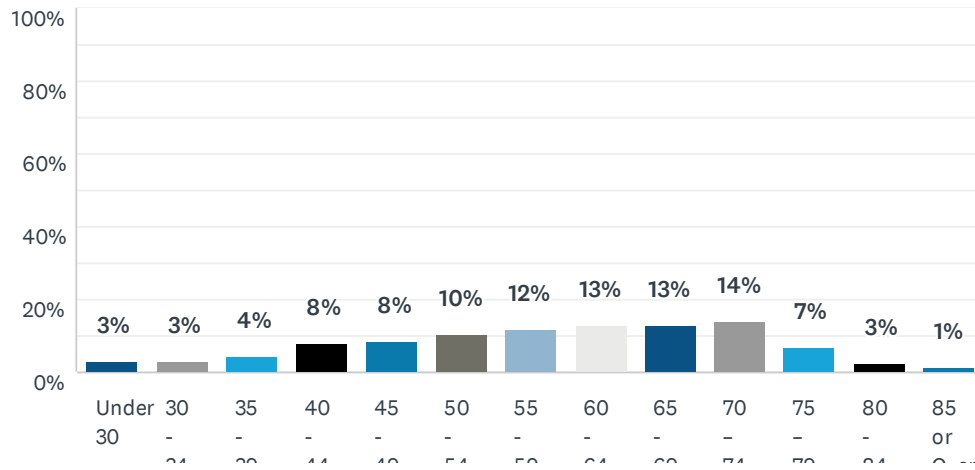


Q1 Age Category:

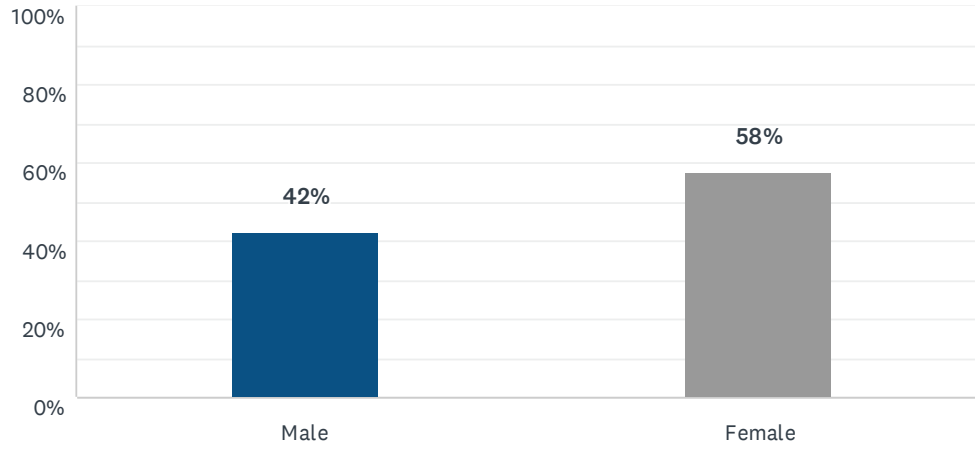
Answered: 602 Skipped: 3



ANSWER CHOICES	RESPONSES
Under 30	3% 19
30 - 34	3% 18
35 - 39	4% 26
40 - 44	8% 48
45 - 49	8% 50
50 - 54	10% 62
55 - 59	12% 73
60 - 64	13% 78
65 - 69	13% 77
70 - 74	14% 84
75 - 79	7% 43
80 - 84	3% 16
85 or Over	1% 8
TOTAL	602

Q2 Gender:

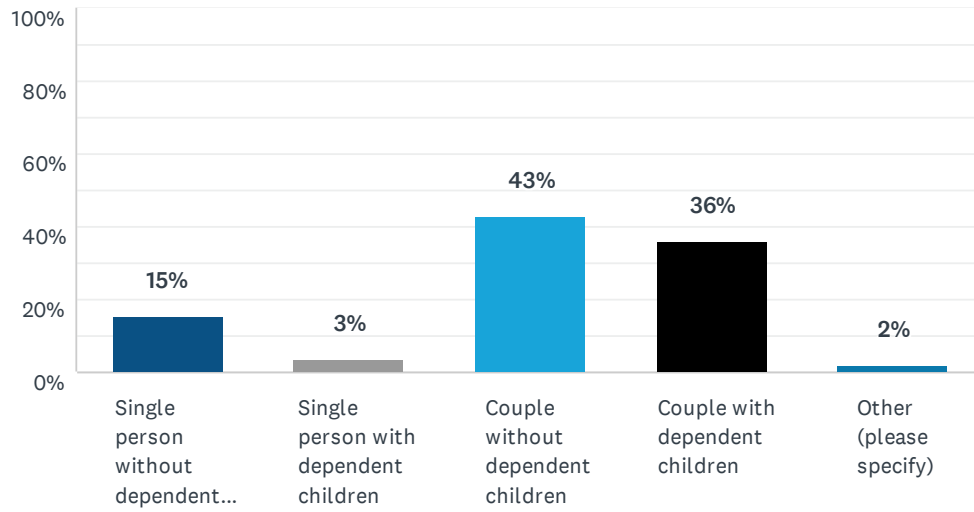
Answered: 596 Skipped: 9



ANSWER CHOICES	RESPONSES	
Male	42%	251
Female	58%	345
TOTAL		596

Q3 Household Composition:

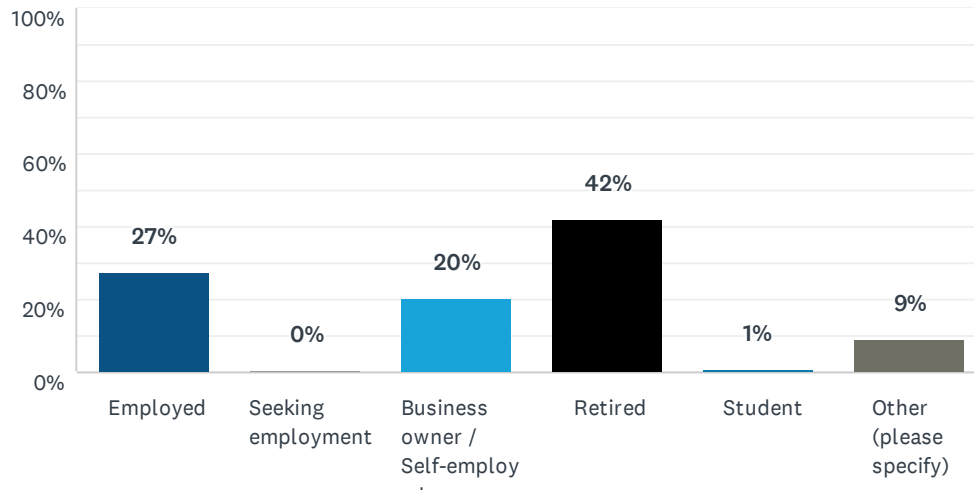
Answered: 602 Skipped: 3



ANSWER CHOICES	RESPONSES	
Single person without dependent children	15%	92
Single person with dependent children	3%	20
Couple without dependent children	43%	260
Couple with dependent children	36%	218
Other (please specify)	2%	12
TOTAL		602

