



BRANDING'S **IMPACT** ON PRIVATE CLUBS

RESEARCH ON CLUB MEMBER PERCEPTION AND PREFERENCES



BRANDING'S IMPACT ON PRIVATE CLUBS

VOLUME 1

718 WASHINGTON AVE N. SUITE 203
MINNEAPOLIS, MN 55401

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INTRODUCTION



Innovation
Creates Leaders
in the Club Industry.



PURPOSE & OBJECTIVES OF THIS STUDY



ILLUMINATING PATHWAYS TO EVOLUTION

The goal of this study is to understand how the modern idea of 'brand' affects the decision-making of prospective members, as well as the satisfaction of current members within a private club.

This purpose is not to dismantle tradition, but rather to infuse it with the vitality needed to attract and retain a dynamic, diverse, and healthy membership.

BRIDGING PAST, PRESENT, AND FUTURE

This research was done with several key objectives:

- To understand members' desired balance between tradition and innovation.
- To discover the levers that impact member behavior, perceptions, and preferences that shape their club's decisions.
- To reveal the hidden threads that tie member satisfaction to a brand's meaning.
- To present insights that empower club leaders to rejuvenate their offerings, embracing change without forsaking heritage.

In the pages that follow, we dissect data and decode narratives. Our findings will shed light on the challenges and opportunities for clubs with their brand.

As we move forward, remember that innovation is not the enemy of tradition; instead, it's tradition's most loyal companion on the journey toward a brighter future. We hope this study inspires positive change for private clubs and their leaders.

01 THE CHALLENGE FACING CLUB LEADERS

BREATHING LIFE INTO TRADITION

Golf clubs, with their noble roots, have often shied away from reimagining their brand for the next generation. It's as if the hallowed echoes of yesteryears drown out the petitions for progress.

THE BRAND QUANDARY

When a club's brand is not leveraged to tell its unique story, the result is a disconnection between the aura of its heritage and the evolving aspirations of the younger generation of club members.

FIND WHERE TRADITION MEETS TOMORROW

How can each club be unique if they sell the same experience? How can clubs keep the spirit of tradition alive in the modern world? How can clubs lead members to new experiences that create value?

WELCOMING CHANGE

The corridors of these clubs echo tales of history that sets golf and its legacy apart from other lifestyle pursuits. It is these traditions that have preserved its charm that also stand as barriers, shielding golf from embracing a vision for the next generation.





#1 KEY FINDING

THE MAJORITY OF MEMBERS ARE PROMOTERS OF THEIR CLUB, & BRANDING IS IMPORTANT TO PROMOTERS.

A club's most valuable asset is its enthusiastic membership base. This research underscores that the majority of members are enthusiastic promoters of their clubs. These promoters see their club not just as a place to golf, but as a part of their identity that they are proud to share.

Understanding this emotional connection, club leaders can **harness the power of promoters by focusing on branding** that appeals to their sense of pride and the desire to impress others. By aligning the brand with the aspirational image that promoters wish to project, clubs can amplify their word-of-mouth marketing and build a stronger community.



#2 KEY FINDING

WEBSITES ARE KEY FOR RECRUITING THE NEXT GENERATION OF MEMBERS.

In the digital age, a club's website is often the first point of contact for younger potential members. Our findings emphasize the critical role of a website in attracting the next generation of members.

Younger generations **rely heavily on online platforms to gather information and make decisions.** Clubs that invest in websites that showcase the overall lifestyle and experiences offered are better positioned to capture the attention of tech-savvy individuals seeking a club that aligns with their values and interests.



#3 KEY FINDING

BRANDING INFLUENCES YOUNG MEMBERS; WHEREAS FEES INFLUENCE OLDER MEMBERS.

Generational nuances play a significant role in member behavior and decision-making. Our research underscores that for younger members, brand plays a pivotal role in their club choice. **They are attracted to clubs with vibrant, modern brands** that resonate with their lifestyles and values.

On the other hand, older members tend to be influenced by membership fees and cost considerations. Understanding these generational dynamics allows clubs to tailor their branding efforts and communication strategies to effectively appeal to different age groups.



#4 KEY FINDING

THE PRIVATE GOLF CLUB SPACE HAS SIGNIFICANT ROOM FOR VISUAL DIFFERENTIATION.

Traditional golf clubs have long been characterized by their adherence to certain aesthetics and design elements. However, our research reveals that **modern private golf clubs have an opportunity to differentiate themselves visually.**

By embracing a fresh visual identity that retains elements of tradition while infusing them with contemporary sensibilities, clubs can attract attention and stand out in a competitive landscape. This differentiation can extend to everything from clubhouse design and signage to marketing materials and digital presence.

