



CLUB *thinking partners*

Staff Housing Survey Report

Presented by:
DENEHY Club Thinking Partners

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Denehy Club Thinking Partners

1500+ Projects
500+ Clients



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Denehy Club Thinking Partners

- **What makes us different**
 - We “get” clubs
 - We are students of industry trends and best practices
 - We tell it like it is, but we say it nicely
 - We work well with your people at all levels as a catalyst to get job done
 - We are actively committed to optimizing every facet of club life
 - We earn consistently positive client feedback and enjoy strong levels of repeat business from our clients

Our record

- Of our placements made during the last decade, over 95% are still in place. We consider long-term success of candidates a key measure of our value. We follow up regularly with clients and candidates to ensure that the new hire is working well.
- Our consulting work in the 24+ years has encompassed operational reviews, new club startups, board governance issues, performance management and executive coaching. The relationships we build and the success of our solutions-oriented approach frequently lead to multiple assignments for particular clients ranging over a period of years.

Denehy’s Research Team



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Methodology and Objectives

Survey Participants:	Club management with responsibilities for staffing and hiring
Survey Open Date:	10/3/2024
Survey Close Date:	10/14/2024
Completed Surveys	180

Club Types and Respondent Titles:	Ownership Structure (n=180)		Title (n=180)	
	Proprietary club (owned by private organization)	18%	COO	51%
Developer owned club	4%	GM or Clubhouse Manager	44%	
Non-profit club	72%	Other C-Suite or Executive Leadership: CFO, CMO, EVP, SVP, etc.	2%	
Other (please specify)	6%	Other (please specify)	3%	

Breakout: Membership Category (Full List)	Current Employment (n=180)
Country Club	54%
Golf Club	22%
Yacht Club	11%
Other Club Types	13%

Note: showing only those at or above ~10%



Survey Objectives

- > To survey a meaningful sample of GM's and other Club managers who make staffing decisions to inform staff housing questions and industry impressions.

- > To assess staff housing statistics regarding current use and behaviors, along with perceived benefits and barriers to adopting staff housing.

- > To discover creative solutions to a known industry challenge and share that with the broader Club industry.

Executive Summary

Overall Takeaways

EXECUTIVE SUMMARY



Staff Housing Summary

Challenges & Optimism

Club Managers are optimistic about the Club industry but note their greatest challenges are indeed around:

- staff housing (61% note it is challenging)
- employee recruitment (50%)

Denehy's new Club Management Confidence Index is 70.1 – indicating overall industry optimism. Recruitment and current member resignations aren't improving, but also not getting worse.



Current Staff Housing

61% of survey respondents said they currently offer staff housing. Among them, they average 19.9 housed employees, and the majority of housing falls under general line staff and seasonal employee roles.

Those that offer housing do so in various forms and sizes, but 65% provide housing on-premises and 35% rent properties off-premises.



Pros & Cons

Positives: Managers largely see staff housing as a win-win—making clubs more attractive for recruiting and retaining talent, particularly during peak seasonality. Housing is critical for internship programs too.

Negatives: Most recognize that staff housing will increase operational costs—either in rental costs or maintenance and facilities costs. Some also note increases in liability risk, along with potential tension with boards.



Aspirational

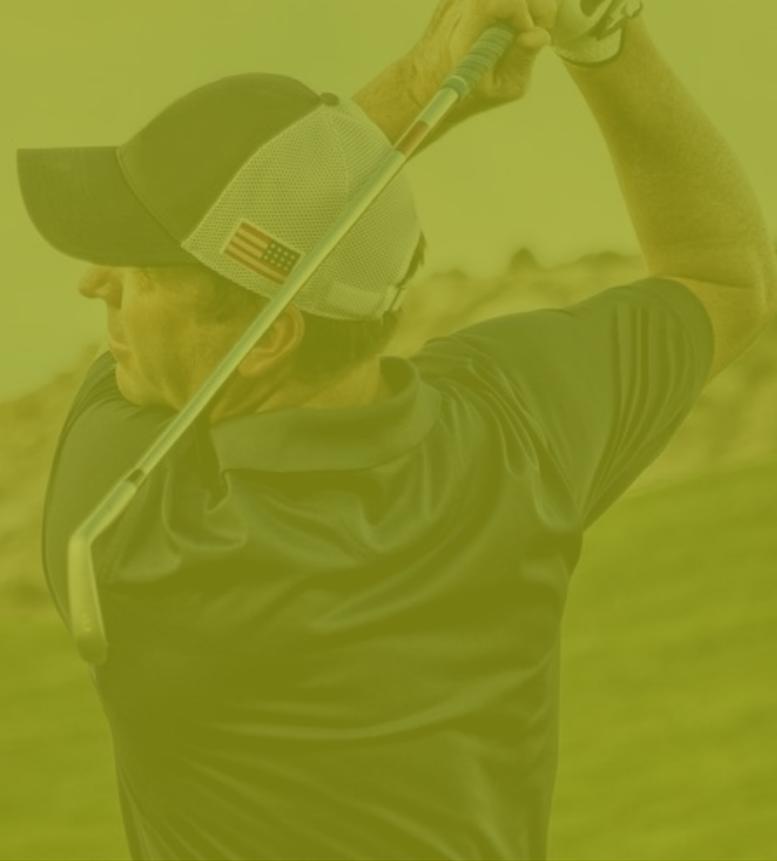
76% of Managers surveyed aspirationally want to add "more" beds.

The median number of employees Managers want to add is 10, but the vast majority is likely for general staff and seasonal staff.

Club Managers are curious about new ways to solve this problem and are open to creative solutions (i.e., motel rehab, tiny homes, dorms, etc.).