Q4 Employment Status:

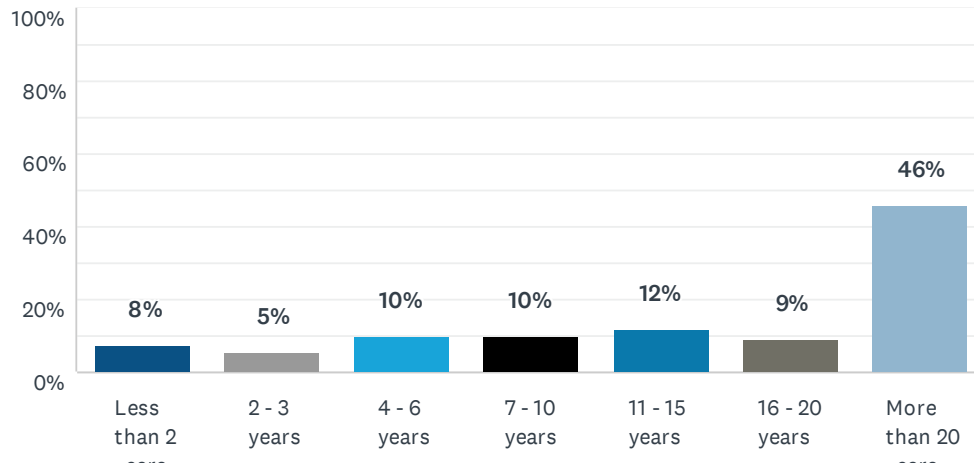
Answered: 597 Skipped: 8



ANSWER CHOICES	RESPONSES	
Employed	27%	163
Seeking employment	0%	2
Business owner / Self-employed	20%	122
Retired	42%	251
Student	1%	5
Other (please specify)	9%	54
TOTAL		597

Q5 How many years have you been a member?

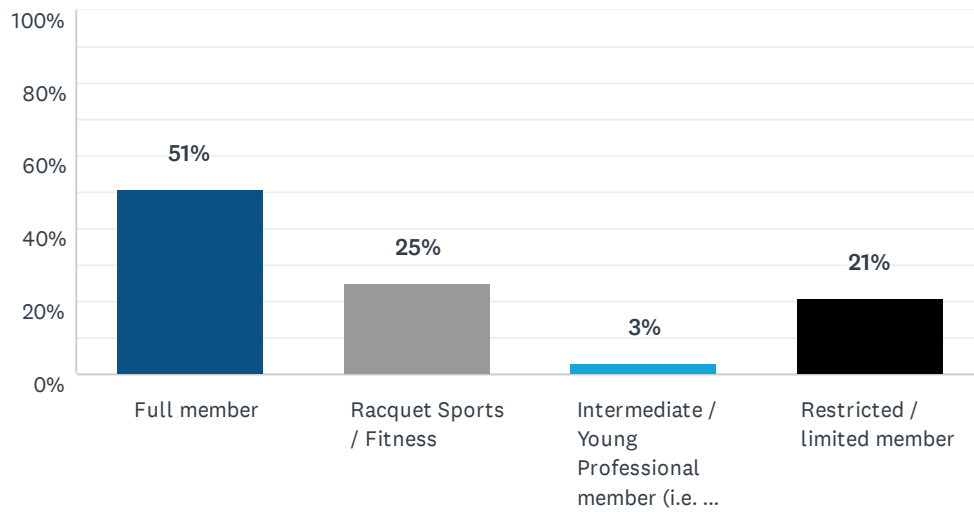
Answered: 597 Skipped: 8



ANSWER CHOICES	RESPONSES
Less than 2 years	8% 46
2 - 3 years	5% 32
4 - 6 years	10% 60
7 - 10 years	10% 59
11 - 15 years	12% 71
16 - 20 years	9% 53
More than 20 years	46% 276
TOTAL	597

Q6 Which of the following best describes your level of membership?

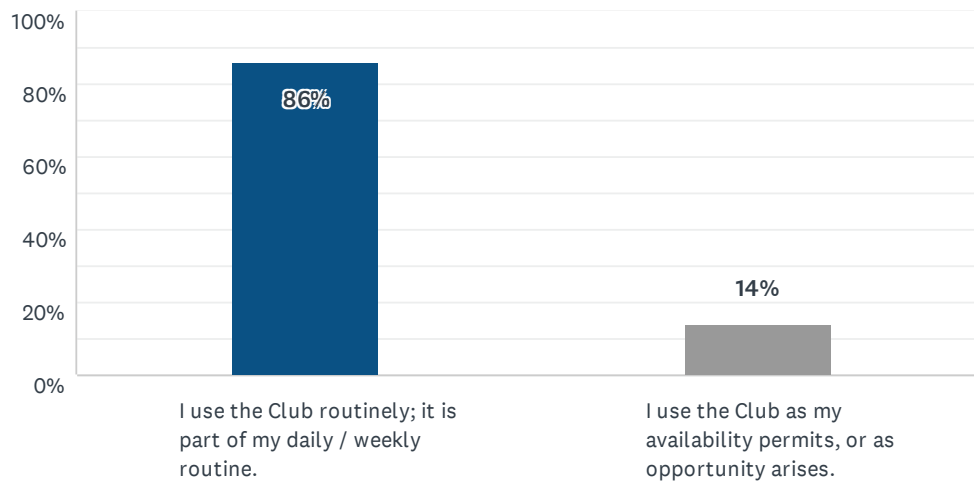
Answered: 597 Skipped: 8



ANSWER CHOICES	RESPONSES	
Full member	51%	303
Racquet Sports / Fitness	25%	150
Intermediate / Young Professional member (i.e. up to age 40)	3%	19
Restricted / limited member	21%	125
TOTAL		597

Q7 Which of the following best describes the frequency with which you use the Club?

