Reopening Your Club Amidst COVID-19

May 8, 2020: Insights from CMAA’s Research Results

During the week of April 27, CMAA fielded a survey to our member-managed clubs to gauge what steps are being taken to reopen following the coronavirus pandemic at clubs across our membership.

Approximately 444 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 relatively on par with each other for each category from less than $3.5 million (19.2%) to $3.5-$4.9 million (16.9%) to $5.0-$7.49 million (23.5%) to $7.5-$9.9 million (17.1%) to $10-$14.9 million (11.9%) to $15.0 million or more (11.4%). In terms of full-time employees, 47.7% of the clubs responding to the survey staff over 50 employees, 14.5% staff between 41-50 employees, 11.1% staff between 21-30 employees, 10.9% staff between 11-20 employees, 9.7% staff between 31-40 employees, and 6.1% staff between 1-10 employees.

Operational Status

- Clubs have experienced major losses during the pandemic. Quarterly operating revenues for several clubs have been significantly impacted. While 26% of the responding clubs are unsure, 24.2% plan to have quarterly operating revenues restored at a pre-pandemic level in 4-6 months, 23.3% in 10-12 months, 16.7% in 7-9 months, and 9.9% in 1-3 months.
- Most clubs postponed or canceled events (weddings, baby showers, holiday celebrations, etc.) due to the pandemic. 29.5% of the responding clubs plan to return to the pre-pandemic level of events in 4-6 months, 26.6% are unsure, 19.8% in 10-12 months, 15.7% in 7-9 months, and 8.4% in 1-3 months.
- 34.7% of the responding clubs have filed a business interruption claim. Several clubs commented that they are not covered in their insurance policy.
- 34.2% of the responding clubs have liability concerns from members related to COVID-19 fears once reopened and 37.7% have sought out legal advice to prepare for their reopening.

Staffing

- Due to the pandemic, several clubs had to make tough decisions related to staffing that included furloughs and layoffs. While 34.5% of the responding clubs plan to have staffing restored at a pre-pandemic level in 1-3 months, 27.6% are waiting for government restrictions to lift. Otherwise. 16.9% expect to return to this level in 4-6 months, 6% in 10-12 months, 4.8% in 7-9 months, and 10.2% are unsure.
- As clubs plan to reopen, the top two biggest challenges being considered for staff are reorganization (51.4%) and retraining (50.2%). Additional challenges include downsizing (36%) and reassignments (20.1%).
Reopening Considerations

- There have been specific guidelines related to social distancing, hygiene and personal protective equipment (PPE) that businesses have had to follow during the pandemic. 68.9% of the responding clubs plan to continue to follow these guidelines until the Centers for Disease Control (CDC) issues differing guidance, 13.5% will follow the guidelines for 1-3 months, 9% for 4-6 months, and 5.9% indefinitely.
- As clubs look to reopen, workplace safety will be a priority and returning staff will want to be assured that the club is completely safe. To ensure workplace safety, clubs plan to monitor CDC advisories (96.6%), install hand washing and hand sanitizing stations (82.9%), reorganize areas members congregate (80.4%), conduct workplace safety audits (68.9%), conduct temperature checks upon arrival at club for staff (67.3%), limit movement of staff to designated work areas (63.1%), explore staggered shifts or alternate workdays (53.2%), provide staff meals to-go or deliver to work area (44.4%), and reconfigure/close staff lounges (43%). Only 15.3% of clubs plan to upgrade HVAC and ventilation.
- In addition, members of the club will want to be assured that their clubs are safe to visit. To ensure that members know it is a safe environment, clubs plan to monitor CDC advisories and communicate to membership (96.8%), install hand washing and hand sanitizing stations (84.4%), limit in-person meetings (77.6%), limit number of members at the club (73.5%), conduct daily audits on all amenities that are open (67.6%), reconfigure meeting areas (67.1%), and prohibit guests (55.6%). Just 25.2% of clubs plan to limit number of facilities a member can go to in a day, 22.5% plan to conduct temperature checks upon arrival at club for members, and 19.3% will install foot pulls for doors.

