Central Bedfordshire Golf Study

Final Report

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ANOG	Assessing Needs and Opportunities Guide
EG	England Golf
NGB	National Governing Body
GDRs	Golf Driving Ranges
APS	Active People Survey
MS	Market Segmentation
CSP	County Sports Partnership

Introduction and Context

- In November 2015, Central Bedfordshire Council commissioned naa to produce a Golf Study for Central Bedfordshire. The strategy provides an evidence base for golf development across the district.

- The study has been developed using the up-to-date Sport England Assessing Needs and Opportunities Guide (ANOG) methodology and provides the council and its partners with a robust evidence base and set of strategic priorities to direct future sports planning policy and funding.

- In terms of drivers for the study there are some clear strategic themes in evidence to develop the game of golf; namely clubs/courses need to make joining easy, to allow flexibility and make facilities welcoming and friendly. They need to be flexible and less formal, shorter, more family, gender and junior friendly in order for the game and in turn individual clubs to flourish. The strategic analysis provides an insight into the type of clubs required and it is therefore important in looking at future needs across Central Bedfordshire to consider the supply in a far broader context than numbers but to look at the role and function of facilities. England Golf (EG) the National Governing Body (NGB) perceive a lack of practice facilities and starter courses across the area. EG have endorsed the final assessment and strategy.

Supply Summary

- **Quantity** – there is a very good and varied supply of golf facilities (standard courses, 'starter courses' and GDRs) in Central Beds if benchmarked against other areas locally, regionally and nationally, with the exception of a small par 3 course for beginners. In the wider 20/30-minute catchment from the middle of Central Beds, relative provision is also above average across the whole range of facilities. Central Beds residents can access golf facilities of all types whether in the district or neighbouring areas, for the whole range of golf, though there is no municipal/public standard course in the district or a small par 3 starter facility as elsewhere.

- **Quality** – the quality of golf facilities is not considered an issue in the context of this study – by the nature of their provision and ownership, all facilities are considered to be in a good condition and fit for their various purposes. This is confirmed by the NGB.

- **Accessibility** – there are 19 golf facilities at 16 sites in Central Beds, and a further 23 sites in the wider catchment, and all residents with a car can access a choice of facilities, whether they be members courses, commercial/LA pay and play. However, there are no 'municipal' full length courses available for pay and play within 20 minutes.

- **Availability** – there are vacancies for members advertised at most clubs in the area, and joining fees are currently not widespread. Waiting lists at clubs are few, and most clubs have spare membership slots. Detailed information on the usage of primarily pay and play courses is not generally forthcoming, but some courses have spare capacity of 25% and above. There is certainly no evidence that courses are accommodating 80,000 rounds a year that they used to achieve in the 1990s when course numbers were fewer. The overall conclusion is that there is significant spare capacity at most facilities in Central Beds and the wider area.

- There may well therefore in principle be a niche in the district itself for one or a small number of relatively informal, starter and training facilities (par 3 or longer) available to all at a reasonable cost, with a full range of playing, teaching and social opportunities. This is generally in accord with the NGB views

Demand Summary

- **Current levels of participation** - participation in golf in Central Beds, extrapolated from APS data suggests that there are about 7500 regular golfers in the area, a higher proportion than the national average rate. This is compatible with the MS profile, though the latter data does confirm that the area is characterised by a high proportion of people within golf playing segments.

- **Recent trends in participation** – despite the higher participation in Central Beds, APS data confirms that participation has dropped slightly in the last 9 years, in accordance with national and regional trends and conventional wisdom from NGBs and other commentators.

- **Latent and future demand** – MS data suggests that there is significant potential latent demand from people in golf-playing segments who would like to take up the sport, in the order of 45%. This is not considered reasonable. Future demand from population increases could increase by 6-12% over the next ten years. This may well be mitigated by the ageing of the population, although it is acknowledges that golf is a popular sport among older people. It is reasonable to assume therefore that there will be an increase in participation in the future from population increase and latent demand.

- **NGB targets from strategy** – EG has a target of a 7% increase in participation over the next three years of its strategy, and although this may well be ambitious, it may have particular implications for the type of course required in the area, as additional participants will be mainly new players needing to learn and develop their skills.

- Overall it is therefore suggested therefore that demand for golf in Central Beds, although it may well have fallen in the last 9 years, is still higher than the average, and that with future and latent demand increasing, and EG actively promoting additional participation, particularly among new players, demand may increase in the area for the types of course suitable for beginners and high handicap players.