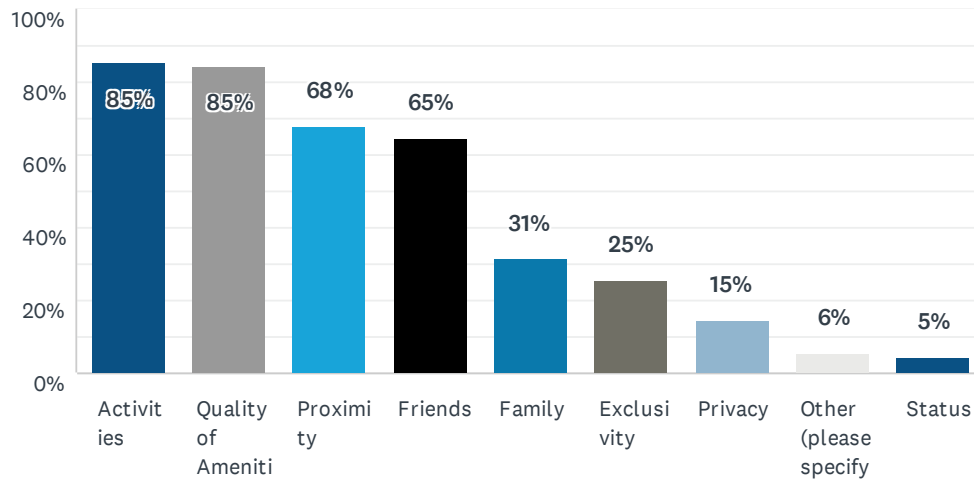
Answered: 597 Skipped: 8



ANSWER CHOICES	RESPONSES	
I use the Club routinely; it is part of my daily / weekly routine.	86%	512
I use the Club as my availability permits, or as opportunity arises.	14%	85
TOTAL		597

Q8 What makes your club important to you? (You may select more than one)

Answered: 597 Skipped: 8



ANSWER CHOICES	RESPONSES	
Activities	85%	509
Quality of Amenities	85%	505
Proximity	68%	405
Friends	65%	386
Family	31%	187
Exclusivity	25%	152
Privacy	15%	87
Other (please specify)	6%	34
Status	5%	27
Total Respondents: 597		

Q9 For the answers you previously selected, please rank them in order of priority to you, with '1' being the highest priority. You can adjust the ranking order by clicking and dragging each answer option up or down the list.

Answered: 552 Skipped: 53

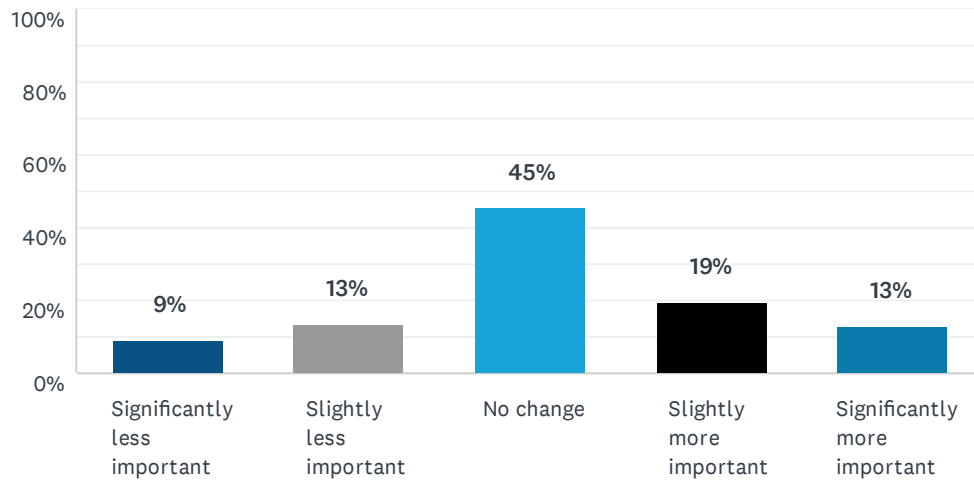
	1	2	3	4	5	6	7	8	9	TOTAL	SCORE
Friends	17% 60	30% 105	24% 86	20% 71	6% 23	2% 7	1% 2	0% 1	0% 0	355	7.21
Privacy	6% 5	10% 8	16% 13	26% 21	23% 18	11% 9	8% 6	0% 0	0% 0	80	5.88
Family	20% 35	20% 36	24% 42	21% 37	10% 17	5% 9	1% 1	0% 0	0% 0	177	7.02
Exclusivity	6% 9	11% 16	18% 26	29% 42	23% 33	7% 10	4% 6	1% 1	0% 0	143	6.07
Activities	53% 241	23% 105	16% 73	6% 27	2% 8	0% 2	0% 1	0% 0	0% 0	457	8.17
Proximity	11% 42	30% 111	29% 108	21% 77	8% 29	1% 4	1% 2	0% 0	0% 0	373	7.11
Status	0% 0	0% 0	12% 3	4% 1	23% 6	35% 9	4% 1	23% 6	0% 0	26	4.15
Quality of Amenities	30% 142	31% 145	25% 119	10% 45	3% 14	0% 2	0% 1	0% 0	0% 0	468	7.74
[Insert text from Other]	45% 15	18% 6	24% 8	6% 2	6% 2	0% 0	0% 0	0% 0	0% 0	33	7.91

A Members' Perspective: The Shifting Private Club Landscape - Roehampton Club

BASIC STATISTICS					
	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
Activities	1.00	7.00	1.00	1.83	1.09
[Insert text from Other]	1.00	5.00	2.00	2.09	1.22
Quality of Amenities	1.00	7.00	2.00	2.26	1.12
Friends	1.00	8.00	3.00	2.79	1.31
Proximity	1.00	7.00	3.00	2.89	1.20
Family	1.00	7.00	3.00	2.98	1.46
Exclusivity	1.00	8.00	4.00	3.93	1.48
Privacy	1.00	7.00	4.00	4.13	1.57
Status	3.00	8.00	6.00	5.85	1.54

Q10 Has the COVID-19 pandemic changed the importance of your Club in your life?

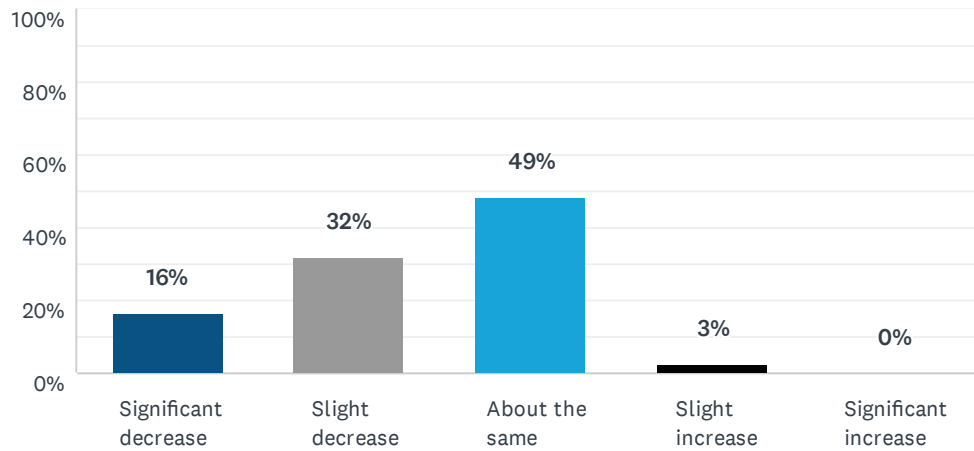
Answered: 586 Skipped: 19



ANSWER CHOICES	RESPONSES	
Significantly less important	9%	52
Slightly less important	13%	78
No change	45%	266
Slightly more important	19%	113
Significantly more important	13%	77
TOTAL		586

Q11 How do you think your disposable income may change in the next twelve months?