RESEARCH INSIGHTS



- 2.1 — THE ROLE OF PROMOTERS AND DETRACTORS
- 2.2 — INFLUENCING MEMBER RECRUITMENT
- 2.3 — A CLUB'S VISUAL IDENTITY

02 THE ROLE OF PROMOTERS & DETRACTORS IN GROWING A CLUB'S BRAND

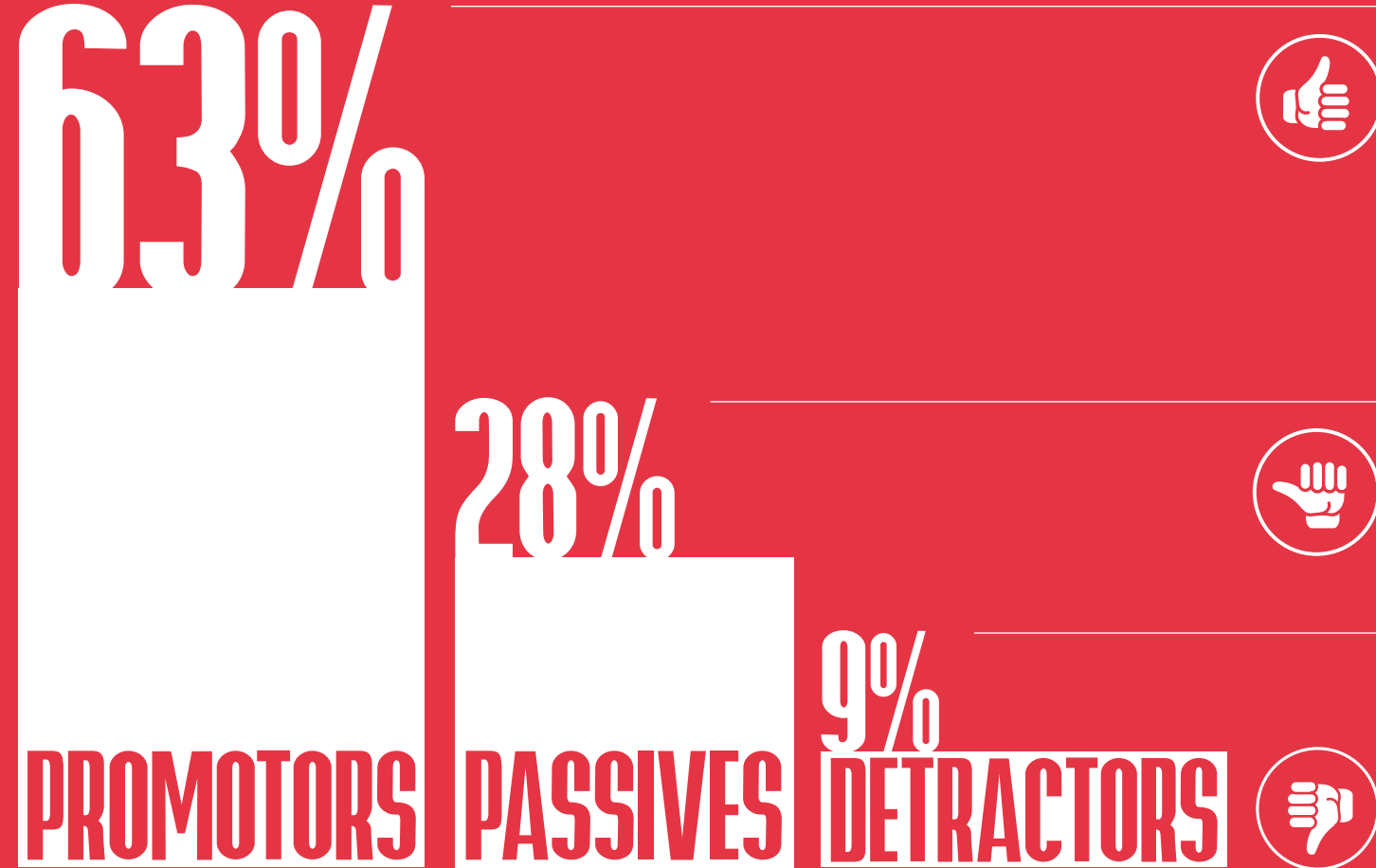
Understanding the promoters and detractors of a club is crucial to shaping long-term brand growth and member satisfaction.

A member who is most likely to recommend their club to others is known as a promoter. Once your promoters have been discovered, it's critical to learn about the good things you've done to make sure that story gets amplified.

A member who is most likely to spread negative comments within the community is known as a detractor. These are normally some of the loudest voices in the room. Once your detractors have been discovered, it's important to learn about what you've done incorrectly to make sure that gets corrected and hopefully turn the detractors into promoters.

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PROMOTERS, PASSIVES & DETRACTORS

Using the Net Promoter Score (the gold standard of customer experience metrics), we measured the loyalty of members to their particular club and their likelihood to recommend its offering to others.

Results showed that most respondents (**63% of members**) fell into the **promoter category** for their current club.

78%

of promoter members would pay higher monthly dues to update club branding.

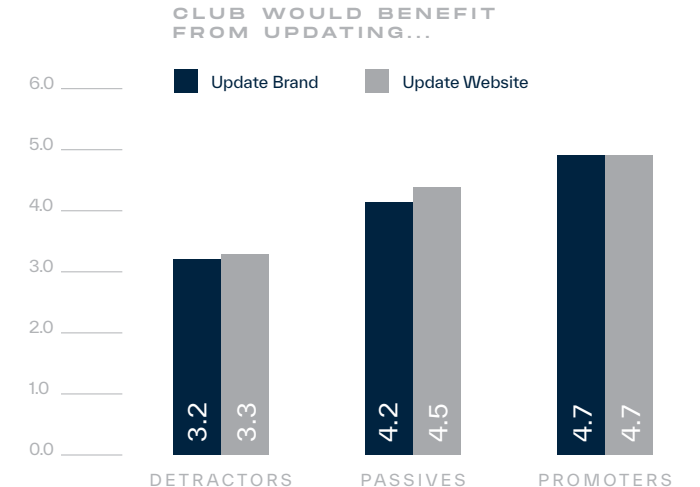


BRAND PERCEPTION IS IMPORTANT FOR PROMOTERS

Even members that promote and recommend their club to others see areas for improvement. When a club makes these improvements to please promoters, they generally make it even easier for promoter members to shout their club's praises within a community.

One key area identified for improvement was the club's brand. Promoters want to impress people outside the club, and the brand has a direct impact on the club's perception and credibility.

Updating and modernizing a club's brand identity can increase member satisfaction and the perceived value of the membership.





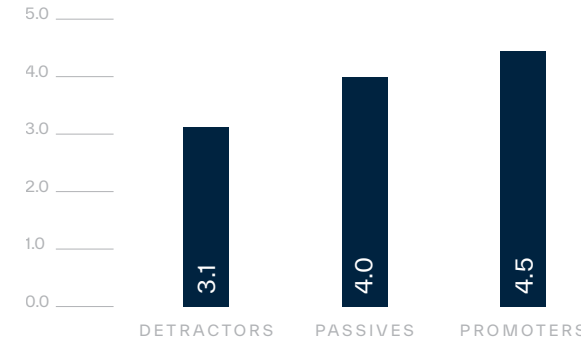
PROMOTERS WANT TO IMPRESS NON-MEMBERS

For promoters, it is important that other people in their lives have a positive view of their club. This can show that members, especially promoters, have a personal ownership of their club's perception. They even admit to feeling proud when others are envious of their membership.

