

**TOWN AND COUNTRY PLANNING ACT 1990
SECTION 78 APPEAL**

APPEAL BY GREAT LAKES UK LTD

REF: APP/C3105/W/20/3259189

**LAND TO THE EAST OF M40 AND SOUTH OF A4095,
CHESTERTON, BICESTER, OXFORDSHIRE OX26 ITE**

**APPENDICES TO PROOF OF EVIDENCE OF
JOHN ASHWORTH MBA, LLB**

Appendix 1: Report of Howard Swan (Swan Golf Designs)

Appendix 2: Reports of Sports Marketing Surveys

Appendix 3: England Golf Facility Planning Report, December 2020

APPENDIX 1 - REPORT OF HOWARD SWAN (SWAN GOLF DESIGNS)

APPENDIX– HOWARD SWAN

1. Background and Experience

1.1 I am Howard Alexander John Swan, a practising Golf Course Architect with almost 50 years' experience as Principal Architect and Director at Swan Golf Designs Limited, a firm located at Framlingham in the County of Suffolk.

1.2 I hold a Bachelor of Science degree from the University of Leeds and a Masters degree in Business Studies from the University of Warwick.

1.3 In 1987 I founded a golf course design practice, having worked since 1972 as a director of Golf Landscapes Ltd, a company specialising in golf course design and construction. I have practised for 48 years and I am regarded as one of Europe's most experienced golf course architects. I have worked on over 400 projects in close to 40 countries from USA to China, from Iceland to South Africa. I worked with my father for 20 years and now with my son, William, for the last fifteen.

1.4 I am a past chairman of the UK National Turfgrass Council, a Past President of the Institute of the British Institute of Golf Course Architects, a board member and Chair of Education of the European Institute of Golf Course Architects and Chairman of the Golf Business International, representing independent consultants in the business of golf. My other industry positions include:

- Founder – British Association of Golf Course Constructors
- Honorary Secretary – European Institute of Golf Course Architects (EIGCA)
- Chairman Education Board – EIGCA
- Quality Assured Trainer – Greenkeeper Training Committee (GTC)
- Golf Consultant – National Lottery Sports Fund

1.5 I work extensively in global golf education and have lectured and spoken all around the world on the subject of golf course design, including at the Asian Golf Summit and at the Africa Golf Summit as well as throughout Europe and in USA. I am the consulting architect for the African Turf Academy.

1.6 I have also spent much time focusing on matters of safety and golf courses, lecturing extensively on the subject at home and abroad and carrying out numerous audits of golf courses to identify risks and dangers in play. I was responsible, with others, for a British Institute of Golf Course Architects' research programme into safety of play and the development of industrywide safety guidelines and recommendations for the analysis of risk and the compilation of risk assessments. I was responsible for the commissioning of a UK market research survey into the safety of the design of golf courses in association with the Royal and Ancient Golf club of St Andrews, England Golf, Wales Golf, the Golf Course Managers' Association and the British and International Golf Greenkeepers Association.

1.7 Amongst my project portfolio I have been responsible for work at the following:

- Royal Wimbledon, Royal Eastbourne, Goodwood, Alnmouth, Ripon City, East Berkshire and The Royal Household Golf Club, Windsor (England)
- Nefyn, Ashburnham and Aberdovey (Wales)
- Moray, Fraserburgh and Stirling (Scotland)
- Old Conna, Bundoran, Belvoir Park, Shandon Park, Clandeboye, (Ireland)
- Royal Marianske Lazne and Karlovy Vary (Czech Republic)
- Estoril Sol, Sao Lourenco, and Boavista Golf Resort (Portugal)
- Royal Bled Golf Club and Grad Otocec (Slovenia)
- Golf Club Reykjavik (Iceland)
- Golf und Land Club Koln and Golf Club Hubbelrath (Germany)
- Dolina Kardinala Golf and Country Club and Zagreb Country Club (Croatia)
- The Links at Spanish Bay, Pebble Beach, California and Eagle Creek Golf Community, Orlando, Florida (USA)
- Karnataka Golf Association (India)
- Golf Club of Lebanon and The New Roumieh Village Golf Community, Beirut (Lebanon)

2. Introduction

2.1 I have been commissioned by Great Lakes (UK) Ltd along with John Ashworth Associates (JAA) and Sports Marketing Surveys (SMS) to consider the effects of the appeal scheme on the adjoining golf course and facilities.

2.2 I have considered conceptual proposals for improving golf facilities at Bicester Hotel, Golf and Spa (BHGS) which would be secured if planning permission were granted for the appeal scheme.

2.3 This appendix supports the evidence of John Ashworth addressing:

- a consideration of the conceptual design of the upgraded and enhanced golfing facilities;
- a market study both locally and nationally; and
- a financial feasibility and business planning exercise.

2.4 In this appendix I have concentrated on consideration of the existing facilities and the delivery of facilities which would better meet anticipated future market demand across four groups: the membership of the golf club; the playing guests and visitors to the hotel and spa; the residents and guests in the Great Wolf Lodge; and the wider community.

2.5 The concepts which I have examined are derived by following the principles and recommendations which are set out in the England Golf 'Customer Focused Facility Guidance' [2018], for which I participated in the compilation of its content and which is provided in full at the back of this appendix.

2.6 This appendix also refers to the England Golf 'Facility Planning Report' dated 1st December 2020. A report was originally published in February 2020, commissioned by Sport England and Cherwell District Council, and has been updated by England Golf to this current version and provided to Cherwell District Council and to Golf Business International, acting on behalf of the Appellant, to assist the appeal.

3. The present golf course, its design, condition, and presentation

3.1 The present golf course lies to the north and to the south of the BHGS and is laid out essentially in two halves of nine holes each. It had been originally developed with a clubhouse at a time when the UK government together with the national golfing bodies were encouraging farmers and others to diversify into recreation and golf. It was subsequently bought by the present owner of BHGS and, together with the development of the hotel and the gym and spa facilities, the golf course was essentially rebuilt and upgraded to a better quality of construction and presentation. The present score card for the golf course is set out in Figure 1.

Figure 1: BHGS Existing Score Card

| DATE | | Handicap | | Strokes Rec'd | | TIME | | Handicap | | Strokes Rec'd | | PAR | 71 | HOLE NUMBER | |
|---|------------------|--------------------|--------------|---------------|--------------|----------------|---|-----------|------------------|---------------|-----|--------------|-----------|-------------|--------------|
| A | | C | | PAR | | 71 | | PAR | | 71 | | 71 | | | |
| B | | Marker/D | | PAR | | 60 | | PAR | | 73 | | 60 | | | |
| | | | | PAR | | 73 | | PAR | | 73 | | 73 | | | |
| Hole | Marker's Score/D | White Yards | Yellow Yards | Par | Stroke Index | Player's Score | | | Points/Net Total | Junior Yards | Par | Stroke Index | Red Yards | Par | Stroke Index |
| | | | | | | A | B | C | | | | | | | |
| 1 | | 363 | 352 | 4 | 14 | | | | | 160 | 3 | 8 | 345 | 4 | 14 |
| 2 | | 346 | 334 | 4 | 8 | | | | | 140 | 3 | 10 | 327 | 4 | 8 |
| 3 | | 162 | 152 | 3 | 18 | | | | | 149 | 3 | 16 | 149 | 3 | 16 |
| 4 | | 440 | 424 | 4 | 4 | | | | | 210 | 4 | 6 | 401 | 5 | 6 |
| 5 | | 484 | 467 | 5 | 12 | | | | | 230 | 4 | 2 | 456 | 5 | 2 |
| 6 | | 459 | 451 | 4 | 2 | | | | | 160 | 3 | 14 | 451 | 5 | 10 |
| 7 | | 488 | 477 | 5 | 10 | | | | | 220 | 4 | 4 | 468 | 5 | 4 |
| 8 | | 125 | 116 | 3 | 16 | | | | | 116 | 3 | 18 | 116 | 3 | 18 |
| 9 | | 361 | 351 | 4 | 6 | | | | | 150 | 3 | 12 | 351 | 4 | 12 |
| | | 3228 | 3124 | 36 | OUT | | | | | 1535 | 30 | | 3064 | 38 | |
| PLEASE REPAIR YOUR DITCH MARKS, REPLACE DIVOTS AND AVOID SLOW PLAY AT ALL TIMES | | | | | | | | | | | | | | | |
| 10 | | 154 | 150 | 3 | 17 | | | | | 150 | 3 | 17 | 146 | 3 | 17 |
| 11 | | 304 | 292 | 4 | 7 | | | | | 140 | 3 | 11 | 292 | 4 | 7 |
| 12 | | 167 | 153 | 3 | 15 | | | | | 96 | 3 | 3 | 96 | 3 | 15 |
| 13 | | 512 | 512 | 5 | 3 | | | | | 220 | 4 | 1 | 407 | 5 | 3 |
| 14 | | 298 | 288 | 4 | 13 | | | | | 120 | 3 | 15 | 218 | 4 | 9 |
| 15 | | 300 | 290 | 4 | 5 | | | | | 150 | 3 | 9 | 245 | 4 | 13 |
| 16 | | 427 | 358 | 4 | 1 | | | | | 200 | 4 | 7 | 346 | 4 | 1 |
| 17 | | 412 | 403 | 4 | 11 | | | | | 170 | 3 | 13 | 342 | 4 | 5 |
| 18 | | 382 | 370 | 4 | 9 | | | | | 220 | 4 | 5 | 339 | 4 | 11 |
| | | 2956 | 2816 | 35 | IN | | | | | 1466 | 30 | | 2431 | 35 | |
| | | 3228 | 3124 | 36 | OUT | | | | | 1535 | 30 | | 3064 | 38 | |
| | | 6184 | 5940 | 71 | TOTAL | | | | | 3001 | 60 | | 5495 | 73 | |
| TOTAL POINTS | | HANDICAP | | NETT SCORE | | 2's | | Holes won | | Holes lost | | Result | | | |
| Marker's Signature | | Player's Signature | | | | | | | | | | | | | |

3.2 In the event of the appeal scheme being granted planning permission and the Great Wolf Lodge being developed on the northern section of the golf course, an existing nine holes (10-18) will be removed and the nine to the south (1-9) of the hotel will remain, and this is discussed further in the next section of this appendix.

3.3 The existing golf course is characterised by raised greens and tees, bunkering essentially at ground level and outfield areas – fairways and roughs – bordered by planted areas and, on occasions, more mature woodland.

3.4 The holes to the perimeter are orientated in an anticlockwise direction and lying adjacent to the access road to the existing BHGS hotel complex, the public highway to the south and, to a limited extent, the public highway to the east. The remainder of the holes lie internally, mainly in a north-easterly – south-westerly direction and the 9th green is located adjacent to the spa and gymnasium of the BHGS buildings.

- 3.5 The golf course is complemented by other recreational facilities to the west – a tennis complex, a (rudimentary) driving range, a newly built performance gymnasium with hospitality facilities together with a more recently created swimming lake and assault course.
- 3.6 Golf at BHGS is offered on a membership basis as well as to visitors or staying in the hotel or walk ins. From the data available it is believed that there are 220 on the present membership role. This has declined over recent years and this is set out in more detail in the main part of John Ashworth's evidence.
- 3.7 The golf course is considered to be a modest one of no more than medium length and moderate degree of difficulty. Its essential features are its raised tees and elevated greens, rebuilt in recent years since the present owner's acquisition of the course, as well as the substantial water features which have been excavated during the construction process. Two of these are lined with an impermeable membrane. The water levels in others are entirely dependent upon the natural water table of the site and therefore subject to fluctuation dependent upon the amount of evaporation and the natural precipitation which prevails in Oxfordshire.
- 3.8 The bunkers on the golf course are very poor both in terms of their shaping and strategy to play and their (lack of) evacuation of surface water as many are noted as being waterlogged.
- 3.9 There are some safety issues on the existing golf course, both internal and external, which need addressing and remedying. These relate to the potential escape of golf balls from the playing areas onto adjacent land or property, particularly towards both the public highways and the access road to the hotel. It is noted that a public right of way is located to the immediate west of the access road to the hotel.

4. The opportunity to change the offer and to create a different concept

- 4.1 Both the market research carried out by SMS (commissioned to identify national and more local data, demand trends and attitudes - a separate appendix to the evidence of John Ashworth) and the details of the developmental recommendations of England Golf (in the Customer Focused Facility Guidance) point to the opportunity to move away from a “regular” 18 hole golf course, which is occupied by membership play as well as some visitors. Membership in golf throughout the country has been experiencing a longer-term decline (albeit there has been a more recent and expected-to-be-temporary shift due to Covid-19 conditions where there has been some additional interest and participation in the game).
- 4.2 Importantly, the future of the game is not in those who currently play it, whether they be members or regular golfing guests, but in those who have yet to take up a club and learn their playing skills. There is no doubt, as England Golf emphasises in the recommendations contained in its Customer Focused Facility Guidance 2018 publication, that facilities need to be developed to encourage newcomers to join the game and for those beginners to be able to identify a pathway whereby their skills may be honed. This is particularly relevant to youngsters and women as the game does remain a male dominated sport.
- 4.3 As such the need to provide a stepped approach to golf provision is imperative and cannot be over emphasised. The provision of the recommended facilities which I identify in Section 5 of this appendix, delivered if the appeal scheme were to be granted permission and the Great Wolf Lodge were to proceed, are designed to do exactly that to encourage such participation.
- 4.4 The sectors of demand which can be identified are fivefold, upon which any works to develop BHGS golf facilities need to be focused.

They are:

- Membership – men/women/kids/full-time/part-time;
- BHGS hotel guests and visitors; walk ins;
- the wider community;
- and Great Wolf Lodge guests.

Figure 3: Proposed golf course layout



5.3 Safety considerations for the modern game demand that the routing of the golf course is revised to a small degree (holes 2, 8 and the 9) with re bunkering and revised hole axes so that adequate margins are provided for to ensure that play related accidents are avoided in places where infrastructures (roads, buildings etc.) are adjacent to the golf holes.

5.4 This would represent a very significant enhancement with delivery of a mid-length golf course, comparable with the existing, but with greatly improved strategy of play on each of the 18 holes and a greatly improved variety of play being available to all standards of golfer.

5.5 The reconfigured design creates:

- A nine hole golf course with nine additional tees
- As eighteen holes the golf course has a length of 5800 yards, some 140 yards shorter than the present course when played from the yellow tee markers
- it has a par of 70, greater than the present 18-hole course and suitable for competition play
- walks between greens and successive tees are not excessive, convenient and safe
- there are no evident internal safety conflicts arising from the revised routing as an 18-hole layout whereby players would be required to endanger themselves to cross other playing areas

- 5.6 The present greens are all greatly and excessively raised above the general ground levels, as are the tees (the potential land drainage issues are recognised in this context) but the structures do not sit naturally and comfortably in the landscape. Each need minor adjustment to improve both their playability as well as their satisfactory coupling in the natural landscape.
- 5.7 The same does not apply to the formation of the original bunkers outside those in the green formations. These require a small extent of elevation and recontouring to ensure not only that they provide satisfactory drainage performance, but also to ensure that - in play - they are visible, and they blend satisfactorily within the landscape both in terms of proportion and balance.
- 5.8 It is not proposed to change the tree stock on the golf course but rather to increase it and therefore enhance the quality of the natural landscape. This would be complemented by the reshaping of some water features to create semiaquatic and aquatic habitats upon which a new environmental management stewardship planning programme could be founded.
- 5.9 The second part of the enhancement is to upgrade the driving range complex on the existing facility. As shown in the zoomed in plan at Figure 4, it is proposed to incorporate the likes of a Topgolf or a Toptracer ball tracking software system into the playing attractions of the improved range and practice ground. Such a feature will apply to the management of play on the range and will not alter the extent of soft landscaping works.

Figure 4: Proposed driving range enhancements



- 5.10 The outfield will also be laid out to provide an Academy Course as nine-holes for beginners and for family play. The targets on the outfield will be slightly raised above the existing general level and would potentially be surfaced with artificial grass for ease and economy of maintenance. Their shaping will be modest to complement the general contours of this part of the golf course and they will feature false bunkers to give perspective to the practising and playing golfer.
- 5.11 The existing perimeter mound work to the outfield to the range will be reshaped and landscaped with heights less than 2.0 m so that it marries into the surrounding ground and the landscape form. The works of enhancement to the driving range will essentially be of low intensity and comprised of soft landscaping, with no hard development required.
- 5.12 Alongside the range outfield will be located a short game practice area, adjacent to the current tennis complex. This will afford opportunities for the professional golfer to provide tuition but also for all levels of player – members or visitors – the opportunity to exercise their putting, bunker play, lobbing and chipping skills and to develop them further.

6. The development of the facilities

6.1 The proposed upgrading and enhancement works could be carried in a single phase with the reconfiguration of the golf course and the upgrading of the driving range together with the development of the Golf Academy and Academy Course. However, a two staged approach would be optimal in order to ensure unbroken use of golf facilities on the site.

6.2 Stage ONE involves re-imagining and renovating the existing golf course. I do not anticipate any of it requiring planning permission, given that what is proposed comprises only soft landscaping works to an existing facility to be completed by the greenkeeping staff and qualified landscape contractors. It is expected it would take 6 months for the renovation of the nine holes (plus a period of grow in and establishment of the grass surfaces).

6.3 Play to 9 holes could continue during this period with interim layouts being provided to ensure continuity. The programming and sequencing of landscaping works to the nine holes will be carefully considered so that disruption and disturbance is kept to a minimum to enable this. The continued use of the holes in the northern section of the site on an interim basis may well be possible anyway by the coordination of the Great Wolf Lodge construction programme (noting that there will be pre commencement conditions to be discharged during this initial period) and so allowing play to be exercised during renovation of the 9 holes.

6.4 For Stage TWO the landscaping of the driving range would also be small in scale and would not require planning permission. It would be beneficial for those improvements to take place at the same time as the construction of the Great Wolf Lodge given the potential to use materials generated from the excavations of the foundations and buildings if that were required, along with the ability to carry out the landscaping at minimal cost in creating the peripheral mound work. This would also enable reductions in traffic movements outside the site as well beyond those that have been assessed. Stage TWO is expected to take 4 months to complete.

6.5 I set out a number of other projects within the United Kingdom of similar, or greater, scale and proportion which have provided improvements to the golf offer and associated amenity benefits. They similarly involved soft landscaping works and repair and renewal/maintenance/redesign of facilities and did not require planning permission.

- *Barton on Sea Golf Club, Dorset – the renovation of all holes including works to greens, tees, bunkering and fairways.*
- *Stirling Golf Club, Scotland – soft landscaping works to greens, tees and bunkering, together with the provision of a Golf Academy and Academy Course.*
- *Rowlands Castle Golf Club, Hampshire – upgrading of golf course including work to greens, tees and bunkering.*
- *Belvoir Park Golf Club, Belfast – revision of golf course layout to include new tees and bunkering.*
- *Thonock Park Golf Club, Lincolnshire – renovation of bunkering to golf course.*
- *Nefyn Golf Club, Gwynedd, Wales – works to renovate the golf course layout, including providing an upgraded and enlarged 9 hole course including new greens, tees and bunkers.*
- *Alnmouth Golf Club, Northumberland – renovation of golf course including additional tees and bunkering.*

7. Summary and conclusions

- 7.1 In my experience of almost 50 years of practising as a golf course architect in some 400+ projects, it is clear to me that the existing 18 hole golf course is no more than satisfactory in its current layout, without any outstanding features to make it memorable and a lack of facilities to arrest the decline in golf interest for future. It has a declining membership and is in need of an update in any event, but a better arrangement is required to encourage and widen participation in the game.
- 7.2 The facility which I am proposing will undoubtedly give the golf course a new lease of life in providing a more exciting, playable and enjoyable layout with significantly more “wow”.
- 7.3 It will attract a wider audience than it does at present from not only the existing hotel and from the local community, but also as a result of those that will be present at the Great Wolf Lodge itself. It will provide facilities unparalleled in the locale. These will encourage not only participation of seasoned golfers, either as members or as visitors, but also extend a reaching hand to the local community to involve youngsters, disadvantaged groups, and families to join the game of golf and begin to learn the skills of playing. It will represent, in my judgment, a much better and more inclusive facility than does the traditional 18-hole course.
- 7.4 I have no doubt that a reconfigured and repurposed nine holes is more than an adequate replacement for the existing 18-hole golf course in its own right. Together with the proposed enhanced and upgraded facilities, it would significantly enhance the present offer. The social attraction created, social responsibility demonstrated, and the social sustainability achieved with such an enhanced facility is considerable and significant with much greater opportunity to increase golf participation and to provide enhanced health benefits for everyone.
- 7.5 The focus on improving facilities is a concept which has been implemented at several significant locations around the United Kingdom and follows the leadership demonstrated by the Royal and Ancient Golf Club of St Andrews in its 2030 Vision Statement and by England Golf in its Guidance for the development of customer friendly facilities.
- 7.6 Once provided for, the facility would be managed on an open access basis to provide enhanced amenity to the local population as well as to a wider geographical audience. It will have no comparable competition within a radius of 50 or more miles.
- 7.7 It is envisaged that its management regime should include a close liaison with local schools and youth groups, disabled and disadvantaged groups on a regional basis and community groups to provide golfing and educational opportunities through the game to a large population and sizeable demand.
- 7.8 Whilst the course, the range and the practice facilities will be a part of the golf membership offer, it is anticipated that special financial arrangements will be developed with schools, local groups and societies through scholarship and golf training initiatives. The promotion of Golf Scholarships is envisaged for the local youngsters. The Facility may become a Centre of Excellence for Golf in Society, an initiative conceived and now initiated and being rolled out nationally to bring the game to dementia sufferers and use golf as a therapeutic tool for men and women sufferers alike. It is

anticipated that the facility may be eligible to become a Golf Roots Centre for the Golf Foundation, the national golfing body for schools.

7.9 Such a comprehensive, enhanced development therefore will provide natural, financially and socially sustainable outcomes and provide a much greater amenity than presently and for the long-term health of BHGS and participation in golf in this location.

A handwritten signature in black ink that reads "HOWARD SWAN ..". The signature is written in a cursive, slightly slanted style.

