

CMAE GOLF CLUB SALARIES AND BENEFITS ANALYSIS 2012 - 2013



CLUB MANAGERS
ASSOCIATION OF EUROPE

BU Bournemouth
University



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Figure 1 – Adaptation of Armstrong's⁴⁴ model of human resource practice

Figure 2 – Response Rates

CCM – CERTIFIED CLUB MANAGER

CMAE – CLUB MANAGERS ASSOCIATION OF EUROPE

EU - EUROPE

HRM – HUMAN RESOURCE MANAGEMENT

PM – PERFORMANCE MANAGEMENT

PRP – PERFORMANCE RELATED PAY

UK – UNITED KINGDOM

3.1 Executive Summary

An industry research paper produced for the Club Managers' Association of Europe (CMAE) by Bournemouth University 'Sport Management Golf' Students.

1. The CMAE, a European professional association for club managers, identified the need to highlight the key salary and benefit trends being offered to golf club managers throughout Europe. These statistics provide the foundations of an employer's remuneration strategy which is an essential part of the club's human resource practice.
2. In order to inform employers of the remuneration packages of golf club managers throughout Europe, the study aimed to expose key compensation statistics in the European golf club industry. The researchers highlighted the theories of culture and organisational structure, performance management, salary and motivation to be topical issues which golf club managers need to utilise fully in order to create a competitive advantage. These focus areas are discussed in full in the research overview and have led to the formation of recommendations.
3. To achieve the project aim, the researchers constructed a questionnaire which was distributed to golf club managers throughout Europe. The survey explored the salary and benefits offered to the most senior employee at their golf club as well as the 6 highest employees operating under the guidance of the respondent. In addition to the quantitative data, provided by the survey, three interviews took place; two with golf managers and one with a recruitment consultant from Colt McKenzie McNair. This qualitative data provided a more in-depth analysis of the current human resource practice occurring at golf clubs.
4. The researchers believed that the findings of this study would be very similar to the 2010 report because of the fickle economy and the aging population of the continent. Our results confirm that our previous notions proved to be correct as the salary and benefits offered to golf club managers have not changed considerably.

5. KEY FINDINGS

CLUB COMPOSITION

80% of respondents come from Northern Europe

75% of clubs are owned by the members

51% of clubs have between 501 and 1,000 members

51% of clubs have gross revenues of below €1M

RESPONDENT PROFILE

84% of managers are employed full-time

30% of respondents are earning a gross salary of €40,000 or less

64% of managers do not receive a bonus

17% of managers receive complimentary golf club membership

13% of managers receive private healthcare cover

OTHER EMPLOYEES

96% of clubs have 1-5 permanent part-time employees

83% of other employees do not earn a bonus

Golf Professionals and catering services are most likely to be outsourced

EDUCATION

26% of respondents have a professional qualification

48% of managers do not have an industry-specific qualification

SCANDINAVIA

Scandinavia is very different to other regions due to their harsh winters. Because of this, one would assume club employees are more likely to be seasonal so it is surprising that all of the managers who responded to the study are employed full-time. It is also evident that private health care and pension schemes are of high importance for Scandinavian managers but accommodation and food while working at the club are less so.

SOUTHERN EUROPE

Clubs in Southern Europe are the most committed to staff training and development for every member of staff. 47% of respondents from this territory are under the age of 40 – lower than the European average.

NORTHERN EUROPE

Northern European managers are more likely to have a higher salary, particularly respondents from Germany. They are also more likely to be educated to a university entrance diploma or higher in comparison to the other regions. However they are less likely to have an industry-specific qualification and when looking at the ages of managers in Northern Europe, it is evident that they are much older – with the majority of respondents being over the age of 51. From this one can assume that many managers in this region entered the industry during the later stages of their working careers whereas managers in other territories tend to be younger with more industry-specific qualifications.

6. RECOMMENDATIONS FOR FUTURE DEVELOPMENT

SOUTHERN EUROPE may benefit from considering their gross salary offerings to employees in order to raise their low satisfaction levels drawing them more in line with Scandinavia's example.

NORTHERN EUROPE should consider a shift in management practice to mirror that of non-equity structured clubs. This may increase revenue should successes reflect those felt in non-equity clubs in Southern Europe where 22% of clubs recorded revenues of 3 to 5 million Euros.

Because of **SCANDINAVIA's** seasonal market, clubs in this region may benefit from employing more part-time employees to save costs during the off-season.

4.1 INTRODUCTION

The contemporary sport industry is a complex environment requiring unique business and management practices.¹ Managers of successful sports clubs can no longer get by on their own drive without a thorough understanding of the business theory behind the club as well as its successful practices.² With this in mind a few fundamental areas of development for the club industry have arisen through the examination of academic literature.

4.2 PERFORMANCE MANAGEMENT, SALARY AND MOTIVATION

Successful management in any industry relies on people and managers who are constantly tasked with ensuring the best results from their employees. Many organisations are revisiting their human resource management (HRM) practices in an attempt to differentiate themselves from the competition and create a sustainable competitive advantage.^{3 and 4} After all, it is the employees who make the decisions, make the products, provide services and meet customers⁵ hence high levels of motivation and performance is vital to an organisation's success.

In order to extract the best out of their employees HR managers have turned to a holistic process called performance management (PM). The PM concept allows organisations to define, measure and stimulate employees with the goal of improving organisational performance.⁶ Although strategy and process are important components to PM, managers must recognise that people are vital to the implementation of PM practice.⁷

"Performance management aims to improve performance at an individual, team and organisation level through efficient practices of people management with the aim of creating a whole that is greater than the sum of its parts".^{14 and 15}

A move toward HRM as a source of competitive advantage is gaining popularity among academics.^{12, 13, 3} It is achieved by maximising

“Jobs which provide performance related pay attract workers of higher ability and induce workers to provide greater effort”.¹⁶

employee performance and developing unique value-adding resources that cannot be easily imitated. Performance-related pay (PRP) is an important element within PM and the overarching theory behind it is simple. PRP aims to encourage increased accomplishment by linking performance with pay.

Furthermore, provision of motivational pay has been shown to have a positive effect on efficiency.^{17, 18, 19 and 20} Academics believe that salary is a prominent and constant motivator for employees and a reward for achievement. Thus poor performance of employees is often a consequence of low satisfaction regarding remuneration.^{21, 22, 23, 24 and 25}

4.3 CULTURE AND ORGANISATIONAL STRUCTURE

“Corporate culture defines the shared set of employee values, beliefs and assumptions within a specific corporation”.²⁶

Having identified PM and staffing as an integral aspect to sustainable competitive advantage,⁸ optimisation of organisational structure and positive culture is vital while retaining functional relationships between employees and employers⁹. Potentially making a considerable difference to business performance without incurring costs or major time management implications.

Organisational culture and structure can have complex effects on employees and in turn, the organisation's success. An organisational or staffing structure is the typical hierarchical arrangement of lines of authority, communications, rights and duties of an organisation.²⁷ It also defines how roles, power and responsibilities are assigned, controlled and coordinated.²⁸

Figure 1 Below shows an adapted model referring to the importance of HRM culture and the different aspects of incentives that may affect employees as a whole or individually.⁴⁴