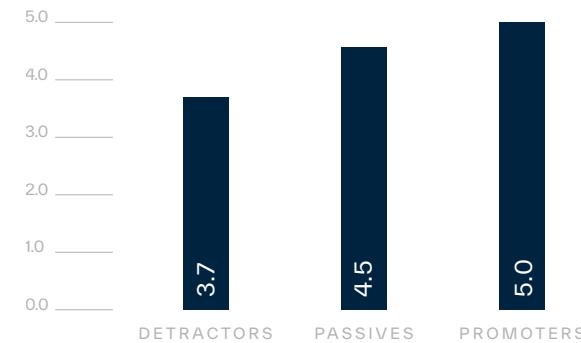
For these members, a strong club brand, club perception, and even **club website** can be an important part of **their satisfaction with their membership.**

THE ROLE OF PROMOTERS AND DETRACTORS

PROUD IF OTHERS ARE ENVIOUS OF CLUB



IMPORTANCE OF OTHERS' POSITIVE VIEW OF THE CLUB



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THE ROLE OF PROMOTERS AND DETRACTORS



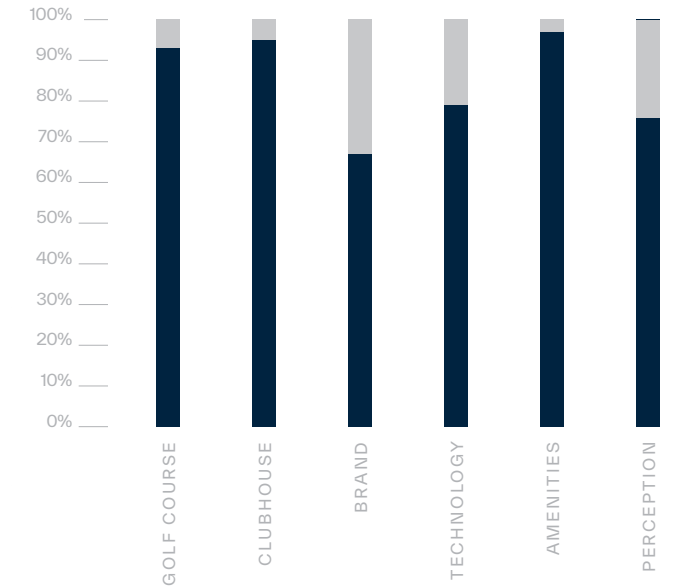
97%

of passive members would raise their monthly dues to update club amenities.

THE ROLE OF PROMOTERS AND DETRACTORS

PASSIVE MEMBERS ARE ALSO LOOKING FOR REASONS TO BELIEVE

PASSIVES WILLING TO RAISE DUES FOR IMPROVEMENTS TO...
 ■ No
 ■ Yes



Passive members like their experience with their club but not enough to actively tell others about it. These individuals are not loyal to their club and **would be more willing to switch if presented with a better offer elsewhere.**

For them to become promoters, they want to see improvements at the club. They want a reason to emotionally “buy in” to a club’s future. This is seen in their willingness to increase monthly dues to improve most aspects of their current club.

THE ROLE OF PROMOTERS AND DETRACTORS

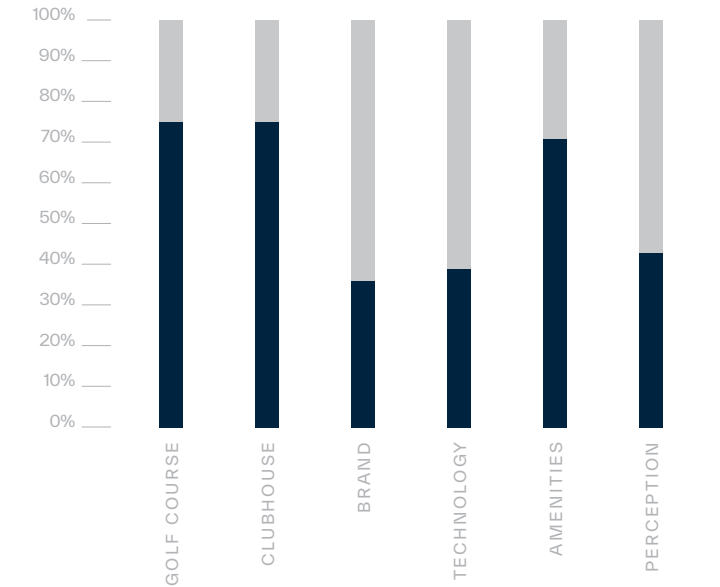


610%

of detractor members don't see value in clubs improving technology.

DETRACTORS CARE MORE ABOUT PERSONAL GAINS VS. CLUB GAINS

DETRACTORS WILLING TO RAISE DUES FOR IMPROVEMENTS TO...
 ■ No
 ■ Yes



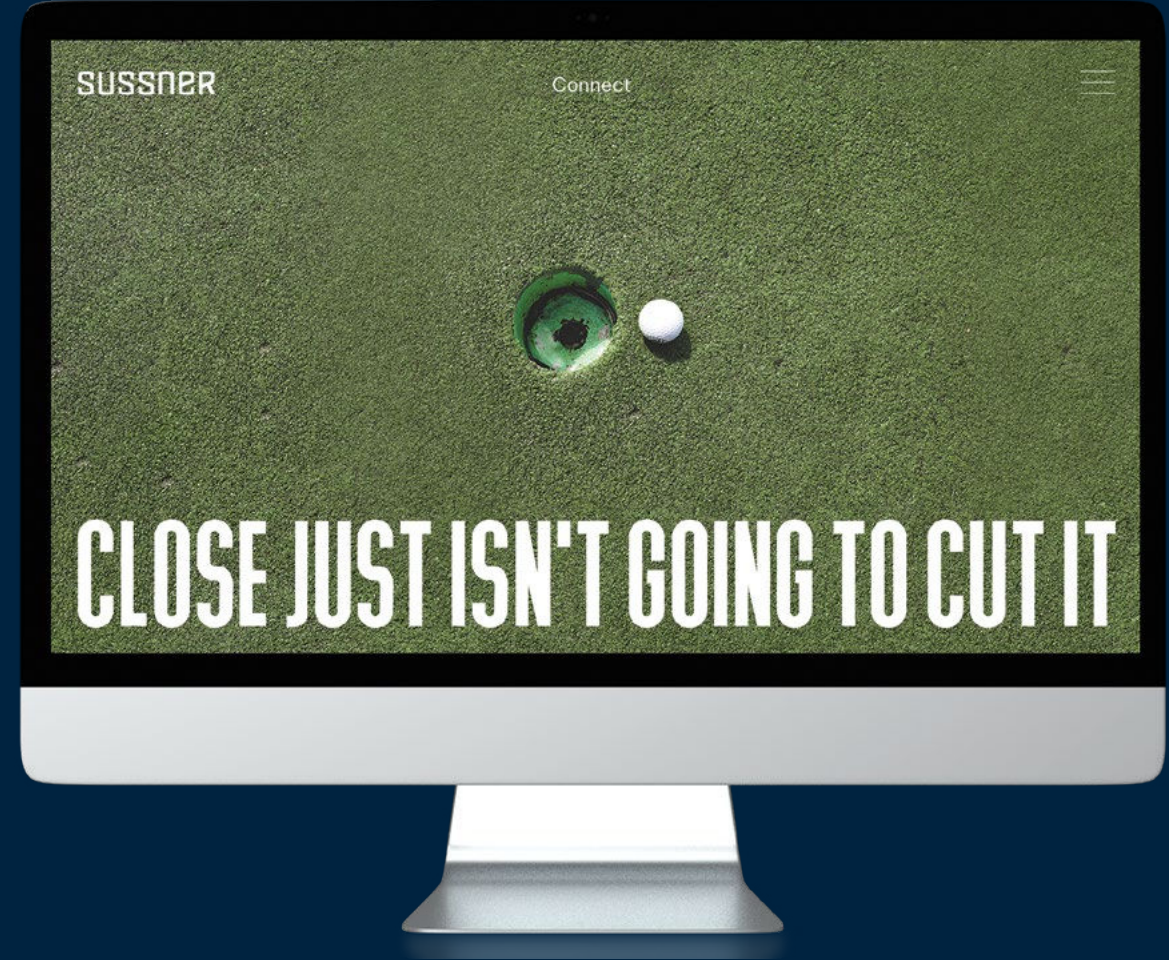
Many of a club's detractors can see capital investments as a negative. They are less willing to increase their dues for club improvements compared to passive and promoter members. The unwillingness to pay for club improvements stems from their discontent for what they already pay for.