Supply and Demand Summary

- Overall the supply and demand analysis suggests there is a good supply of golf courses, particularly in terms of the traditional offering. The picture is less clear in terms of par 3, beginner and starter courses.
- Despite national trends there are good levels of demand across the area, and allied to population increases there is likely to be some growth in demand across the area and probably some justification for new small learner facilities (starter courses or par 3) in the future.
- There may well therefore in principle be a niche in the district itself for one or a small number of relatively informal, learning facilities available to all at a reasonable cost, with a full range of playing, teaching and social opportunities. This could incorporate new or developing alongside existing provision to support future sustainability.
- There are minor deficiencies in accessibility in the district, with particular gaps in starter provision in the east of the district, area around Biggleswade/Sandy, and the west, near Ampthill/Flitwick

- This is generally in accord with the NGB views, and the Regional Manager for England Golf considers that the quantity of venues is at an acceptable level for the current demand level overall

Conclusions

- **Current situation** — there is a balance between supply and demand in general. There is spare capacity at existing courses, and none is as busy as it was 10-20 years ago. Conversely there do not appear to be any courses that are struggling in Central Beds (there may be the odd one outside the district). There is a good supply of a range of courses; standard, club based, starter, GDRs. Starter clubs, with shorter courses, academy courses, practice facilities, flexible and low cost membership and beginner friendly culture, usually relatively recently provided since 1990 to meet the 'golf boom', and commercially operated include; Caddington, Chalgrave Manor, Mt Pleasant, Tilsworth (including GDR), Henlow. To these you can add the 9-hole extension at South Beds. There is a shortage in Central Beds at present of par 3 courses (as opposed to starter courses), however par 3 courses are very prevalent in the wider local area (and regionally and nationally).
- **Future demand** — if demand increases up to 2024 by say 1000 golfers, there may be justification for additional courses, as the spare capacity at present would not accommodate all this. But in line with NGB targets, any additional courses should be starter/beginners/par 3 courses to attract priority groups. This could increase further with any anticipated additional housing/population.
- **Type of courses/facilities required** — there is a particular shortfall, according to the needs and evidence of par 3 courses at present, but these are often no more than recreational facilities, and would be unlikely to be sustainable without additional facilities. Any future provision should therefore include par 3 courses (for which there is a shortfall) together with ancillary 9-hole starter courses to meet future need.
- **Potential locations** - include the built up areas around Biggleswade/Sandy in the east and Ampthill/Flitwick in the west as the areas with least good provision. Plugging these gaps would ensure good accessibility throughout the district. Whilst it is acknowledged that golfers tend to travel by car (e.g. need to carry clubs etc), new locations for courses specifically aimed at juniors/other current non-participants, should be close to built up areas in parts of the district not currently provided for.
- Extensions to existing facilities are preferable, but this does depend on location. If there is a proven need for a new type of golf venue in a locality then new build can be justifiable but it is becoming harder to justify new build facilities with conviction, given that many areas still have golf oversupply and sustainability of existing facilities is seen as key.
- Also, it makes sense to extend/convert existing golf venues as it will generally be cheaper and quicker than new build, plus there will be the benefits of economies of scale, and infrastructure already being in place (clubhouse, car parking etc).
- Whilst the key shortfall across Central Beds is for par 3 courses, the inclusion of a 9-hole starter course and maybe GDR, to meet additional need in the future, is a more sustainable development option.

Introduction

1.1 In November 2015, Central Bedfordshire Council commissioned naa to produce a Golf Study for Central Bedfordshire. The strategy provides an evidence base for golf development across the district.

1.2 A needs assessment and strategy using the Assessing Needs and Opportunities Guide (ANOG) framework was required to advise Central Bedfordshire Council about the future need for additional golf facilities in response to an increasing quantity of planning applications for golf related activities.

1.3 The study has therefore been developed using the up-to-date Sport England methodology and provides the council and its partners with a robust evidence base and set of strategic priorities to direct future sports planning policy and funding.

1.4 The needs assessment work has been produced in line with the National Planning Policy Guidance (NPPF), which requires that (Paragraph 73, page 18):