Current Club Challenges



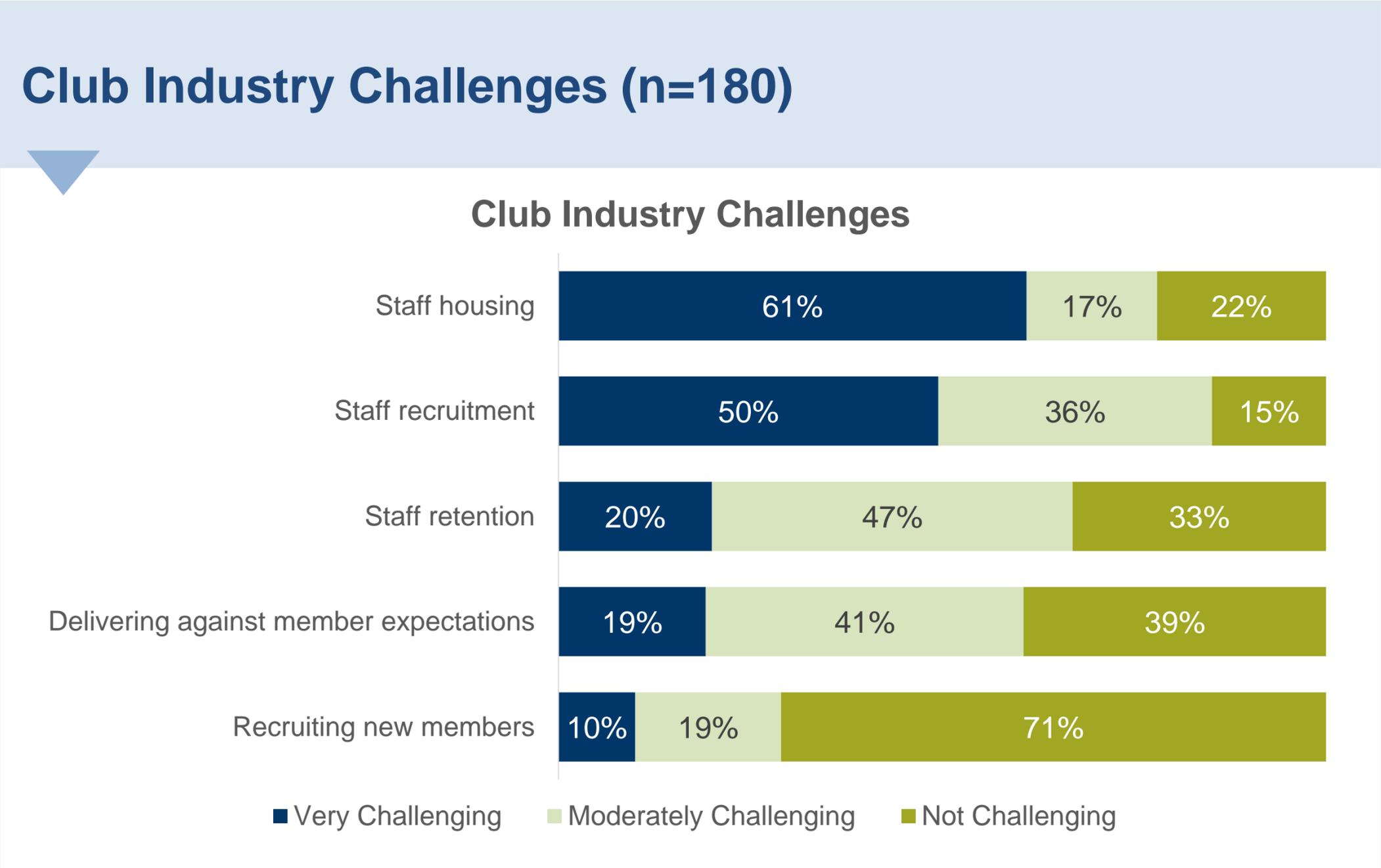
What are Club Managers Thinking About **DETAILED FINDINGS: CURRENT CLUB CHALLENGES**

Staff housing and staff recruitment are top challenges for Club Managers.

 Staff housing is seen as very challenging for Managers – fueled by competitive job markets and housing affordability in expensive markets

 Managers note how important retention is to deliver a consistent member experience, but staff retention is not generally seen as very challenging.

 Recruiting new members is not challenging for the majority of Managers.



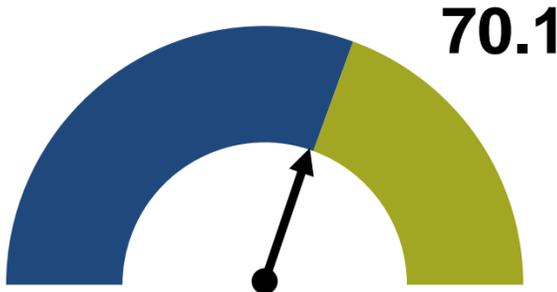
Q. Please rate how challenging each issue is to your club?

Club Management Confidence Index [CMCI]

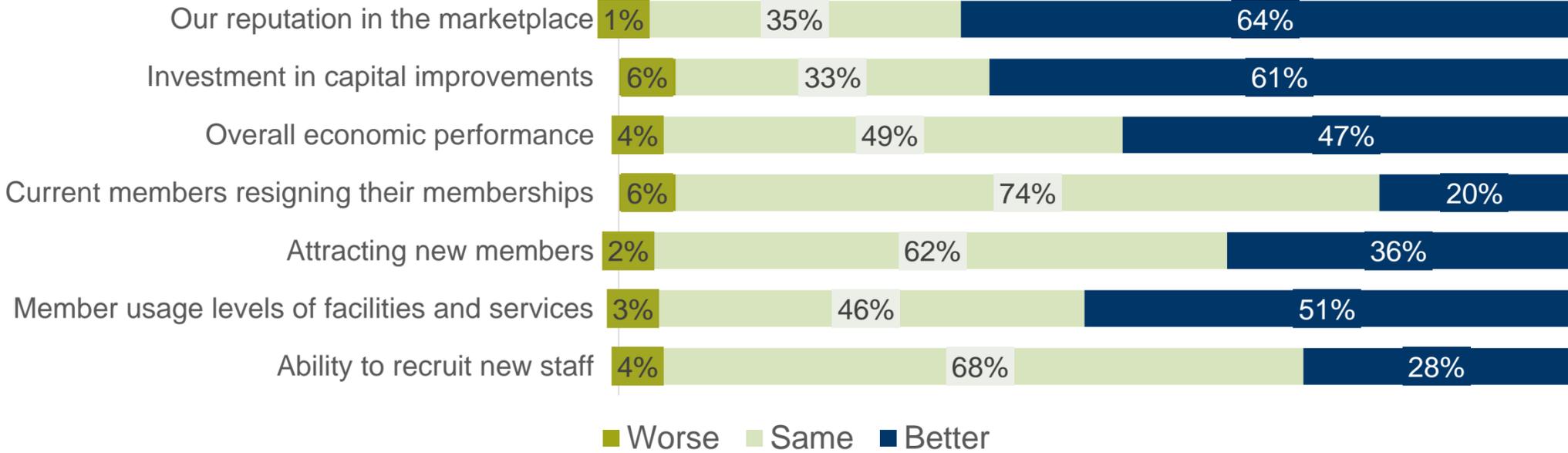
Club Managers are generally optimistic

- > Managers expect reputations and capital investments to get better in the next 12 months (Over 60%)
- > Managers generally don't envision conditions getting "worse" (nothing above 6%)
- > Recruitment of new staff and member resignations are expected to largely remain the same.