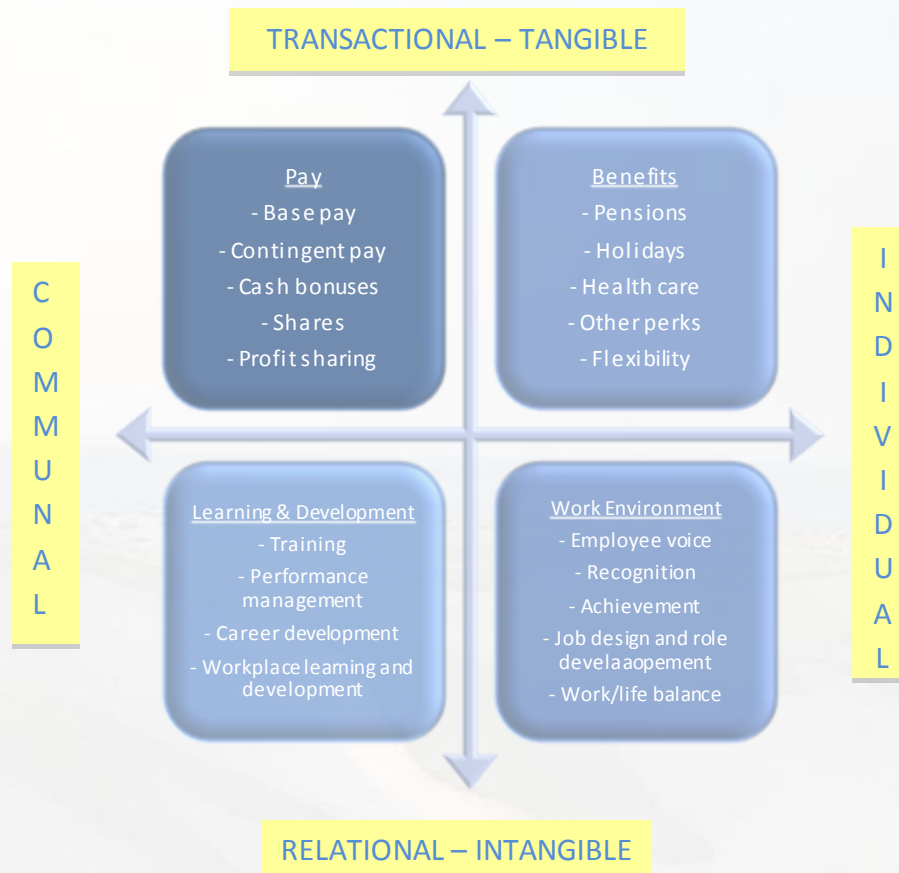


Figure 1 shows an adaptation of Armstrong's (2006) model of HRM Culture

The two different types of club structures, equity versus non-equity, use different hierarchy compositions. This impacts employee roles and responsibilities, management staff and the general organisation of the club. Although there is disagreement on the best structure, decentralisation is most commonly used in golf clubs, especially non-equity clubs.²⁹ The separation of departments within golf clubs ensures focus among Department Managers and provides General Managers time to effectively develop business objectives. Decentralisation empowers and motivates workers, while reducing stress and burdens of senior management.³⁰ Furthermore, subordinates may have a better knowledge of the local environment regarding

their area of work.³¹ This should allow them to make more informed, proactive choices. Also, the effects of salaries on motivation must be considered with relation to decentralisation in order for this structure to be successful. In addition to differing structures and work life cultures, research has revealed that providing employees with valuable benefits increases job attractiveness³² and leads to increased commitment towards the organisation.³³ Consequently, the role of employee benefits can be seen as a means of increasing extrinsic motivation³⁴ and be a key recruitment method for the acquisition of most qualified candidates for a position.^{35, 36}

4.4 EXPECTED OUTCOMES

A Sport England study concluded that no previous recession has had such a profound impact on sports participation.¹⁰ Furthermore, golf-specific research has indicated that the sport has had its first ever decline in participation levels since records began¹¹ – reducing golf club revenues and stunting market development. Furthermore, the continued ageing of the continents population and the declining economy lead researchers to assume that the industry will remain in a stagnant position and the findings of this report be similar if not worse than the previous study.

4.5 AIMS & OBJECTIVES

4.5.1 AIM

The 2012 Salary and Benefits Study aims to expose key compensation statistics in the European golf club industry; informing managers of recruitment and retention trends.

4.5.2 OBJECTIVES

- To analyse the regional differences in salaries and benefits, using academic theory to offer an insight into why these differences occur.
- To provide discussion and recommendations for current and future remuneration packages made justifiable by academic theory combined with market research data.
- To utilise qualitative data to offer discussion of topical trends and changes within the industry and to aid predictions of industry development.

5.1 RESEARCH DESIGN

In order to fulfil the project brief outlined by the CMAE, two questions needed to be asked:

- What information is needed to fulfil the aims and objectives of the project?
- What is the most efficient method to gather this information?

From answering these questions, a mixed-methods approach was decided upon as it is widely considered to give the researcher the best chance of obtaining the most useful answers.^{37,38} Quantitative analysis was essential to derive the key statistics on the salaries and benefits offered at golf clubs throughout Europe. To further enhance this data, a qualitative method was used to add discussion and uncover subjective meanings, experiences and attitudes through words and rich description.³⁹

A questionnaire, compiling 30 questions, was produced to provide statistical data which conjured the basis of this report. In addition to this, semi-structured interviews were used to potentially lead to further explanation and understanding of a chosen question.⁴⁰ From this it is evident that the combination of quantitative and qualitative data will provide a greater conclusion of results.⁴¹ The design of the questionnaire allowed the participants to provide details of the packages awarded to staff within the management structure. This was essential in order to construct a picture of the different managerial structures across territories; allowing comparative analysis to take place.⁴²

5.2 PILOTING

Before the research design could be put into practice, both the questionnaire and interviews were piloted to golf club managers in the UK. Piloting is used to improve the research design's ability to harness the most reliable and valid results.⁴³ For example, in terms of the questionnaire, it was important to make the design as simple to navigate as possible and let the respondents know how long it will take to complete.

5.3 SAMPLE

Potential respondents were identified using the database provided by the CMAE and survey completion requests were sent to 4,500 contacts throughout Europe. Questionnaires sent out via e-mail generally have a low respond rate³⁶ so it was important that the respondent rate was kept track of in order to re-target specific territories.

	<i>Contacts</i>	<i>Respondents</i>	<i>Return %</i>				
<i>Austria</i>	47	0	0.00%	<i>Malta</i>	1	0	0.00%
<i>Belgium</i>	35	0	0.00%	<i>Netherlands</i>	59	0	0.00%
<i>Bulgaria</i>	4	0	0.00%	<i>Norway</i>	15	1	6.67%
<i>Cyprus</i>	4	1	25.00%	<i>Portugal</i>	94	0	0.00%
<i>Czech Republic</i>	7	0	0.00%	<i>Republic of Ireland</i>	226	26	11.50%
<i>Denmark</i>	51	2	3.92%	<i>Slovenia</i>	6	0	0.00%
<i>Finland</i>	24	15	62.50%	<i>Spain</i>	230	1	0.43%
<i>France</i>	195	7	3.59%	<i>Sweden</i>	99	5	5.05%
<i>Germany</i>	142	3	2.11%	<i>Switzerland</i>	32	0	0.00%
<i>Greece</i>	5	0	0.00%	<i>Turkey</i>	36	0	0.00%
<i>Hungary</i>	2	0	0.00%	<i>Ukraine</i>	1	0	0.00%
<i>Iceland</i>	22	2	9.09%	<i>United Kingdom</i>	3076	96	3.12%
<i>Italy</i>	77	9	11.69%	<i>Total</i>	4494	39	4.53%
<i>Luxemborg</i>	5	0	0.00%				

Figure 2 shows the response rates of those who the survey was sent to.

5.4 LIMITATIONS

- With a bigger sample in some territories, it is inevitable that we will garner a higher volume of responses from some countries in comparison to others.
- Due to time constraints it will prove difficult for the researcher to carry-out interviews in every territory surveyed.

6.1 RESEARCH OVERVIEW

It is important to provide discussion relating to both our findings and each topic outlined in the rationale. This section will provide relevant industry discussion and present findings in such a way that meets the objectives of this study.

PM, salary and motivation are linked within the remit of any club manager's responsibilities – often encompassed as HRM. Employees who are satisfied with their remuneration package will often provide the highest standards with regard task completion. High satisfaction will often lead to positive working relationships within the work place. This is outlined as being key to organisational performance.

Results show that southern Europe may need to pay closer attention to its remuneration packages to improve employee satisfaction. Sustaining competitive advantage and ensuring that staff maintain a positive outlook is integral to HRM and influences profitability. Management of relationships between employer and employees may be made significantly more difficult should employees not be satisfied with their remuneration packages. This is arguably more prominent in Southern Europe with a greater percentage of clubs focused on profitability.

Southern Europe's attitude towards bonus provision was higher compared to other territories. It is likely that the provision of bonuses in this territory was designed to boost the profitability of certain departments; possibly through decentralisation techniques which give lower management greater responsibility for the profitability of their department. The higher provision of bonuses in Southern Europe is likely to be related to the non-equity structure of clubs. It is however interesting to note that the likelihood of employee six obtaining a bonus between 5,000 to 9,999 is 25% greater than that of employee 1 at 33%.

However, Scandinavia, provide contrast to the issues of Southern Europe as 58% of employees are satisfied with their remuneration package. Fundamental differences can be seen in the cultural makeup of many Scandinavian golf clubs with 91% of respondents indicated to have an equity structure. Scandinavia's differences however stretch further than simply cultural differences as remuneration also differed considerably to that of other European territories.

25% of Scandinavia's most senior employees receive a bonus and gross salaries in this territory are considerably higher than average as 78% of golf club managers earn upwards of €50,000. Scandinavia's predominantly equity club structure has shown through its club profitability, membership levels and remuneration offerings that the equity market in this territory is very strong. It is possible to conclude from this data that the higher gross salary remuneration offered by Scandinavia is impacting on remuneration satisfaction more heavily than bonus schemes offered in Southern Europe. Therefore, Southern Europe may benefit from restructuring remuneration strategies to offer higher gross salaries – in line with Scandinavia's strategy.