Howard Swan

Golf Course Architect

January 2021

APPENDIX 2 – REPORTS OF SPORTS MARKETING SURVEYS

2a – Bicester Redevelopment Evaluation (December 2020)

2b – UK Participation Study: Golf Actives (2015)

GREAT WOLF RESORTS BICESTER REDEVELOPMENT EVALUATION DECEMBER 2020



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BACKGROUND

- Great Wolf Resorts (GWR) has identified Bicester as their preferred venue at which to open the first Great Wolf Lodge outside the United States.
- Specifically, the site of interest to GWR is the land to the north of the existing Bicester Hotel, Golf & Spa (BHGS), including 9 holes of BHGS's 18 hole golf course.
- For GWR to develop this site, the existing course at BHGS would need to be redeveloped to become a 9 hole course, making the remaining land available for GWR.
 - On this point the planning application for the new Great Wolf Lodge was rejected, as the conversion from 18 hole to 9 hole was seen as a loss of amenity to the local area.
- With a view to presenting a revised planning application, GWR has commissioned three expert organisations to further examine the situation at BHGS.
- The three organisations are:
 - Swan Golf Designs – to investigate potential alternative arrangements for the golf course at BHGS.
 - John Ashworth Associates – to examine the financial projections for redevelopment.
 - Sports Marketing Surveys – to provide research on the general golf landscape in the UK and primary research specifically in relation to the proposed development at BHGS.
- This report details the findings of both primary and secondary research gathered by Sports Marketing Surveys as part of this programme.

INDEPENDENCE OF SPORTS MARKETING SURVEYS

- Sports Marketing Surveys is a fully independent market research agency, specialising in the sports and leisure sectors.
- As an organisation we adhere to the UK Market Research Society's Code of Conduct, and our research professionals are themselves members of the MRS, who are individually bound by the Code of Conduct.
- We are a commercial organisation and operate on commissioned work for clients, however we always remain independent in our research methods and our analysis of findings.
 - As such, clients are not guaranteed to receive findings that align to their own goals.
- Sports Marketing Surveys has been trusted in the sporting world for over 35 years, with clients relying on our independent and insightful research projects.
- The direction of many major decisions for the USGA and The R&A has been directly influenced by our work, for example:
 - Development of the revision to the Rules of Golf in 2017.
 - Development of the World Handicap System in 2018.
 - Understanding of the current global situation around Distance in Golf.

KEY FINDINGS & CONCLUSIONS



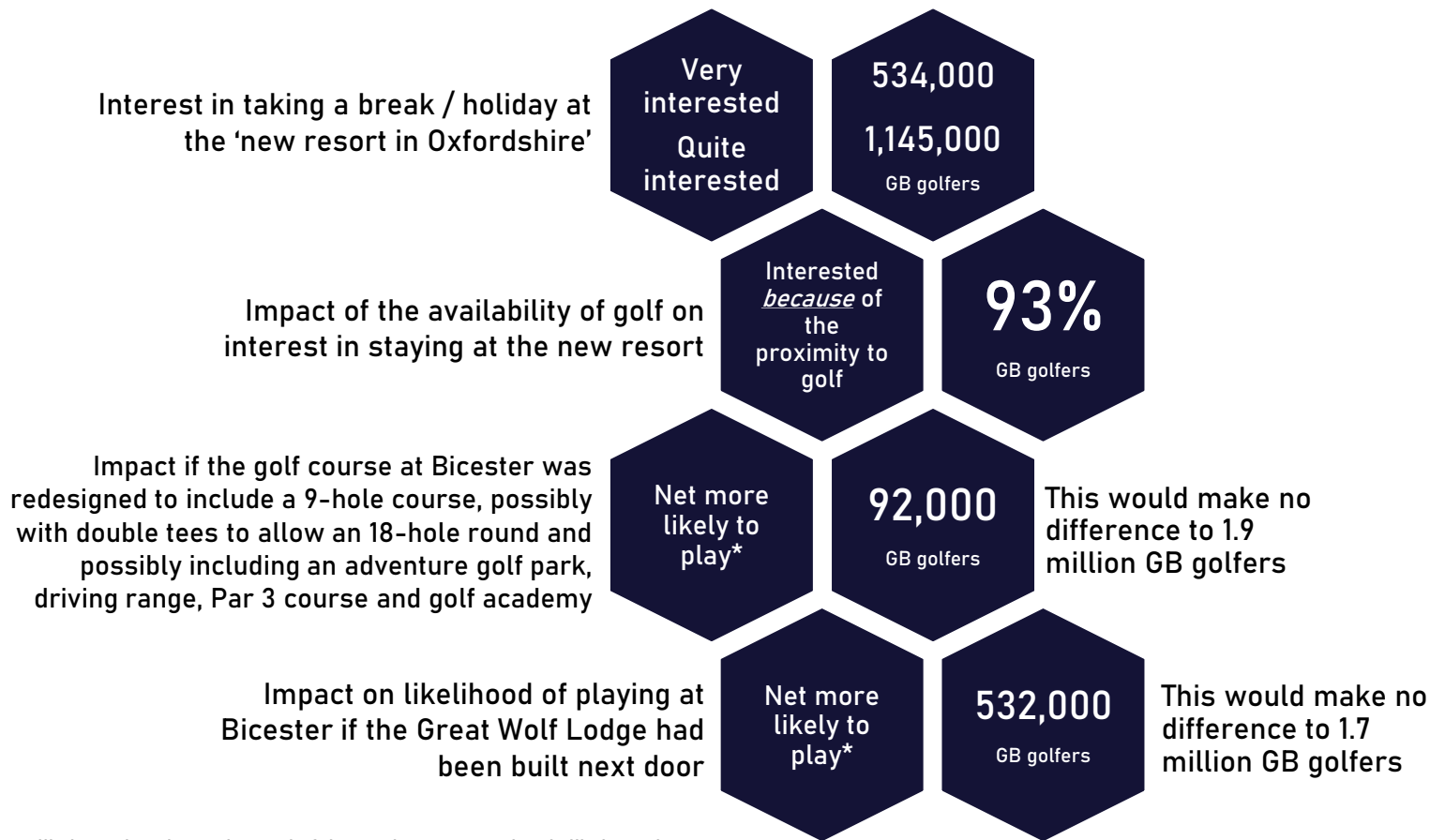
WHAT IS THE CURRENT SITUATION?

- Amongst the broad golfer base, many older golfers play regularly, however younger golfers tend to play less regularly, most likely in light of family and work commitments.
- Nearly three quarters of golfers have taken a UK-based holiday or break in the past year and 28% of golfers take holidays with children.
- 24% of golfers have stayed in a resort destination in the UK in the last 3 years. This group represents the target market for Great Wolf Resorts, as very few of these golfers would have been as easily able to play golf during their break as they would have been at the site at Bicester, following the proposed development.
- 46% of golfers would consider a resort holiday in future. This may be fuelled by the current situation with the Covid-19 pandemic, as golfers generally think it will be possible to travel for a golf break in the UK earlier than it will be possible overseas.
- When asked specifically, 72% of golfers were more interested in a holiday resort that has golf next door than one that does not. This rises to 90% amongst those who have themselves taken a holiday / break at a resort before.

HOW APPEALING IS THE PROPOSITION?

- Provision of golf alongside a family-friendly holiday destination is a proposition that would be welcomed by a substantial number of golfers.
- The appeal is highest for golfers under the age of 45, those with children under the age of 15 and those who already take or would consider taking a holiday at a resort similar to a Great Wolf Lodge.
- As this group is already engaged with the concept of a resort holiday, the provision of golf next door is likely to draw numbers away from other offerings (such as Center Parcs) with a primary pull being the availability of golf.
- The proposed developments to the course at Bicester Hotel, Golf & Spa would serve to broaden the reach and appeal of the facility.
- If the Great Wolf Lodge had been built at the Bicester site or if changes had been made to the golf facilities at Bicester Golf Club, the general feeling amongst golfers is that they would be more likely to play at Bicester Hotel, Golf & Spa, or that it would make no difference to them.
 - This suggests that the proposed changes are more likely to be of benefit to the site as a whole with regards to golf than they are to be of detriment.

THE POTENTIAL IMPACT IN NUMBERS



*Net more likely to play shows the total of those who were previously likely to play at BHGS but were less likely if changes had been made, plus those who were previously unlikely to play but were more likely to do so if changes had been made

CONCLUSIONS

- Adapting the golf facilities at BHGS will diversify and broaden the appeal of the venue.
- Considering the geographical situation of Bicester, the range of other tourist attractions available in the area and the proportion of golfers who already take family resort holidays, the siting of the Great Wolf Lodge in this area and next to Bicester golf club should provide a significant draw to golfers from further afield.
- Many Great Wolf Lodge holidaymakers will be economically active but time-poor, with reduced opportunity to play golf regularly due to their other work and family commitments.
- Providing an opportunity for this group to combine their holiday with golf will undoubtedly be appealing, and will also allow golfing parents to introduce and encourage their children to try the sport as a holiday activity, especially if 'starter' facilities are developed at the site.
- The current golf facilities at Bicester Hotel, Golf & Spa (18 holes and very basic practice facilities) serve a relatively low number of members and existing golfers visiting the course.
- The proposed changes to BHGS in conjunction with the development of the Great Wolf Lodge, are likely to attract people:
 - From further afield in the UK
 - Who are under the age of 45 and have young families with them
 - Who would benefit from and be drawn to a range of enhanced facilities at the site.
- It would be important for the golf offer at BHGS to feel fully integrated with the offer at the Great Wolf Lodge, with preferential pricing for GWR guests and possibly an option to add golf at the time of booking a holiday.

NATIONAL GOLFER SURVEY PRIMARY RESEARCH



NATIONAL GOLFER SURVEY | SCOPE & METHODOLOGY

- Our focus for the primary research is on current golfers in the UK.
- A survey was designed in conjunction with Swan Golf Designs and John Ashworth Associates to provide insight into the attitudes and behaviour of golfers across the country with regards to their holiday preferences, what role golf has in their planning and their interest in the types of facilities being suggested for redevelopment of the existing golf course at Bicester.
- As the survey focused on UK golfers nationally, we have limited feedback from local residents and people who have visited Bicester Golf Club previously, however results from the survey provide a level of understanding of the impact that development of the site (both in terms of building the Great Wolf Lodge and adapting the existing course) that has not been previously assessed.
- The survey was live from the 27th October to the 8th November 2020 and feedback was gathered from 3,059 UK golfers in total.
- Distribution took place through the panels of three key golfer publications in the UK:
 - National Club Golfer
 - Lady Golfer
 - Golf Monthly

NATIONAL GOLFER SURVEY | OBJECTIVES



To develop an understanding of UK golfers' holiday preferences, and how important it is that golf is available to them while on holiday.



To assess the level of cut-through of 'family resort' holidaymakers in order to evaluate the potential market who would be attracted to the Great Wolf Lodge *because* of its proximity to Bicester Golf Club.



To provide evidence on the impact that a new Great Wolf Lodge at the Bicester site would have on engagement with golf at the adjacent Bicester Hotel, Golf & Spa, and how appealing some of the proposed developments would be to the broader golfer group.

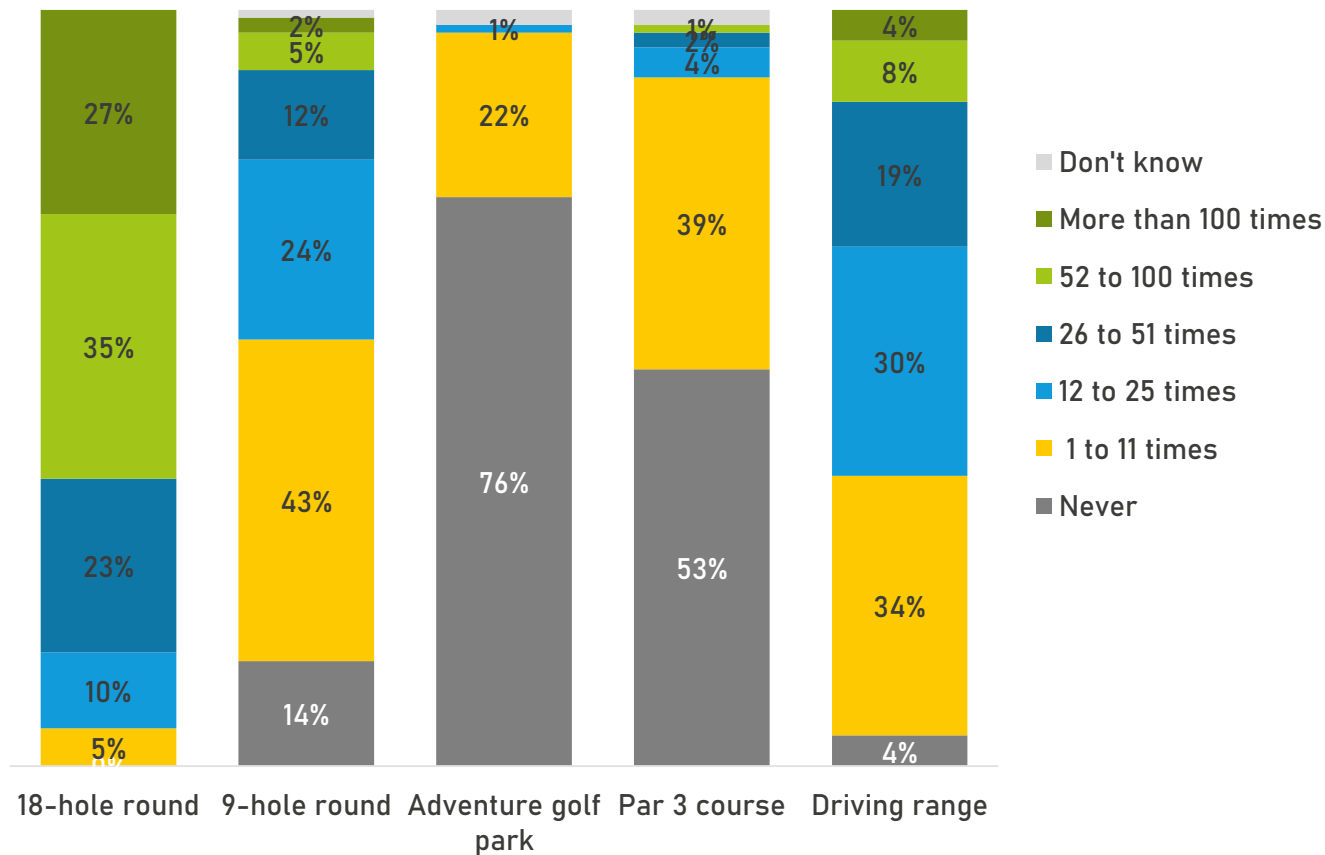
NATIONAL GOLFER SURVEY

GOLFER PROFILE



GOLFER PROFILE | Annual frequency of play

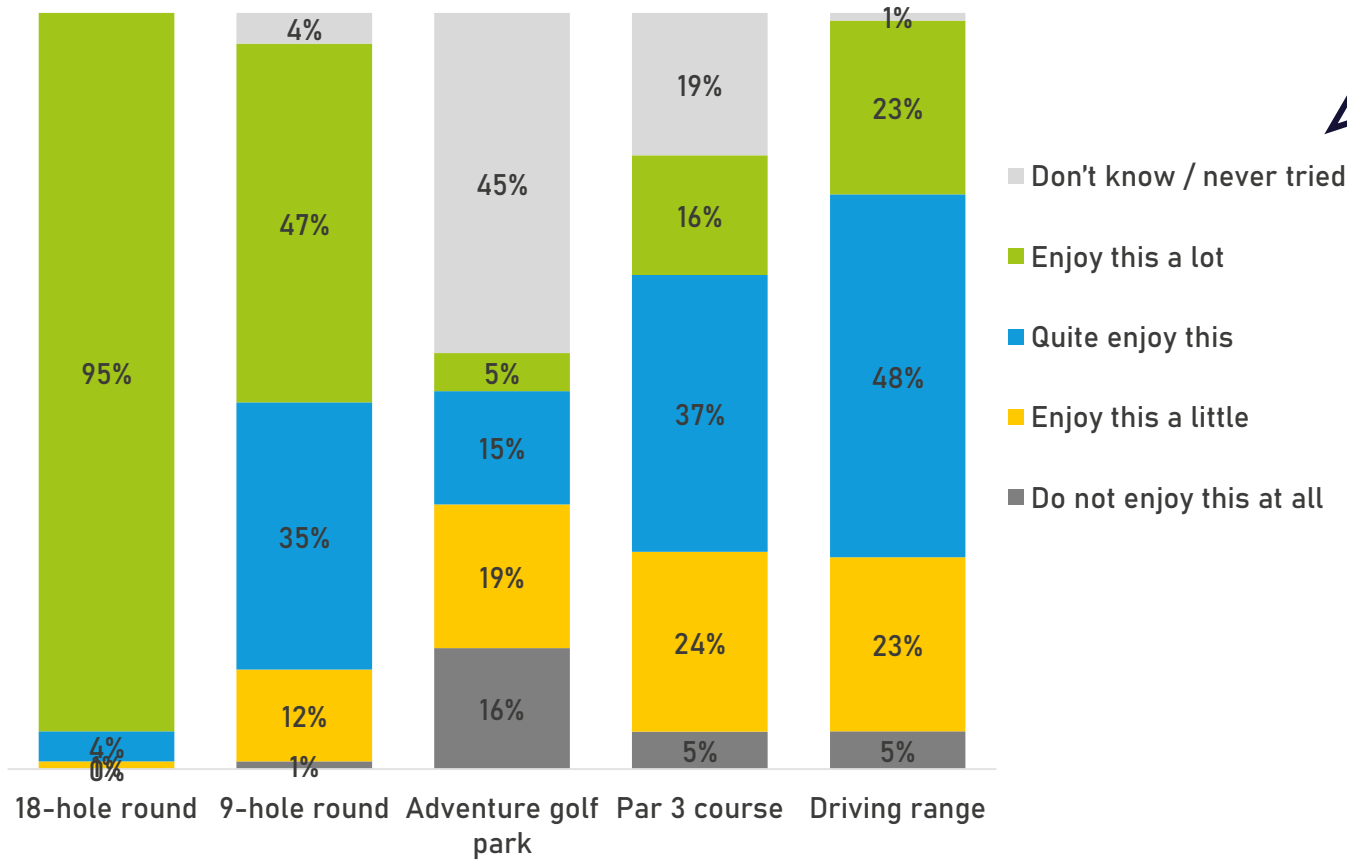
Q. In a normal year, how many times are you likely to play each of these different forms of golf?



Amongst the golfer sample, play was focused on 18-hole courses – with 62% playing an 18 hole course once a week or more in the average year.

GOLFER PROFILE | Golf enjoyment

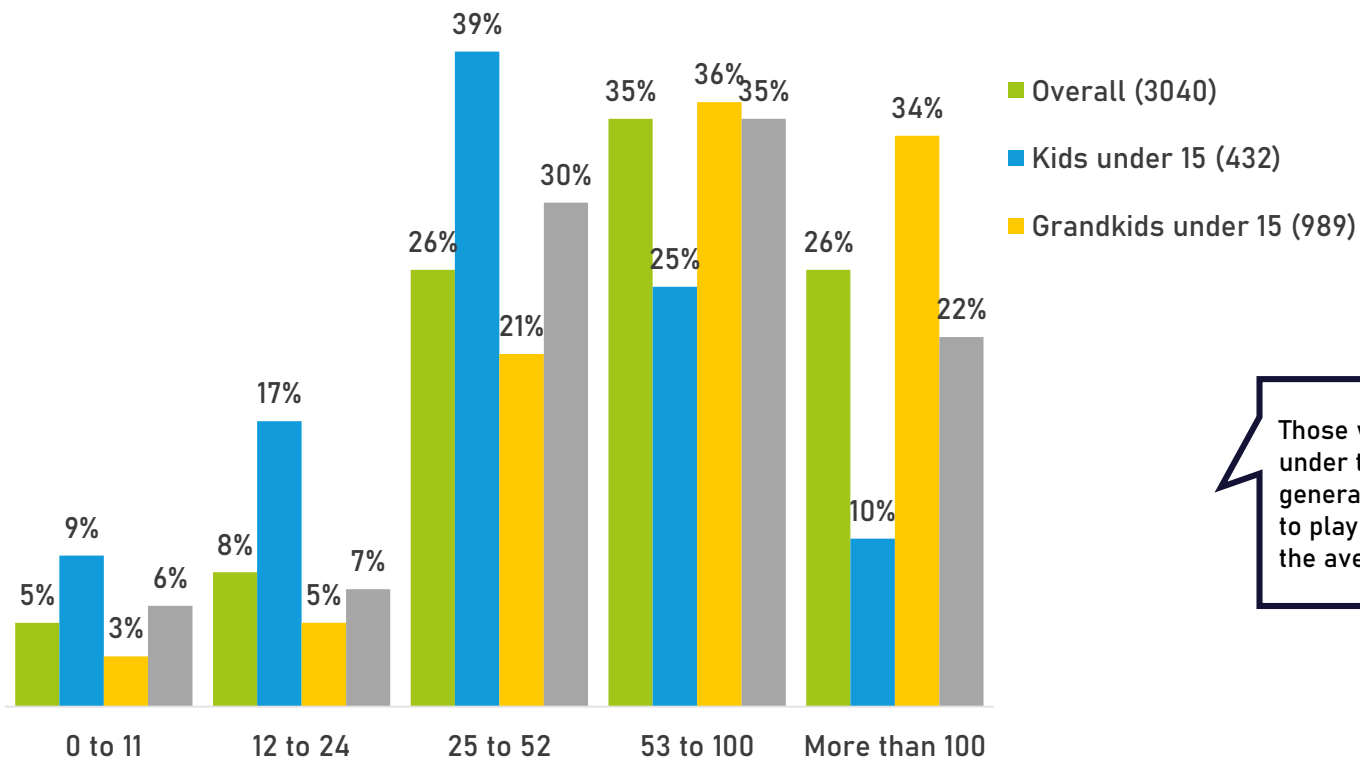
Q. In general, how much do you enjoy playing each of these forms of golf?



Reflecting frequency of play, golfers very much enjoy 18 hole golf. 9-hole golf was also enjoyed by the vast majority.