How You Feel YOUR Club Will Perform (n=180)



Denehy Club Management Confidence Index (n=180)



Q. Please rate how you feel your club will perform on the following metrics in the next 12 months.

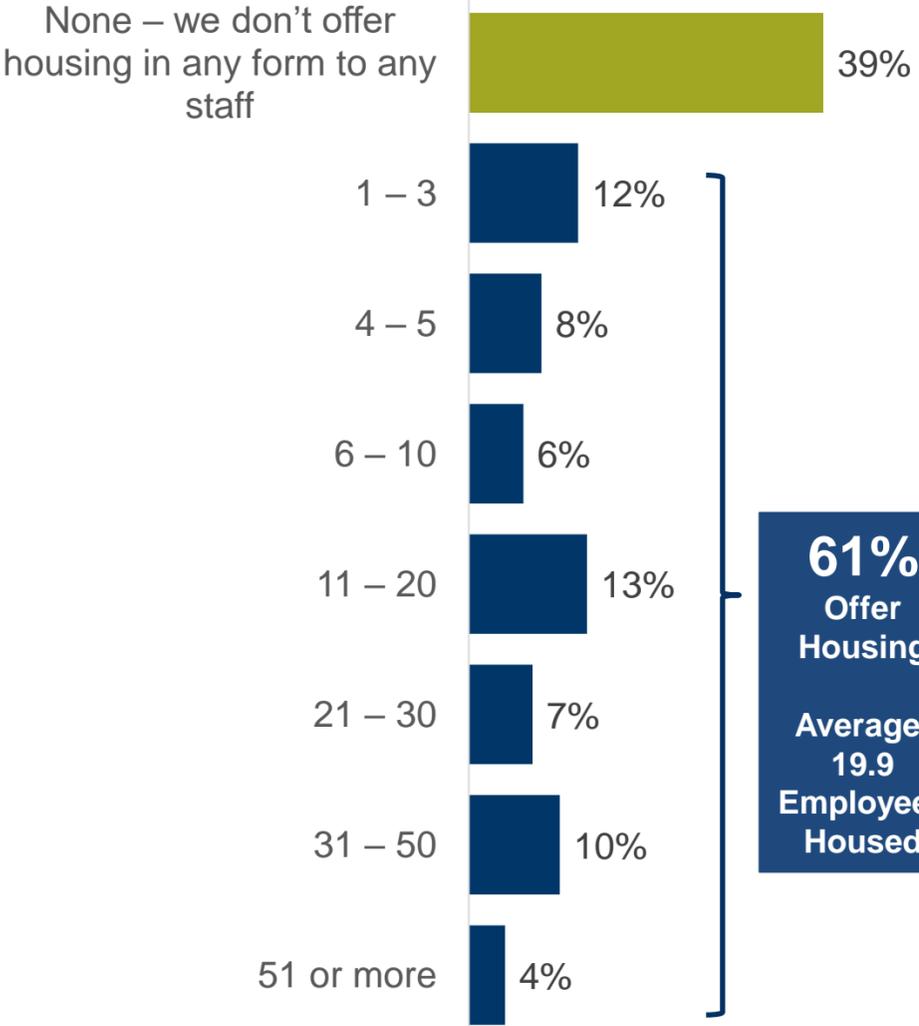
Current Staff Housing

What are Clubs currently doing?

DETAILED FINDINGS: CURRENT STAFF HOUSING ENVIRONMENT

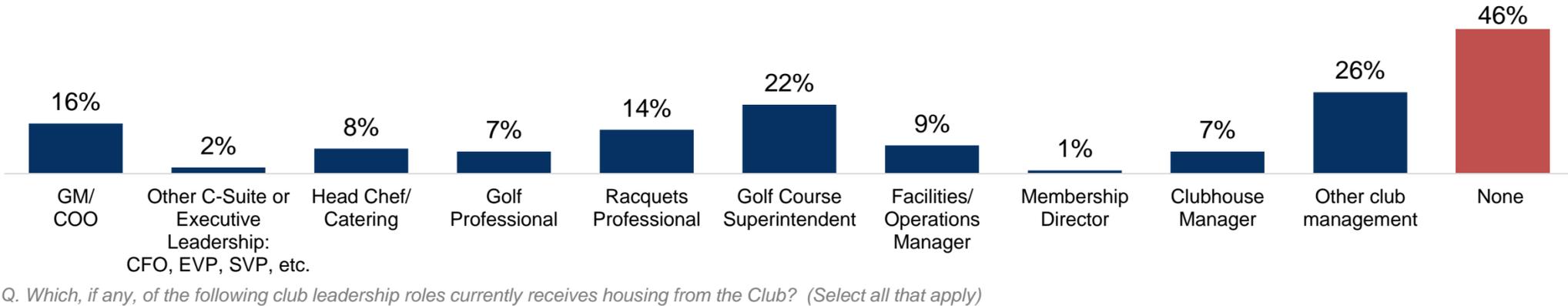
Housing Stats Summary: Housing is most common for line staff and seasonal employees (89% offer). Management housing is offered by 54%.