When it comes to areas of the club that do not clearly affect their own experience, detractors said **they do not see value in improvements** such as updating club technology. This causes us to believe that detractors do not find as much value in "behind the scenes" improvements compared to promoters.

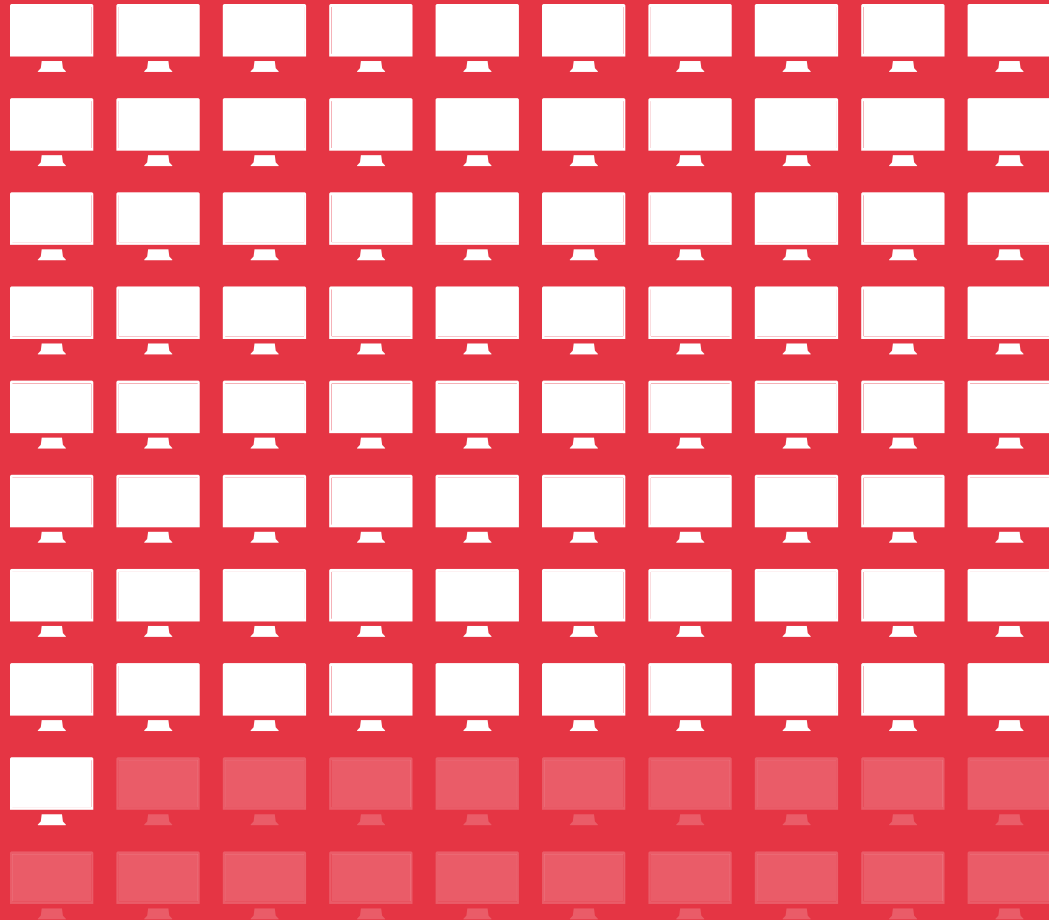
02 KEY INFLUENCES ON MEMBER RECRUITMENT

Recruitment happens in a variety of ways. Our research reviews these influences, from social circles to online interactions. Understanding what **drives prospective members to your club's doorstep** empowers you to tailor your brand's attractiveness more effectively.

RESEARCH INSIGHTS



RESEARCH INSIGHTS



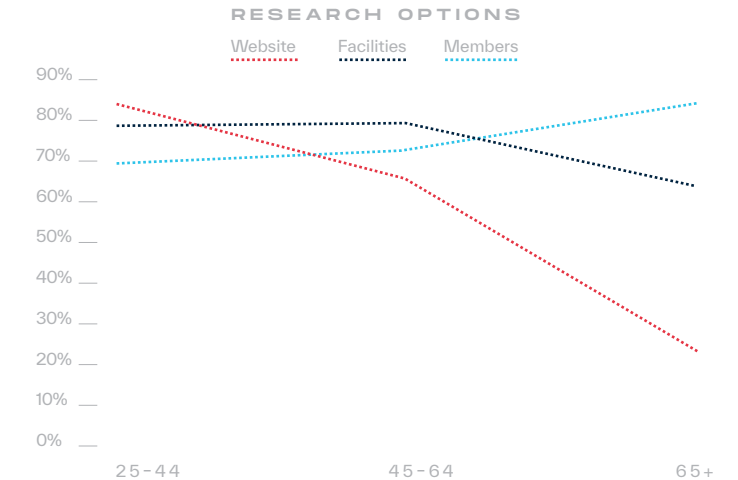
81%

of young prospective members look at club websites first during their research.

ROLE OF CLUB WEBSITES

When the younger generation of club members (45-years-old and younger) research potential clubs, they prefer to use digital mediums. **4 out of every 5 people** in this generation said they **searched online before moving forward** with a club. This allows them to get a good idea of the club, its culture, and its offerings before committing to a visit or further conversations.