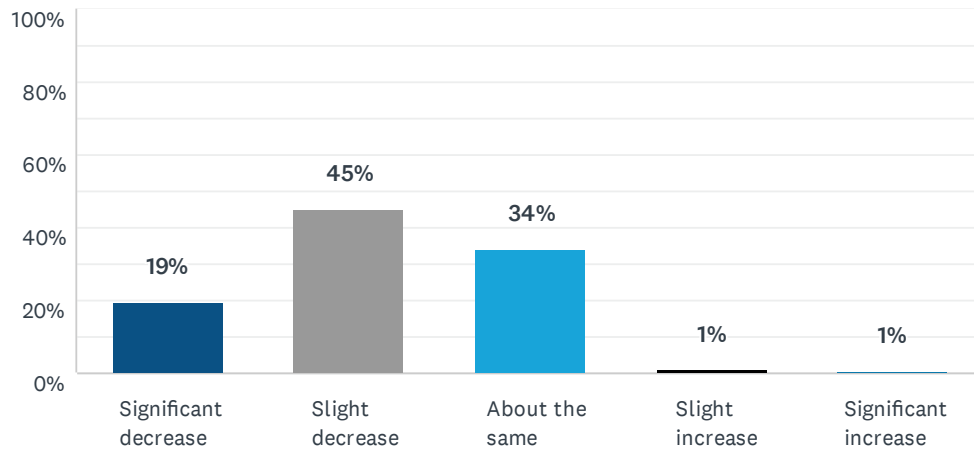
Answered: 583 Skipped: 22



ANSWER CHOICES	RESPONSES	
Significant decrease	16%	96
Slight decrease	32%	188
About the same	49%	283
Slight increase	3%	15
Significant increase	0%	1
TOTAL		583

Q12 How do you think your overall consumer spending will change in the next twelve months?

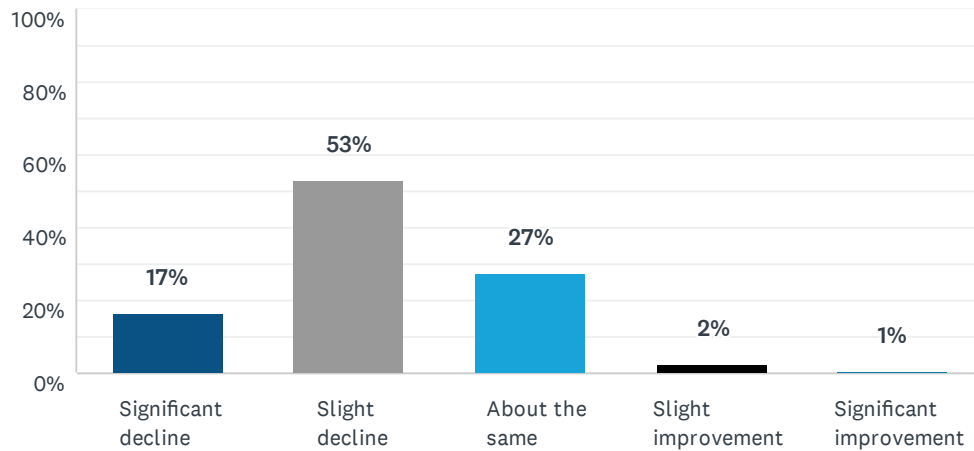
Answered: 584 Skipped: 21



ANSWER CHOICES	RESPONSES	
Significant decrease	19%	113
Slight decrease	45%	263
About the same	34%	198
Slight increase	1%	7
Significant increase	1%	3
TOTAL		584

Q13 How do you think your Club's financial position will change in the next twelve months?

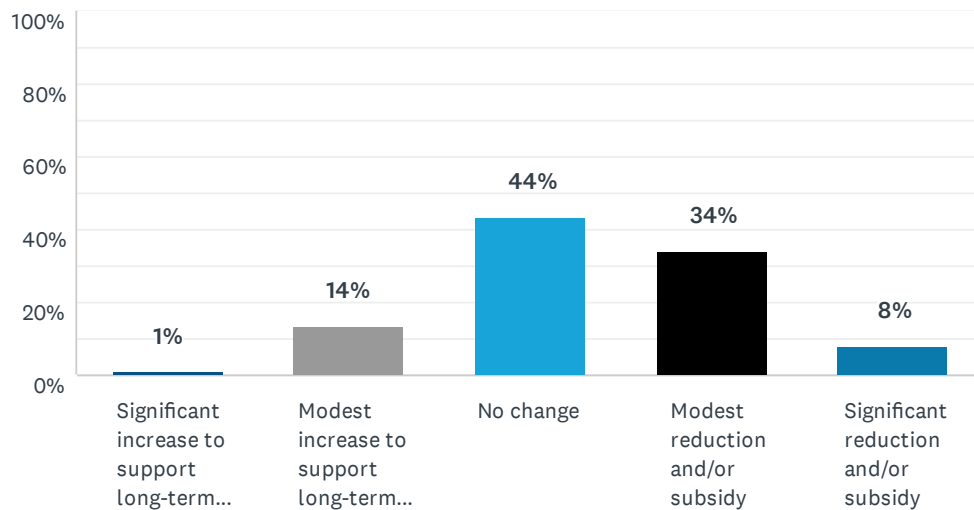
Answered: 581 Skipped: 24



ANSWER CHOICES	RESPONSES	
Significant decline	17%	97
Slight decline	53%	307
About the same	27%	159
Slight improvement	2%	14
Significant improvement	1%	4
TOTAL		581

Q14 How do you expect your club to adjust member subscriptions and fees (if at all) for the current year as a result of COVID-19?