Number of Employees with Housing (n=180)

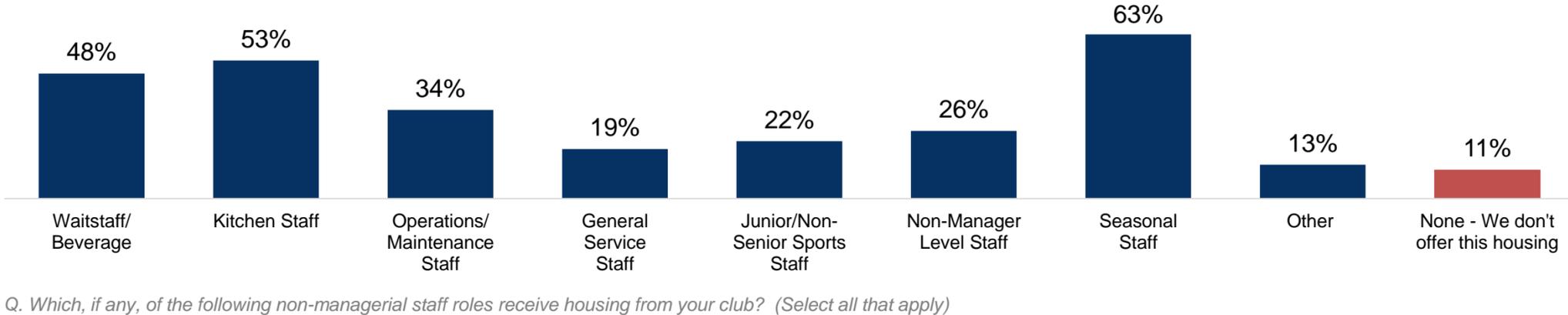


Q. Please tell us how many employees from the following roles in your club currently work at the club?

Management Housing (n=110)



Staff Housing (n=110)



Types of Housing Offered

Types of Housing Offered	(n=110)
Club-Owned Housing On-Premises	64%
Club-Owned Housing Off-Premises – please describe	19%
Club-rented Housing Off-Premises – please describe	35%
Rental Reimbursement Off-Premises (Non-Club Owned or rented Properties)	18%
Other (please specify)	4%

Types of Quarters	(n=110)
Single Rooms	58%
Double Rooms	54%
Triple Rooms	15%
Dorm Style	24%
Suites/Efficiency Studios	11%
Private Single-Family Residences	37%
Other (please specify)	5%

We probed which type of housing was most essential and responses came back fairly evenly distributed

Reimbursement / Free Housing	(n=110)
We offer free housing	58%
We charge market-value rents	4%
We charge below-market-value rents	36%
We provide a stipend or bonus to make local housing more affordable	12%
We offer to cover or help cover utilities like heat, electricity or cable	16%
Other (please specify)	8%

Timeframes for Housing Offered	(n=110)
Less than 1 month	0%
1 - 3 months	21%
4 - 6 months	57%
7 - 9 months	29%
10 - 11 months	6%
Yearly (12 months)	58%
Other (please specify)	6%

Clubs offer a wide range of housing options

Among those **61%** of clubs that offer housing:

- 64% offer housing on-premises and over 35% use rentals
- Single rooms and double rooms top the sizes but 37% do offer single-family housing
- Cost savings (free or below market value rents) are likely used as an incentive to attract and retain talent
- Clubs also offer a variety of timeframes for housing, with seasonal up to yearly offers



Housing is generally seen as a cost rather than a revenue opportunity for clubs, so many clubs historically have hesitated to pursue it. While Club Managers understand that housing can attract and retain talent, there still is a risk-reward equation that needs to be proven to certain boards.

REVENUE

\$ Collected annually for rental or housing income from employees

Average

~\$47,000

- Most clubs opt to AVOID rent or income associated with housing
- One club in the survey noted they collected \$640,000 from employees

COSTS

\$ Costs for housing expenses including utilities, transportation, security, added employee meals, property taxes and insurance, etc.

Average

~\$113,000

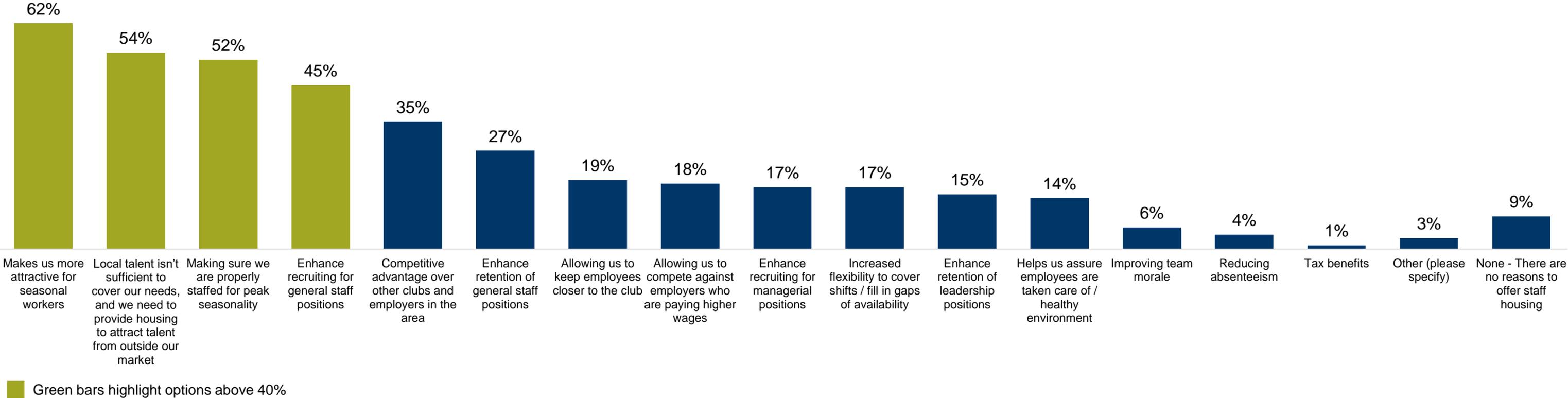
- The median costs noted were \$35,000 suggesting that there are some outliers who spend significantly more on housing annually.

Managers recognize that providing staff housing makes their clubs' more attractive to talent. The general assumption is that better talent will deliver a better member experience.