This became less common in members of the next older generation where 3 out of every 5 people searched online as their first inquiry. However, this points to a glaring need in the club industry—many websites look and sound the same, causing confusion which leads to price shopping amongst younger members.



02 WHY DO MEMBERS JOIN?

When members were asked about the top 3 reasons they decided to join a private club, some core themes emerged. These themes are the key selling points that club brands should be leveraging with their content, design, and copywriting to help them stand out.

Not all members cared deeply about one specific element. This points to the need that clubs have to understand their membership and speak to their desires specifically.

LIFESTYLE
& HEALTH

PASSION FOR
THE SPORT

ACCESS TO
EXCLUSIVE
FACILITIES
& AMENITIES

PRIVACY &
RELAXATION

CONVENIENCE &
ACCESSIBILITY

EXCLUSIVITY
& PRESTIGE

BUSINESS AND
NETWORKING
OPPORTUNITIES

PERSONALIZED
EXPERIENCE AND
ENHANCED PLAY

ACCESS TO
EXCLUSIVE,
HIGH-QUALITY
COURSES

SOCIAL
CONNECTIONS
& FRIENDSHIPS



88%

of members under the age of 45 would raise their monthly dues to update club branding.

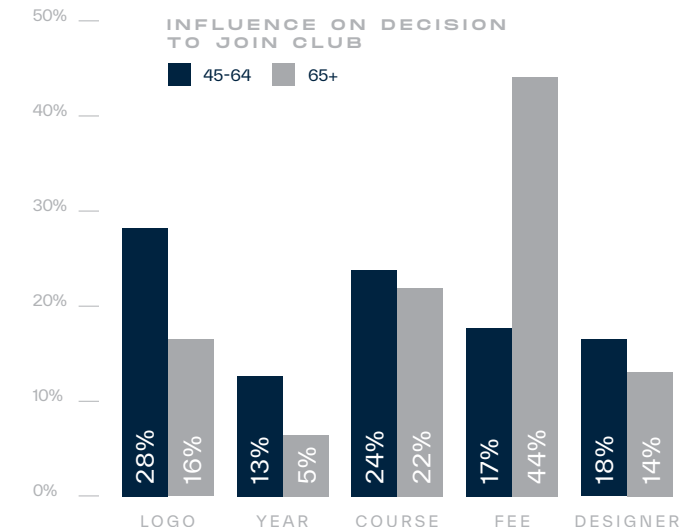
INFLUENCES ON MEMBER RECRUITMENT

BRAND IMPACTS POTENTIAL YOUNGER MEMBERS

Using a conjoint methodology, we gave respondents sets of 3 fictional clubs that varied on the logo, year established, championship-level course, initiation fee, and golf course designer.

An appealing logo was the largest influence on 45 to 64-year-olds' decision to choose a club. This shows the importance of perception for the younger generation of members.

On top of that, when looking at younger age groups, they would invest more into the brand as they see it as an important asset for a club.



INFLUENCES ON MEMBER RECRUITMENT



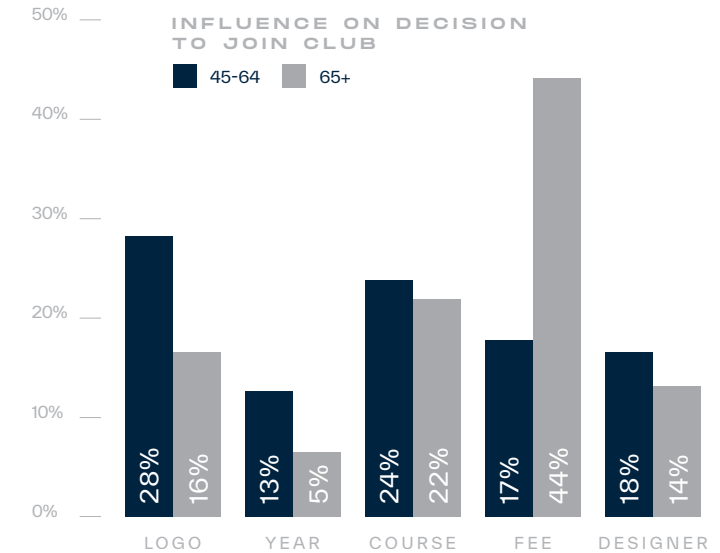
2X

Fees influenced members over the age of 65—twice as much as any other factor.

FINANCIALS IMPACT POTENTIAL OLDER MEMBERS

Using a conjoint methodology, we gave respondents sets of 3 fictional clubs that varied on the logo, year established, championship-level course, initiation fee, and golf course designer.

A club's initiation fee was the largest influence on members over 65 in their decision to select a club. This shows the importance of financials for the older generation of members.