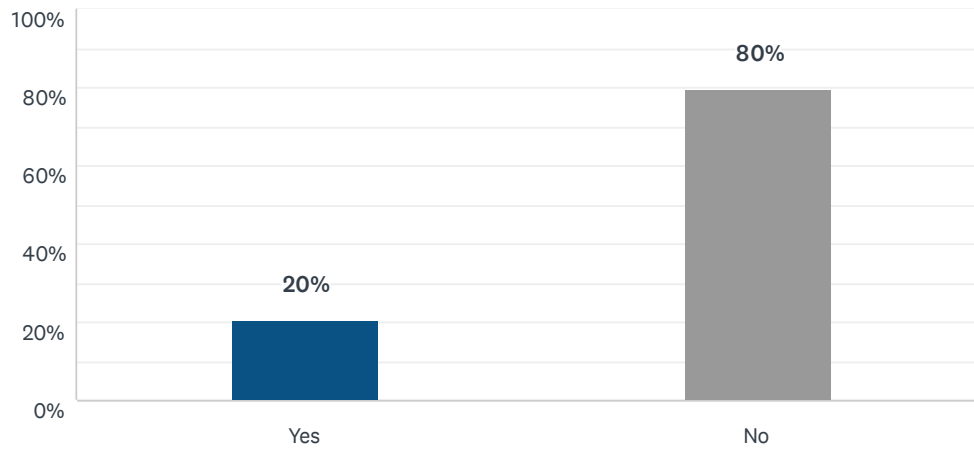
Answered: 583 Skipped: 22



ANSWER CHOICES	RESPONSES	
Significant increase to support long-term sustainability.	1%	5
Modest increase to support long-term sustainability	14%	80
No change	44%	254
Modest reduction and/or subsidy	34%	198
Significant reduction and/or subsidy	8%	46
TOTAL		583

Q15 Are you in favor of your club offering membership specials and offers to encourage prospective members to join during the crisis?

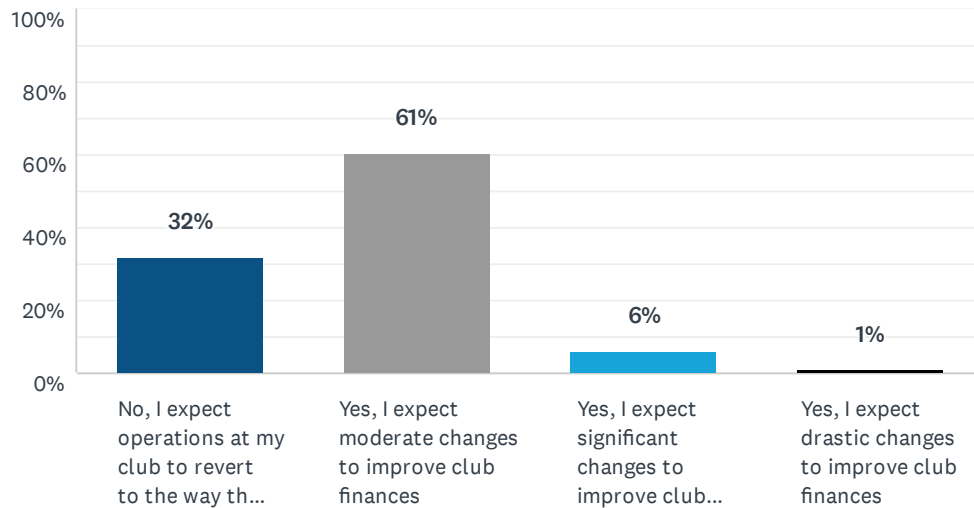
Answered: 580 Skipped: 25



ANSWER CHOICES	RESPONSES	
Yes	20%	118
No	80%	462
TOTAL		580

Q16 Do you expect your club to make changes to operations in the near-term (post COVID-19 crisis) for the betterment of club finances?

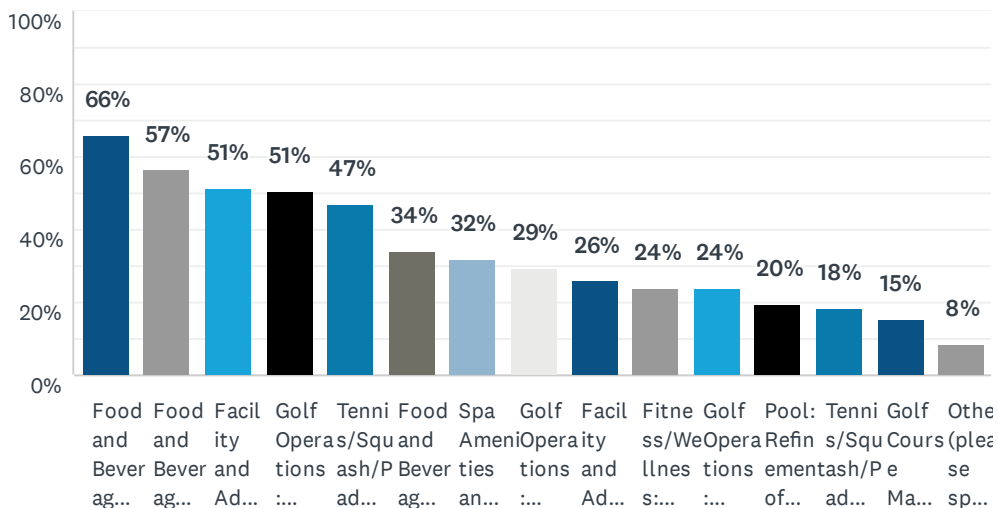
Answered: 582 Skipped: 23



ANSWER CHOICES	RESPONSES	
No, I expect operations at my club to revert to the way they were before the crisis.	32%	186
Yes, I expect moderate changes to improve club finances	61%	353
Yes, I expect significant changes to improve club finances	6%	36
Yes, I expect drastic changes to improve club finances	1%	7
TOTAL		582

Q17 Please select all areas of change that should be considered: (skip any amenities that your club does not offer)