GOLFER PROFILE | Play frequency – last 12 months

Q. Approximately how many rounds of golf have you played in the last 12 months?

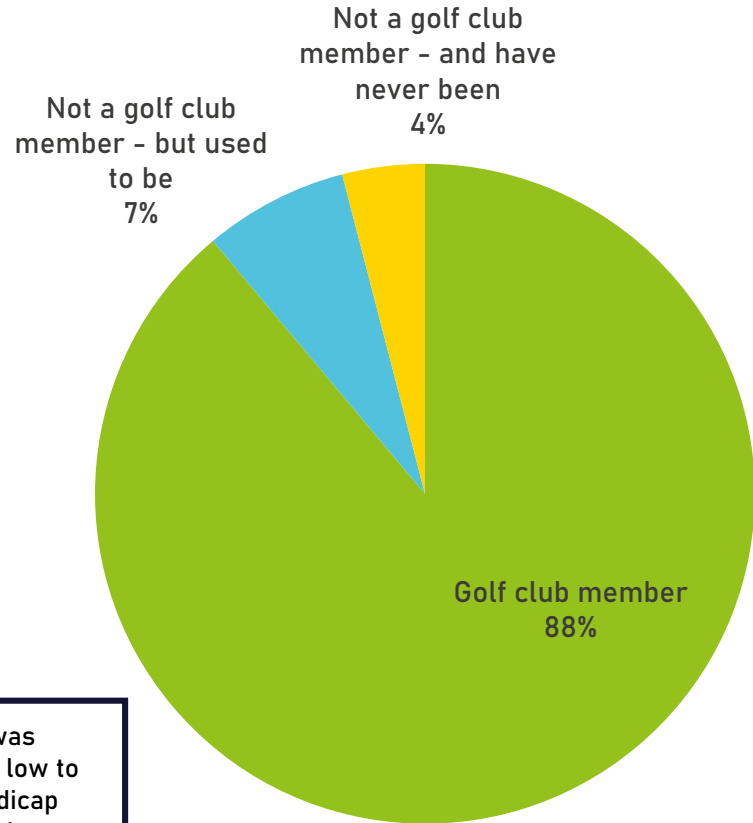
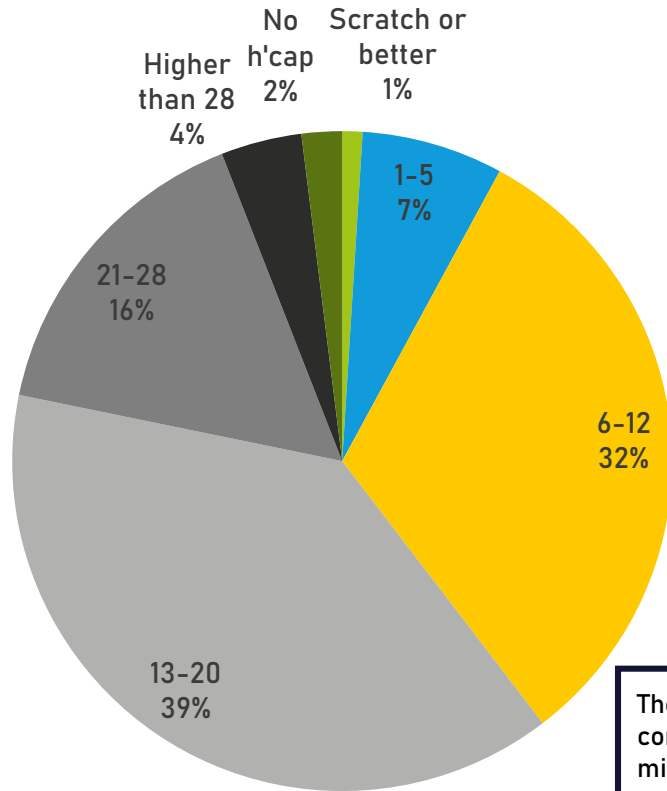


Those with children under the age of 15 generally managed to play golf less than the average.

Base numbers shown in brackets

GOLFER PROFILE | Handicap & club membership

Q. What is your handicap?
 Q. Are you a member of a golf club?



The sample was comprised of low to middling handicap golfers, and the majority were current golf club members.

Base: 3053

Base: 2966

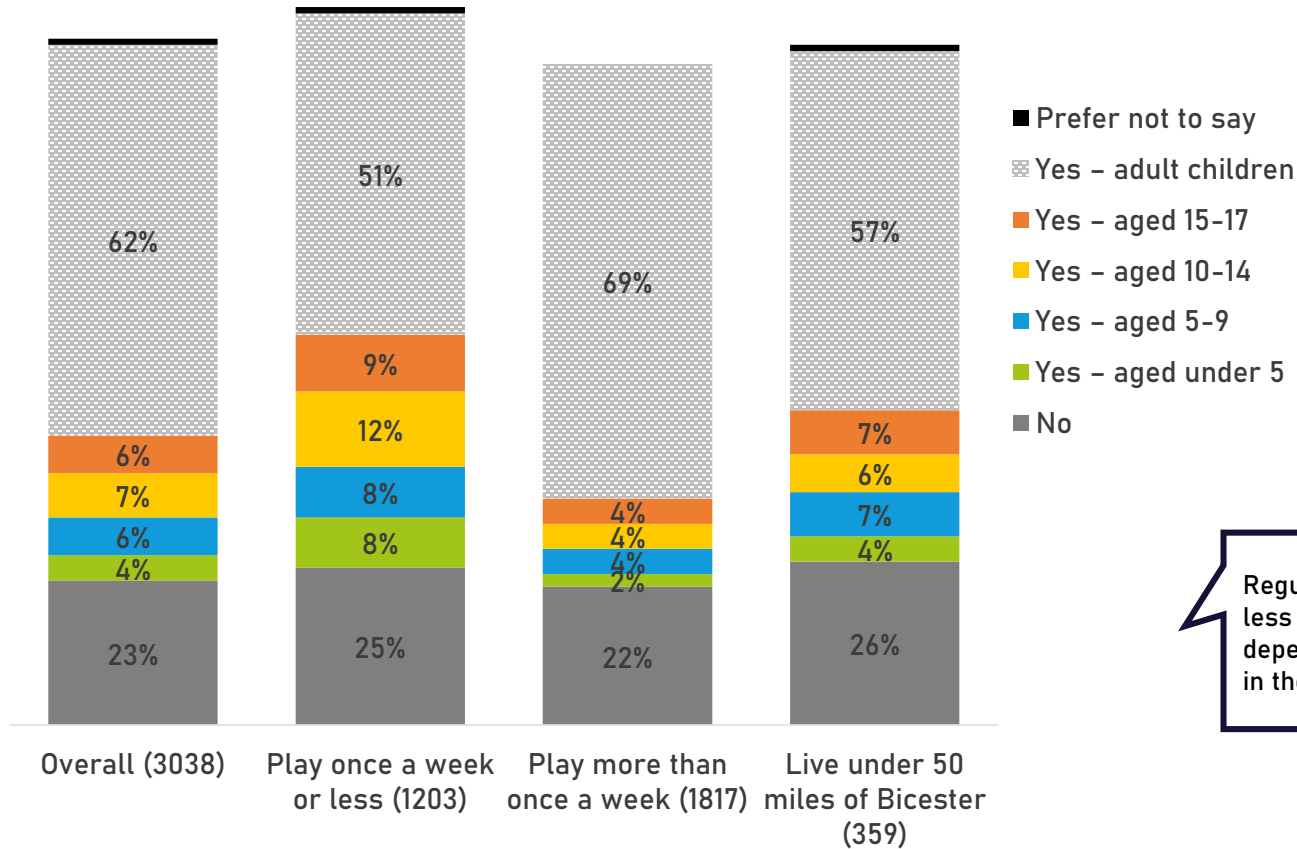
NATIONAL GOLFER SURVEY

GOLFER LIFESTYLE



GOLFER LIFESTYLE | Children

Q. Do you have children?

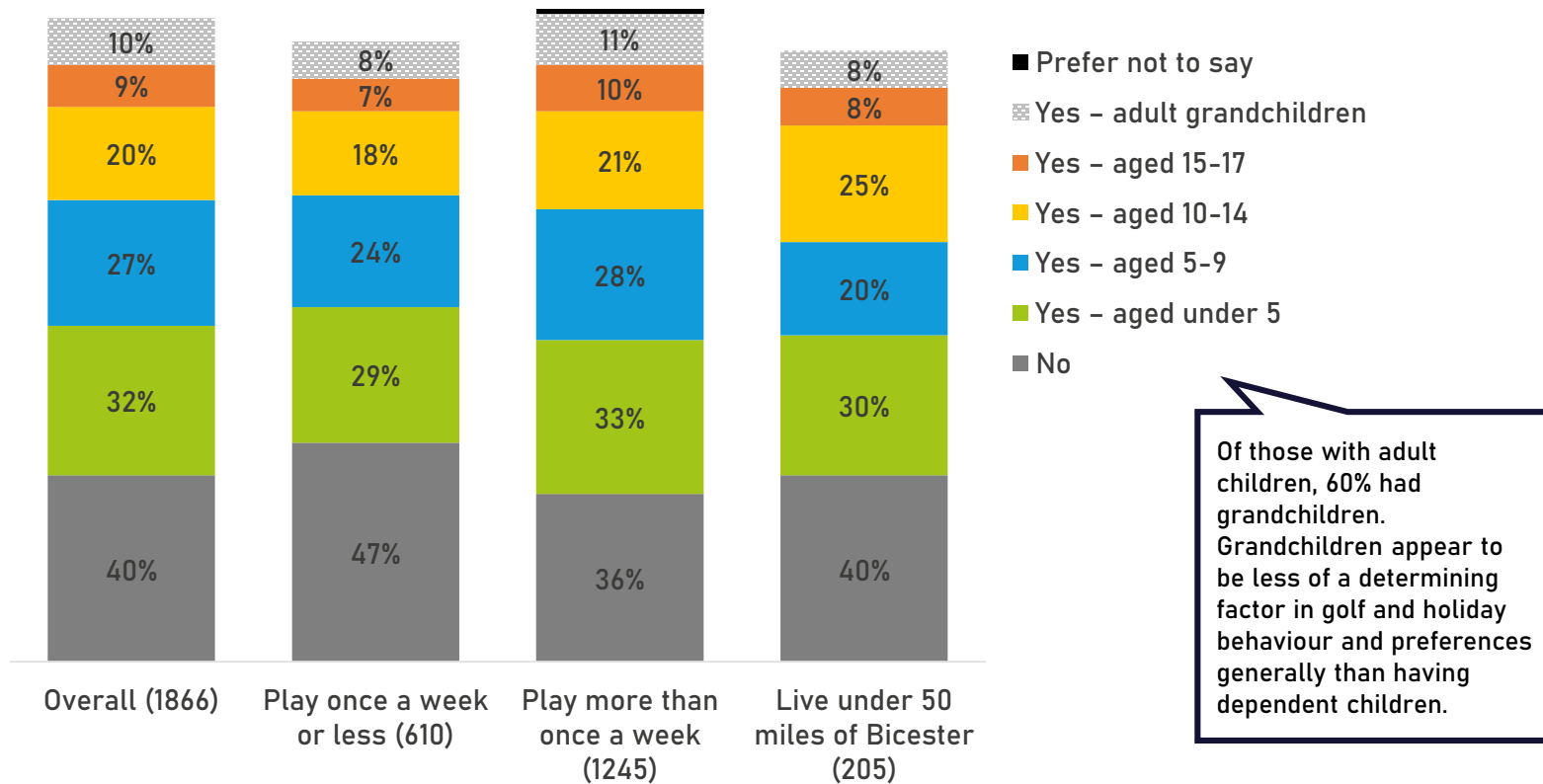


Regular golfers were less likely to have dependent children in their household.

Base numbers shown in brackets

GOLFER LIFESTYLE | Grandchildren

Q. Do you have grandchildren? ASKED ONLY TO THOSE WHO SAID THEY HAD ADULT CHILDREN



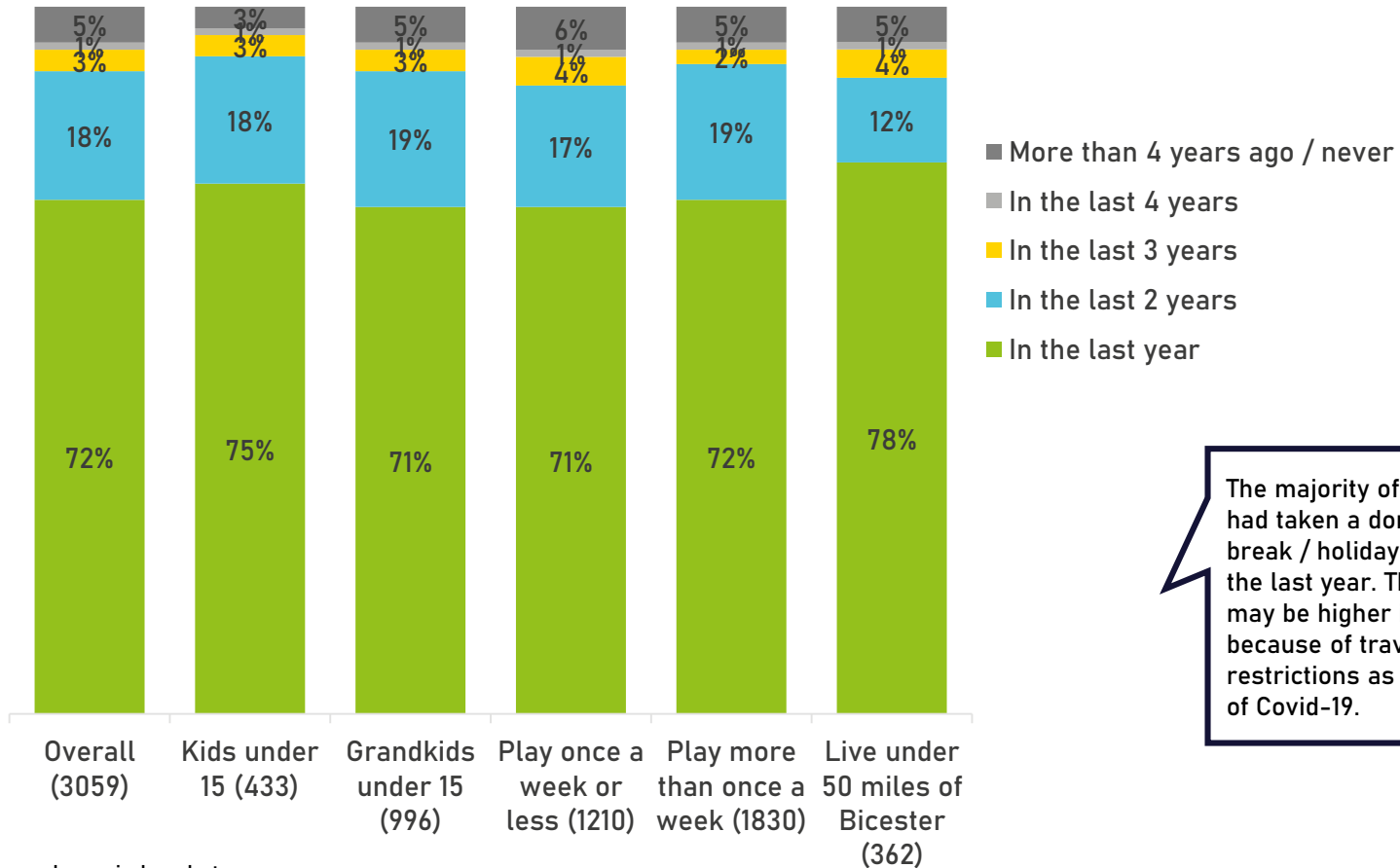
Base numbers shown in brackets

NATIONAL GOLFER SURVEY HOLIDAY PROFILE



HOLIDAY PROFILE | UK breaks / holidays

Q. When did you last take a break / holiday within the UK?

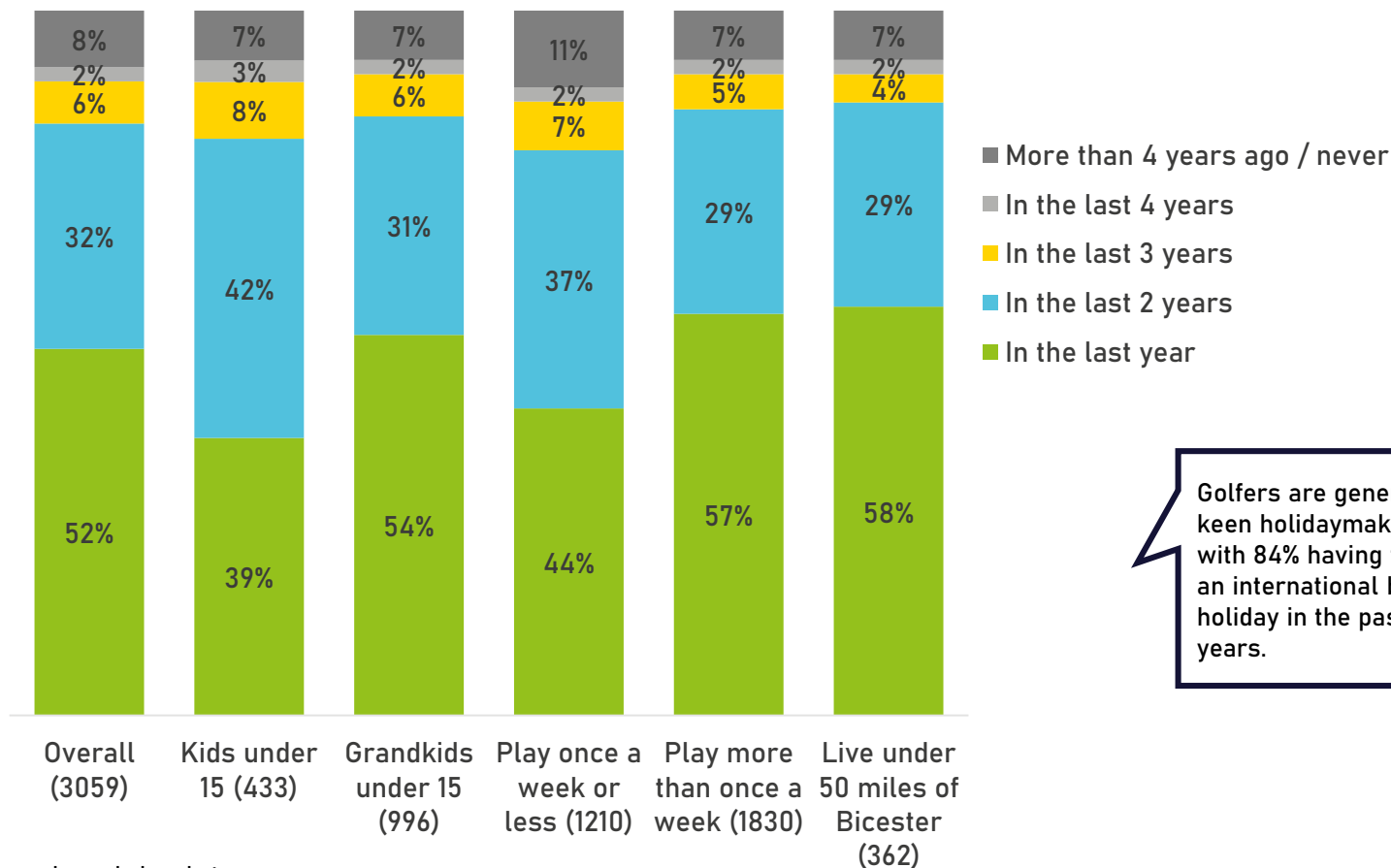


The majority of golfers had taken a domestic break / holiday within the last year. This figure may be higher in 2020 because of travel restrictions as a result of Covid-19.

Base numbers shown in brackets

HOLIDAY PROFILE | Breaks / holidays outside the UK

Q. And when did you last take a break / holiday outside the UK?



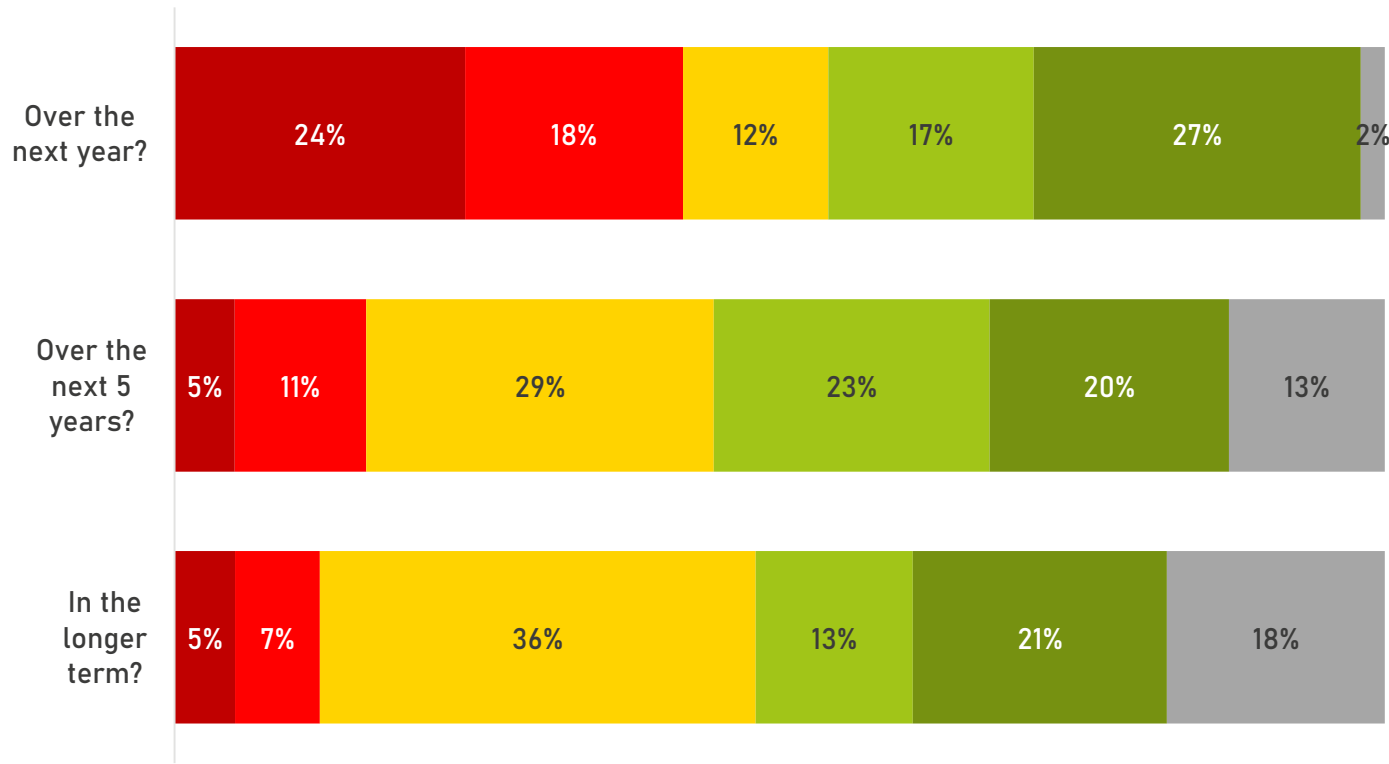
Golfers are generally keen holidaymakers, with 84% having taken an international break / holiday in the past two years.