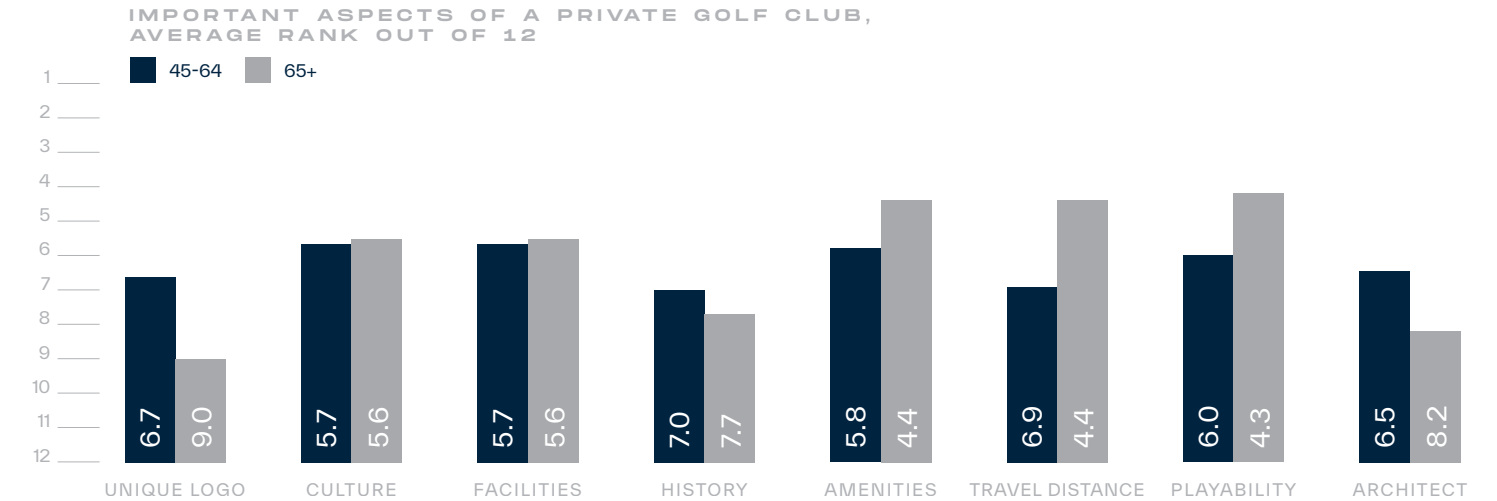
GENERATIONAL MEMBER RECRUITMENT DIFFERENCES

INFLUENCES ON MEMBER RECRUITMENT

As mentioned, focusing on a visually appealing, functional, and user-friendly website will be essential for clubs seeking to recruit the next generation of members. However, the elements that each generation deems important for the key selling points differ.

Both generations of respondents agree on the importance of a club's culture and facilities. Older prospective members care more about a club's distance from their home, golf course playability, and club amenities. Younger prospective members care more about the uniqueness of a club's logo, the golf course architect, and if their family has ties to the club.

Overall, the younger generation cares about all aspects of a club while older members care more about specific aspects.



INFLUENCES ON MEMBER RECRUITMENT

02

THE IMPORTANCE OF A CLUB'S VISUAL IDENTITY

A club's visual identity **isn't just a logo or a color scheme** – it is the style and tone that is being used to represent a club within both the local and broad marketplaces.

This identity is the first impression for new members. **It becomes the calling card and a symbol of the spirit** and experience of a club. It is also the backdrop against which ongoing members etch their memories. Becoming the calling card and symbol of experience for a club.

Our research delves into how this identity shapes perceptions, helping you understand how design can be a tool that helps tell a club's unique and meaningful story.

2.3



96%

of members can place their club's logo into 1 of 3 common design categories.

SIMILARITIES IN APPEARANCE & IDENTITY

We described to respondents 4 different categories of logos and asked them to indicate which one best represented their current club's logo.

These categories were **Nature Emblem, Crossed Golf Clubs, Monogram, or Other**. **Only 4% of respondents** chose the 'Other' option, which dictates that the private club space has ample room for visual differentiation.

When a vast majority of clubs use similar symbols to represent themselves, it can communicate to outside prospects that the culture, offering, and value of a club are not unique.

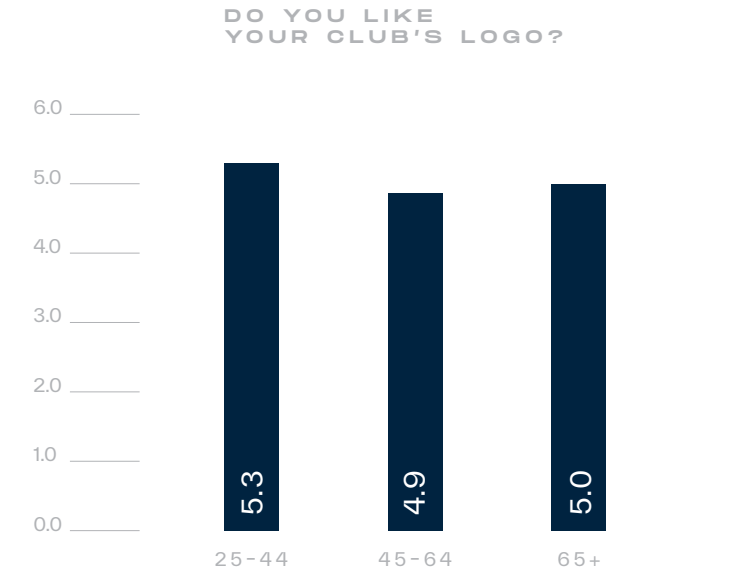
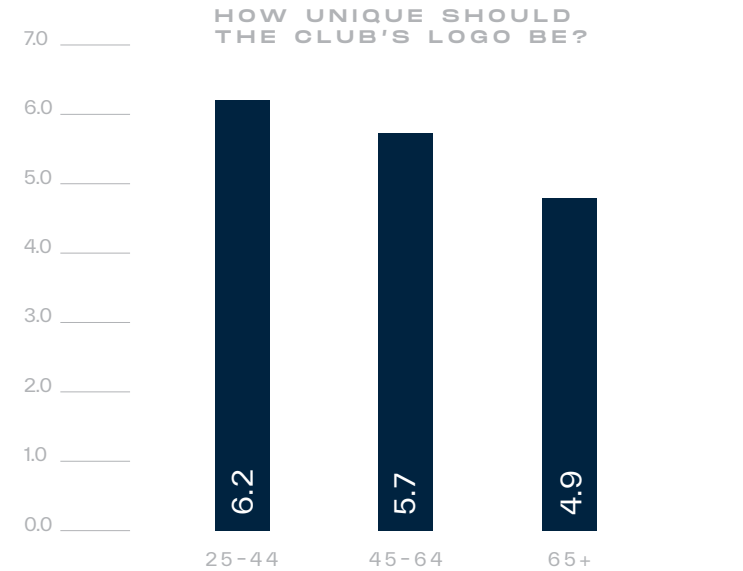


CLUB LOGO

When asked about the importance of a club's logo compared to amenities and other offerings, all members communicated that the logo wasn't the most important piece of a club's identity. However, members under the age of 45 think a club's logo is more important than its history.

When asked about the importance of a unique club logo compared to other clubs, all members said it was important to them. Members younger than 45 felt a distinct logo was more important than member older than 65 did.