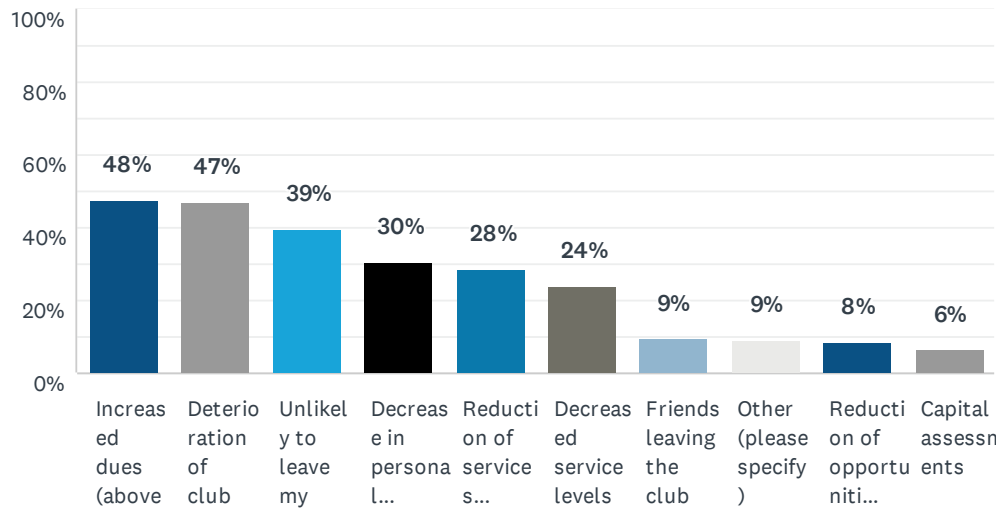
Answered: 355 Skipped: 250



ANSWER CHOICES	RESPONSES	
Food and Beverage: Adjustment to hours of operation for certain outlets to reduce costs	66%	234
Food and Beverage: Reduction of subsidized member events	57%	201
Facility and Administration: Adjustment to hours of operation for certain outlets to reduce costs	51%	182
Golf Operations: Reduction of subsidized member events	51%	180
Tennis/Squash/Padel: Reduction of subsidized member events	47%	167
Food and Beverage: Refinement of service standards to reduce staffing costs	34%	121
Spa Amenities and Treatments: Refinement of service standards to reduce staffing costs	32%	114
Golf Operations: Reduction of golf services (i.e. club cleaning and storage, cart servicing, starters)	29%	104
Facility and Administration: Refinement of service standards to reduce staffing costs	26%	93
Fitness/Wellness: Refinement of service standards to reduce staffing costs	24%	86
Golf Operations: Refinement of service standards to reduce staffing costs	24%	85
Pool: Refinement of service standards to reduce staffing costs	20%	70
Tennis/Squash/Padel: Refinement of service standards to reduce staffing costs	18%	65
Golf Course Maintenance: Refinement of service standards to reduce staffing costs	15%	55
Other (please specify)	8%	30
Total Respondents: 355		

Q18 What could cause you to leave your club in the near future? (You may select more than one)

Answered: 576 Skipped: 29



ANSWER CHOICES	RESPONSES	
Increased dues (above typical annual increases)	48%	274
Deterioration of club facilities	47%	270
Unlikely to leave my club for any cause (within reason)	39%	227
Decrease in personal wealth/disposable income	30%	175
Reduction of services offered	28%	164
Decreased service levels	24%	137
Friends leaving the club	9%	54
Other (please specify)	9%	53
Reduction of opportunities for socialization	8%	48
Capital assessments	6%	37
Total Respondents: 576		

Q19 For the answers you previously selected, please rank them in order of priority to you, with '1' being the highest priority. You can adjust the ranking order by clicking and dragging each answer option up or down the list.

Answered: 444 Skipped: 161

	1	2	3	4	5	6	7	8	9	10	TOTAL	SCORE
Unlikely to leave my club for any cause (within reason)	83% 125	12% 18	2% 3	3% 4	0% 0	0% 0	0% 0	0% 0	0% 0	0% 0	150	9.76
Increased dues (above typical annual increases)	45% 103	34% 78	16% 36	2% 5	3% 7	0% 0	0% 0	0% 0	0% 0	0% 0	229	9.16
Decreased service levels	11% 13	20% 24	36% 43	28% 33	4% 5	1% 1	1% 1	0% 0	0% 0	0% 0	120	8.00
Capital assessments	32% 10	32% 10	16% 5	13% 4	3% 1	3% 1	0% 0	0% 0	0% 0	0% 0	31	8.68
Reduction of services offered	24% 33	37% 51	24% 33	12% 17	4% 5	0% 0	0% 0	0% 0	0% 0	0% 0	139	8.65
Friends leaving the club	6% 3	21% 10	32% 15	17% 8	15% 7	9% 4	0% 0	0% 0	0% 0	0% 0	47	7.62
Decrease in personal wealth/disposable income	36% 57	37% 59	14% 22	6% 9	6% 10	1% 1	0% 0	0% 0	0% 0	0% 0	158	8.89
Deterioration of club facilities	26% 61	34% 79	25% 58	9% 22	6% 14	0% 1	0% 0	0% 0	0% 0	0% 0	235	8.63
Reduction of opportunities for socialization	10% 4	10% 4	26% 11	29% 12	10% 4	14% 6	2% 1	0% 0	0% 0	0% 0	42	7.29
[Insert text from Other]	74% 35	11% 5	6% 3	6% 3	0% 0	0% 0	2% 1	0% 0	0% 0	0% 0	47	9.45

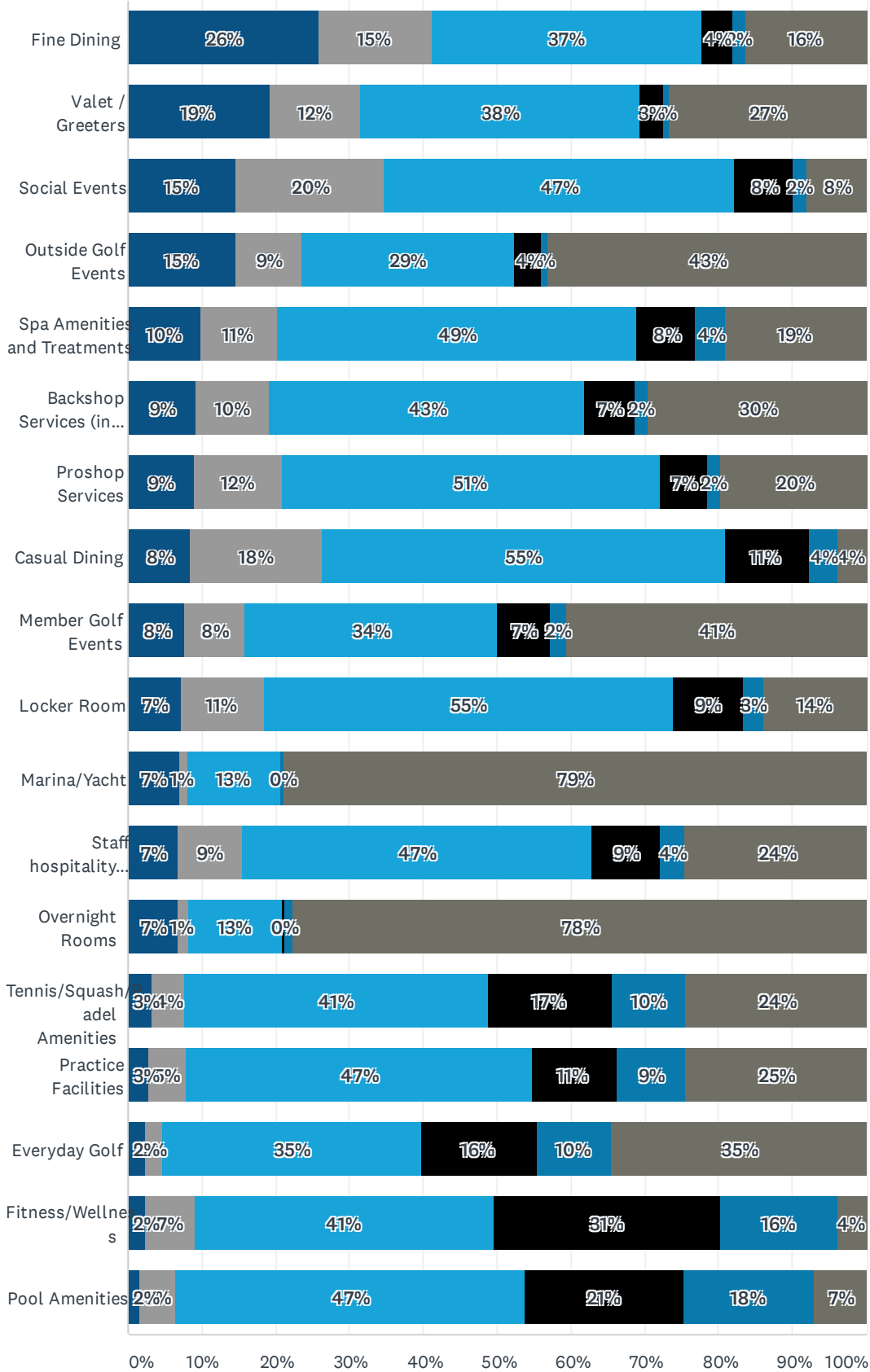
A Members' Perspective: The Shifting Private Club Landscape - Roehampton Club

