



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).

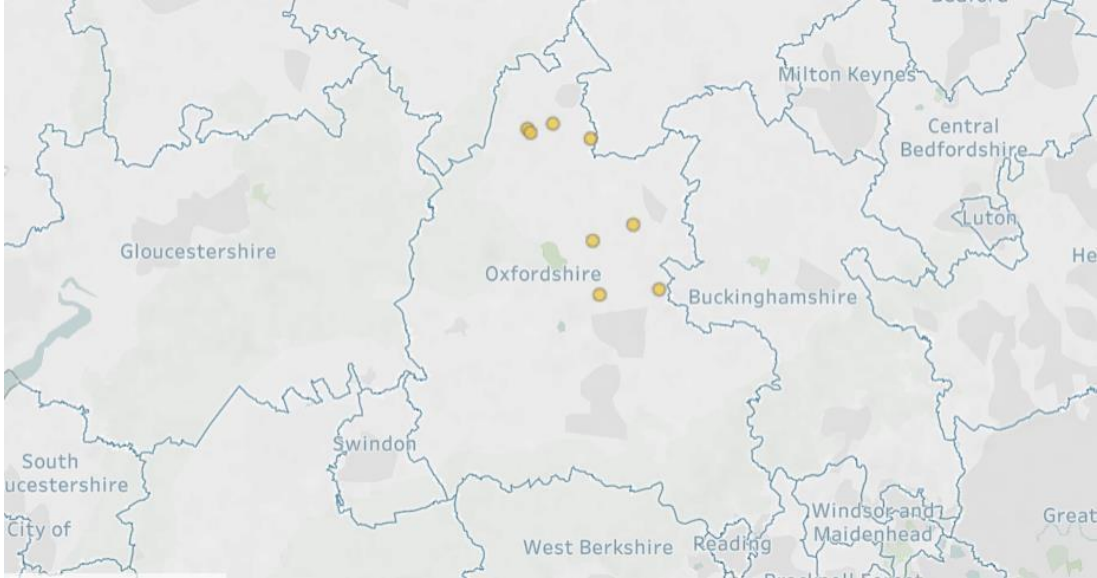
In addition to the mapping tool, we have guidance on 'Understanding Your Market' for the type of golfing experience that particular profiles are looking for, which enables facilities to adapt their offer to cater for a range of different needs.

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.