Gross annual revenue figures solidify conclusions regarding club structure. Results show that Northern Europe and Scandinavia are similar in terms of revenue. Scandinavia however was slightly more profitable with 47% of clubs recording over 2 million in gross annual revenue compared with 33% in Northern Europe.

Southern Europe's predominantly non-equity structure backs up the theory of profitability as the number one business driver – 22% of clubs confirmed revenues of 3 to 5 million Euros in this territory. Notably, revenue generation for Southern European clubs is predominantly coming from visitors. The lucrative nature of this market in southern Europe is however either not reflected in the rest of Europe or is not being effectively exploited by competing organisations.

Both Southern Europe and Scandinavia predominantly employ an equity structure and have indicated to have similar revenue streams, however membership levels differ dramatically along with salary provision. Scandinavia has considerably higher membership numbers with 26% indicating 1,501 to 2,000 members. In contrast, Northern Europe has dramatically lower membership numbers with only 13% of clubs indicating 1,100 to 1,500 members. Therefore the fact that Northern Europe competes with Scandinavia in terms of revenue generation may have a direct link to salary provision and in turn remuneration satisfaction. Northern Europe, potentially the lowest provider of gross annual salary with 35% earning less than €40,000, may be cutting spending in order to maintain revenues.

Also, Northern Europe appears to be expecting difficulty in terms of revenue generation with all streams expecting decreases in 2012. However, Scandinavia predicts a 3% increase in revenue from membership and joining fees. Therefore it is difficult to see where revenue generation will come from for Northern European clubs due to their lower membership numbers and lower visitor revenue. Northern Europe needs to possibly consider its approach to revenue generation within all club structures to stop this evident decline. A shift in this territory in terms of management practice to mirror that of non-equity structured clubs may provide positive implications regarding revenue should successes reflect those felt in Southern Europe where 22% of clubs confirmed revenues of 3 to 5 million Euros.

6.2 RECOMMENDATIONS FOR INDUSTRY DEVELOPMENT:

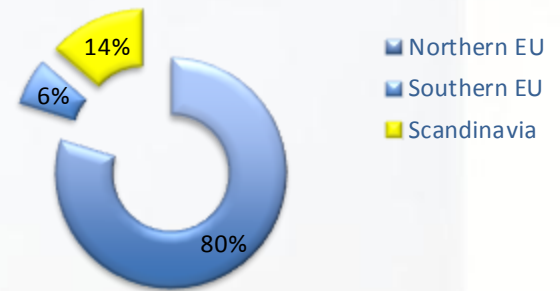
- Southern Europe may benefit from considering their gross salary offerings to employees in order to raise their low satisfaction levels drawing them more in line with Scandinavia's example.
- Northern Europe should consider a shift in management practice to mirror that of non-equity structured clubs. This may increase revenue should successes reflect those felt in non-equity clubs in Southern Europe where 22% of clubs recorded revenues of 3 to 5 million Euros.
- Because of Scandinavia's seasonal market, clubs in this region may benefit from employing more part-time employees to save costs during the off-season.

6.3 RECOMMENDATIONS FOR FUTURE STUDY

- Qualitative data adds a new aspect to the salary and benefits study. However, it was hard for the researchers to reach clubs abroad for this activity. Because of this, a strategy was devised to provoke responses from a recruitment agency and one equity Club and non-equity club however this objective was not met. For future studies it would be beneficial to cover the topic from both an equity club and non-equity perspective in each territory.
- It is evident from the results that those who responded to the survey from Southern Europe were nearly all from resort hotels. In order to gain a better picture of this territory it would have been better to get more responses from non-equity clubs.
- The quantitative data collected from the survey was sent out to 4,500 contacts throughout Europe, however the response rates from both Southern Europe and Scandinavia are considerably lower than that of Northern Europe. In order to offer a more equal comparison between territories future studies should aim to have a more consistent spread of respondents from each territory.

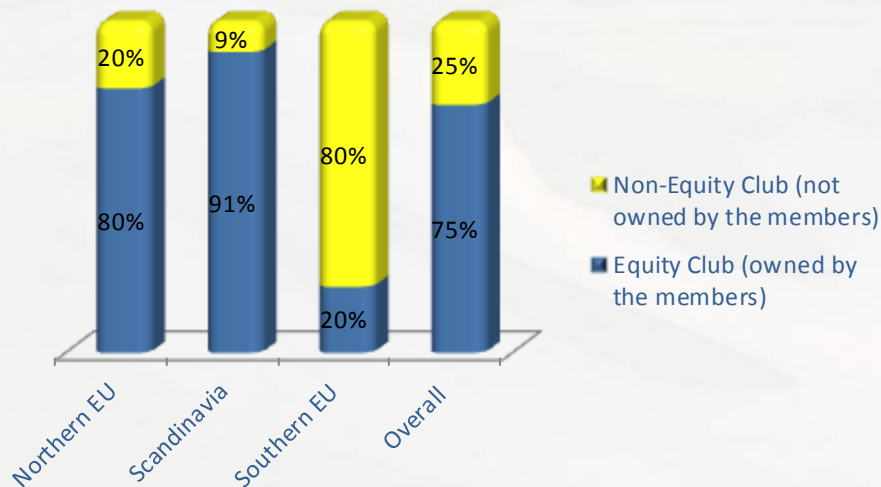
7.1 GOLF CLUB OVERVIEW

A vast percentage of the respondents came from Northern Europe (80%) encompassing the United Kingdom, Ireland, Iceland, Germany and France. The remaining two territories provided a lower response rate with Scandinavia providing 14% and Southern Europe 6% respectively.



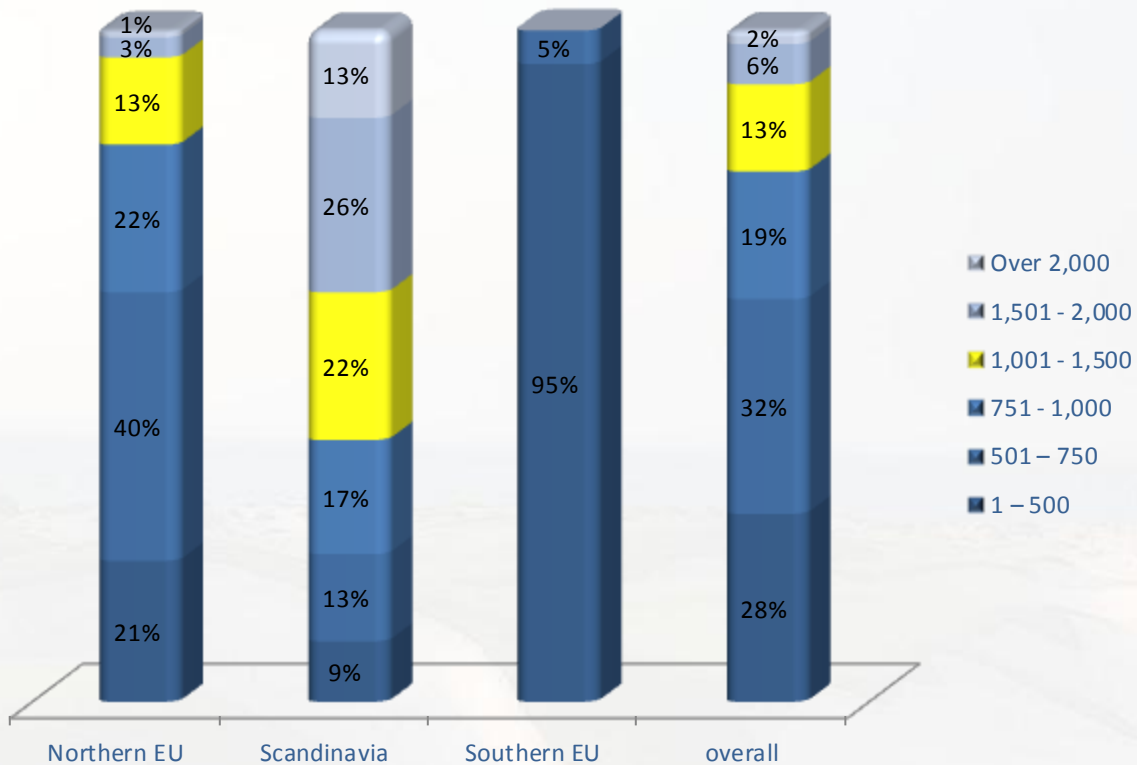
7.1.1 GOLF CLUB COMPOSITION

Section	Countries
Northern EU	UK, Ireland, Iceland, Germany, France
Southern EU	Spain, Italy, Portugal, Greece, Turkey
Scandinavia	Sweden, Finland, Denmark, Norway