Reasons to Offer Housing

Reason Housing Is Offered (n=180)



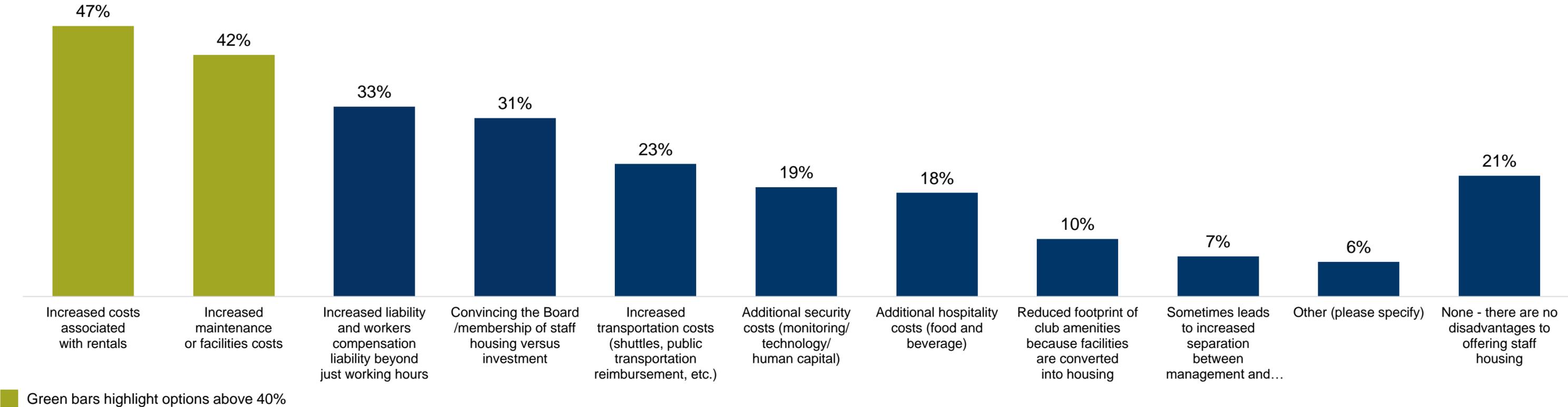
Q. Which of the following reasons best represent the reasons a club or organization offers housing for employees? (Select at most 5 options)

The top concerns about offering staff housing are cost-related. Liability and board tension also get more than 30%.



Disadvantages of Offering Housing

Disadvantages of Offering Staff Housing



Q. Now, please let us know what you see as the key disadvantages of offering staff housing. (Please select at most 5 options)

The desire for more general staff and seasonal staff housing is clear (46% - 66% of Managers want “More”).

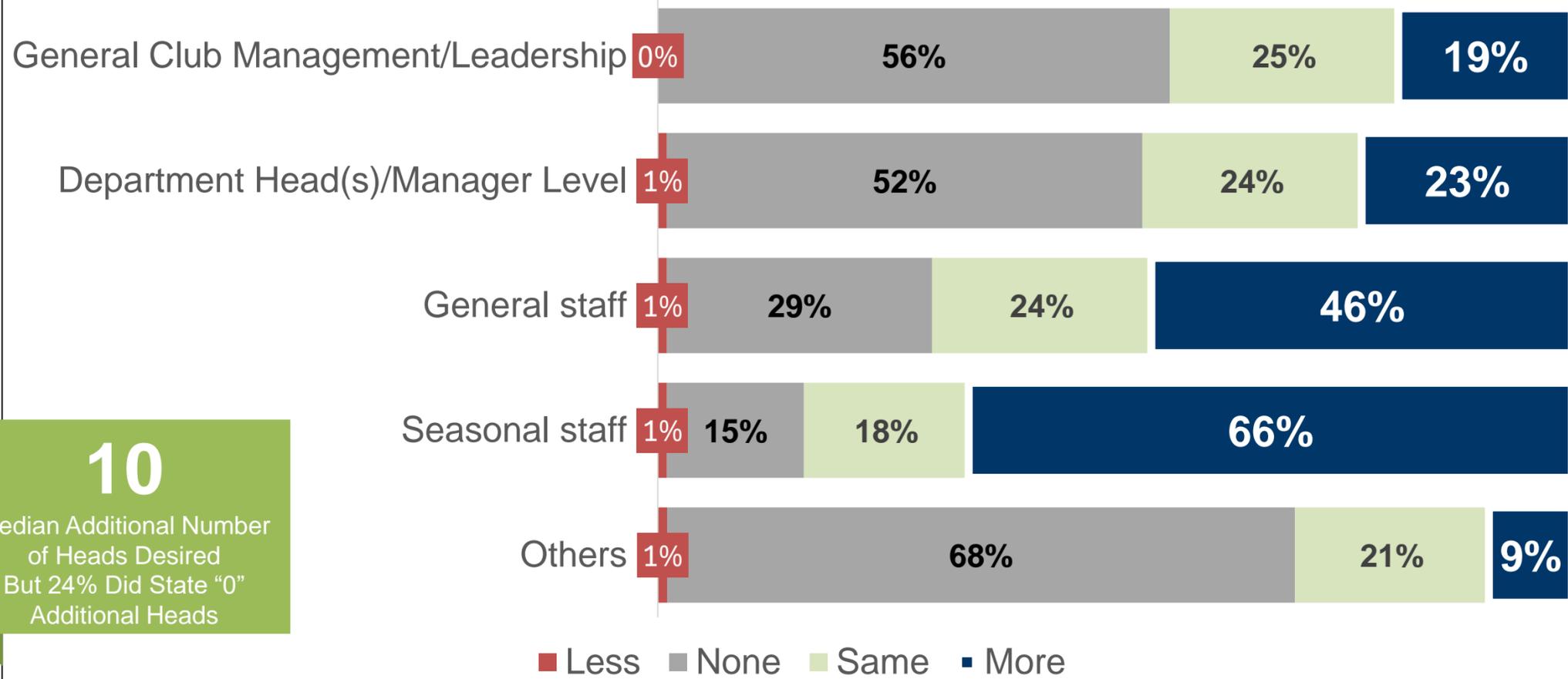
The median number of desired beds is 10.

> Nearly NO ONE wants less housing, but appetite for Management housing is more limited.

> Nearly 2 in 3 Managers “want” more seasonal staff housing.