This communicates that the basic function of a **club's logo is more impactful when discussing ongoing member satisfaction.**

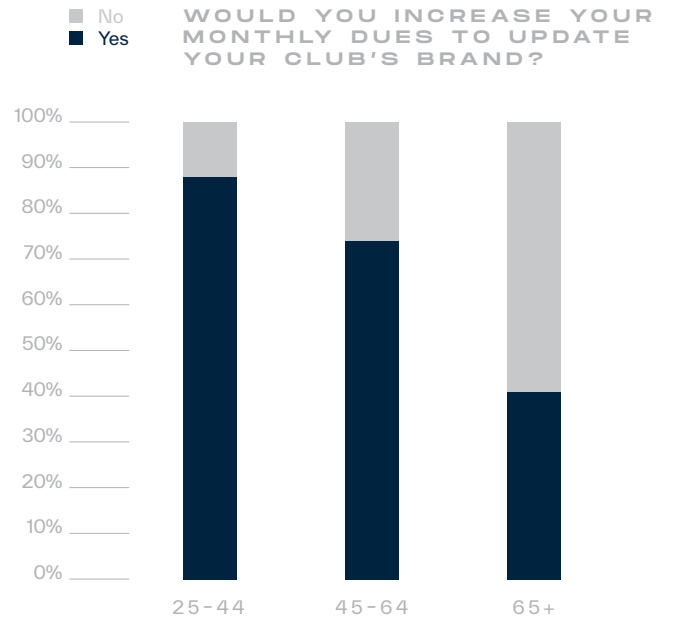


71%

of members would raise their monthly dues to update club branding.



DO MEMBERS WANT THEIR CLUB TO UPDATE ITS BRAND?

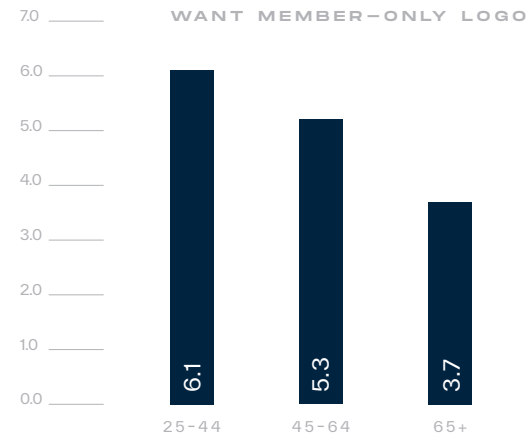


Intentional branding in the golf space is a relatively modern concept. Member desires to leverage branding at the club level follows this pattern with younger generations communicating the desire for updated branding. Although older generations were not as definitive, they also slightly agreed that they would like to see club branding updated.

Even promoters agree that their club would benefit from updating their brand.



DO MEMBERS WANT A MEMBER-ONLY LOGO?

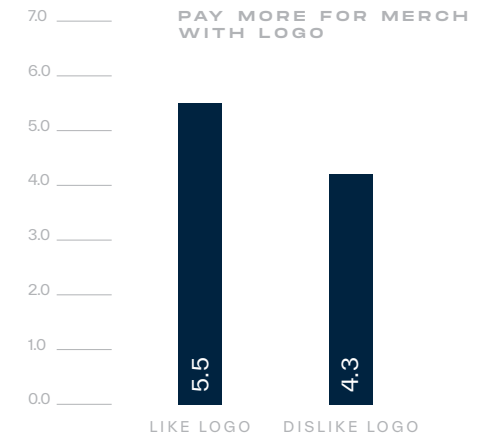


Member-only logos are symbols that only members can wear and purchase. These symbols are a nod to the membership's culture and unique ties to 'insider' club knowledge.

When asked to what degree they would like a member-only logo, the overall result leans to wanting one. However, there was a clear generational divide. Members older than 65-year-old were actually slightly against having a member-only logo whereas members younger than 45-years-old were in favor of a member-exclusive symbol.

This is validated by research on the Millennial generation wanting more personalized and exclusive experiences compared to other generations. To the respondents of this private member research, they believe **a member-only club logo can provide that exclusive offering.**

LIKED BRANDING CAN RESULT IN MORE MERCHANDISE SALES



Although updating a club's brand isn't something that most club leaders would consider when wanting to inspire more pro shop sales, members did say **they would pay more** for club merchandise with their club's logo on it, if it was a **logo they liked.**

Understand the overall appeal of a club's logo and branding in the eyes of the members is an underutilized opportunity. If members like specific elements, these should be the focal point of their merchandising strategy. If members do not like the logo or branding of a club, **changing these elements** would provide them with **a great financial return.**

RESEARCH INFORMATION

- 3.1 — DATA GATHERING
- 3.2 — SURVEY SNAPSHOT
- 3.3 — ABOUT SUSSNER & SPROCKET



DATA GATHERING

RESEARCH INFORMATION

3.1

SURVEYED 328 MEMBERS FROM VARIOUS PRIVATE GOLF CLUBS

For this research study, Sussner collaborated with Sprocket CX to conduct a quantitative survey encompassing 328 members from various private golf clubs across the United States.

Leveraging a third-party panel, meticulous attention was directed towards the assembly of a nationally representative sample, ensuring a diverse spectrum of age groups among the participants.

For more specific information on how the data was collected, please reach out to our team at inquire@sussner.com and we would be happy to **share the specific process that was taken during this initiative.**