BASIC STATISTICS					
	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
Unlikely to leave my club for any cause (within reason)	1.00	4.00	1.00	1.24	0.62
[Insert text from Other]	1.00	7.00	1.00	1.55	1.18
Increased dues (above typical annual increases)	1.00	5.00	2.00	1.84	0.97
Decrease in personal wealth/disposable income	1.00	6.00	2.00	2.11	1.18
Capital assessments	1.00	6.00	2.00	2.32	1.30
Reduction of services offered	1.00	5.00	2.00	2.35	1.08
Deterioration of club facilities	1.00	6.00	2.00	2.37	1.16
Decreased service levels	1.00	7.00	3.00	3.00	1.13
Friends leaving the club	1.00	6.00	3.00	3.38	1.36
Reduction of opportunities for socialization	1.00	7.00	4.00	3.71	1.52

Q20 In the wake of the COVID-19 Pandemic, what aspects, if any, of your club experience do you believe will become more important or less important to you moving forward (please select an option for each service/amenity):

Answered: 563 Skipped: 42

A Members' Perspective: The Shifting Private Club Landscape - Roehampton Club



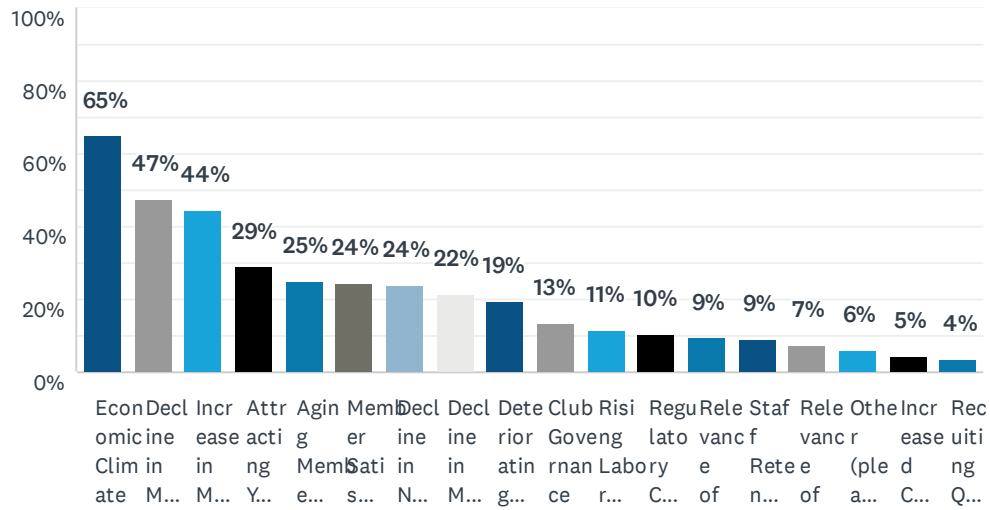
■ Significantly less important
 ■ Slightly less important
 ■ No change
 ■ Slightly more important
 ■ Significantly more important
 ■ n/a

A Members' Perspective: The Shifting Private Club Landscape - Roehampton Club

	SIGNIFICANTLY LESS IMPORTANT	SLIGHTLY LESS IMPORTANT	NO CHANGE	SLIGHTLY MORE IMPORTANT	SIGNIFICANTLY MORE IMPORTANT	N/A	TOTAL
Fine Dining	26% 137	15% 81	37% 194	4% 22	2% 10	16% 86	530
Valet / Greeters	19% 99	12% 63	38% 195	3% 16	1% 4	27% 138	515
Social Events	15% 79	20% 107	47% 254	8% 43	2% 10	8% 43	536
Outside Golf Events	15% 75	9% 45	29% 148	4% 18	1% 4	43% 221	511
Spa Amenities and Treatments	10% 51	11% 55	49% 254	8% 41	4% 21	19% 100	522
Backshop Services (incl. starters and marshals)	9% 49	10% 51	43% 225	7% 36	2% 9	30% 155	525
Proshop Services	9% 48	12% 63	51% 273	7% 35	2% 9	20% 105	533
Casual Dining	8% 46	18% 98	55% 298	11% 62	4% 21	4% 21	546
Member Golf Events	8% 40	8% 43	34% 177	7% 38	2% 11	41% 211	520
Locker Room	7% 38	11% 60	55% 293	9% 50	3% 15	14% 73	529
Marina/Yacht	7% 34	1% 4	13% 61	0% 0	0% 2	79% 376	477
Staff hospitality (i.e. personal interactions and high-touch culture)	7% 34	9% 44	47% 239	9% 46	4% 18	24% 123	504
Overnight Rooms	7% 33	1% 6	13% 61	0% 2	1% 5	78% 372	479
Tennis/Squash/Padel Amenities	3% 17	4% 23	41% 213	17% 88	10% 51	24% 127	519
Practice Facilities	3% 15	5% 26	47% 243	11% 59	9% 48	25% 127	518
Everyday Golf	2% 13	2% 12	35% 188	16% 84	10% 53	35% 185	535
Fitness/Wellness	2% 13	7% 35	41% 218	31% 164	16% 86	4% 20	536
Pool Amenities	2% 9	5% 25	47% 253	21% 114	18% 95	7% 37	533

Q21 Which of the following do you believe to be key risks to the financial sustainability of your club in the next 18 months:(If you do not feel sufficiently informed to answer, please skip to the next question)

