clubs with reduced operations are food and beverage - normal (80.1%), outdoor pools (59.7%), locker rooms (59.3%), fitness/exercise (48%), and steam/sauna (40.2%).
- When it comes to the clubs with reduced operations, 50.5% have cancelled some/all outside events, 43.2% have postponed some/all outside events and 6.3% have had no cancellations or postponements at this time.
- For clubs that are completely open or have reduced operations, 52.2% have considered a complete shutdown.

Initial Economic and Employment Impact
- 75.4% of the clubs that responded have experienced a financial loss. The average loss is $146,140 and cumulatively it is greater than $31 million due to the coronavirus pandemic.
- In terms of clubs paying full-time staff during a club shutdown, 54.8% have a policy while 45.2% do not have a policy. Further insight will be provided in the Employee Compensation and Scenario Planning Survey, in the field the week of March 23.
Initial Economic and Employment Impact (continued)

- While 39.9% of clubs are unsure of the time period that they will cover the salary of the full-time employees, 22.1% will cover salaries indefinitely, 15.9% of clubs will cover salaries for the next 2-4 weeks, and 10.9% will cover salaries for the next 2 weeks.
- 53.6% of clubs have a sick leave policy that addresses any issues that may arise because of the coronavirus pandemic.
- While several clubs (35.3%) tentatively plan to resume operations between April 1-15, 35.9% of clubs are unsure of when they will be able to reopen.

COVID-19 Impact

- 4.4% of the responding clubs have had a member/guest or staff member diagnosed with the COVID-19.
- Since the start of the coronavirus pandemic, 97.8% of clubs have upgraded their internal cleaning.
- Other challenges that clubs are facing in response to the coronavirus pandemic include: hiring freeze, dues payments from members, mental stress on staff and members, refunds for social members, seasonal staff uncertainty, travel restrictions for H2B/J1 programs, capital improvement project delays, childcare restrictions, potential layoffs, member resignation among other challenges.

Clubs are experiencing an incredible impact from the COVID-19 pandemic. CMAA will reissue this survey twice a month during the pandemic to provide CMAA members with valuable information. CMAA will distribute a survey regarding staffing in the next week. Please visit www.cmaa.org/beprepared for the latest survey and results.

CMAA has worked to ensure that all information in this report is accurate as of the publication date and is consistent with good industry practices. It is recommended, however, that readers evaluate the applicability of this information considering their work conditions, particular situations, and changing standards. It is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If legal advice or other expert assistance is required, the services of a competent professional should be sought.

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Participant Demographics
Participant Demographics

SURVEY OPEN MARCH 17-22

362 RESPONDENTS
Location
Responding Clubs

Club Type

- Country
- Golf
- City
- Others
- Yacht
- Athletic
- POA/HOA/CIRA

Total Operating Revenue

- Less than $3.5 million
- $3.5-$4.9 million
- $5.0-$7.49 million
- $7.5-$9.9 million
- $10.0-$14.9 million
- $15.0 million or more
Club Communications
Communication Frequency on Club Status

AS A PERCENT

- Daily: 24%
- Weekly: 28%
- As Needed: 48%
Operational Status
Club Status

AS A PERCENT

- Completely Open: 4%
- Completely Closed: 33%
- Reduced Operations: 63%
Top Five Open Club Operations

AS A PERCENT

- Food and beverage - take-out only: 51%
- Golf course: 47%
- Tennis courts - outdoor: 27%
- Locker room: 18%
- Pickleball: 17%
Top Five Reduced Club Operations

AS A PERCENT

<table>
<thead>
<tr>
<th>Service</th>
<th>Reduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Golf course</td>
<td>18%</td>
</tr>
<tr>
<td>Food and beverage- normal</td>
<td>14%</td>
</tr>
<tr>
<td>Food and beverage- take-out</td>
<td>11%</td>
</tr>
<tr>
<td>Locker room</td>
<td>11%</td>
</tr>
<tr>
<td>Tennis courts- outdoor</td>
<td>8%</td>
</tr>
</tbody>
</table>
Top Five Closed Club Operations

AS A PERCENT

- Food and beverage - normal: 80%
- Pools - outdoor: 60%
- Locker room: 59%
- Fitness/exercise: 48%
- Steam/sauna: 40%
Cancellation and Postponed Events

As a Percent

- No Cancellations or Postponements: 6%
- Cancelled Some/All Outside Events: 51%
- Postponed Some/All Outside Events: 43%
Clubs Considering a Complete Shut Down

**AS A PERCENT**

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>52%</td>
</tr>
<tr>
<td>No</td>
<td>36%</td>
</tr>
<tr>
<td>Other</td>
<td>20%</td>
</tr>
</tbody>
</table>
Initial Economic and Employment Impact
Financial Loss Due to COVID-19

AS A PERCENT

[Bar chart showing 75% of respondents indicating financial loss due to COVID-19, and 24% indicating no loss.]
Clubs With a Policy to Pay Full-time Staff During a Shutdown

AS A PERCENT

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>55%</td>
<td>45%</td>
</tr>
</tbody>
</table>
How Long you Plan to Cover Salary During a Shutdown

AS A PERCENT

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-2 weeks</td>
<td>11%</td>
</tr>
<tr>
<td>2-4 weeks</td>
<td>16%</td>
</tr>
<tr>
<td>4-6 weeks</td>
<td>7%</td>
</tr>
<tr>
<td>6-8 weeks</td>
<td>4%</td>
</tr>
<tr>
<td>Indefinitely</td>
<td>22%</td>
</tr>
<tr>
<td>Unsure</td>
<td>40%</td>
</tr>
</tbody>
</table>
Tentatively Resume Club Operations

AS A PERCENT

- April 1-15: 35%
- April 16-30: 15%
- May 1-15: 9%
- May 16-31: 4%
- June 1-15: 0%
- June 16-30: 1%
- Not sure: 36%
COVID-19 Impact
Member/Guest or Staff Diagnosed with COVID-19

As a Percent

- Yes: 4%
- No: 95%
Sick Leave Policy That Addresses Issues That may Arise due to COVID-19

AS A PERCENT

Yes: 54%
No: 44%
Upgraded Internal Cleaning Since Crisis

As a Percent

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>98%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Other Challenges Club Face Amid COVID-19

want possible season good Potential trying impact area golf staff needed yet food May
currently loss happen keeping social changing operations time summer
will start members seems staff new
membership also dues stress club related open well go
services challenge every concerned increase employees revenues uncertainty events
day seasonal staff able April pay
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