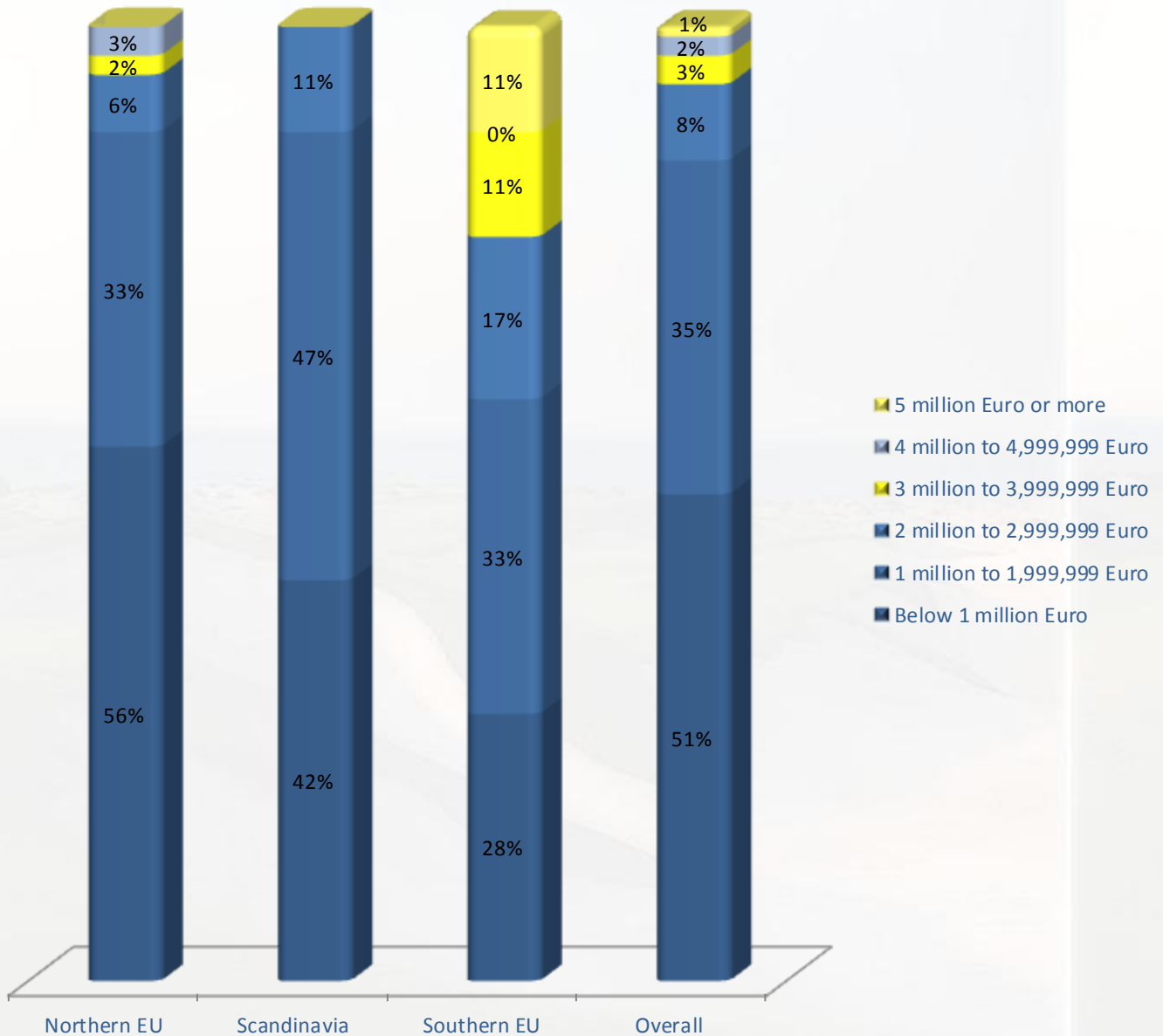
- 80% of respondents from Southern Europe worked within a non-equity structured club, whereas Scandinavia and Northern Europe have a much higher concentration of equity clubs.

7.1.2 MEMBERSHIP SIZE



- The majority of clubs have between 501 and 750 members.
- As Southern Europe is non-equity focused it is evident that, with lower membership numbers, they are likely to focus on the pay and play market.
- Scandinavia has a higher amount of golf club members directly relating to the high concentration of equity clubs.

7.1.3 GROSS ANNUAL REVENUE



- Northern Europe and Scandinavia are similar in terms of revenue. Scandinavia however was slightly more profitable with 47% of clubs recording over 2 million in gross annual revenue.

7.1.4 CLUB PERFORMANCE SINCE LAST YEAR

Interesting comparisons can be made from observing this studies club performance measures.

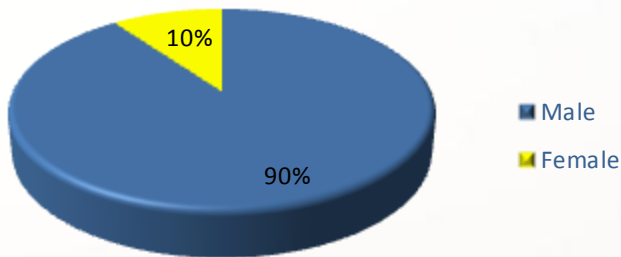
		Club performance			
		<i>Revenue and annual membership</i>	<i>Revenue from membership and joining fees</i>	<i>Visitor revenue</i>	<i>Number of club employees</i>
2012 will be less than 2011	Northern EU	34%	32%	45%	16%
	Scandinavia	2%	3%	5%	2%
	Southern EU	4%	4%	2%	5%
	European Average	40%	39%	51%	24%
2012 will be more than 2011	Northern EU	26%	16%	14%	4%
	Scandinavia	5%	3%	6%	0%
	Southern EU	6%	6%	6%	1%
	European Average	27%	25%	27%	4%

- All Scandinavian managers believed that their employee numbers will not have increased in 2012 and both Northern and Southern Europe indicated minimal increases.
- Southern Europe and Scandinavia expect to see an increase in visitor venue from 2011 to 2012 however Northern Europe believed this income stream has decreased in 2012.
- Club managers are uncertain about the revenues created from membership and joining fees with many indicating that 2012 revenues will be down from 2011 in this category.
- The majority believe that revenues will have increased in 2012 however this could be likely to be a result of increased inflation and rising operating costs.