Aspirational Increases to Staff Housing (n=180)

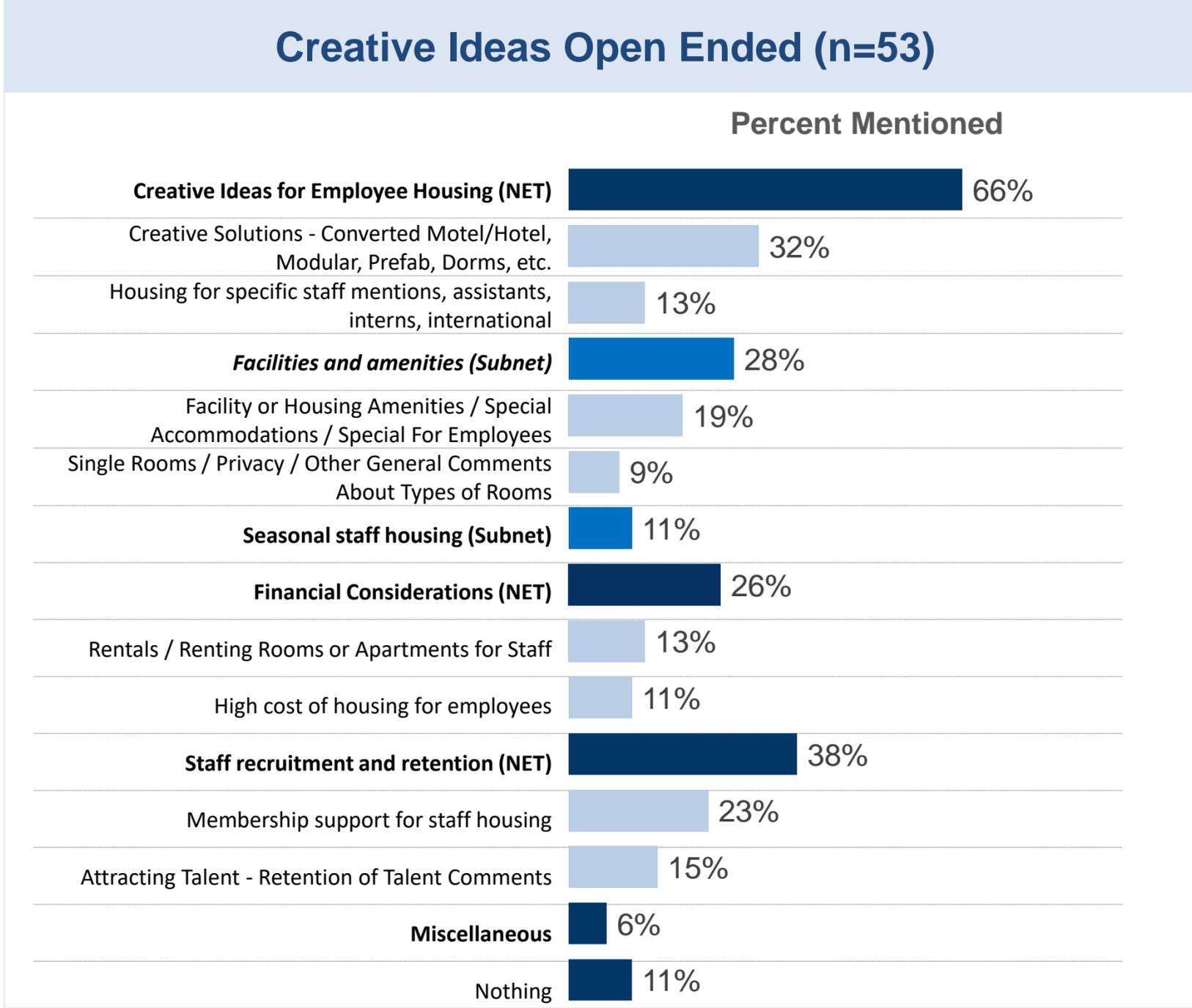
Aspirational Desires for Housing (n=180)



10
Median Additional Number of Heads Desired But 24% Did State “0” Additional Heads

Q. Aspirationally, would you offer none, less, the same, or more staff housing for each of the following employment levels?
 Q. In an ideal world, how many additional employees would you like to provide housing for? (Enter a whole number. If you would not want to offer any additional housing, please enter “0”)

Creative Ideas for Staff Housing – Open Ended



Summary

Managers note a variety of ways clubs are addressing housing challenges...

- Some have heard of other clubs purchasing and rehabbing properties like motels and apartment buildings while others note creative solutions like tiny homes, modular housing, etc.
- Many also noted adding amenities to their current housing and/or to prospective housing will be important (e.g., BBQ, large common areas, outdoor recreation, etc.)

CREATIVE IDEAS MENTIONED

Some Quotes

Motels / Hotels / Apartments

- *Clubs have purchased small motel-style buildings and transformed them into housing. Palmetto Bluff is an example*
- *I am aware of a Club in the Northwest that purchased a Motel and converted it to Staff housing successfully!*
- *Another local club recently purchased a motel and converted into staff housing. Great idea. We have also looked at dropping in modular housing used in remote construction sites at our golf maintenance area. have not been able to get it off the ground.*
- *We lease 2 Bedroom apartments near club, leases are 5- and 12-month leases. They are fully furnished including utilities. We provide transportation to and from the housing to the Club which runs on a set schedule. 4 people are in each apartment. Housing is in a college town that offers many stores within walking distance.*
- *The apartments we rent are 20 minutes from the Club. This allows the employees work life balance as the apartment complex offers fitness, a pool and shopping.*

Facilities and Amenities

- *We do not have much space, but built a team member social lounge above our cart barn, TV's, Video games, Ping pong tables so they have a place to enjoy outside of the rooms they stay in*
- *I designed the staff house based on all my experience since moving to the States. I was on an H2B visa and lived in a staff house for a few years. I highly recommend that everyone have their own single room, without having to share. Each room should have its own AC unit so the person can adjust the temperature as they desire. A large living room with TVs and games is important—if possible, two living rooms would be ideal. Additionally, an outdoor seating area with a BBQ would allow staff to cook and build camaraderie.*

Modular / Other Construction

- *"Offsite Rental Partnerships: Onsite Tiny Homes or Modular Housing: Renovation of Club-Owned Property: Seasonal Housing with Local Universities: Subsidized Living Allowances: Staff Housing as Part of Recruitment:"*
- *I built 2 modular houses and designed them in such a way that each house would house a minimum of 6 individuals with the ability to expand to 24 if need be*
- *Another local club recently purchased a motel and converted into staff housing. Great idea. We have also looked at dropping in modular housing used in remote construction sites at our golf maintenance area. have not been able to get it off the ground.*
- *We are investigating the option of converting shipping containers to create on-site accommodations in the style of "tiny houses".*