Base numbers shown in brackets

HOLIDAY PROFILE | Influence of Covid-19

Q. Has the current situation with Covid-19 affected how likely you are to take a break / holiday within the UK...

- Much less likely to take a holiday in the UK because of Covid-19
- A little less likely to take a holiday in the UK because of Covid-19
- Covid-19 would make no difference
- A little more likely to take a holiday in the UK because of Covid-19
- Much more likely to take a holiday in the UK because of Covid-19
- Don't know

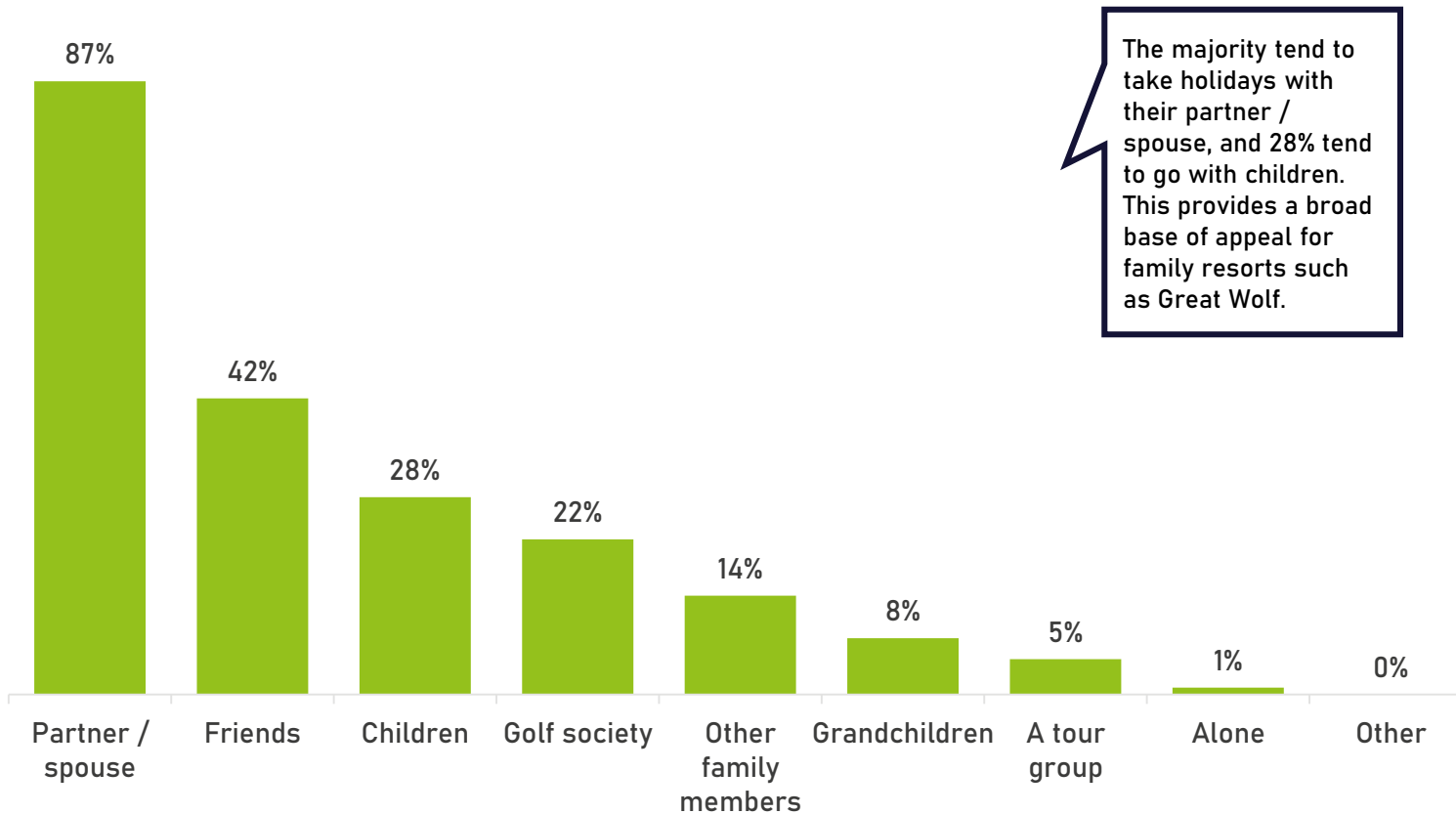


The current impact of Covid-19 on break / holiday intent can clearly be seen, with 42% of golfers saying they are less likely to take a UK break / holiday in the next year because of the virus. Over the next five years and in the longer term this rebalances, with the majority saying the virus wouldn't make any difference, or that they would be more likely to take a domestic break / holiday because of it.

Max base: 3045

HOLIDAY PROFILE | Companions

Q. Who do you tend to go on holiday with?



Base: 3038

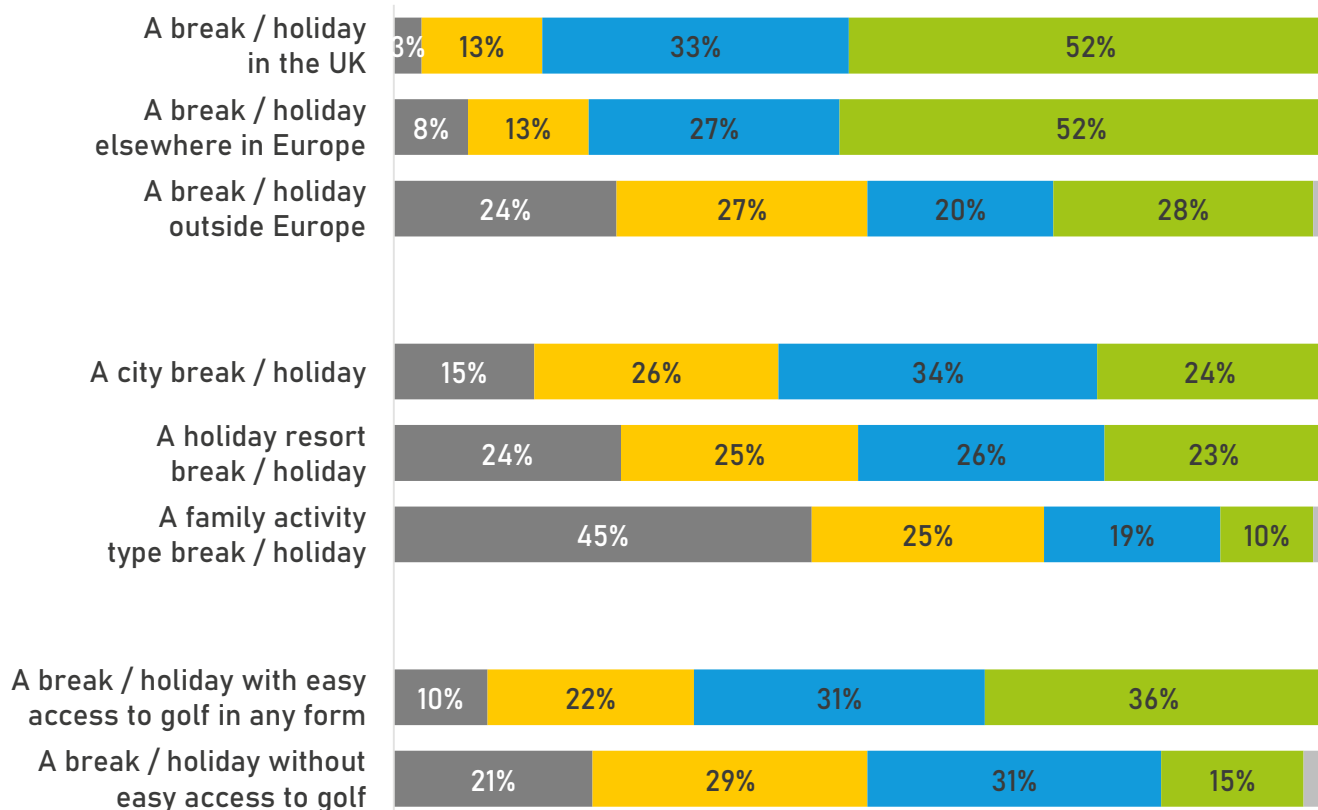
NATIONAL GOLFER SURVEY HOLIDAY PREFERENCES



HOLIDAY PREFERENCES | Break / holiday considerations

Q. In general, when you are thinking about where to go on a break / holiday, how likely are you to consider...

Not at all likely
 Slightly likely
 Quite likely
 Very likely
 Don't know



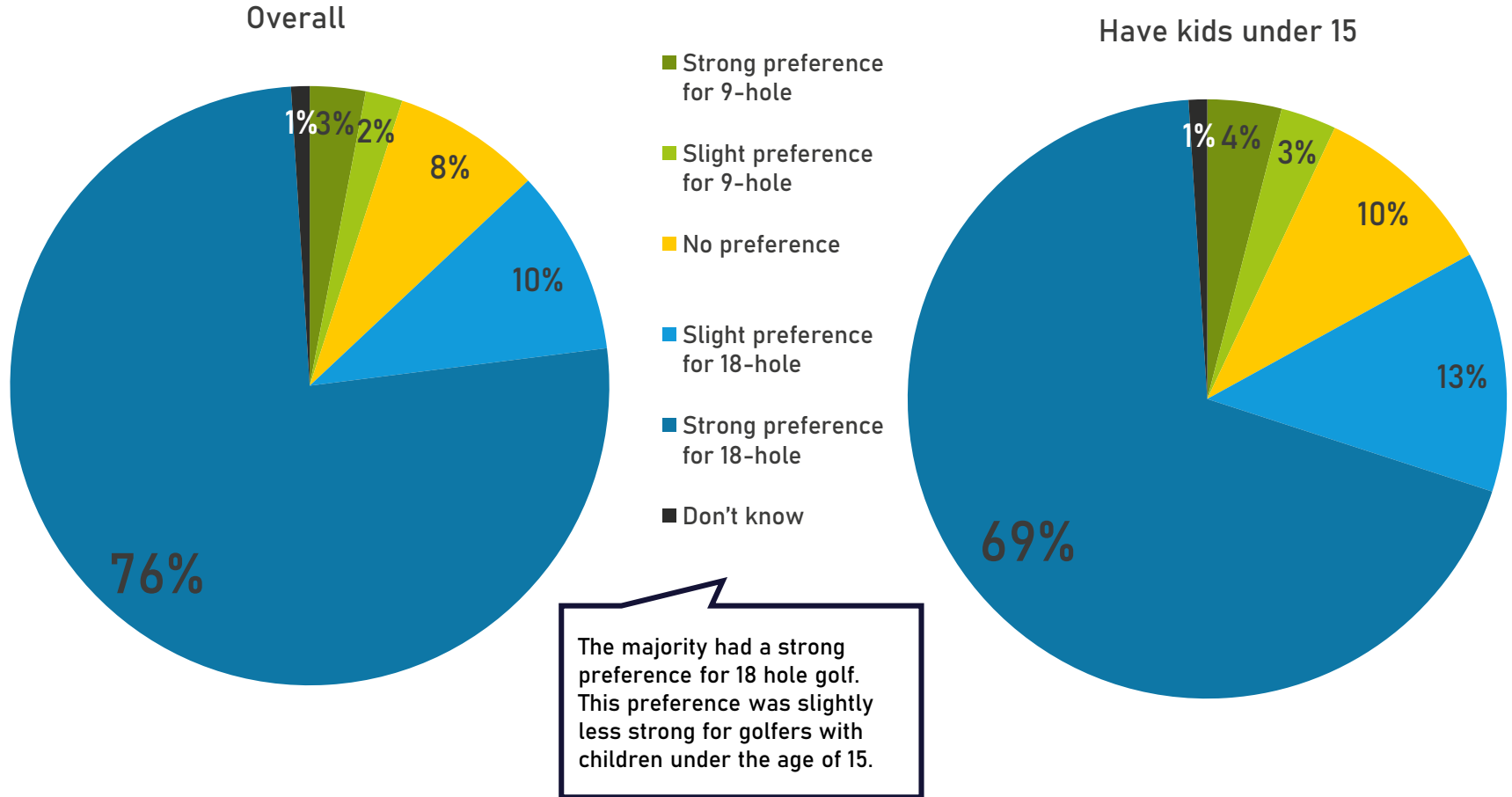
UK breaks were very appealing to golfers with more than half saying they were very likely to consider a break / holiday in the UK. Access to golf is very important, with more than a third of golfers saying they were very likely to consider a break / holiday with easy access to golf in any form.

22% of golfers were very or quite likely to consider a family activity type break And very or quite likely to consider a break with easy access to golf. This equates to around 680,000 people in Great Britain.

Max base: 3059

HOLIDAY PREFERENCES | 9 vs 18 hole holiday preference

Q. If you were playing a round of golf while away on holiday, would your preference be for a 9-hole or 18-hole course?

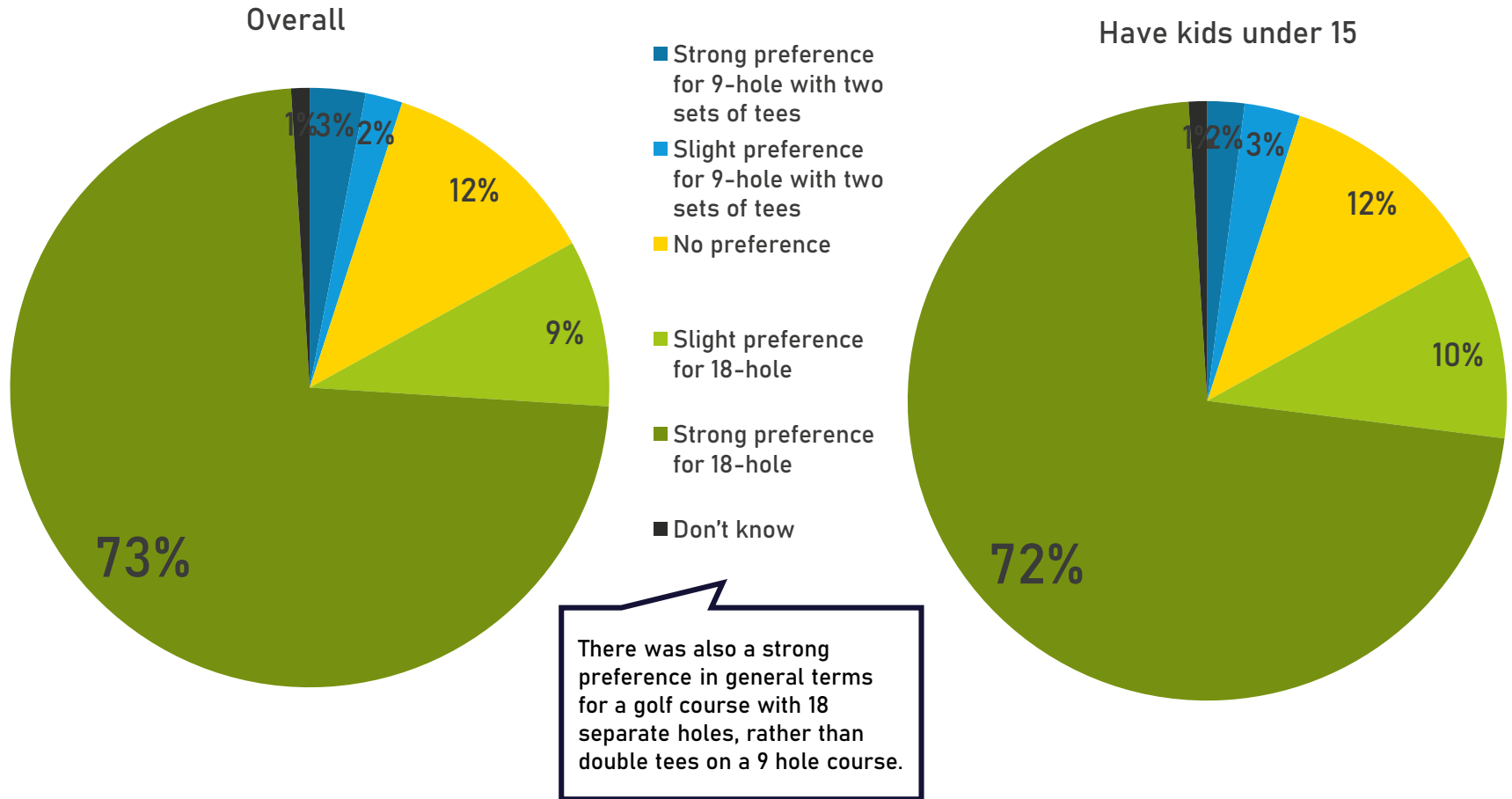


Base: 3054

Base: 432

HOLIDAY PREFERENCES | Two tees vs single tees

Q. And would your preference be for a 9-hole course with two sets of tees (18 tees in total over 9 holes) or for an 18-hole course (18 tees over 18 holes)

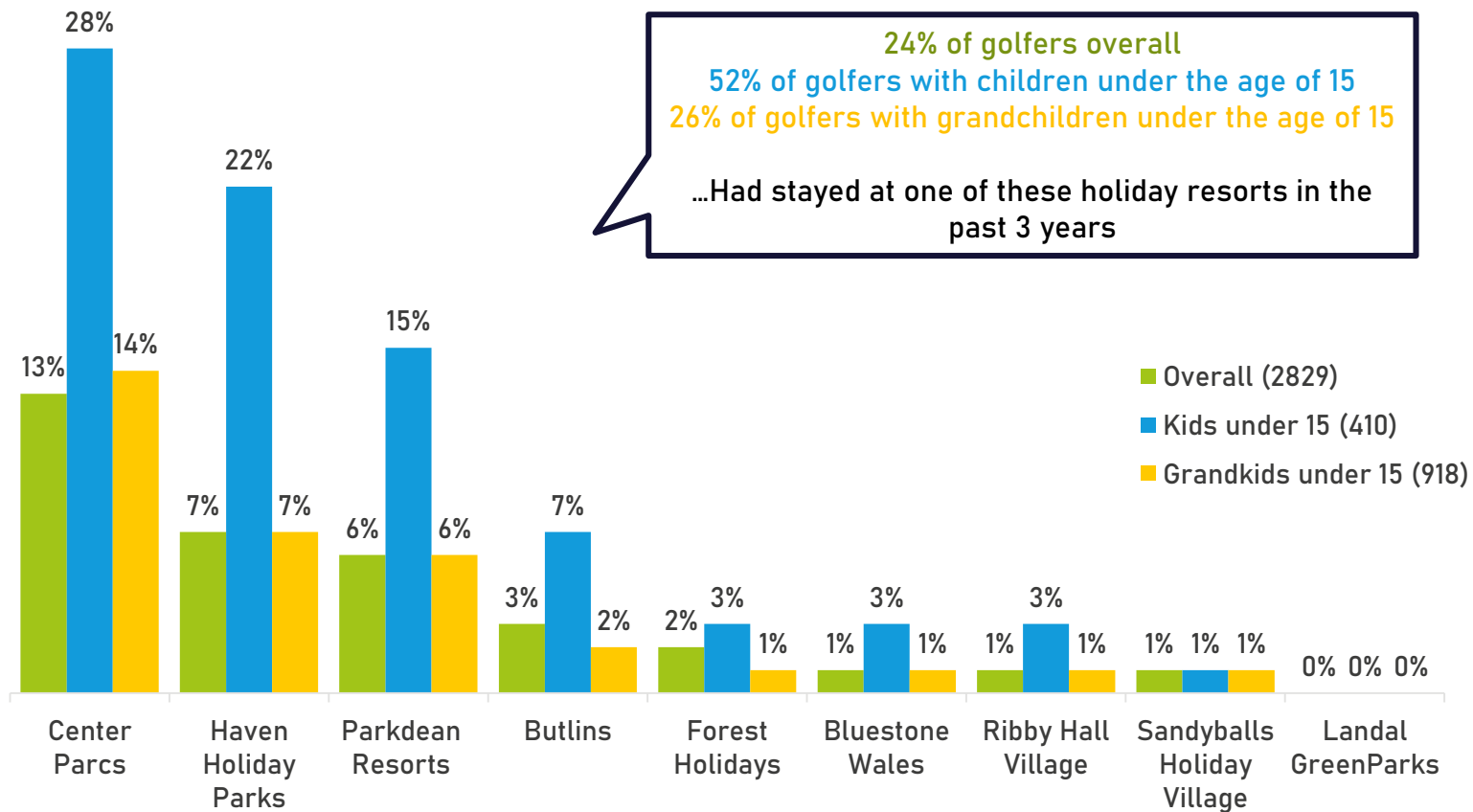


Base: 3006

Base: 430

HOLIDAY PREFERENCES | Resort destinations visited

Q. Have you been on a break / holiday to any of these resort destinations in the UK in the last 3 years?

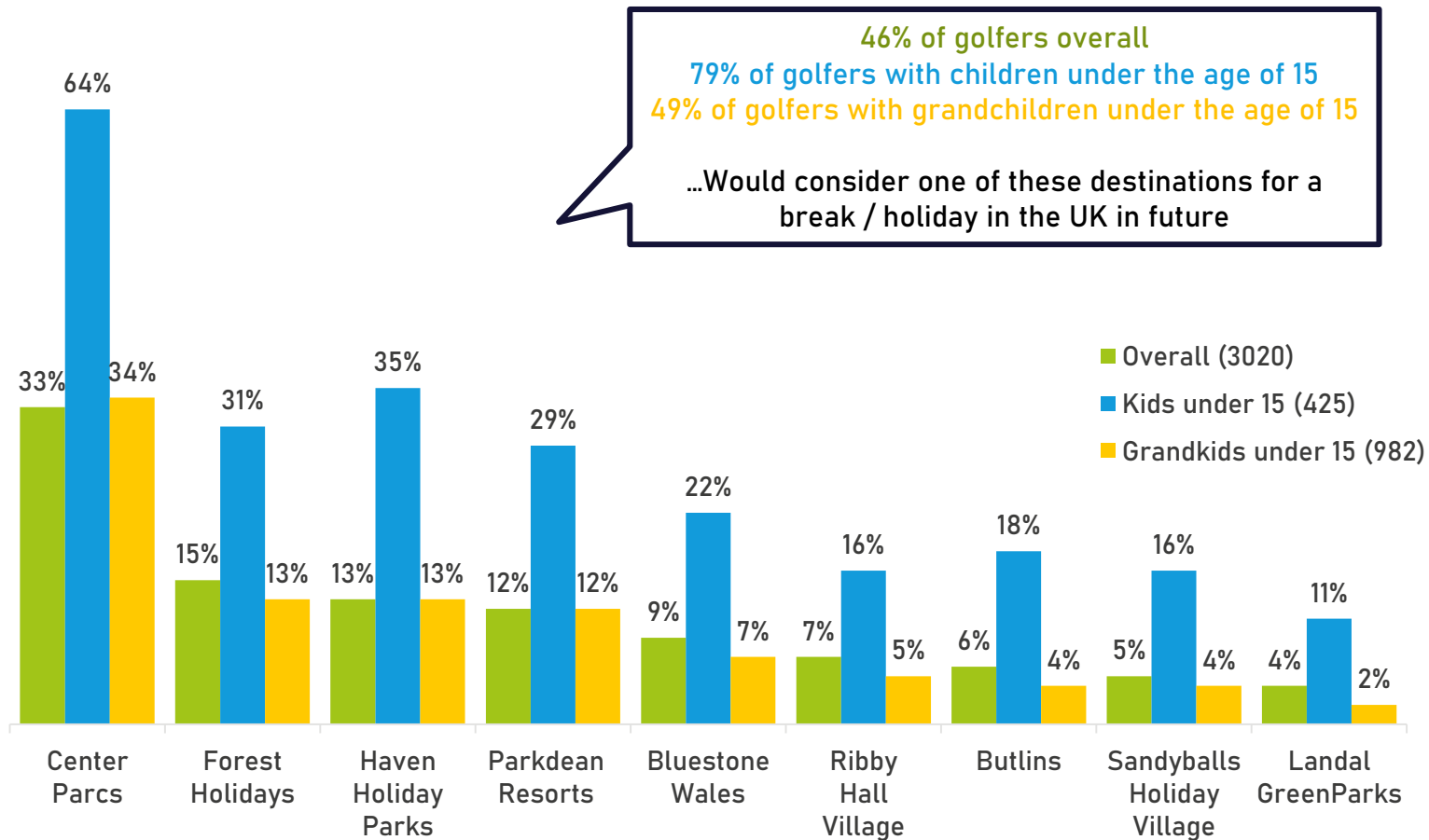


24% of golfers overall
 52% of golfers with children under the age of 15
 26% of golfers with grandchildren under the age of 15
 ...Had stayed at one of these holiday resorts in the past 3 years