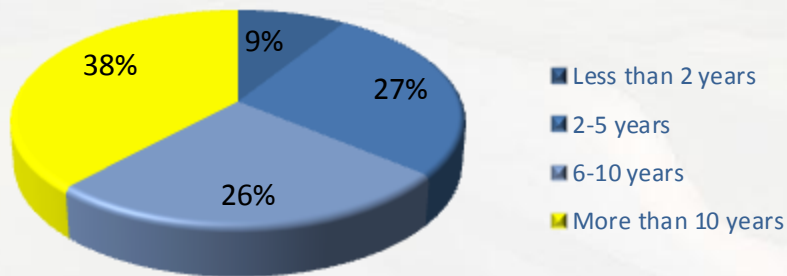
7.2 RESPONDENT PROFILING

7.2.1 DEMOGRAPHICS AND EXPERIENCE

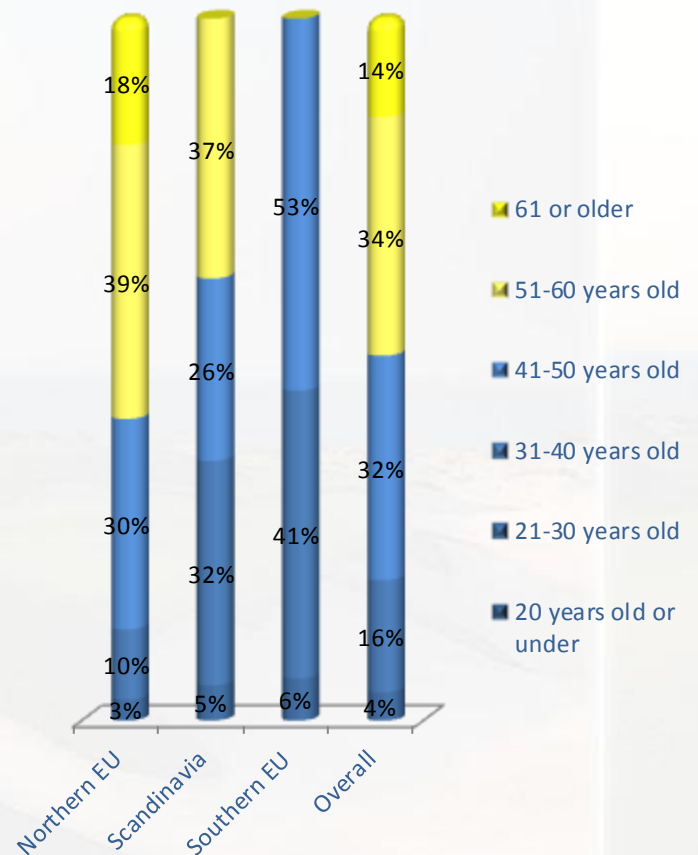
Gender



Industry experience

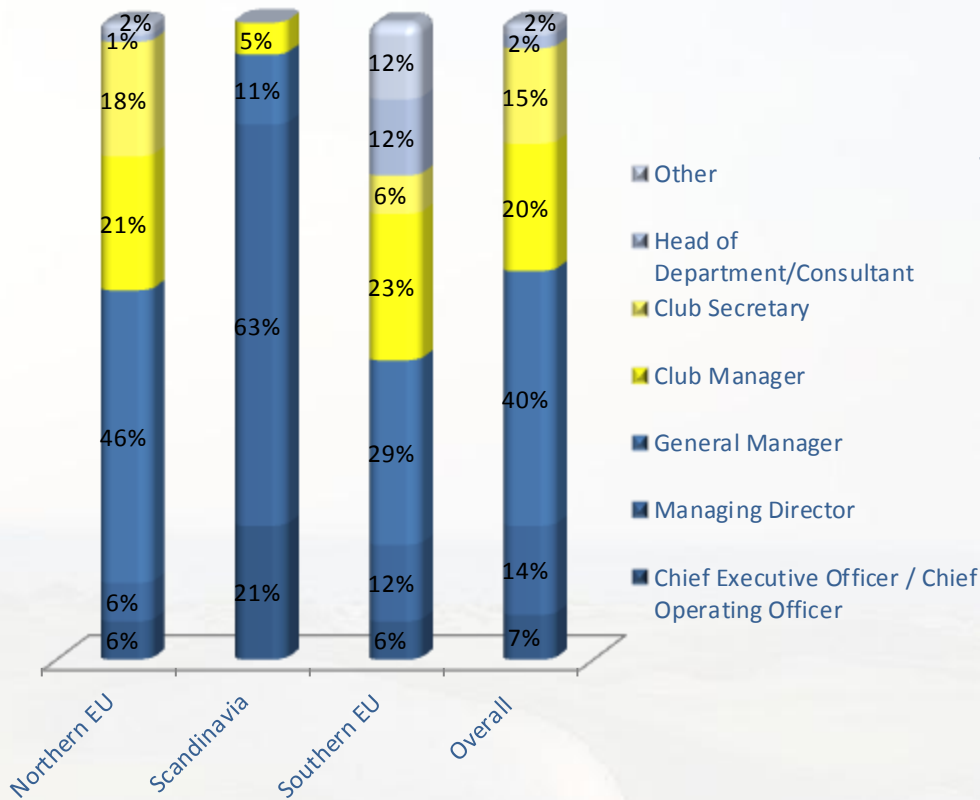


Age



- Those working in the industry are unlikely to be placed in higher management positions until they are over 41 years of age, with 34% of managers being between the ages of 51 to 60.
- 57% of Northern European managers are over the age of 51 providing contrast with Southern Europe where 100% of respondents are under the age of 40.
- 38% of respondents have indicated over 10 years of industry experience providing evidence for the higher age of industry professionals.

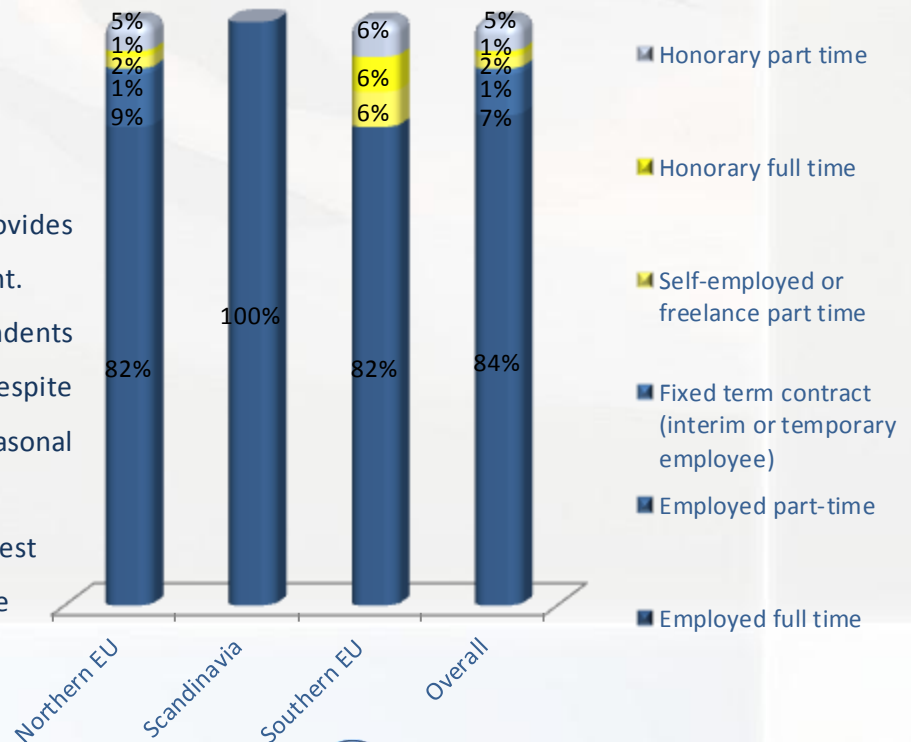
7.2.2 JOB TITLE



- All respondents surveyed held the most senior position at their club with the most popular titles being Managing Director and Club Manager.

7.2.3 EMPLOYMENT STATUS

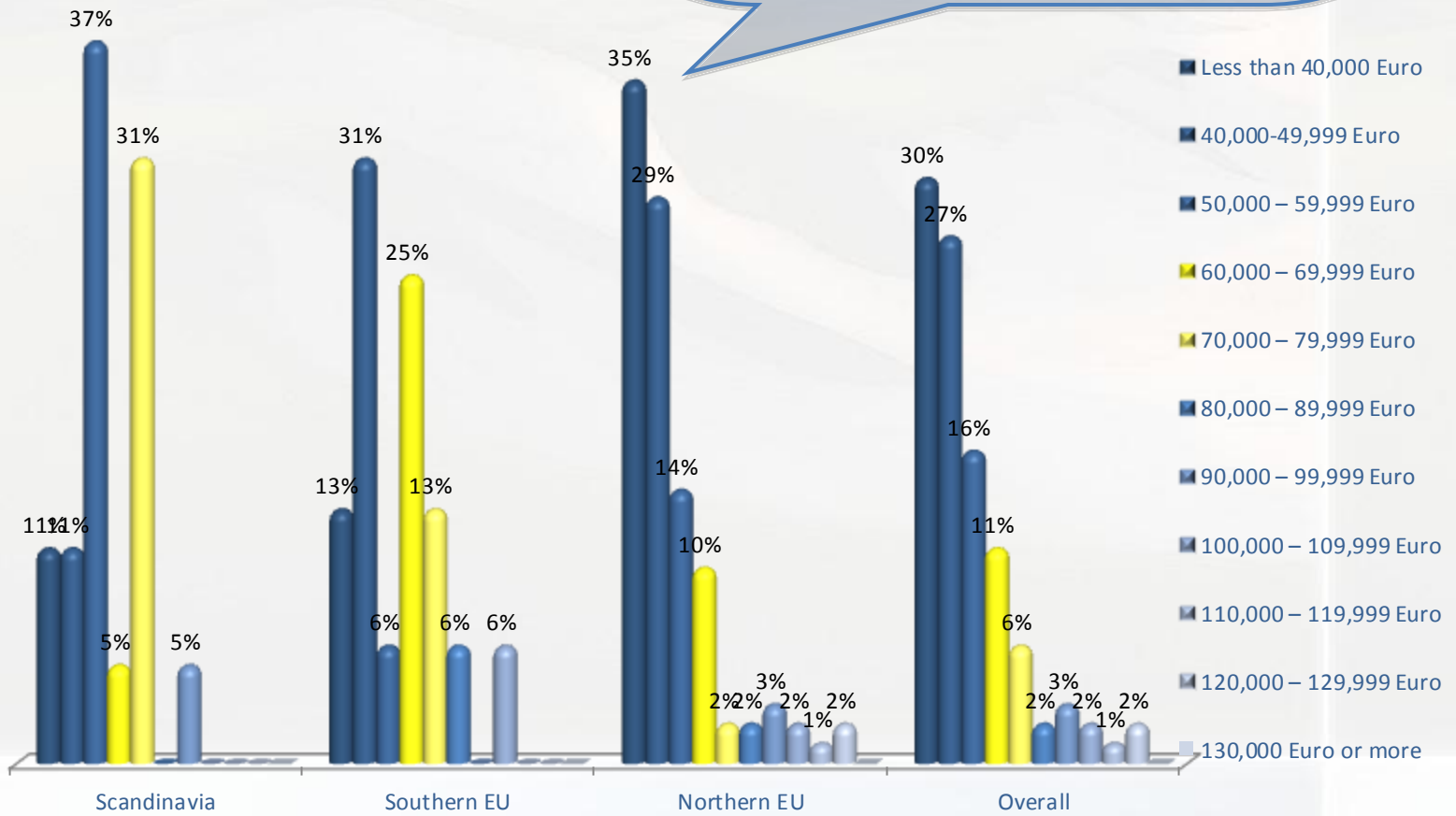
- The golf industry in Europe provides predominantly full time employment.
- Surprisingly all Scandinavian respondents report to be full time employees despite the fact that they operate in a seasonal market.
- Southern Europe has the highest amount of self-employed or freelance managers.