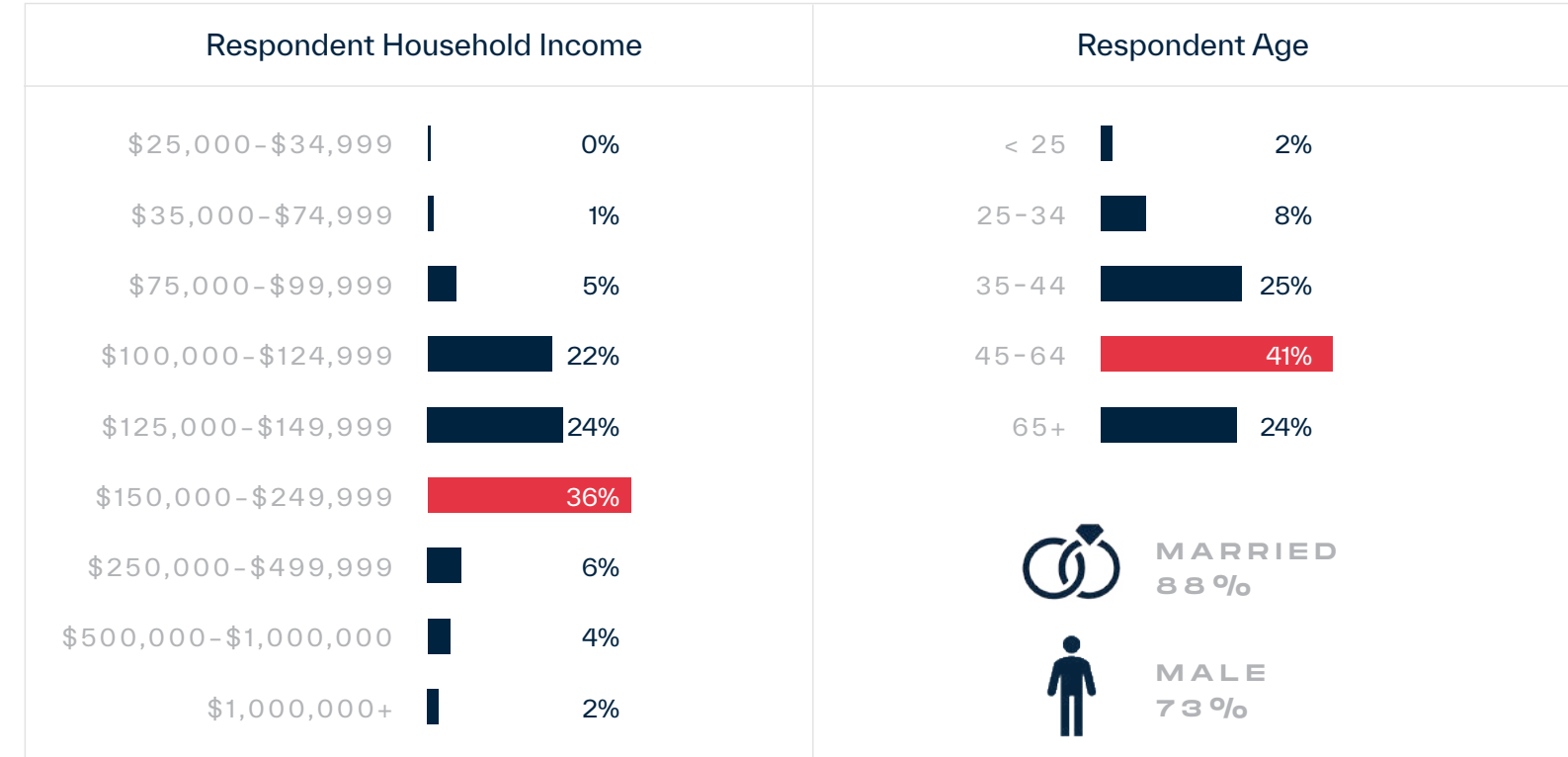
DATA GATHERING



SURVEY SNAPSHOT

3.2

RESEARCH INFORMATION





ABOUT SUSSNER

We are a team of designers, strategists, and copywriters that helps private clubs delight members with emotion, style, and storytelling.

When done right, a club's brand can energize and grow membership, elevate perception, create pride, and impact the club's financial health for decades.

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RESEARCH INFORMATION



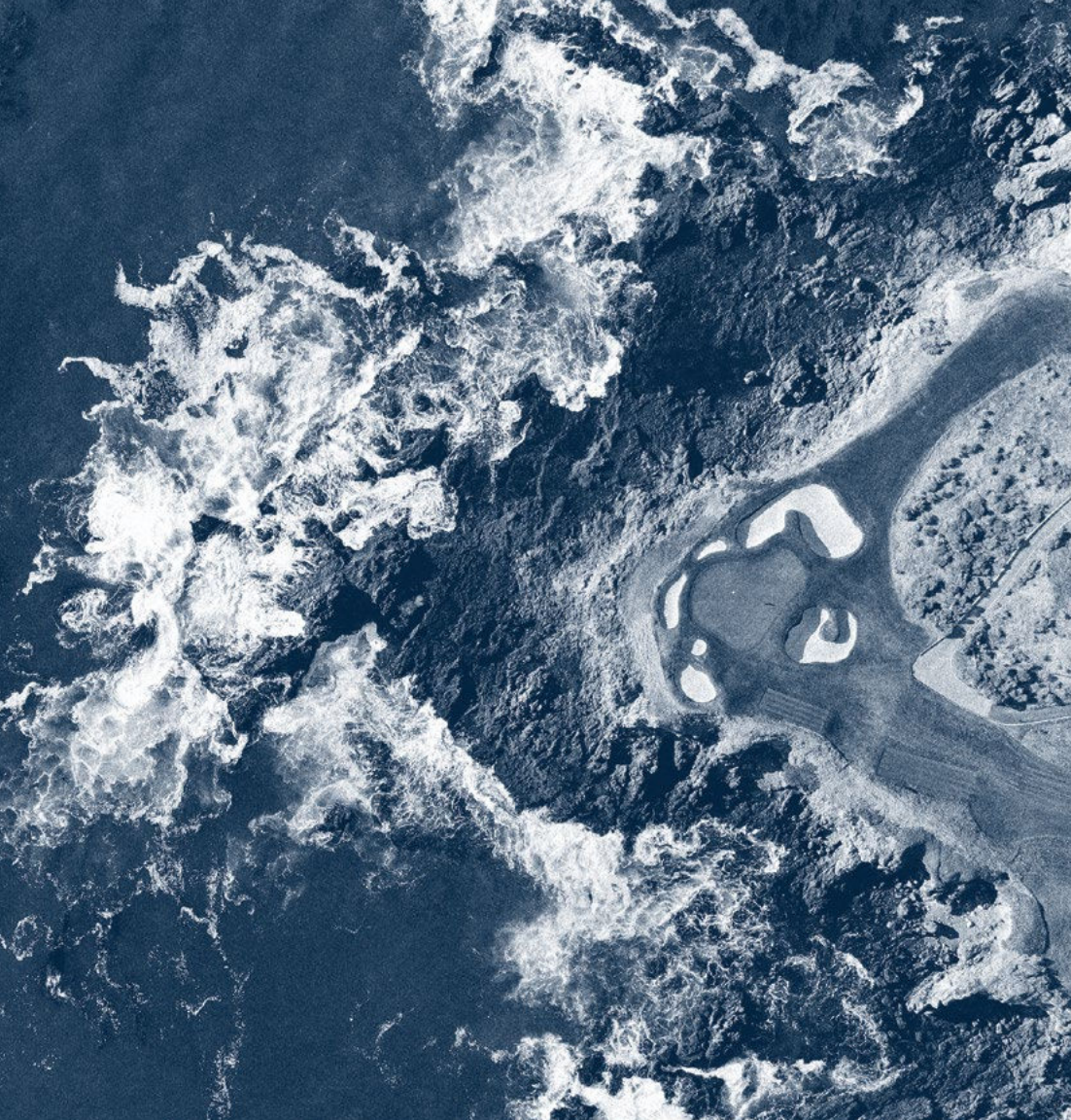
ABOUT SPROCKET

We deliver actionable consumer insights that change the game for private clubs. This valuable information equips clubs with the confidence to create one-of-a-kind experiences.

Our team blends psychological expertise and actionable data science to help clubs find answers to any question.

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