Base numbers shown in brackets

HOLIDAY PREFERENCES | Future resort destinations

Q. Would you consider any of these resort destinations for a break / holiday in the UK in future?



Base numbers shown in brackets

NATIONAL GOLFER SURVEY RELATIONSHIP WITH BICESTER GOLF CLUB



BICESTER GOLF CLUB | Playing at Bicester

Q. Have you played at Bicester Golf Club before?

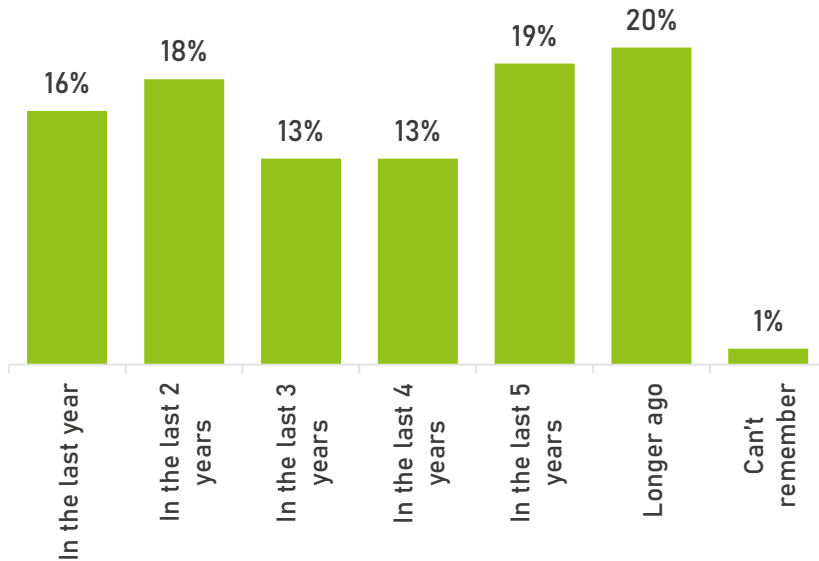
Q. When did you last play at Bicester Golf Club?

Q. In what capacity did you play at Bicester Golf Club most recently?

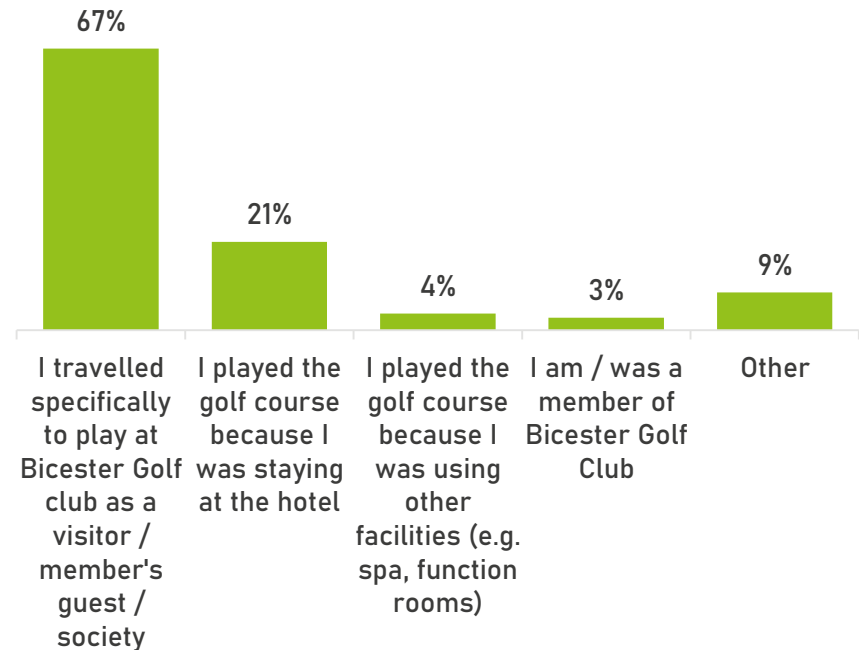
5% of golfers overall (142 people) had played at Bicester Golf Club in the past.

19% of golfers who live less than 50 miles from Bicester (68 people) had played at Bicester Golf Club in the past.

Of those who had played at Bicester, just over a third had played there in the past 2 years:



Of those who had played at Bicester, just over two thirds had visited the club specifically to play there as a visitor or member's guest, or as part of a society:



Base: 142

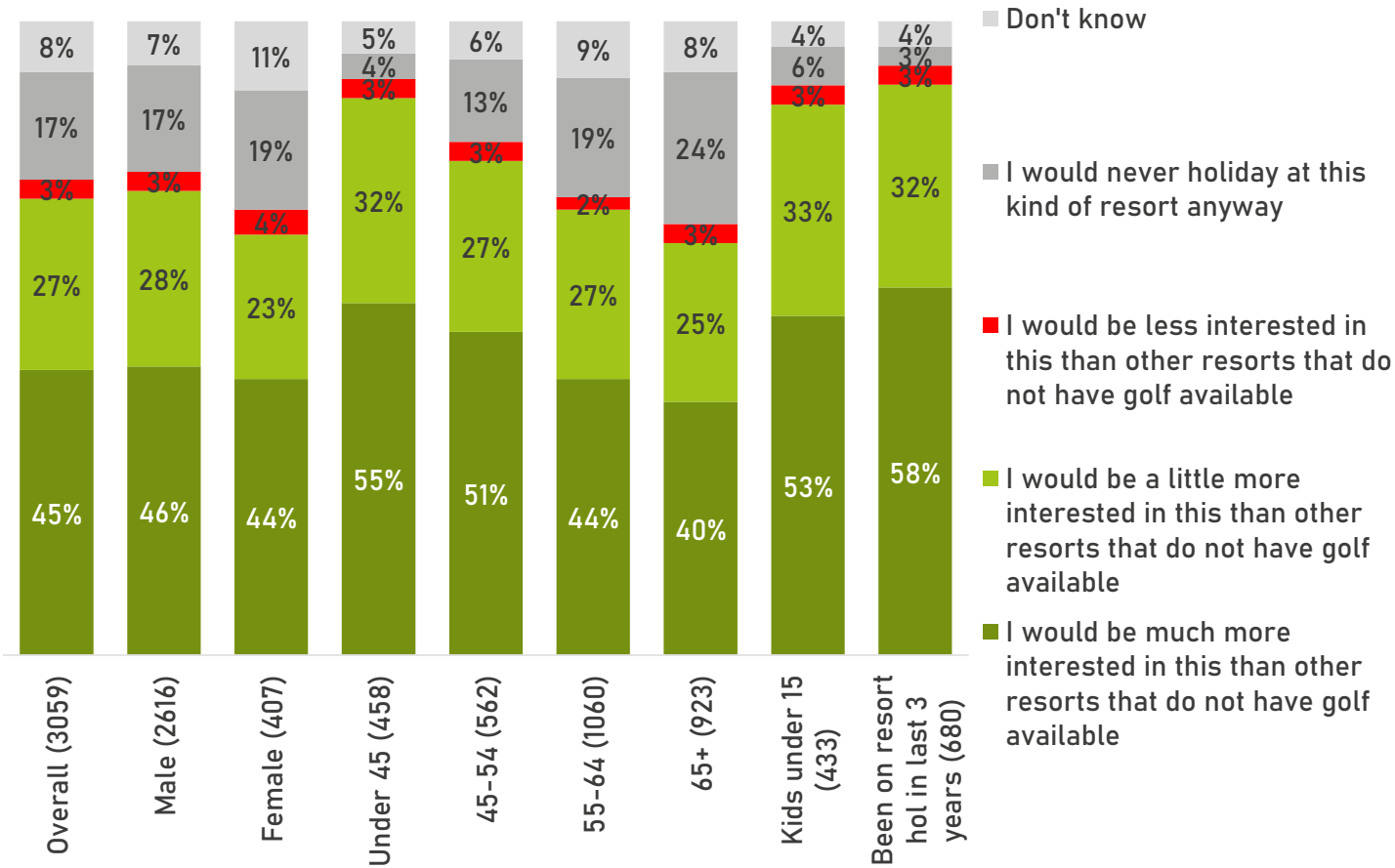
Base: 143

NATIONAL GOLFER SURVEY POTENTIAL FOR GREAT WOLF RESORTS



POTENTIAL FOR GWR | Interest in concept

Q. Which of the following statements best describe how you would feel if a new holiday resort opened, similar to Center Parcs, but with golfing facilities (such as a full course, adventure golf park and driving range) right next door?

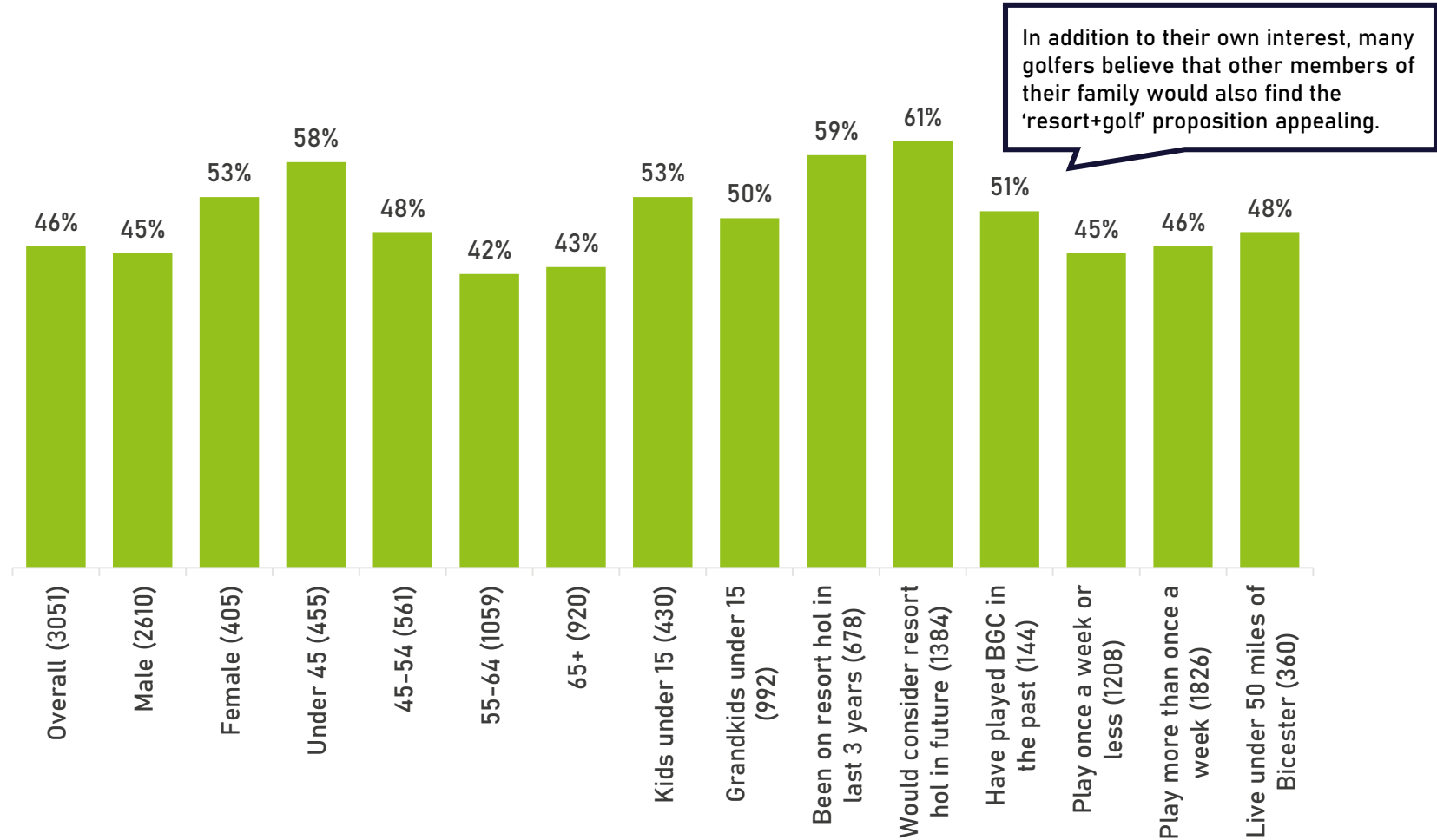


Appeal of a holiday resort similar to Center Parcs but with golf facilities right next door is extremely high, with 72% of golfers saying they would be more interested in this proposition. Interest was even higher amongst golfers under the age of 45 (87%), those with children under the age of 15 (86%) and those who have stayed at a similar resort in the last 3 years (90%).

Base numbers shown in brackets

POTENTIAL FOR GWR | Other family interest

Q. Are there other people in your family who may find this type of holiday appealing?



Base numbers shown in brackets

The following statement was shown to respondents before they were asked for their specific reactions to the proposition. Specifying that the new resort would be near Bicester allows people to factor the location into their responses.

“Proposals are currently being developed for a new family holiday resort to be built near Bicester in Oxfordshire. The resort would include high quality accommodation, a water park, adventure park (including facilities such as climbing walls and a rope course), a nature trail and a range of dining options including a restaurant, cafes, and snack / sweet shops.

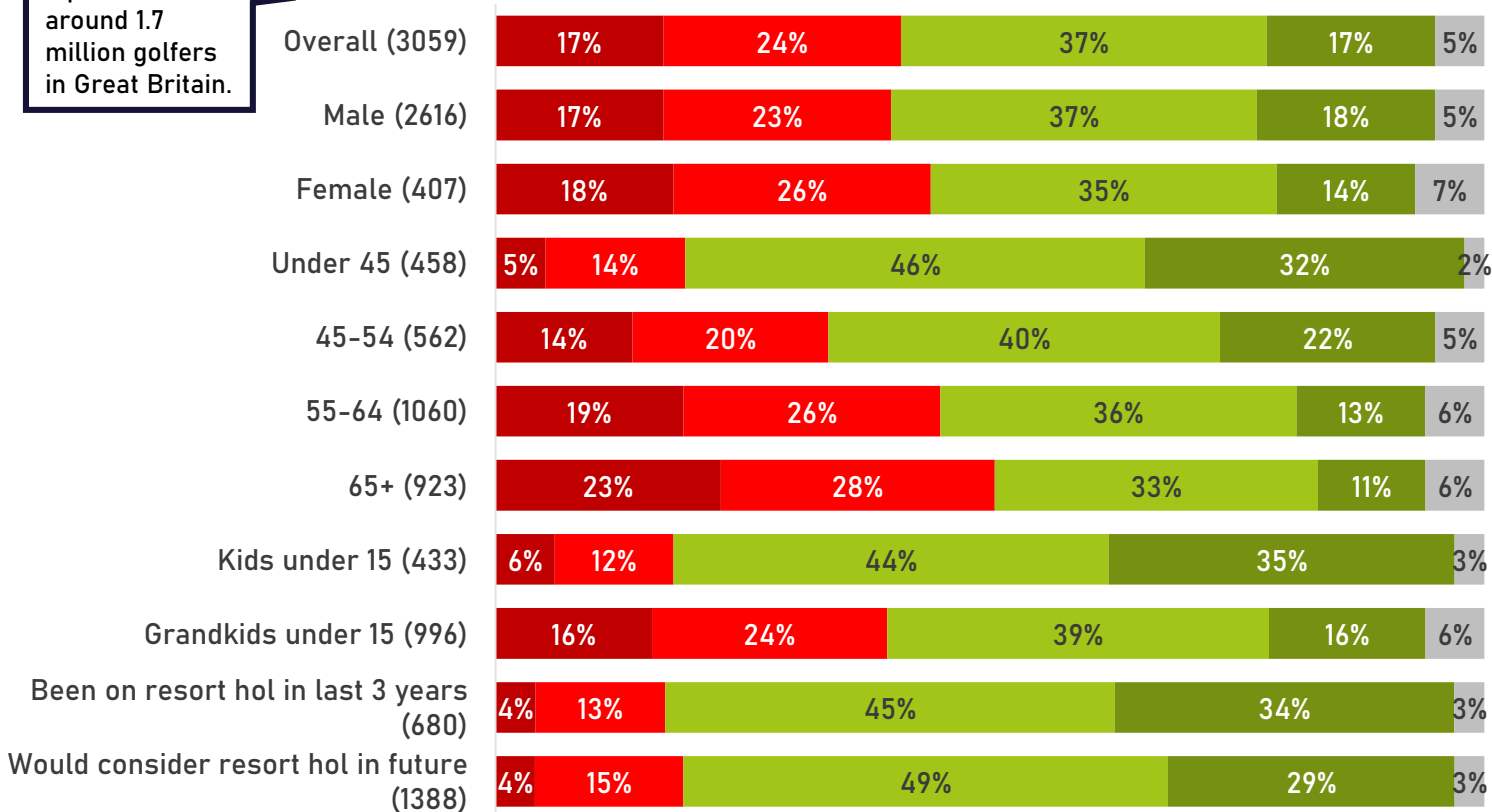
The resort would be next to an existing four-star hotel and golf resort, which includes a spa. The golf course would be a 9-hole course, possibly with double tees to allow an 18-hole round. An adventure golf park, driving range, Par 3 course, driving range and golf academy may be included within the facilities, which would be open to all visitors, including those staying at the new resort.”

POTENTIAL FOR GWR | Interest in Bicester GWR

Q. How interested would you be in taking a break / holiday specifically at this new resort in Oxfordshire?

Overall interest equates to around 1.7 million golfers in Great Britain.

■ Not at all interested ■ Not very interested ■ Quite interested ■ Very interested ■ Don't know



Interest in the new resort was high, with 54% saying they were very or quite interested in taking a break / holiday there. This was substantially higher for those aged under 45, those with children under the age of 15 and for those who have previously or would consider in future, taking a resort holiday or break.