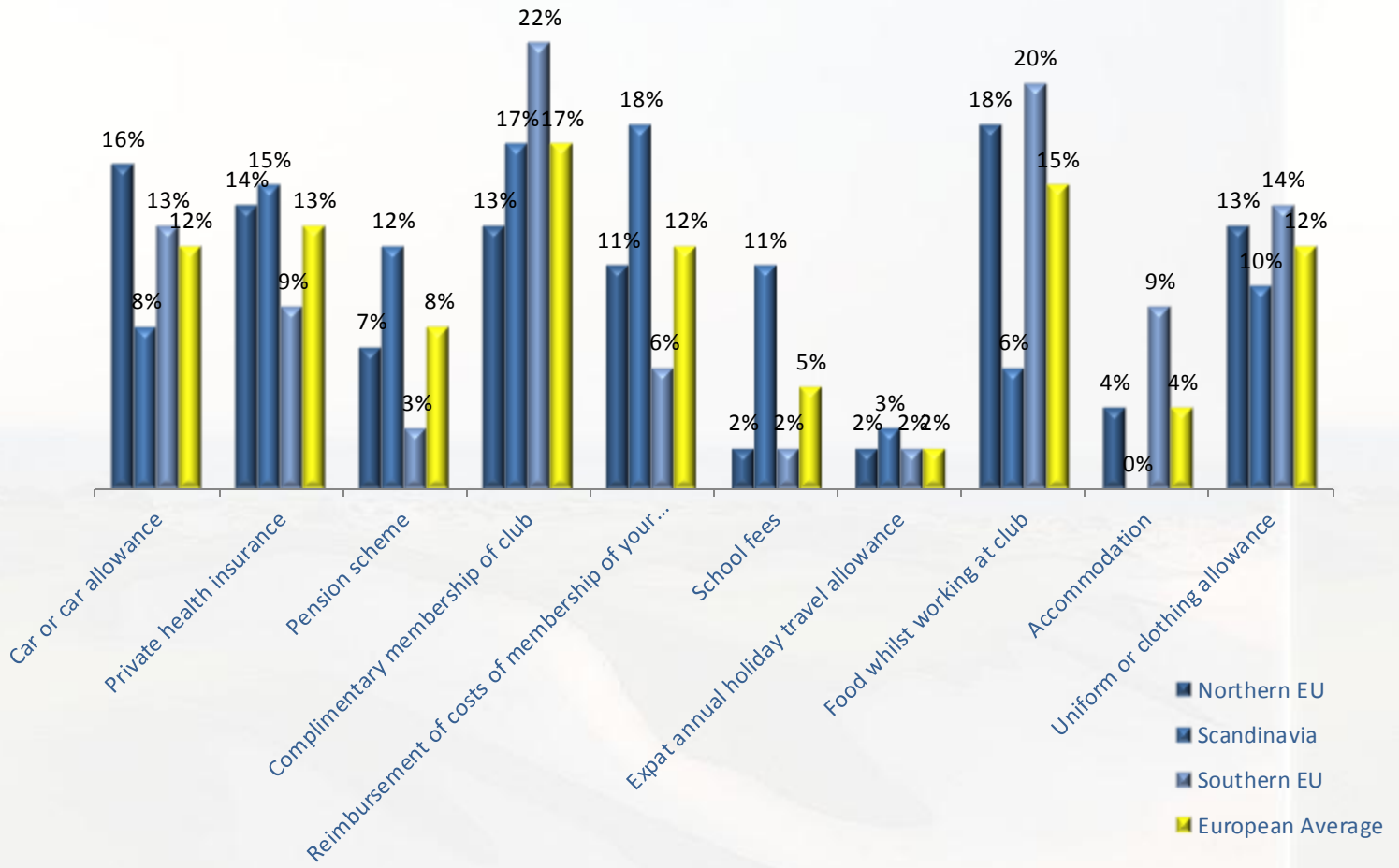
7.2.4 GROSS ANNUAL SALARY

- Remuneration has not shown to of changed since 2010. 30% of respondents reported a gross salary of €40,000 or less and the highest paying positions were found in Northern Europe – in particular Germany.
- Scandinavia differs in terms of gross salary as 78% of managers earn upwards of €50,000 – much higher than Northern and Southern Europe.

"We have seen very little change in salary levels since 2010. In many cases, basic salary levels have actually reduced as businesses favour a package that combines basic salary with a bonus reflecting the employee's individual performance. This is not limited to sales people but across all aspects of golf operations." Richard Wood: Colt MacKenzie McNair



7.2.5 EMPLOYEE BENEFITS



- Private health care and pensions schemes are of high importance for Scandinavian managers, but accommodation and food while working at the club appear to be less so.
- Complimentary membership of the club is common across all territories –most common in Southern Europe.
- Food while working at the club is common in Northern European clubs and car or car allowances are popular in both Southern and Northern Europe.
- It would also appear that mobile phone usage is a popular employee benefit.

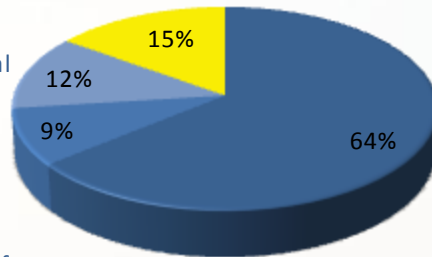
7.2.6 BONUS

■ No

■ Yes, based on my personal performance

■ Yes, based on the overall business performance of my golf facility

■ Yes, based on a mixture of personal and overall business performance



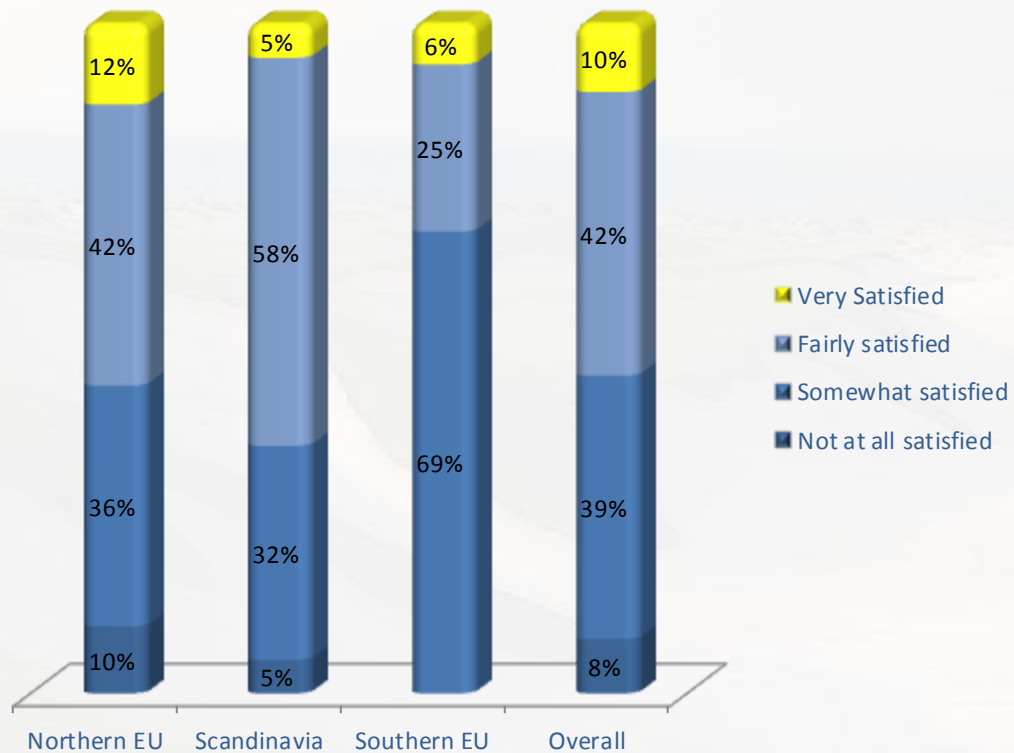
"If incentives were brought in it would increase the affiliation with your department and its business objectives. Incentives would not have to be paid out unless profitability of the department increased, therefore only offering positives for the club." Charlie Swann: Remedy Oak Golf Club

- The majority of managers do not receive a bonus but Scandinavian managers are most likely to receive a minimal bonus on top of their basic salary.
- Managers from Southern Europe earn the highest bonuses.