Rentals / Reimbursements

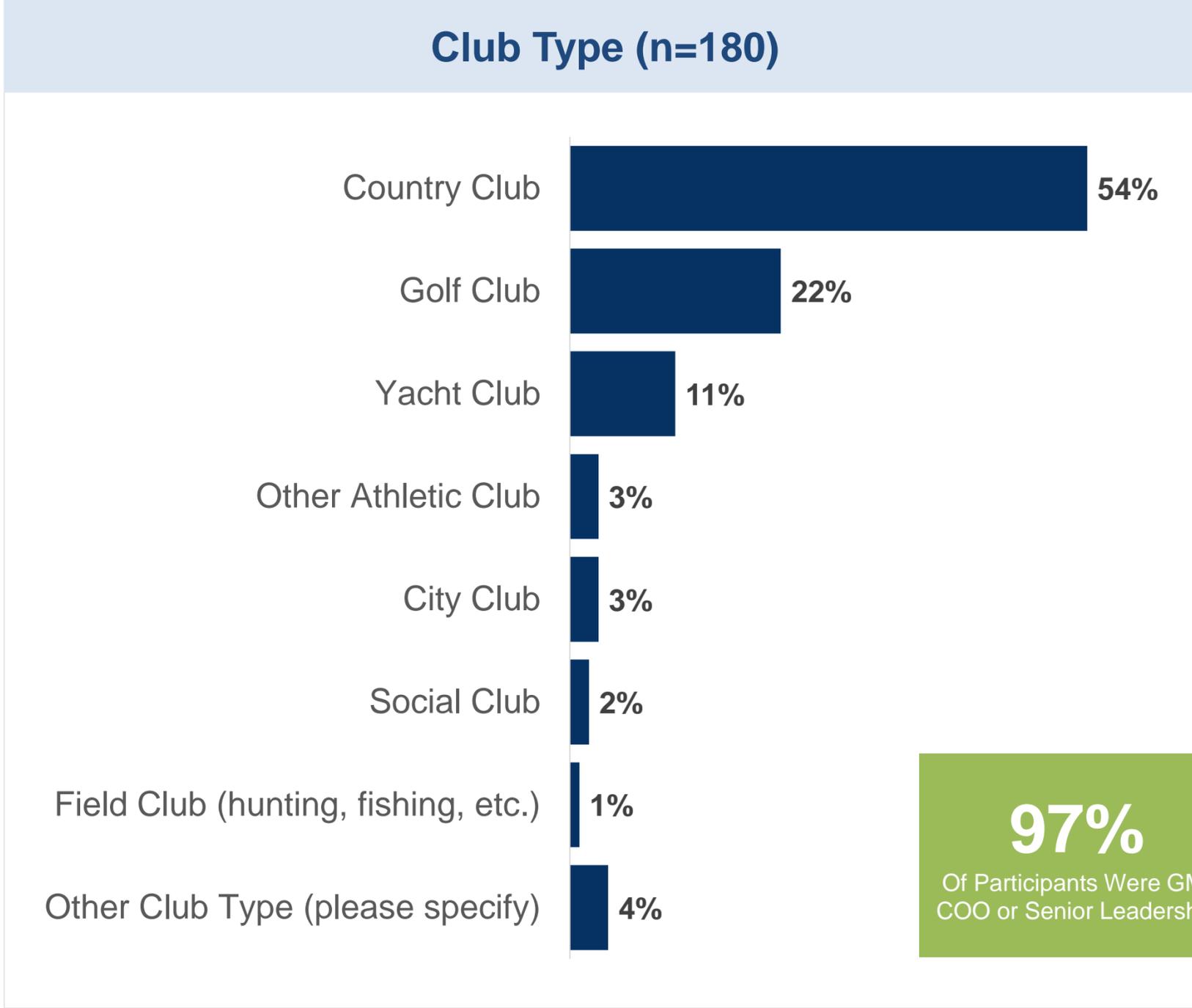
- *we offer a bonus to the seasonal staff who rent housing from us to ensure that all the property is respected and no issues*
- *Looking at renting 2 bedroom apartments nearby for 6-10 months and absorbing a high percentage of the cost to attract talent as the cost of housing in the area is extremely high.*
- *We have found that dorm and share housing units has allowed us to accommodate our line level and seasonal staff, but has fallen well short for the middle and upper-level management. As a result we are planning to phase in a "housing allowance" to accommodate those we cannot meet their needs within our employee housing portfolio, but in hopes the allowance program will have the following positive impacts:...Assist those looking to buy (help get across the line with increased support), Assist those looking to rent a bigger unit (private, higher end, more rooms), ncrease team morale outside of those we can accommodate within our housing, Create equality for those in employee housing and for those not in housing, Attract the best candidates for key roles in future seasons, Retain our best staff members for the long-term*

Club Info

Who Took This Survey?

DETAILED FINDINGS: CLUB FIRMOGRAPHICS

Types of Clubs and Survey Participants



Summary

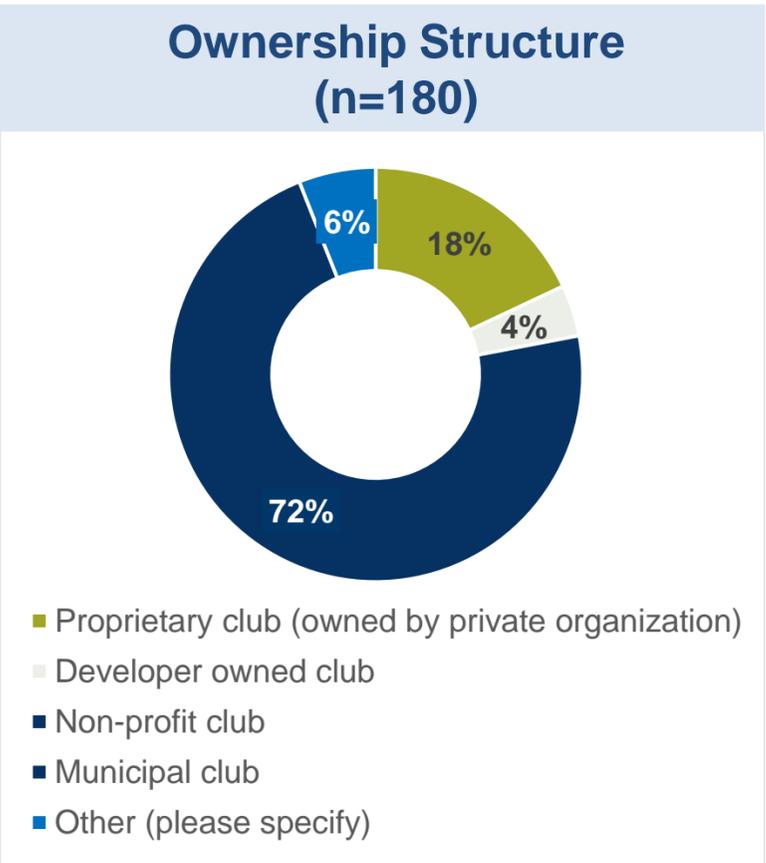
Survey participants are primarily employed at Country Clubs and Golf Clubs.