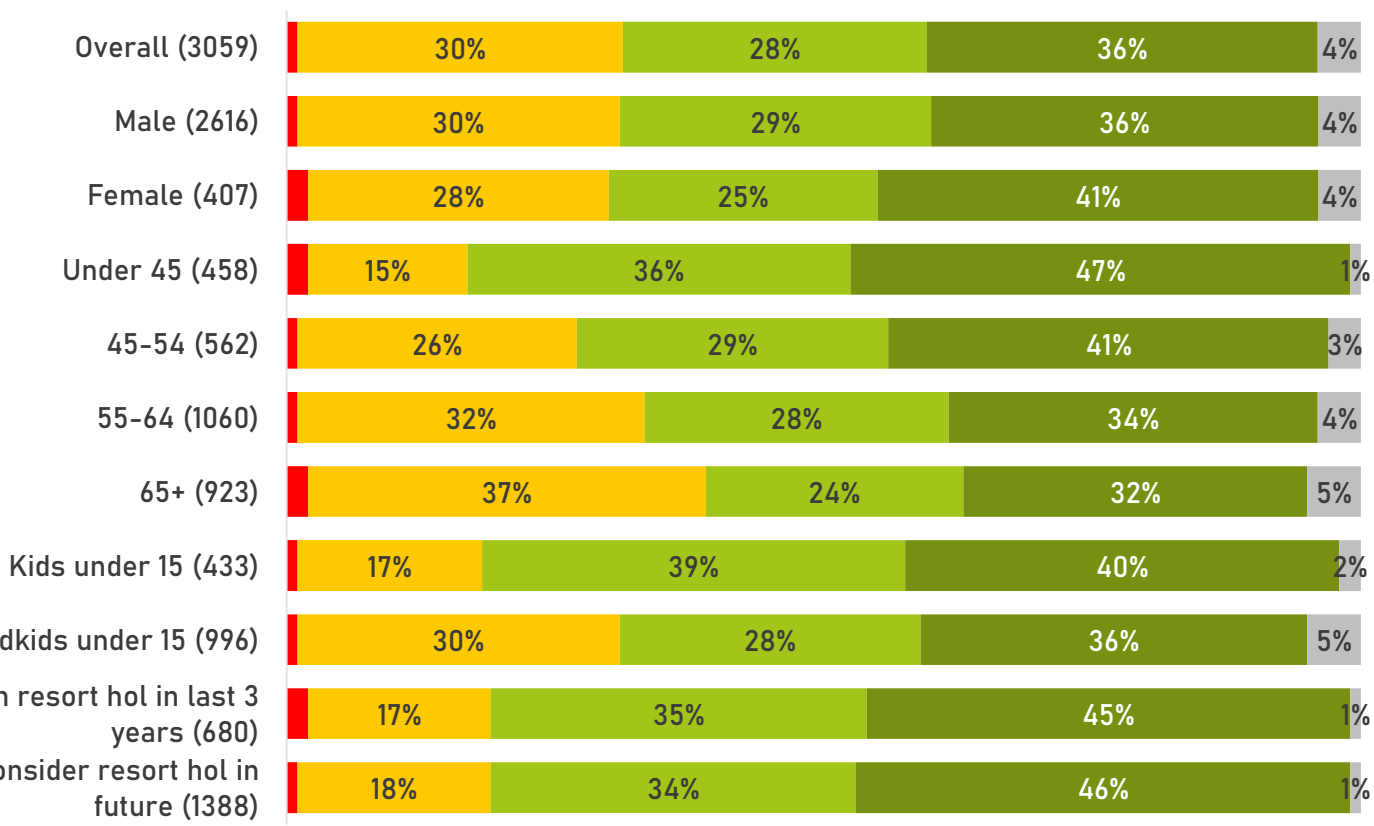
Base numbers shown in brackets

POTENTIAL FOR GWR | Influence of golf facilities

Q. Is your level of interest in the new resort influenced by the presence of golf next door?

■ I am less interested in it because of the golf facilities next door
 ■ It makes no difference
 ■ I am a little more interested in it because of the golf facilities next door
 ■ I am much more interested in it because of the golf facilities next door
 ■ Don't know

Interest in the general concept of the new resort near Bicester was very much influenced by the presence of golf next door, encouragingly especially so for those who have taken a resort holiday in the last 3 years or would consider one in the future.



Base numbers shown in brackets

NATIONAL GOLFER SURVEY FUTURE OF BICESTER GOLF CLUB

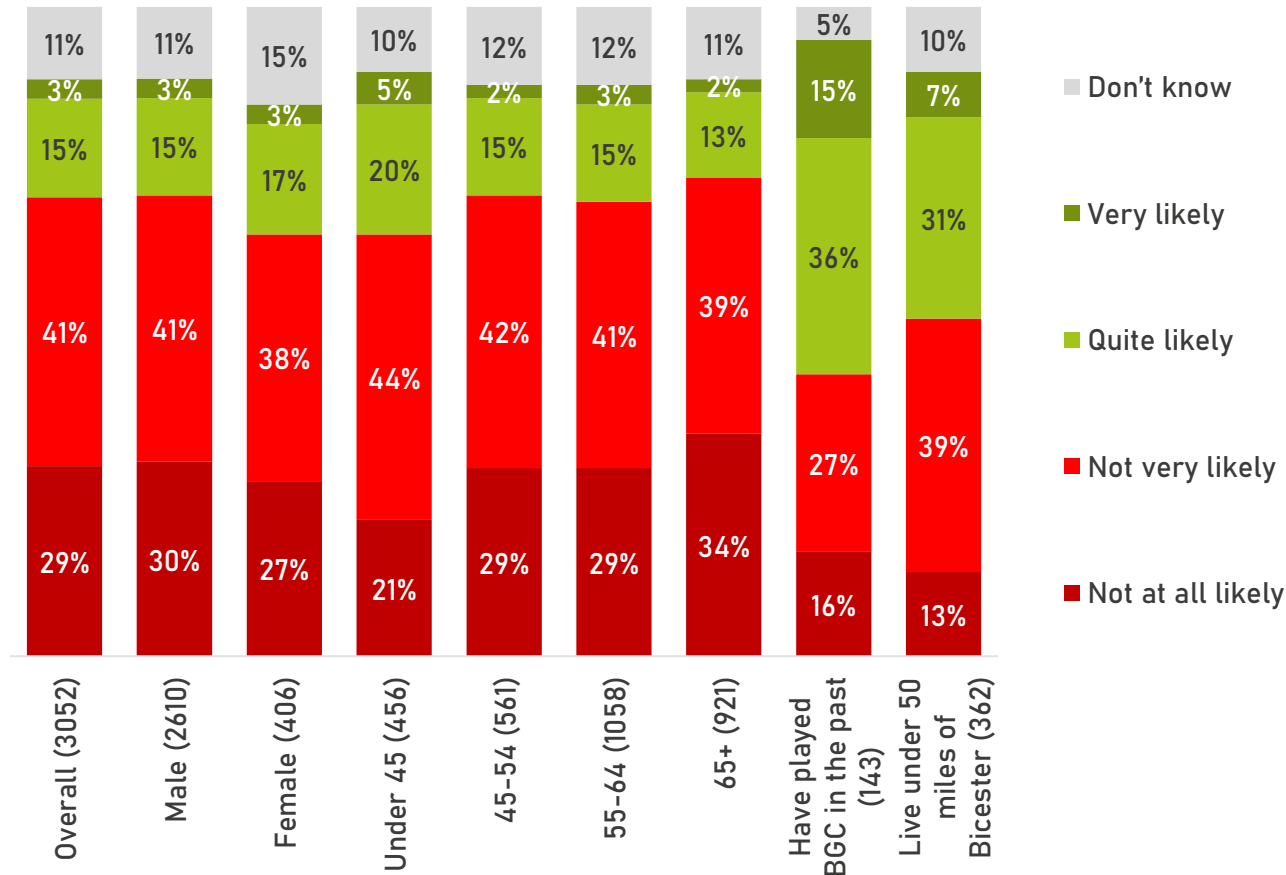


Before being asked for opinions around the specifics of the new resort near Bicester, or asking specifically about Bicester Golf Club, respondents were informed:

“The golf course next door to the new resort would be the existing Bicester Golf Club.”

FUTURE OF BICESTER GC | Future play at Bicester

Q. How likely are you to play at Bicester Golf Club in the future, if there was no change to the facilities (currently there is an 18-hole course on-site)



Generally it was unlikely that golfers would play at the existing Bicester Golf Club in future in its current form.

Base numbers shown in brackets

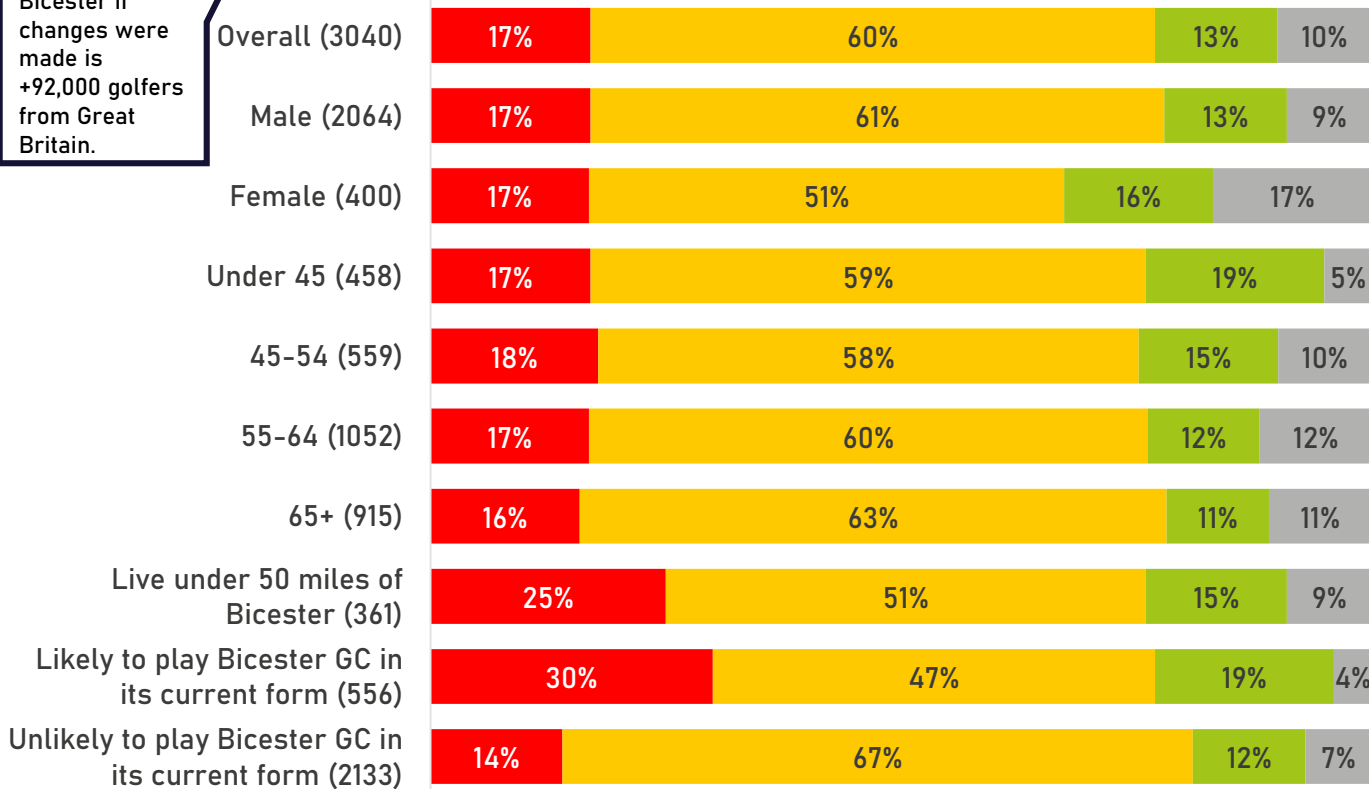
FUTURE OF BICESTER GC | Future play if changes were made

Q. Would it make a difference to you if the golf course at Bicester was redesigned as previously described (to include a 9-hole course, possibly with double tees to allow an 18-hole round. An adventure golf park, driving range, Par 3 course and golf academy may be included within the facilities)?

Net likelihood of playing at Bicester if changes were made is +92,000 golfers from Great Britain.

■ I would be less likely to play there
 ■ It would make no difference
 ■ I would be more likely to play there
 ■ Don't know

If changes were made to the existing course at Bicester Golf Club, the appeal of the venue would be greatest to those aged under 45 and to those with children under the age of 15. Encouragingly, 12% of golfers who had previously said that they would be unlikely to play the course at Bicester in its current form said they would be more likely to play there if changes were made.

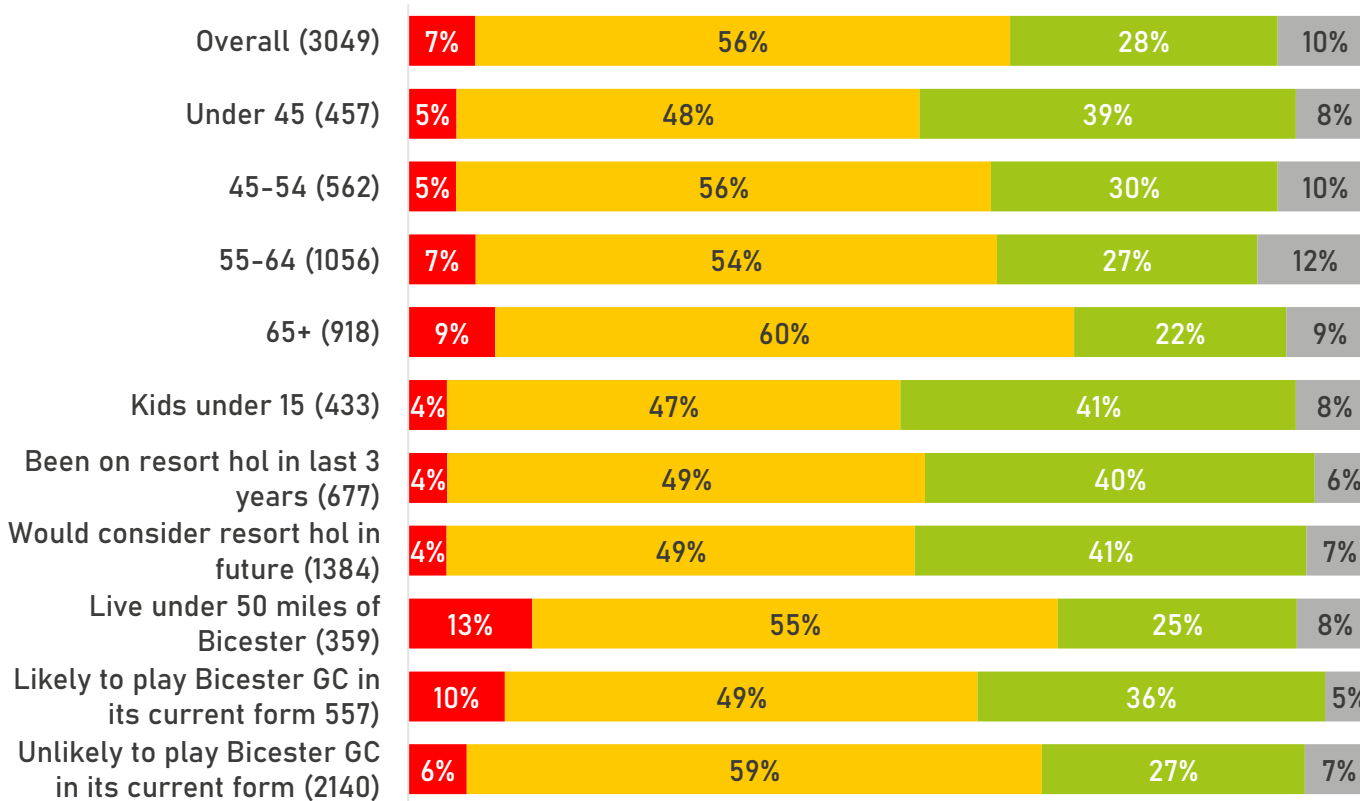


Base numbers shown in brackets

FUTURE OF BICESTER GC | Impact of GWR next door

Q. And would it make a difference to you if the holiday resort had been built next door to Bicester Golf Club?

■ I would be less likely to play there
 ■ It would make no difference
 ■ I would be more likely to play there
 ■ Don't know



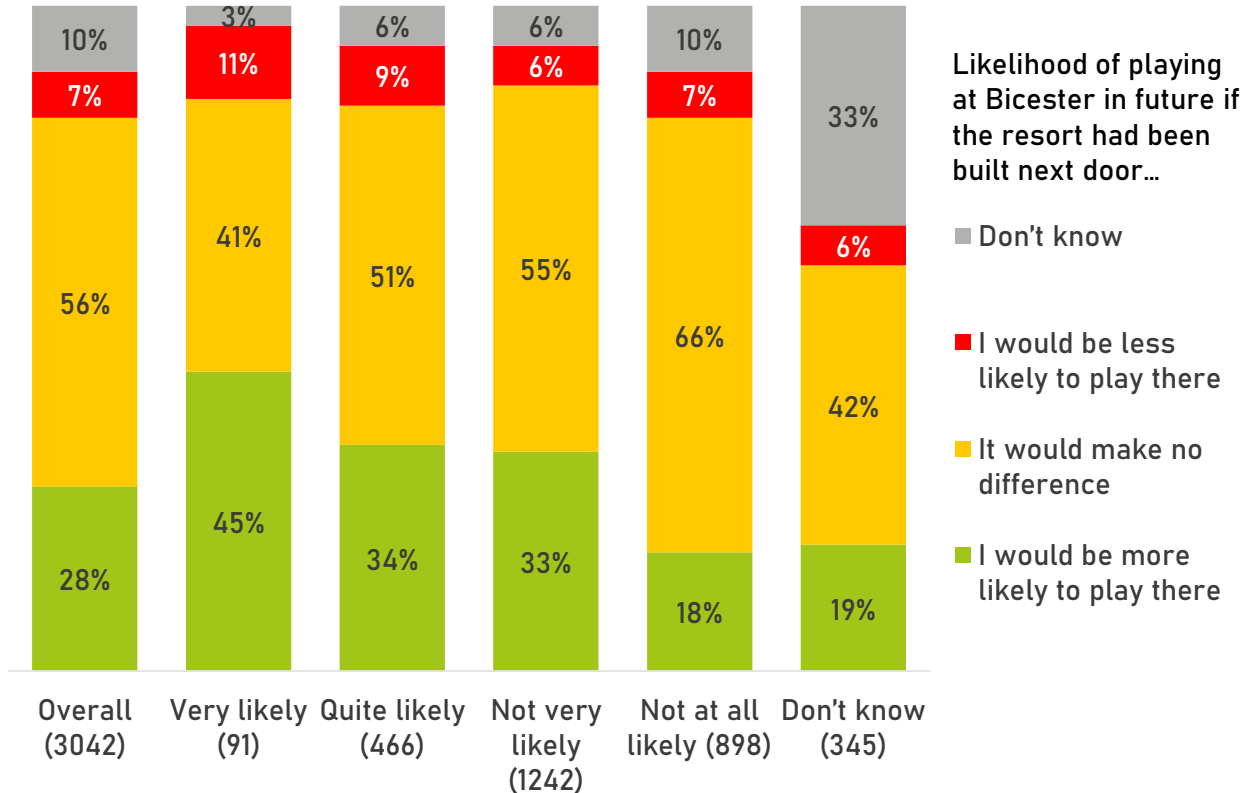
The Great Wolf venue being situated next door would provide even greater encouragement for golfers to visit Bicester Golf Club in future. 27% of those who were previously unlikely to play at Bicester Golf Club said they were more likely to do so if the resort had been built next door.

Base numbers shown in brackets

FUTURE OF BICESTER GC | Impact by likelihood of visiting

Q. And would it make a difference to you if the holiday resort had been built next door to Bicester Golf Club?

Q. How likely are you to play at Bicester Golf Club in the future, if there was no change to the facilities (currently there is an 18-hole course on-site)?



Taking into account those who were initially unlikely to play at Bicester but would be more likely if the GWR had been built, and those who were initially likely to play at Bicester but less likely if the GWR had been built, the net likelihood of playing at Bicester if the GWR had been built next door is +21%. This equates to 532,000 golfers from Great Britain.