7.2.7 EMPLOYEE SATISFACTION

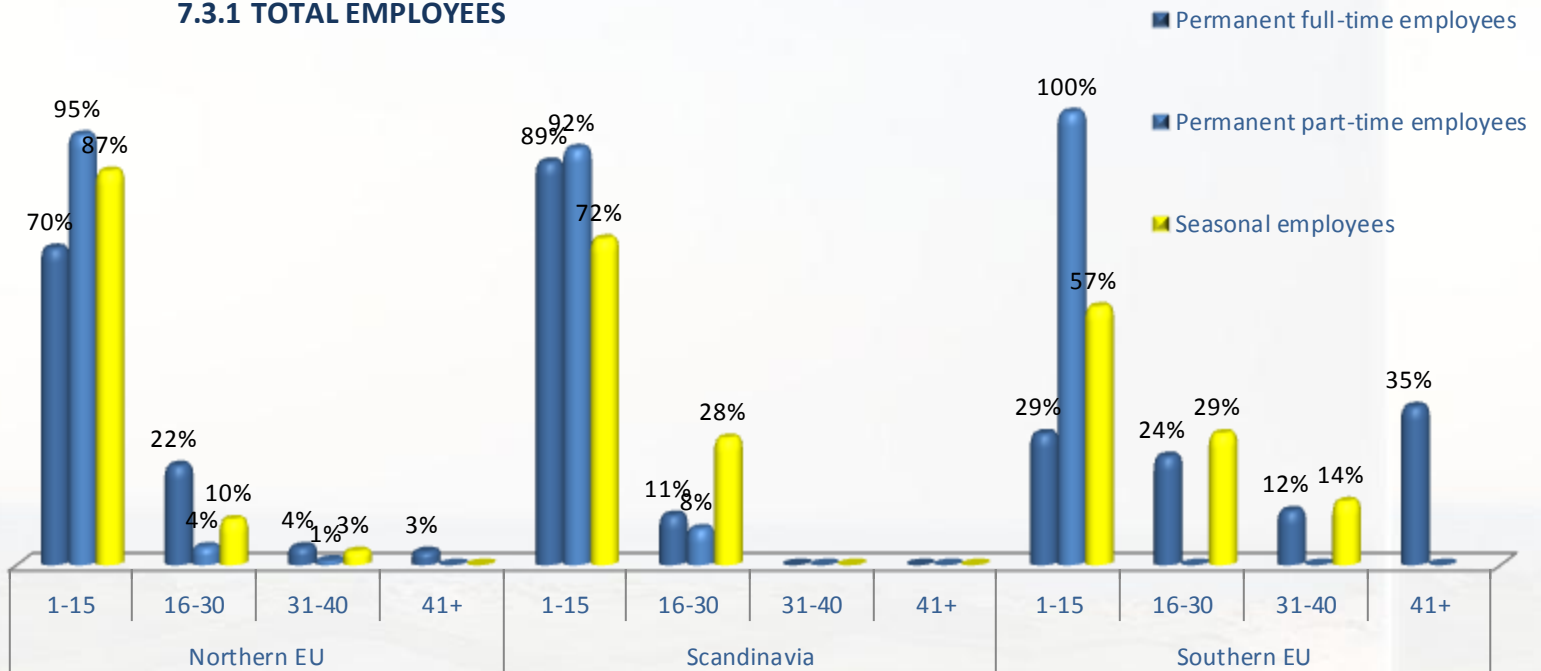
"An effective remuneration strategy is essential if they are to create a vibrant and motivated workforce. It is in every clubs' interest to ensure they have an established strategy that fits within the overall aims, thus enabling them to compete for, and retain, quality staff." Richard Wood: Colt MacKenzie McNair



- As a whole the majority of managers are only fairly satisfied with their employment packages.
- 69% of Southern European respondents are only somewhat satisfied with their employment package.

7.3 STAFFING

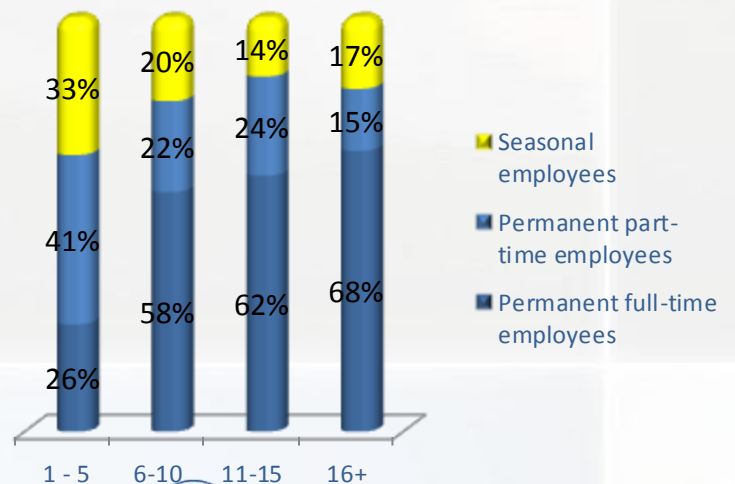
7.3.1 TOTAL EMPLOYEES



- Most clubs have between 1 and 15 permanent part-time employees and all clubs in Southern Europe employ between 1 and 15 permanent part-time employees.
- 89% of respondents from Scandinavia indicated that they only have 1-15 permanent full-time employees; however 28% indicated that they also have between 16 and 30 seasonal employees – linked to their seasonal market.

7.3.2 DIRECT REPORTING EMPLOYEES

- Overall, the majority of managers have over 16 permanent full-time employees reporting directly to them.
- It appears that seasonal employees often do not report to the highest person in command.



7.3.3 BONUSES OFFERED TO OTHER STAFF

		<i>No Bonus</i>	<i>Less than €5,000</i>	<i>€5,000 – €9,999</i>	<i>€10,000 – €14,999</i>	<i>€15,000 – €19,999</i>	<i>€20,000 – €24,999</i>	<i>€25,000 or more</i>
Northern EU	Employee 1	75%	23%	2%	0%	0%	0%	0%
	Employee 2	77%	20%	3%	0%	0%	0%	0%
	Employee 3	82%	16%	1%	0%	0%	0%	0%
	Employee 4	86%	14%	0%	0%	0%	0%	0%
	Employee 5	89%	11%	0%	0%	0%	0%	0%
	Employee 6	93%	8%	0%	0%	0%	0%	0%
Scandinavia	Employee 1	75%	25%	0%	0%	0%	0%	0%
	Employee 2	100%	0%	0%	0%	0%	0%	0%
	Employee 3	100%	0%	0%	0%	0%	0%	0%
	Employee 4	100%	0%	0%	0%	0%	0%	0%
	Employee 5	100%	0%	0%	0%	0%	0%	0%
	Employee 6	100%	0%	0%	0%	0%	0%	0%
Southern EU	Employee 1	75%	17%	8%	0%	0%	0%	0%
	Employee 2	80%	10%	10%	0%	0%	0%	0%
	Employee 3	80%	10%	10%	0%	0%	0%	0%
	Employee 4	63%	13%	13%	0%	0%	0%	0%
	Employee 5	67%	17%	17%	0%	0%	0%	0%
	Employee 6	50%	17%	33%	0%	0%	0%	0%