Answered: 468 Skipped: 137

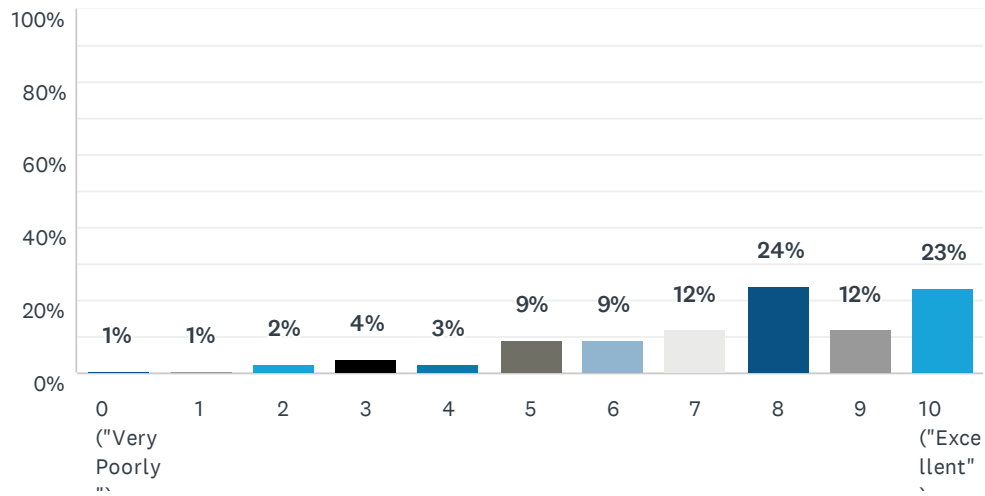


A Members' Perspective: The Shifting Private Club Landscape - Roehampton Club

ANSWER CHOICES	RESPONSES	
Economic Climate	65%	305
Decline in Member Spending	47%	222
Increase in Membership Resignations	44%	208
Attracting Young Members	29%	136
Aging Membership	25%	118
Member Satisfaction	24%	114
Decline in New Membership Sales	24%	113
Decline in Member Use of Club	22%	101
Deteriorating Facilities	19%	91
Club Governance	13%	63
Rising Labor Costs	11%	53
Regulatory Climate	10%	48
Relevance of Club Amenities	9%	44
Staff Retention	9%	41
Relevance of Club to the Entire Family	7%	35
Other (please specify)	6%	28
Increased Competition in the Market	5%	22
Recruiting Qualified Staff	4%	17
Total Respondents: 468		

Q22 How well do you feel your club has performed through the COVID-19 crisis?

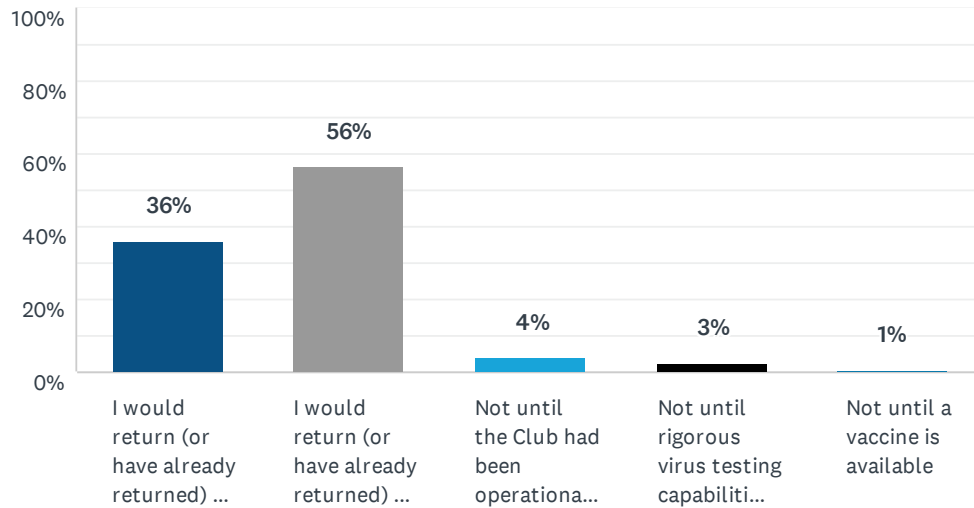
Answered: 550 Skipped: 55



ANSWER CHOICES	RESPONSES	
0 ("Very Poorly")	1%	3
1	1%	3
2	2%	13
3	4%	23
4	3%	14
5	9%	49
6	9%	50
7	12%	67
8	24%	133
9	12%	67
10 ("Excellent")	23%	128
TOTAL		550

Q23 If your club could open tomorrow and return to full operations (or is now open), which statement below best describes how you would approach returning to the Club?

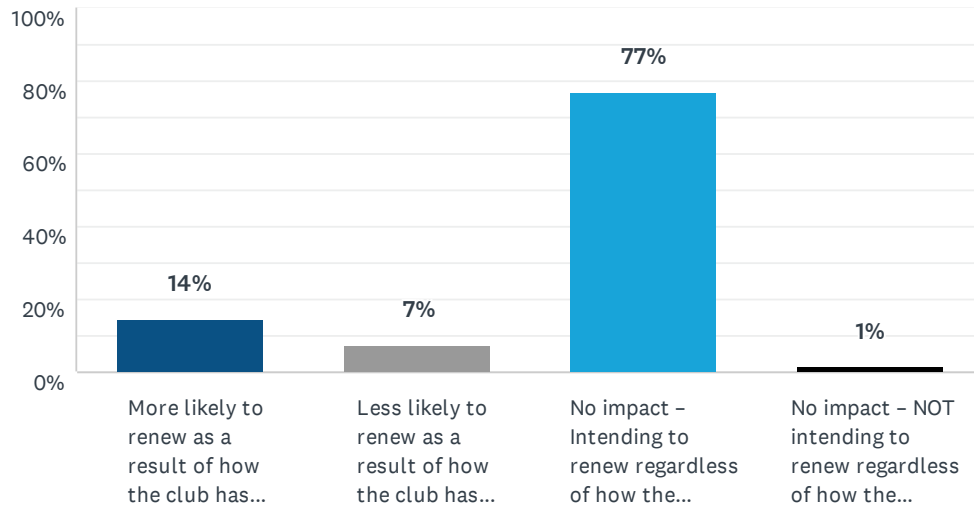
Answered: 554 Skipped: 51



ANSWER CHOICES	RESPONSES	
I would return (or have already returned) and use the club as I normally do	36%	200
I would return (or have already returned) so long as social distancing is maintained and all government guidelines are enforced	56%	313
Not until the Club had been operational 'without issues' for a trial period	4%	23
Not until rigorous virus testing capabilities are available	3%	15
Not until a vaccine is available	1%	3
TOTAL		554

Q24 As a result of how the club has responded to the COVID-19 crisis, has your intention to renew your membership in January of 2021 changed?

Answered: 545 Skipped: 60



ANSWER CHOICES	RESPONSES	
More likely to renew as a result of how the club has responded.	14%	78
Less likely to renew as a result of how the club has responded.	7%	40
No impact – Intending to renew regardless of how the crisis was handled.	77%	419
No impact – NOT intending to renew regardless of how the crisis was handled.	1%	8
TOTAL		545