Amenity Considerations

- By mid-June, the top five amenities that will be operating at a normal level for clubs include food and beverage - takeout (76.4%), golf courses (43.9%), outdoor tennis courts (29.8%), locker rooms (22.1%), and pickleball courts (21.6%).
- The top five amenities that will be operating at a reduced level for clubs are food and beverage - on premises dining (71.5%), banquets (45.3%), locker rooms (39.5%), outdoor pools (38.8%), and fitness/exercise (32.4%).
- The top five amenities that will be closed for clubs include banquets (43.7%), locker rooms (21.2%), steam/sauna (20.2%), food and beverage - on premises dining (17.4%), and outdoor pools (16.2%).
- For clubs with golf courses, the measures taken as they reopen will include sanitizing golf cars between uses (93.6%), limiting food and beverage (80.4%), limiting golf car use (70.1%), frequent sanitizing of range golf balls (68.6%), limiting amount of people in groups (63.6%), restricting to members only play (63.1%), and less frequent tee-times (59.5%). Additional measures include removing rakes/ball washers/tee markers/trash cans, raising cups, wash carts with soap and water, range spacing, flag stick alterations, and use of personal push carts.
- For clubs with tennis courts, the measures taken as they reopen will include limiting the amount of people that can play simultaneously (67.5%), restricting to members only play (65.4%), limiting schedule for members (50.2%), limiting food and beverage (47.1%), frequent sanitizing of tennis balls (35.3%), only specific groups can play together (34.9%), and disposing of tennis balls after each game or lesson (24.1%). Additional measures include use of own tennis balls, individual marked tennis balls, net dividers, singles only unless family, and requiring rubber gloves for non-racquet hand.
- For clubs with pools, the measures taken as they reopen will include limiting the number of members in the facility (75.5%), frequent cleaning of pools (65.3%), members only allowed in the pool (62.4%), limiting food and beverage (57.6%), and limiting the schedule for members (57%). Additional measures include additional staff to monitor social distancing and spacing and sanitizing of furniture.
Amenity Considerations (continued)

- For food and beverage operations, the measures taken for reopening will include having dining tables set up for optimal social distancing (97.5%), frequent cleaning of the kitchen (94.3%), eliminating all buffets (87.4%), new training for servers (87.4%), offering curbside pick-up (85.1%), limiting the amount of people that can eat simultaneously (80.7%), limiting the schedule for food and beverage offerings (59.6%), and allowing only members in the dining room (44.5%). Additional measures include expansion into other spaces, and disposable menus/flatware/cups/cutlery.

- For events at the club, reopening measures will include having dining tables set up for optimal social distancing (85.1%), frequent cleaning of the areas where the events are held (84.9%), limited amount of attendees (74.8%), new training for staff (74.3%), limited schedule for event availability (50%), eliminating all club dances and socials (37.3%), and prohibiting non-member events (29%). Additional measures include moving events outside, not allowing events, and waiting on CDC and state guidelines.

- For clubs with fitness areas/programs, the measures taken for reopening will include frequent cleaning of machines and materials used (86.8%), limiting the amount of people that can exercise simultaneously (81.3%), limiting the schedule for members exercising or participating in wellness programs (59.9%), machines set up for optimal social distancing (59.5%), new training for fitness staff (56%), and not hosting group fitness classes (42.8%). Additional measures include limiting locker room access to restrooms only and reservation-only access to fitness.

Capital Improvement or Renovation Plans

- Golf course capital improvement or renovation projects for 2020 will proceed as planned for 44.4% of the responding clubs while 16.6% have canceled or postponed these projects. 22.8% of the clubs responding did not have plans for their golf course for 2020.

- Golf course maintenance equipment capital improvement or renovation projects for 2020 will proceed as planned for 54.1% of the responding clubs while 12.5% have canceled or postponed these projects. 20.1% of the clubs responding did not have plans for golf course maintenance equipment for 2020.

- Fitness/spa capital improvement or renovation projects for 2020 will proceed as planned for 24.8% of the responding clubs while 14.4% have canceled or postponed these projects. 52.9% of the clubs responding did not have plans for their fitness/spa for 2020.

- Clubhouse capital improvement or renovation projects for 2020 will proceed as planned for 36.7% of the responding clubs while 23.1% have canceled or postponed these projects. 20.4% of the clubs responding did not have plans for their clubhouse for 2020.

- Dining area capital improvement or renovation projects for 2020 will proceed as planned for 32.1% of the responding clubs while 21.6% have canceled or postponed these projects. 28.8% of the clubs responding did not have plans for the dining area for 2020.