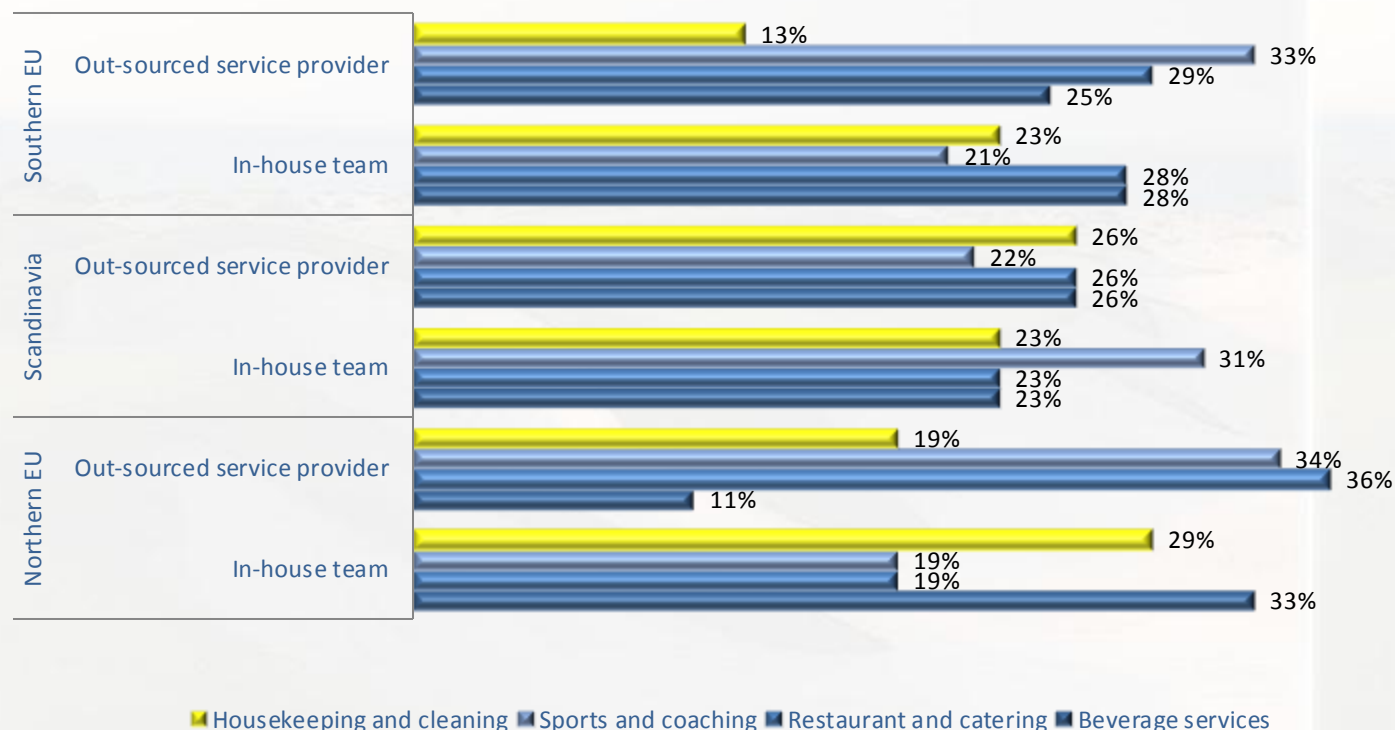
- The majority of employees do not earn a bonus on top of their basic salary. However, bonuses based on individual performance were most popular in Southern and Northern Europe.
- Also in Southern Europe, the likelihood of employee 6 receiving a bonus is higher than that of employee 1 probably because of a lower basic salary.
- Scandinavian employees are least likely to earn a bonus.

7.4 CUSTOMER SATISFACTION AND OUTSOURCING

7.4.1 IS CUSTOMER SATISFACTION REGULARLY MEASURED?

- Clubs are quality focused with 58% of clubs regularly measuring customer satisfaction.
- All clubs in Southern Europe are non-equity businesses and as it shows, measuring customer satisfaction is very important to their culture.

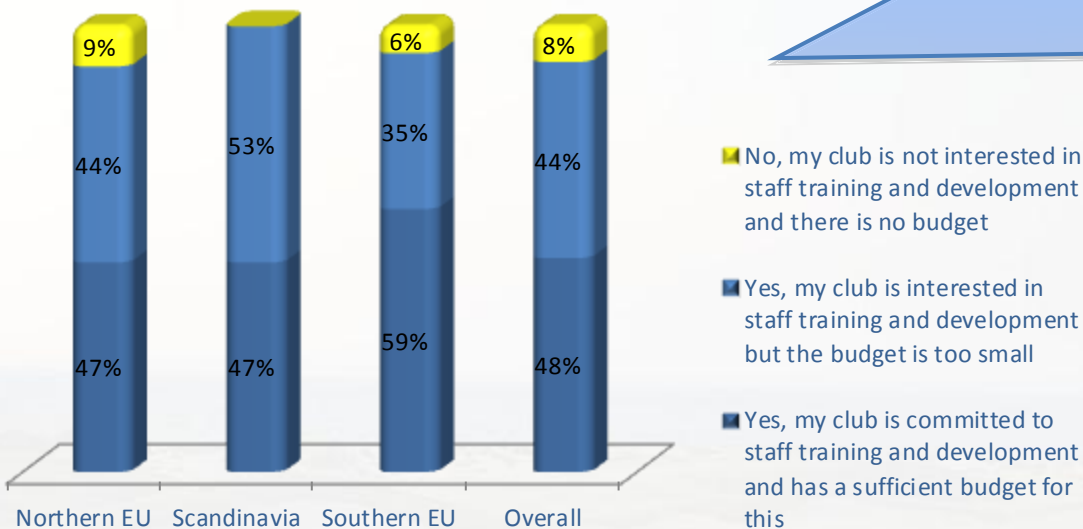
7.4.2 OUTSOURCING



- Outsourced beverage services are more common in Scandinavia and Southern Europe, whereas outsourced catering and coaching services are more popular in Northern European clubs.
- A continuing trend from the 2010 study indicates that Scandinavia is most likely to outsource services.

7.5 TRAINING AND DEVELOPMENT

7.5.1 COMMITMENT TO TRAINING AND DEVELOPMENT



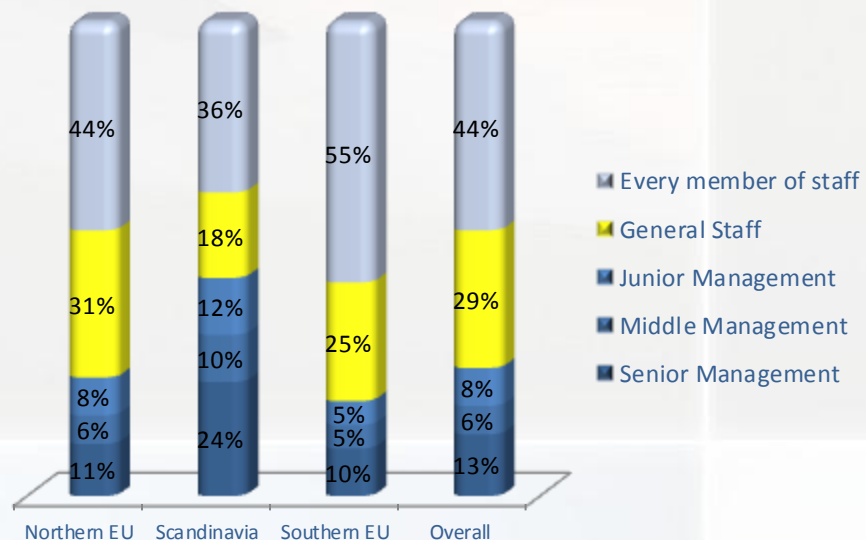
"The club spends an average of 50K per year on this area of developing their staff, it is mainly spent on the senior management team and middle management teams to ensure that they are their best at developing their team. The club also draws down extra funding from the government for their training and development of Chefs, Leisure Assistants and Catering Assistants."

Marc Newey: Roehampton Club

- Nearly all golf clubs are interested in training and development. However less than half believe that their club has the budget to accommodate the activity.

7.5.2 WHO BENEFITS FROM TRAINING AND DEVELOPMENT?

- Scandinavia appears to put a greater emphasis on training and development for those in higher management.
- Southern Europe seem to have a much broader view of this discipline as the majority of clubs offer training to every member of staff.



7.5.3 GENERAL EDUCATION QUALIFICATIONS

Answer Options	Northern EU	Scandinavia	Southern EU	European Average
<i>Doctorate or MBA</i>	2%	12%	0%	2%
<i>Degree from university, college or academic institution</i>	20%	25%	25%	22%
<i>A professional qualification</i>	26%	23%	29%	26%
<i>University entrance diploma or equivalent</i>	6%	0%	4%	5%
<i>Other diploma or college qualifications</i>	18%	20%	21%	19%
<i>Secondary school qualification</i>	26%	20%	13%	24%
<i>Other</i>	2%	0%	8%	2%

- Only 22% of respondents have a university degree, however it was most common to have a professional qualification of some kind.
- These included professional qualifications (26%); secondary school qualifications (24%) and diplomas or college qualifications (19%).

7.5.4 INDUSTRY-SPECIFIC QUALIFICATIONS

Answer Options	Northern EU	Scandinavia	Southern EU	Overall
<i>Certified Club Manager (CCM)</i>	7%	8%	5%	7%
<i>Hospitality or hotel management degree</i>	6%	4%	11%	6%
<i>Golf or Sports Management degree</i>	9%	36%	16%	13%
<i>PGA Golf Professional, Tennis Professional or other Sports Professional</i>	6%	16%	16%	8%
<i>Qualified Head Greenkeeper or course manager</i>	1%	4%	31%	6%
<i>None of the above</i>	56%	28%	16%	48%
<i>Other qualification</i>	15%	4%	5%	12%

- Nearly half of respondents indicated that they had no industry-specific qualifications with Scandinavian respondents being most likely to have one.
- Southern European managers appear to be well educated in subjects such as green keeping and hospitality management.
- Over half of Northern European respondents do not own an industry-specific qualification.

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