Almost all participants (97%) were senior - level management.

FIRMOGRAPHICS



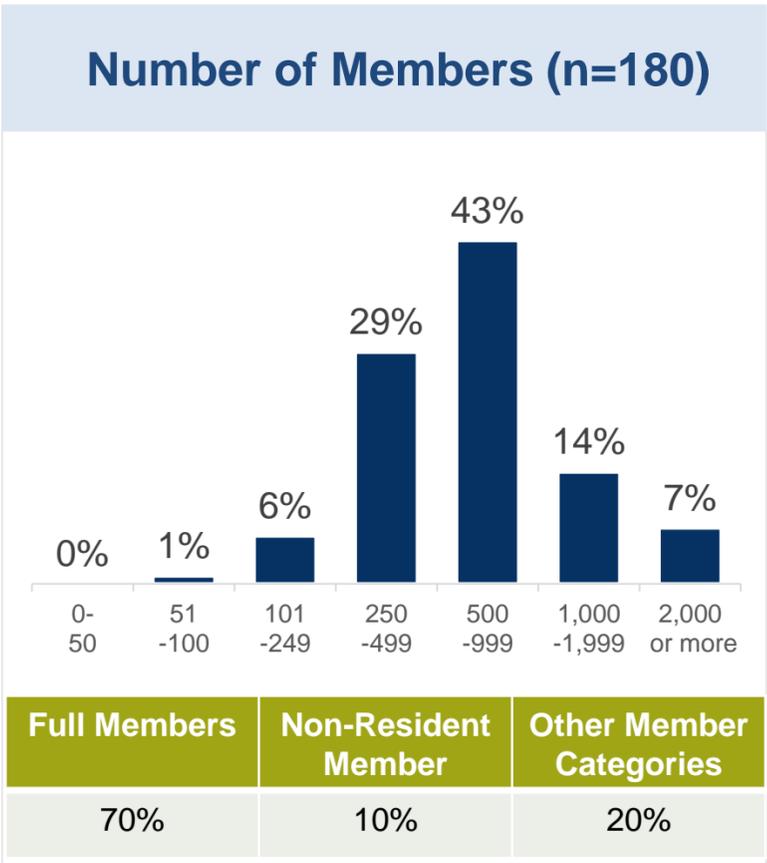
72% of respondents come from non-profit clubs. Membership universes and annual revenues show a broad representation by club size.



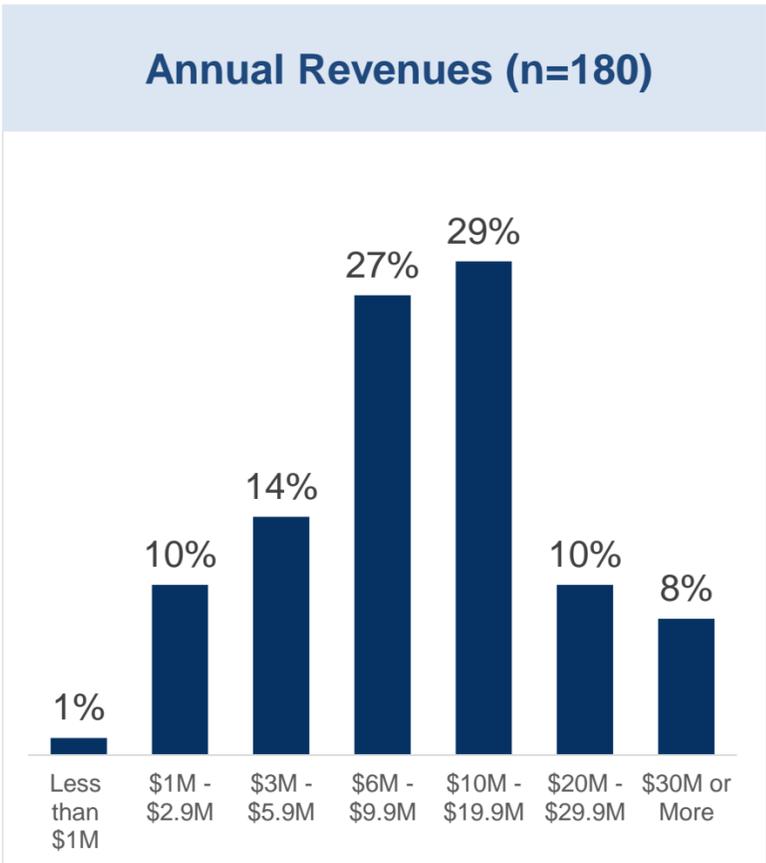
Q. Is your club...?



Q. Is your club located in the US?



Q. How many members (across all membership classes) do you have in total at your club? Q. What percent of your members are...?



Q. Which range best reflects your club's annual gross revenues?

Summary: Number of Employees by Position

Number of Employees by Position (n=180)				
Number of Employees (Median)		Mean (Average #)	Maximum	Minimum
GM/COO	1	1.0	3	0
Department Head(s)/Manager Level	8	10.5	110	0
General staff (full-time)	50	74.9	420	0
General staff (part-time)	25	34.1	325	0
Seasonal staff	40	55.1	450	0



Summary

There was a mix of clubs based on size and focus. Median numbers of employees by role are shown on the left:

- Median number of employees was about 176 employees across full-time, part-time and seasonal staff.

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Thank you!



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