Clubs are experiencing an incredible impact from the COVID-19 pandemic. Please visit www.cmaa.org/beprepared for the latest surveys, results, and other resources related to COVID-19.
CMAA Reopening Your Club Amidst COVID-19: Insights From CMAA Research

Jeffrey D. Morgan, FASAE, CAE, Sarah Bal, CAE, and Amilcar Davy
Participant Demographics
Participant Demographics

SURVEY OPEN APRIL 29-MAY 5

444 RESPONDENTS
Responding Clubs

Club Type
- Country
- City
- Other (please specify)
- Athletic
- Golf
- Yacht
- 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
Number of Full-Time Employees

AS A PERCENT

<table>
<thead>
<tr>
<th>Number of Full-Time Employees</th>
<th>Percent</th>
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<tbody>
<tr>
<td>0-10</td>
<td>6%</td>
</tr>
<tr>
<td>11-20</td>
<td>11%</td>
</tr>
<tr>
<td>21-30</td>
<td>11%</td>
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<tr>
<td>31-40</td>
<td>10%</td>
</tr>
<tr>
<td>41-50</td>
<td>15%</td>
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<tr>
<td>50+</td>
<td>48%</td>
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Operational Status
Projected Timeframe for Quarterly Operating Revenues to be at the Pre-Pandemic Level

AS A PERCENT

- 1-3 months: 10%
- 4-6 months: 24%
- 7-9 months: 17%
- 10-12 months: 23%
- Unsure: 26%
Projected Timeframe for Events to be at the Pre-Pandemic Level

AS A PERCENT

- 1-3 months: 8%
- 4-6 months: 30%
- 7-9 months: 16%
- 10-12 months: 20%
- Unsure: 27%
Business Interruption Claim Filed by Club

AS A PERCENT

Yes: 35%
No: 65%
Liability Concerns from Members at Club Related to COVID-19 Fears

As a percent

Yes: 34%
No: 66%
Clubs Seeking Legal Advice to Prepare for Reopening

AS A PERCENT

Yes: 38%
No: 62%
Staffing
Projected Timeframe for Staffing to be at the Pre-Pandemic Level

AS A PERCENT

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>1-3 months</td>
<td>35%</td>
</tr>
<tr>
<td>4-6 months</td>
<td>17%</td>
</tr>
<tr>
<td>7-9 months</td>
<td>5%</td>
</tr>
<tr>
<td>10-12 months</td>
<td>6%</td>
</tr>
<tr>
<td>Unsure</td>
<td>10%</td>
</tr>
<tr>
<td>When government restrictions are lifted</td>
<td>28%</td>
</tr>
</tbody>
</table>
Staffing Challenges Being Considered

AS A PERCENT

- Reorganization: 51%
- Retraining: 50%
- Reassignments: 20%
- Identification of Redundancies: 11%
- Downsizing: 36%
Reopening Considerations
How Long Club Plans to Follow COVID Related Guidelines

AS A PERCENT

- 1-3 months: 14%
- 4-6 months: 9%
- 7-9 months: 2%
- 10-12 months: 1%
- Indefinitely: 6%
- Until the CDC issues differing guidance: 69%
Workplace Safety: 
Steps Clubs are Taking for Staff

AS A PERCENT

- Monitor CDC advisories: 97%
- Install hand washing and hand...: 83%
- Reorganize areas members...: 80%
- Conduct workplace safety audits: 69%
- Temperature checks upon...: 67%
- Limit movement of staff to a...: 63%
- Explore staggered shifts or...: 53%
- Staff meals to go or delivered...: 44%
- Reconfigure/Close staff lounge: 43%
- Upgrade HVAC and ventilation: 15%
Club Safety: Steps Clubs are Taking for Members

AS A PERCENT

<table>
<thead>
<tr>
<th>Step</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor CDC advisories and communicate to membership</td>
<td>97%</td>
</tr>
<tr>
<td>Install handwashing and hand sanitizing stations</td>
<td>84%</td>
</tr>
<tr>
<td>Limit in-person meetings</td>
<td>78%</td>
</tr>
<tr>
<td>Limit number of members at the club</td>
<td>73%</td>
</tr>
<tr>
<td>Conduct daily audits on all amenities open</td>
<td>68%</td>
</tr>
<tr>
<td>Reconfigure meeting areas</td>
<td>67%</td>
</tr>
<tr>
<td>Prohibit guests</td>
<td>56%</td>
</tr>
<tr>
<td>Limit number of facilities a member can go to in a day</td>
<td>25%</td>
</tr>
<tr>
<td>Temperature checks upon arrival at club for members</td>
<td>22%</td>
</tr>
<tr>
<td>Install foot pulls for doors (hands free door openers)</td>
<td>19%</td>
</tr>
</tbody>
</table>
Amenity Considerations
The following slides detail the top amenities that will be normal, reduced and closed for the responding clubs by mid-June.