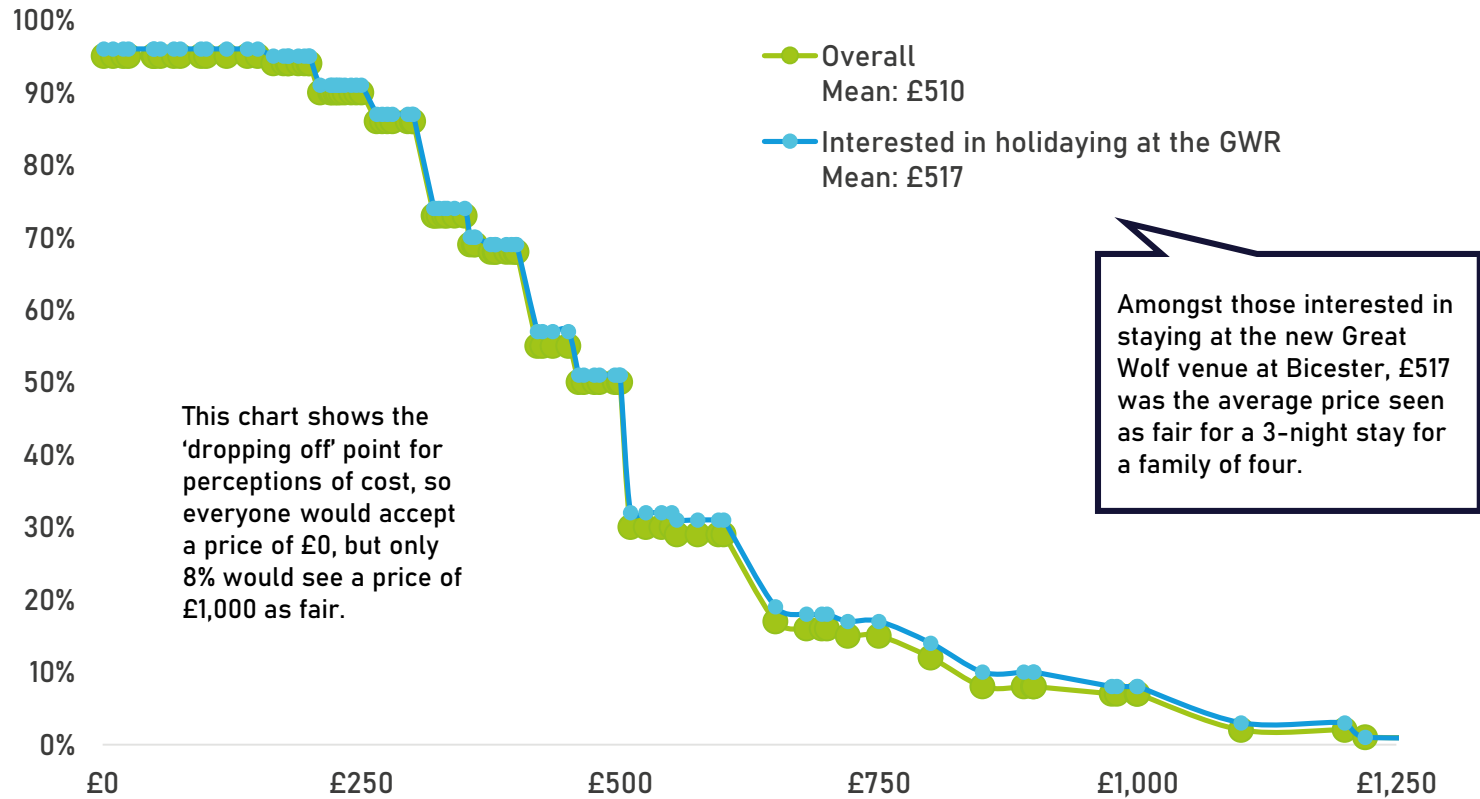
Base numbers shown in brackets

NATIONAL GOLFER SURVEY PERCEPTIONS OF 'FAIR' PRICING



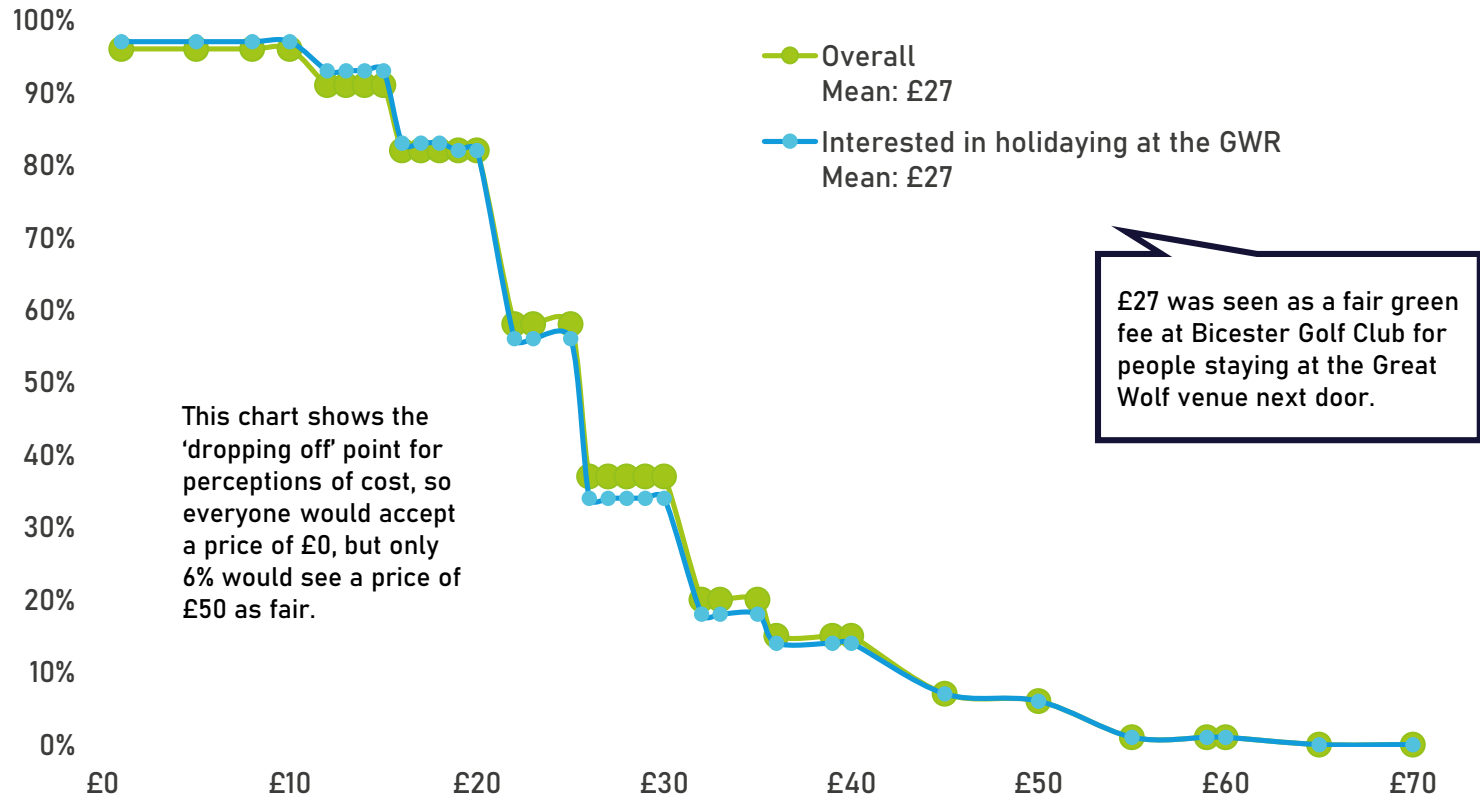
APPEAL OF NEW FACILITIES | Fair price for a 3-night stay

Q. Roughly what do you think would be a fair price for each of the following?
 A 3-night stay for a family of four at the new resort:



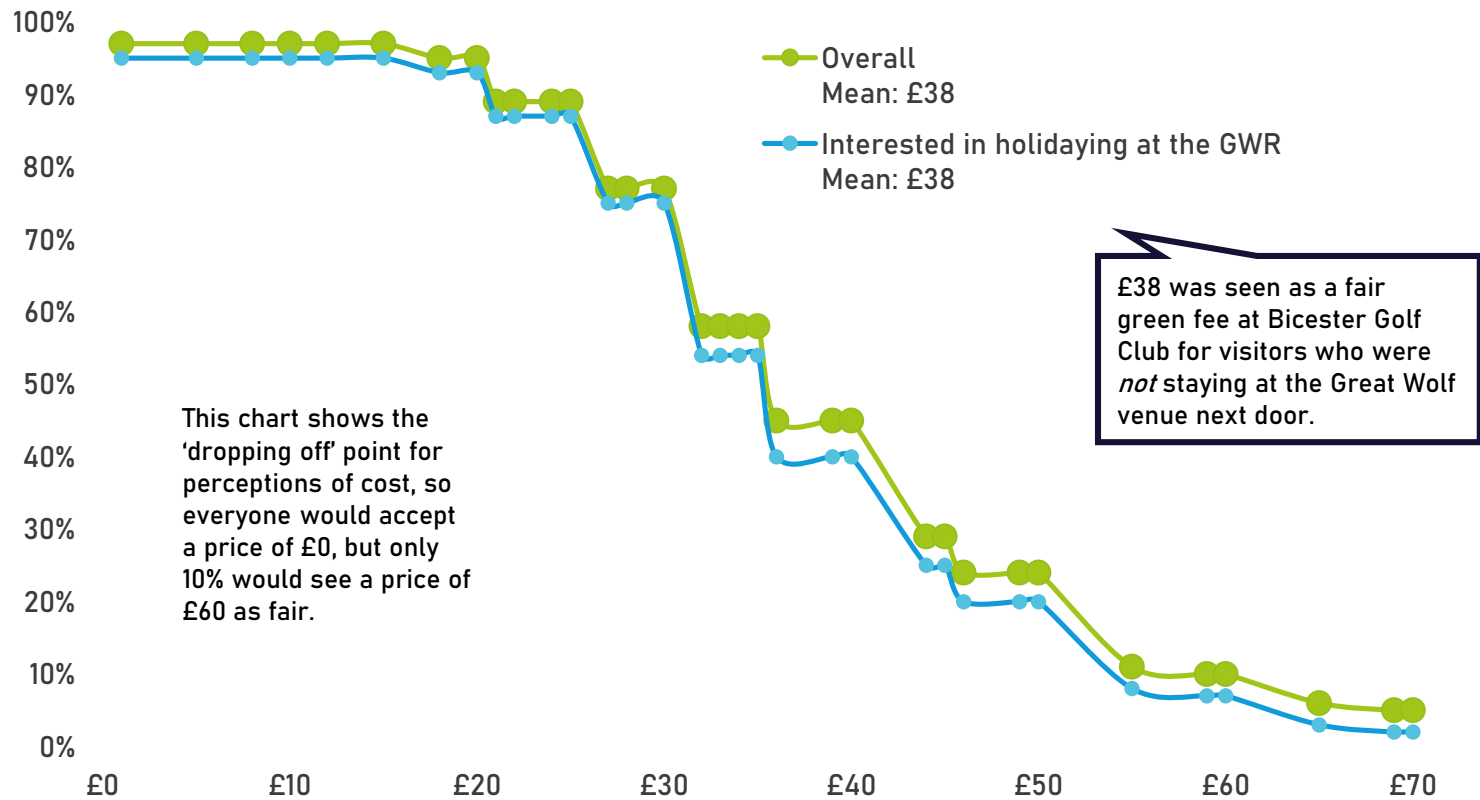
APPEAL OF NEW FACILITIES | Fair green fee for GWR visitors

Q. Roughly what do you think would be a fair price for each of the following?
 Green fee at Bicester Golf Club for people staying at the new resort next door:



APPEAL OF NEW FACILITIES | Fair green fee for non-GWR visitors

Q. Roughly what do you think would be a fair price for each of the following?
Green fee for visitors to Bicester Golf Club (not staying at the new resort):



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UK Participation Study : GOLF ACTIVES

STUDY TO UNCOVER THE NUMBER OF GOLF ACTIVES IN THE UK- PLAYERS INVOLVED IN SOME FORM OF THE GAME

Introduction



STUDY TO UNCOVER THE NUMBER OF GOLF ACTIVES IN THE UK

INCLUDING PLAY ON:

FULL LENGTH COURSE

DRIVING RANGE

9 HOLE COURSE

ADVENTURE GOLF

PITCH & PUTT

GOLF COMPUTER GAMES

PUTTING GREEN

PAR 3 / SHORT COURSE

GOLF SIMULATOR

SCHOOL

OTHER

STUDY TO UNCOVER THE NUMBER OF GOLF ACTIVES IN THE UK

- Golf Player studies have traditionally assessed golf participation by analysis of play on full length golf courses and other more established forms of golf
- Forms of golf such as Par 3, pitch & putt, driving range, adventure golf and even e-gaming have not been included
- Traditional golf participation numbers in the UK have been showing a steady decline over the last 10 years – but this does not reflect emerging formats and new forms of play opportunities or consumption
- The European Tour commissioned a study undertaken by SPORTS MARKETING SURVEYS Inc. to establish a complete picture of golf activity in the UK including digital and other less traditional forms of the game



OVERVIEW

- With an increase in the different kinds of golf available, the appeal of the sport has widened
 - Full length golf course use now represents a core section of the UK golf market rather than the definition
- While the golf courses continue to be dominated by older males, the wider definition of golf uncovers a greater variety of golfer types
 - Women and younger people have a strong presence
 - Faster forms of golf allow more involvement by people with work and family commitments

OVERVIEW

- The wider definition of “Golf Actives” leads to a total UK adult golfer figure of **9.3 million** adults
 - Of these, only 3.5 million are full length golf course users
- There are a further **1.7 million** junior golfers
- This creates an unique opportunity to change perceptions by including and promoting the wider forms of golf and illustrating how these formats can fit in much more easily with everyday life
 - Encouraging Golf Actives to be involved over a shorter time frame, and at non-traditional venues – whilst acting as the stimulus to trial and embrace the full-length golf course experience
 - For The European Tour, this represents a more rounded assessment of our audience than traditional participation measures

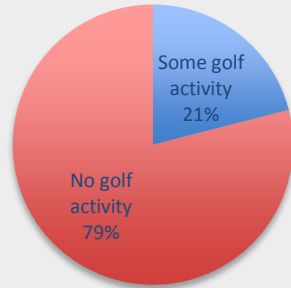


SUMMARY : GOLF ACTIVES

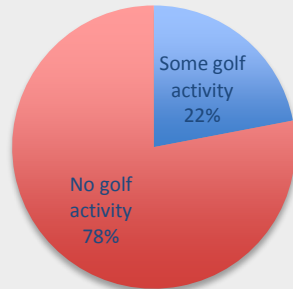
- Using the broader participation definition, just over **a fifth** of the UK population had engaged with some form of golf over the last 12 months;
 - For adults the most popular forms of golf were play on full length courses and driving ranges, while children were most likely to have been to adventure golf
- This equates to **9.3 million adults**, and a further **1.7 million juniors** in the UK
- The most frequent golf activity was seen amongst adults who had played full length golf courses or golf computer games
 - For juniors, golf computer games were the most frequently played
- As seen in other participation research, those playing full length courses were predominantly male, older, white and in the top socio-economic groups
- Those engaging in other golf activity (not full length courses) were far more reflective of the population as a whole
 - More likely to be female, younger and from a broader socio-economic background

GOLF ACTIVITY : Types of Golf

Adults

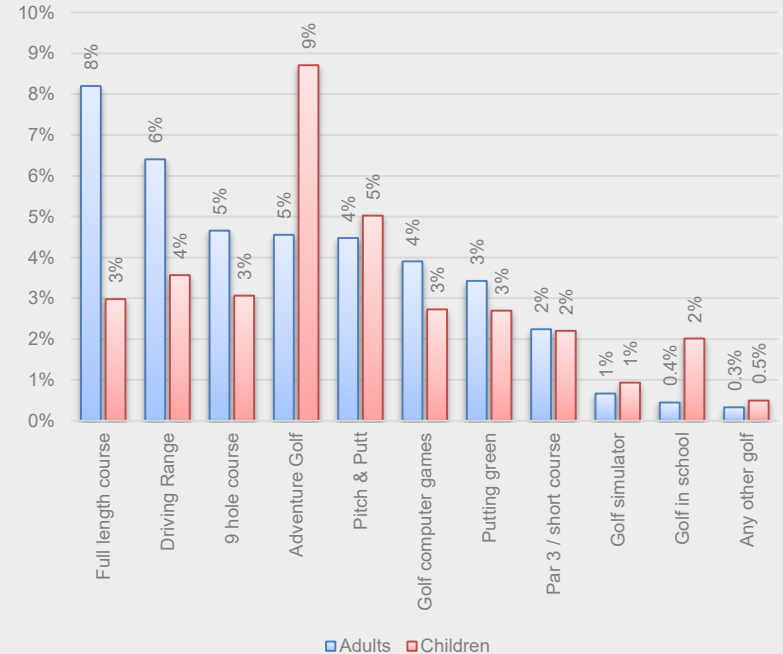


Children



Just over a fifth of the UK population had taken part in some form of golf activity in the last year.

For adults the most popular forms of golf were full length courses and the driving range, while children were most likely to have been to adventure golf



To offset sample bias, involvement is counted if participation frequency is more than twice in the last year



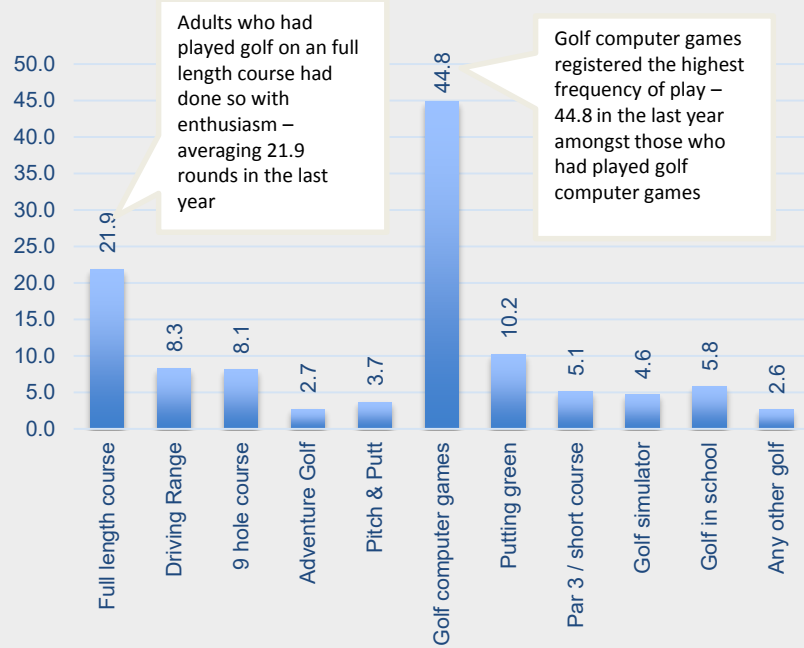
GOLF ACTIVITY : How Many People?



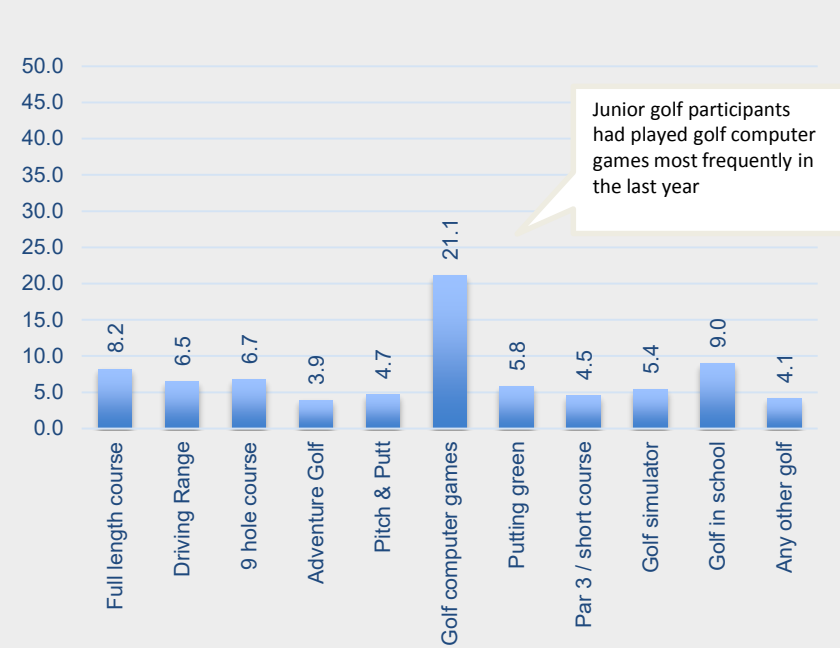
This graphic shows the absolute number of people who have taken part in each of the categories of golf in the past year, including the broader definition of golf activity

GOLF ACTIVITY : Frequency of Participation

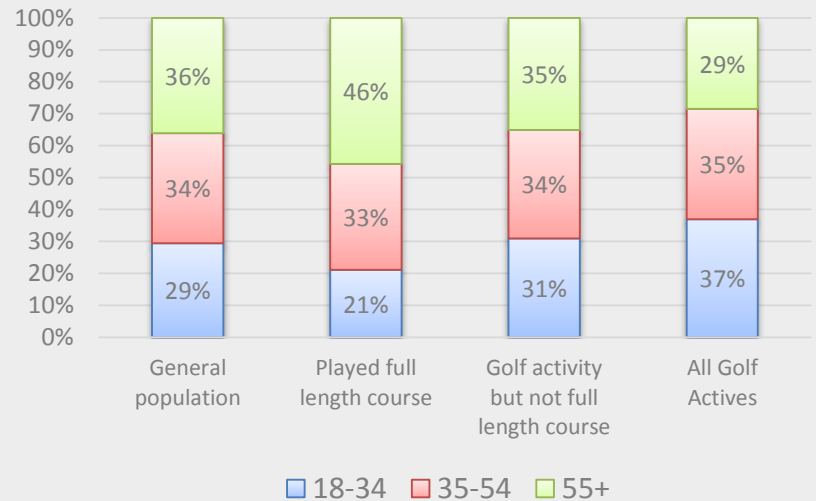
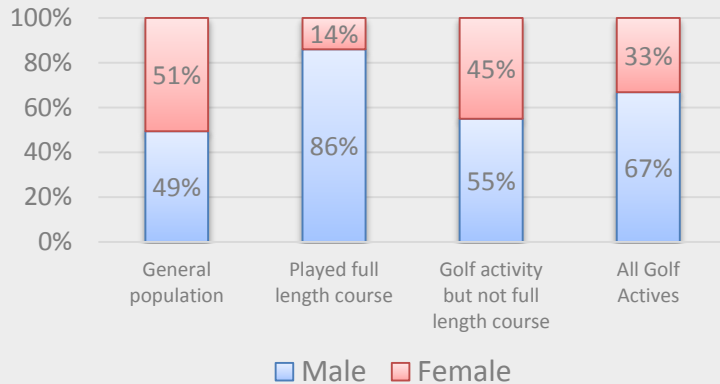
Adults



Children



GOLF ACTIVITY : Profiling

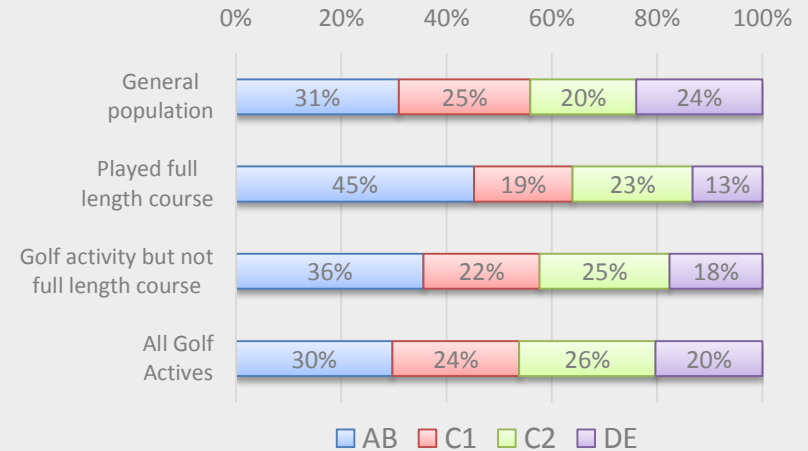
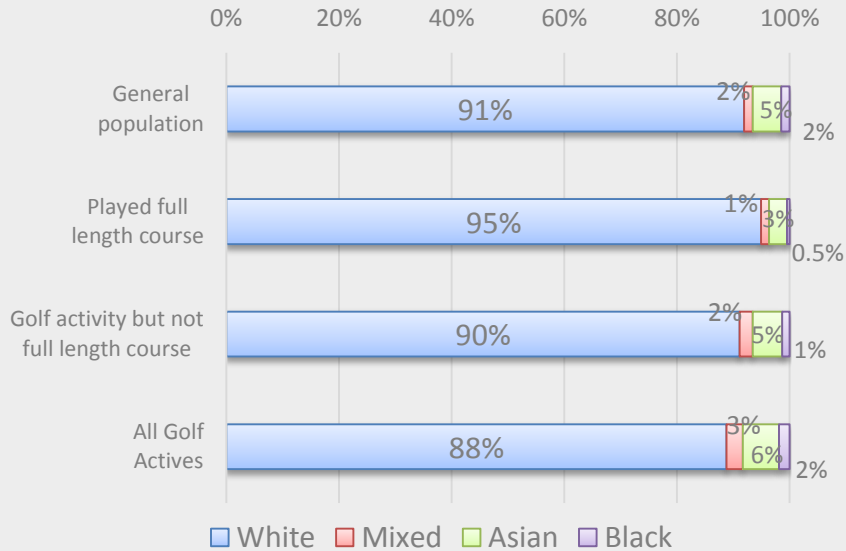


To offset sample bias, involvement is counted if participation frequency is more than twice in the last year



All mentions of participation have been included in average frequency calculations

GOLF ACTIVITY : Profiling



To offset sample bias, involvement is counted if participation frequency is more than twice in the last year

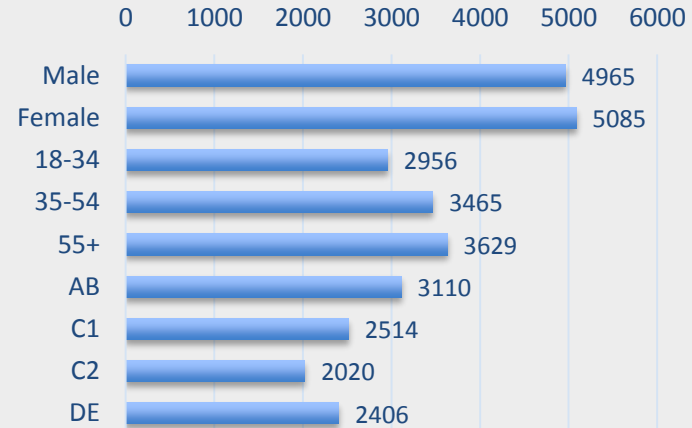


All mentions of participation have been included in average frequency calculations

METHODOLOGY

- 10,050 online interviews carried out in the UK
 - Fieldwork between the 5th June and the 6th July 2015
- Nationally representative survey of adults based on age (18-80), gender, region, socio-economic group and ethnicity
- Respondents asked about golf activity of 6-17 year old children in their household to give a view of junior participation
 - Survey results cover 10,050 adults and 3,226 children aged 6-17
- Extrapolations based on UK population with household internet access:
 - 43.1m 18-80 year olds
 - 7.8m 6-17 year olds

Number of interviews



To be included in the definition of 'Golf Actives', a person must have taken part in one of the following forms of golf at least twice in the last year:

- Full length course, driving range, 9 hole course, adventure golf, pitch & putt, golf computer games, putting green, par 3 / short course, golf simulator, school, other

SPORTS MARKETING SURVEYS INC.