Each club was able to select that an amenity would be normal, reduced or closed at their club by mid-June;

- Normal= business as usual
- Reduced= reduction to normal operations
- Closed= no access
Top Normal Amenities of Clubs by Mid-June (2/4)

AS A PERCENT

- **Food & Beverage - Takeout**: 76%
- **Golf Course**: 44%
- **Outdoor Tennis**: 30%
- **Locker Rooms**: 22%
- **Pickleball**: 22%
Top Reduced Amenities of Clubs by Mid-June (3/4)

**AS A PERCENT**

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Beverage - On Premises Dining</td>
<td>71%</td>
</tr>
<tr>
<td>Banquets</td>
<td>45%</td>
</tr>
<tr>
<td>Locker Rooms</td>
<td>40%</td>
</tr>
<tr>
<td>Outdoor Pool</td>
<td>39%</td>
</tr>
<tr>
<td>Fitness/Exercise</td>
<td>32%</td>
</tr>
</tbody>
</table>
Top Closed Amenities of Clubs by Mid-June (4/4)

AS A PERCENT

- Banquets: 44%
- Locker Rooms: 21%
- Steam/Sauna: 20%
- Food & Beverage - On Premises Dining: 17%
- Outdoor Pool: 16%
Golf Course - Measures Clubs are Taking

**AS A PERCENT**

- 69% Frequent sanitizing of range golf balls
- 94% Sanitize golf cars between uses
- 70% Limited golf car use
- 64% Limited amount of people in groups
- 60% Less frequent tee times
- 63% Members only play (no guests allowed to play)
- 80% Limited food and beverage (increase spacing)
- 12% Regular food and beverage
Tennis Courts: Measures Clubs are Taking

AS A PERCENT

- Frequent sanitizing of tennis balls: 35%
- Dispose of tennis balls after each game or lesson: 24%
- Only specific groups can play together: 35%
- Members only play (no guests allowed to play): 65%
- Limited amount of people that can play simultaneously: 67%
- Limited schedule for members: 50%
- Limited food and beverage: 47%
- Regular food and beverage: 8%
Pools: Measures Clubs are Taking

AS A PERCENT

- Frequent cleaning of pools: 65%
- Limited schedule for members: 57%
- Limit number of members in facility: 75%
- Members only allowed in the pool (no guests): 62%
- Limited food and beverage: 58%
- Regular food and beverage: 13%
## F&B: Measures Clubs are Taking

### AS A PERCENT

<table>
<thead>
<tr>
<th>Measure</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequent cleaning of kitchen</td>
<td>94%</td>
</tr>
<tr>
<td>Eliminate all buffets</td>
<td>87%</td>
</tr>
<tr>
<td>Dining tables set up for optimal social distancing</td>
<td>97%</td>
</tr>
<tr>
<td>Limited amount of people that can eat simultaneously</td>
<td>81%</td>
</tr>
<tr>
<td>Limited schedule for food and beverage offering</td>
<td>60%</td>
</tr>
<tr>
<td>Members only allowed in dining options (no guests at the club)</td>
<td>45%</td>
</tr>
<tr>
<td>New training for servers</td>
<td>87%</td>
</tr>
<tr>
<td>Offer curb side pick-up</td>
<td>85%</td>
</tr>
</tbody>
</table>
Events: Measures Clubs are Taking

AS A PERCENT

- Frequent cleaning of areas where events are held: 85%
- Dining tables set up for optimal social distancing when necessary: 85%
- Eliminate all club dances and socials: 37%
- Prohibit non-member events: 29%
- Limited amount of attendees: 75%
- Limited schedule for event availability: 50%
- New training for staff: 74%
Fitness and Wellness: Measures Clubs are Taking

**AS A PERCENT**

- Frequent cleaning of machines and materials used: 87%
- Machines set up for optimal social distancing: 60%
- Limited amount of people that can exercise simultaneously: 81%
- Limited schedule for members exercising or participating in wellness programs: 60%
- No group fitness classes (instructor lead courses i.e. zumba, yoga, pilates, etc.): 43%
- New training for fitness staff: 56%
Capital Improvement or Renovation Plans
We will proceed as planned: 54%
We will spend <20% less than initially planned: 37%
We will spend >20% less than initially planned: 32%
Our capital improvement projects for 2020 have been cancelled or postponed: 17%
We did not have plans for capital improvements or renovations in 2020: 53%

We will spend >20% less than initially planned: 9%
We will spend <20% less than initially planned: 8%
We will proceed as planned: 4%
Questions?
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