ABOUT US

SPORTS MARKETING SURVEYS INC. is a specialist sports research company focusing on the sports participant and sports goods markets.

Established in 1984 with SPORTS MARKETING SURVEYS USA starting in 1999, and SPORTS MARKETING SURVEYS INC as an independent company in 2011

In the last two years, SPORTS MARKETING SURVEYS INC. and SPORTS MARKETING SURVEYS USA has completed research amongst over 250,000 respondents on sports participation in over 20 markets and covering over 100 sports

Research has been undertaken online or by telephone interviews on a nationally representative basis.

ABOUT OUR PARTNER

Our fieldwork provider for this European Tour “GOLF ACTIVES” study was founded in 1999 and now employs over 1,200 people in over 20 offices around the world

The company adheres to industry guidelines and is associated with many key industry bodies around the world

Most relevant for this study are the organisation’s affiliations to the Market Research Society (MRS) and ESOMAR





Thank you

APPENDIX 3 – ENGLAND GOLF FACILITY PLANNING REPORT, DECEMBER 2020



ENGLAND
GOLF

England Golf Facility Planning Report

Bicester Hotel, Golf and Spa

Cherwell Local Authority, South East Region.

Background

Golf is the fifth largest participation sport in the Country, with around 630,000 members belonging to one of 1850 affiliated clubs and a further 2 million people playing golf independently outside of club membership.

More than more than 4 million people have played golf on a full-length course in the last 12 months – this is an increase on previous years and highlights a growing golf participation market. Other notable figures regarding golf club participation in the last 12 months suggest a large and growing market of new and existing golfers:

- 2.6 million have used driving ranges
- 2.1 million played a short course
- 3.7 million played pitch & putt
- 6.8 million have been to Adventure Golf facility (Source: Sport MR)

England Golf have seen a decline in affiliated golf club members in recent years, but this reflects the wider range of golfing options available, even to people who enjoy playing full-length courses.

Facility Strategy

England Golf published the 'Raising Our Game' strategy in 2014, which clearly defined the organisation's strategic direction for the 2014-2017 window. This document highlighted the need for a strategy to enhance market understanding of the size and shape of the golfing market and to map alongside the golfing facilities catering for that demand.

Jigsaw research were commissioned by England Golf in 2015, in order to create a market segmentation which is specific to golf. The research identified that 24% of adults in England are potential players. This is made up of – 9% current players, 8% lapsed players and 7% latent players – amounting to c.9.6 million people in total. It also provided England Golf with 9 defined profiles and clearly identified behaviours, motivations and barriers within each one.

England Golf then worked with LCMB, facility consultancy, to utilise the segmentation work to develop a facility strategy and create some practical tools to overlay supply with demand. When looking at a club, Local Authority or Region, our mapping report can identify the total number of golfers within a 20-minute catchment. This number will include current, lapsed and latent golfers – the full 24%.

Methodology

The mapping tool is a statistical data engine that identifies golfing demand within a 20-minute drive of each golf facility within England. It does this by utilising the demographic information taken from the CACI Acorn model and applies a statistical analysis to convert demographics into a likely breakdown of the 9 golfing profiles, as identified by the Jigsaw Research.

The tool allows us to identify the dominant profiles within the catchment area and review by Region and Local Authority and also by a specific club/facility. This can then be used to predict likely demand for each type of facility and to support informed marketing, development and investment decisions.

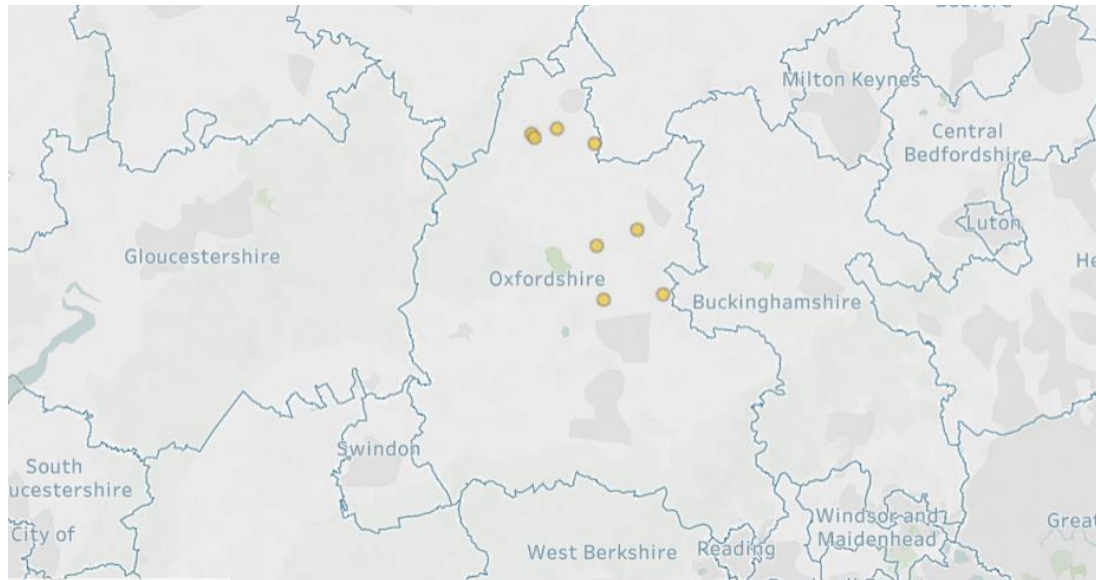
The facilities at each golf club are also included, so we can review and cross-check information listed within any additional supporting documents such as number of holes, number of courses, number of driving range bays, championship courses (during the next 3 years) and performance centres (England Golf).

In addition to the mapping tool, we have guidance on 'Understanding Your Market' for the type of golfing experience that particular profiles are looking for, which enables facilities to adapt their offer to cater for a range of different needs.

Local knowledge and desk based research will also help to paint a fuller picture of the golfing opportunities available within the surrounding area. Each of these is intended to be offered to clubs in a structured manner in conjunction with England Golf.

Analysis

Within Cherwell, there are six affiliated clubs and one non-affiliated facility.



The demand for golf within the borough and the region by profile as follows;

| Profile Name | Average number of people per club/facility/local authority (within 20-minute drive time*) | |
|----------------------------|--|---------------|
| | <u>Local Authority</u> | <u>Region</u> |
| | Cherwell | South East |
| 1: Relaxed Members | 2,881 | 6,149 |
| 2: Older Traditionalists | 2,656 | 5,662 |
| 3: Younger Traditionalists | 2,764 | 5,836 |
| 4: Younger Fanatics | 2,883 | 6,193 |
| 5: Younger Actives | 2,798 | 5,960 |
| 6: Late Enthusiasts | 2,775 | 5,943 |
| 7: Occasional Time Pressed | 2,798 | 5,941 |
| 8: Social Couples | 2,711 | 5,781 |
| 9: Casual Fun | 2,997 | 6,494 |

**The figures represent the number of people within each profile, within a 20-minute drive time of each club/facility. It is averaged to ensure no double counting and is therefore at its most accurate at club/facility level.*

In addition, the following outlines the demand for each of the clubs and facilities within a 20-minute drivetime.

| Profile Name | Average Number of People per Affiliated Facility (within 20-minute drive time*) | | | | |
|----------------------------|--|------------------------|------------------------|---------------------------|------------------------|
| | <u>Non-Affiliated Club</u> | <u>Affiliated Club</u> | <u>Affiliated Club</u> | <u>Affiliated Club</u> | <u>Affiliated Club</u> |
| | HILLSIDE FARM GOLF DRIVING RANGE | KIRTLINGTON GOLF CLUB | NORTH OXFORD GOLF CLUB | TADMARTON HEATH GOLF CLUB | RYE HILL GOLF CLUB |
| 1: Relaxed Members | 2408 | 2642 | 7537 | 1701 | 1894 |
| 2: Older Traditionalists | 2192 | 2560 | 6954 | 1477 | 1658 |
| 3: Younger Traditionalists | 2343 | 2399 | 7306 | 1698 | 1886 |
| 4: Younger Fanatics | 2355 | 2823 | 7588 | 1553 | 1748 |
| 5: Younger Actives | 2335 | 2583 | 7333 | 1634 | 1822 |
| 6: Late Enthusiasts | 2280 | 2700 | 7263 | 1525 | 1713 |
| 7: Occasional Time Pressed | 2348 | 2522 | 7368 | 1663 | 1853 |
| 8: Social Couples | 2253 | 2566 | 7044 | 1561 | 1744 |
| 9: Casual Fun | 2411 | 3070 | 7863 | 1528 | 1729 |

| Profile Name | Average Number of People per Affiliated Facility (within 20-minute drive time*) | | | | |
|----------------------------|--|------------------------|--|--|--|
| | <u>Affiliated Club</u> | <u>Affiliated Club</u> | | | |
| | BICESTER HOTEL, GOLF AND SPA | STUDLEY WOOD GOLF CLUB | | | |
| 1: Relaxed Members | 2470 | 1963 | | | |
| 2: Older Traditionalists | 2365 | 1835 | | | |
| 3: Younger Traditionalists | 2243 | 1887 | | | |
| 4: Younger Fanatics | 2592 | 2030 | | | |
| 5: Younger Actives | 2406 | 1915 | | | |
| 6: Late Enthusiasts | 2493 | 1925 | | | |
| 7: Occasional Time Pressed | 2350 | 1918 | | | |
| 8: Social Couples | 2396 | 1837 | | | |
| 9: Casual Fun | 2805 | 2132 | | | |

Also within an approximate 20 minute drivetime from Bicester HGS are facilities from the following local authorities:

South Oxfordshire

| Profile Name | Average Number of People per Affiliated Facility (within 20-minute drive time*) | | | | |
|----------------------------|--|---------------------------------|--|--|--|
| | <u>Affiliated Club</u> | <u>Affiliated Club</u> | | | |
| | WATERSTOCK GOLF CLUB | THE OXFORDSHIRE GOLF CLUB | | | |
| 1: Relaxed Members | 7174 | 2742 | | | |
| 2: Older Traditionalists | 6657 | 2728 | | | |
| 3: Younger Traditionalists | 6967 | 2542 | | | |
| 4: Younger Fanatics | 7285 | 3089 | | | |
| 5: Younger Actives | 6993 | 2711 | | | |
| 6: Late Enthusiasts | 6952 | 2884 | | | |
| 7: Occasional Time Pressed | 7030 | 2671 | | | |
| 8: Social Couples | 6705 | 2633 | | | |
| 9: Casual Fun | 7561 | 3375 | | | |

Aylesbury Vale

| Profile Name | Average Number of People per Affiliated Facility (within 20-minute drive time*) | | | | |
|----------------------------|--|--|--|--|--|
| | <u>Affiliated Club</u> | | | | |
| | BUCKINGHAM GOLF CLUB | | | | |
| 1: Relaxed Members | 2783 | | | | |
| 2: Older Traditionalists | 2680 | | | | |
| 3: Younger Traditionalists | 2528 | | | | |
| 4: Younger Fanatics | 2948 | | | | |
| 5: Younger Actives | 2716 | | | | |
| 6: Late Enthusiasts | 2826 | | | | |
| 7: Occasional Time Pressed | 2653 | | | | |
| 8: Social Couples | 2700 | | | | |
| 9: Casual Fun | 3197 | | | | |

Vale of White Horse

| Profile Name | Average Number of People per Affiliated Facility (within 20-minute drive time*) | | | | |
|----------------------------|--|--|--|--|--|
| | <u>Affiliated Club</u> | | | | |
| | HINKSEY HEIGHTS GOLF CLUB | | | | |
| 1: Relaxed Members | 8106 | | | | |
| 2: Older Traditionalists | 7538 | | | | |
| 3: Younger Traditionalists | 7841 | | | | |
| 4: Younger Fanatics | 8255 | | | | |
| 5: Younger Actives | 7902 | | | | |
| 6: Late Enthusiasts | 7878 | | | | |
| 7: Occasional Time Pressed | 7931 | | | | |
| 8: Social Couples | 7592 | | | | |
| 9: Casual Fun | 8594 | | | | |

In addition, the table below provides the most recent affiliated membership numbers along with some commentary from the local Club Support Officer and/or Regional Manager;

| Affiliated Club Name | 2015 Numbers | 2016 Numbers | 2017 Numbers | 2018 Numbers |
|------------------------------|--------------|--------------|--------------|--------------|
| KIRTLINGTON GOLF CLUB | 292 | 352 | 380 | 389 |
| NORTH OXFORD GOLF CLUB | 424 | 475 | 417 | 441 |
| TADMARTON HEATH GOLF CLUB | 515 | 548 | 562 | 552 |
| RYE HILL GOLF CLUB | 39 | - | 93 | 140 |
| BICESTER HOTEL, GOLF AND SPA | 317 | 328 | 281 | 252 |
| STUDLEY WOOD GOLF CLUB | 580 | 490 | 455 | 409 |
| WATERSTOCK GOLF CLUB | 128 | 119 | 117 | 114 |
| THE OXFORDSHIRE GOLF CLUB | 321 | 304 | 387 | 375 |
| BUCKINGHAM GOLF CLUB | 635 | 565 | 554 | 728 |
| HINKSEY HEIGHTS GOLF CLUB | 204 | 156 | 117 | 74 |

The Local Picture

Facility Provision & Prices:

| Affiliated Club Name | Number of Holes | Driving Range Y/N | Driving Range Bays | Green fees weekday | Green fees weekend | 7 Day membership fees |
|----------------------------------|--------------------|-------------------|------------------------|--------------------|--------------------|----------------------------|
| KIRTLINGTON GOLF CLUB | 27 | Y | 8 | £32 | £40 | £1,125 |
| NORTH OXFORD GOLF CLUB | 18 | N | NA | £30 | £30 | £1195 |
| TADMARTON HEATH GOLF CLUB | 18 | Y | 4 + Outdoor grass bays | £40 | £50 | £1,242 (£1000 Joining Fee) |
| RYE HILL GOLF CLUB | 18 + Par 3 Academy | Y | 5 | £25 | £30 | £995 |
| BICESTER HOTEL, GOLF AND SPA | 18 | Y | 6 | £35 | £35 | £1,199 |
| STUDLEY WOOD GOLF CLUB | 18 | Y | 15 | £40 | £40 | £1236 (+VAT) |
| HILLSIDE FARM GOLF DRIVING RANGE | 0 | Y | 16 | NA | NA | NA |
| WATERSTOCK GOLF CLUB | 18 | Y | 22 | £30 | £30 | £980 |
| THE OXFORDSHIRE GOLF CLUB | 18 | Y | 14 | £60 | £80 | £2,050 |
| BUCKINGHAM GOLF CLUB | 18 | Y | 10 | £30 | £40 | £1,301 |
| HINKSEY HEIGHTS GOLF CLUB | 18 | N | NA | £22 | £28 | £825 |

Hillside Farm Golf Driving Range is a 15-bay covered driving range facility, it is not attached to any golf course. The facility is open to the public. This facility is not affiliated to England Golf and have not engaged.

Kirtlington Golf Club is a proprietary golf facility with an 18-hole golf course and a 9-hole short golf course. The facility also includes an eight-bay driving range, with additional grass tees and a teaching bay, a pro shop, coaching and a clubhouse that offers catering and function room hire, all these facilities are available to the public. The club have engaged with England Golf with regards to handicapping, Covid-19 safe opening compliance and Safeguarding.

North Oxford Golf Club is a proprietary golf facility with an 18-hole golf course. The facility also includes a pro shop and a clubhouse that serves food. The facilities at the club are open to the public. The club have engaged with England Golf with regards to

handicapping, Covid-19 safe opening compliance and Safeguarding.

Tadmarton Heath Golf Club is a private members golf facility with an 18-hole golf course, 4-bay covered driving range, pro shop and clubhouse that serves food. The club is open to visitors. The club have engaged with England Golf with regards to governance, equality, handicapping, Covid-19 safe opening compliance and Safeguarding.

Rye Hill Golf Club is a proprietary golf facility with an 18-hole golf course. The facility also includes a pro shop, an academy course for practice and a clubhouse that serves food and allows for the hosting of functions. The facility is open to the public. The club have engaged with England Golf with regards to handicapping, Covid-19 safe opening compliance and Safeguarding.

Bicester Hotel, Golf and Spa is a proprietary golf facility with an 18-hole golf course. The facility also includes a hotel, spa and multiple eateries, as well as offering golf tuition and equipment rental. All the facilities are open to the public. The club have engaged with England Golf with regards to handicapping.

Studley Wood Golf Club is a proprietary golf facility with an 18-hole golf course. The facility also includes a pro shop, clubhouse that serves food, golf tuition and a covered 15 bay driving range which are open to the public. The club have engaged with England Golf with regards to handicapping, Covid-19 safe opening compliance and Safeguarding.

Waterstock Golf Club is a proprietary owned facility with an 18 hole golf course. It also hosts a clubhouse that serves food, a covered driving range, pro shop and golf tuition, all of which is open to the public. The club have engaged with England Golf with regards to handicapping, Covid-19 safe opening compliance and Safeguarding. The club were recently awarded funding via the R&A Covid-19 Support Fund, which will be used towards a project that promotes business sustainability.

The Oxfordshire Golf Club is a proprietary owned facility with an 18 hole golf course and a 50-room hotel that includes a spa, dining rooms and conference facilities. The facility also provides a golf shop, covered driving range and short-game practice areas. The facility is open to the public. The club have engaged with England Golf with regards to handicapping, Covid-19 safe opening compliance and Safeguarding.

Buckingham Golf Club is a member run facility with an 18 hole golf course, a clubhouse that can host functions, a driving range and pro shop. The facility is open to the public. The club have engaged with England Golf with regards to club governance and staffing structure, handicapping, Covid-19 safe opening compliance and Safeguarding.

Hinksey Heights Golf Club is a proprietary owned facility that has an 18 hole golf course, a foot golf course, rugby golf course and a nature trail. The facility also has a golf shop, a clubhouse that serves food and is open to the public. The club have engaged with England Golf with regards to handicapping, Covid-19 safe opening compliance and Safeguarding.

Conclusion

Our work around mapping demand and supply, and the need for improved market understanding is all about supporting clubs to ensure they retain their existing members and players as well as capitalise on untapped demand. Customer focus is critical to this success, which very much aligns to England Golf's refreshed strategy 'Growing the Game of Golf in England 2017-2020'.

A more detailed description of the different customer profiles can be found within the 'Understanding Your Market' resource that accompanies this report. The 9 golfing profiles are designed to illustrate the wants and needs of different customers and are intended as a guide for clubs to assist with tailoring their initiatives and approach and are not meant to be a commentary on any golf club or facility.

Within the identified region there is a relatively low demand for golf when compared to the average for the South East region. The demand is split evenly over the 9 golfing profiles, both club-based and independent. There is a high level of golf provision within the area in comparison to the demand, with a good number of traditional 18-hole courses. There is only one stand-alone 9-hole course (Kirtlington GC). There is also a good number of practice facilities that are open to the public, including one stand-alone facility. Based on our initial analysis, most clubs are proactively targeting new audiences through coaching programmes and a wider range of membership options, which we will continue to support and encourage.

Membership numbers are mixed when compared with the national average, with two clubs (Tadmarton Heath Golf Club & Buckingham Golf Club) above the national average of 484 members and one club (Studley Wood Golf Club) matching the average exactly. All the other clubs falling below the average. It is worth noting that each club will have a different financial model in terms of income generation from membership vs green fees etc.

We know that clubs showing growth are developing new income streams and catering for a wide range of needs, so there is clearly scope for clubs to offer additional non-traditional and flexible playing opportunities wherever appropriate. As each club/facility has its own USP and place in the market, there may also be further opportunities for some clubs to work more collaboratively in terms of creating pathways where appropriate and collectively cater for the needs of all golfing profiles.

Further analysis at club or facility level, along with some additional England Golf tools can be used to better understand the existing members and visitors of each venue. This in turn may help to establish a clearer picture of the overall facility landscape and how well it

caters for the local demographic. We believe success is reliant upon utilising a combination of the customer profiles, the mapping tool and local knowledge and experience.