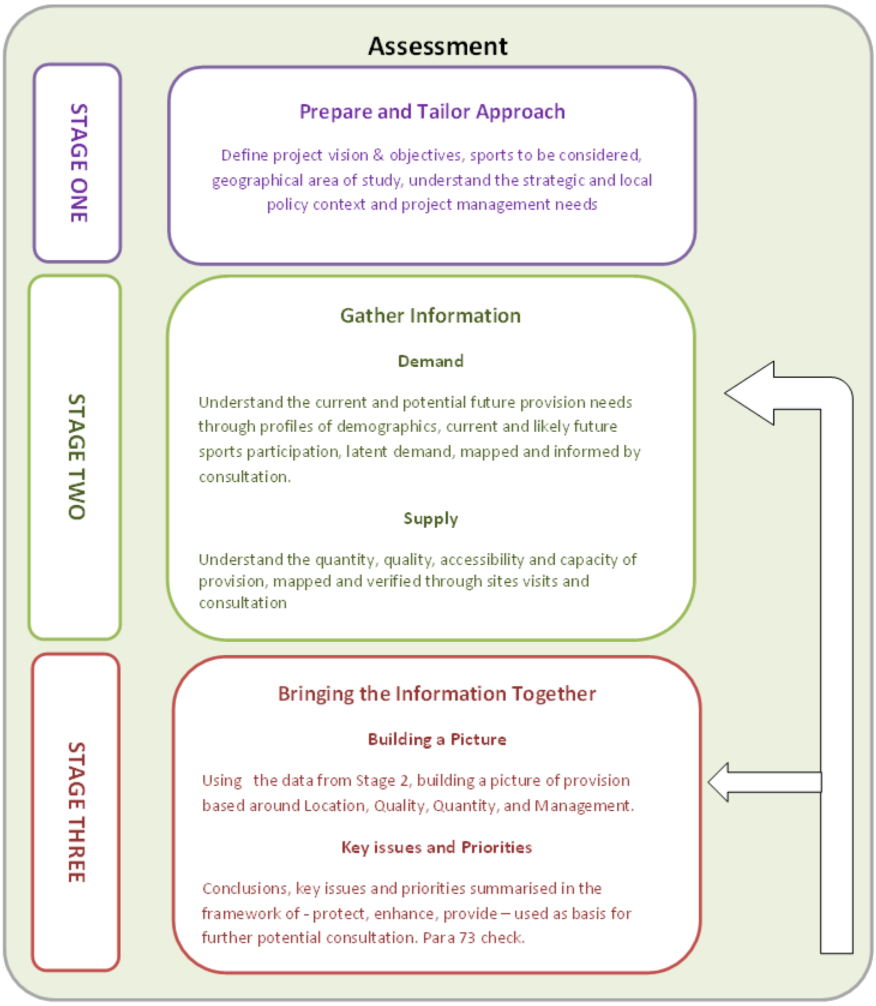
'………planning policies are based upon robust and up-to-date assessments of needs for open space, sport and recreation facilities and opportunities for new provision.

1.5 This assessment and subsequent strategy has therefore been produced in line with guidance by Sport England (Assessing Needs and Opportunities Guide for Indoor and Outdoor Sports Facilities; January 2014).

Assessing Needs and Opportunities Guide - ANOG

1.6 Assessing Needs and Opportunities Guide (ANOG) has been developed by Sport England and sets out an approach to undertaking needs assessment for sport and recreation facilities, in order to be compliant with the NPPF. The approach adopted to develop the Golf Study in Central Bedfordshire has utilized the process set out in the ANOG guide, as illustrated in the diagram overleaf. It is therefore planning policy compliant.

Figure 1.1: The ANOG Approach



1.7 The key principles of ANOG, the sports covered and the tasks that have been undertaken are summarized in the remainder of this section.

1.8 The first element of work seeks to tailor the approach to reflect the geographical and sporting nature of the local area. This was undertaken through discussions with the project steering group, building upon local knowledge and a clear understanding of the patterns of golf participation.

1.9 The scope of the strategy was established by the steering group as golf; all facilities across all sectors in Central Bedfordshire, but also recognising the local travel patterns, taking account of provision in neighbouring authorities.

1.10 The work has therefore considered the strategic context and golf participation profile across the district, looked at supply and demand of golf facilities across Central Bedfordshire in terms of *quantity,* quality, *access and availability*, built in consultation with the National Governing Body (NGB), England Golf and utilised Sport England planning tools to develop the needs and evidence base and subsequent strategy recommendations. EG have endorsed the final assessment and strategy.

1.11 The key drivers for the council in developing the study are set out below:

- Central Bedfordshire Council has received a number of planning application enquiries for new golf course facilities and extensions to existing facilities. These are all likely to involve the importation of significant amounts of inert waste and therefore will be considered by officers within the Minerals and Waste Team.

- The proposals are likely to be received at a time when there is a perceived general lack of need for such facilities in a market where some golf clubs are struggling.

- The Council does have an adopted Leisure Strategy which assesses the current supply and demand for a range of sporting facilities, however, this does not consider the provision of golf facilities as there are no municipal facilities and are all provided by the commercial sector within the local authority area.

- There is a lack of information of the importance of golf courses in terms of employment and their contribution to the local economy and tourism.

- Scope of the commission is therefore to undertake an assessment of the current supply, accessibility and demand for golfing facilities in Central Bedfordshire and prepare a report identifying the level of any additional facilities required and suggest options for the future approach to the provision of facilities.

- To provide an evidence base and framework for considering the golf related planning applications referred to above and a framework for others.

Strategic Context

1.12 ANOG states that all needs assessment work should ultimately seek to reflect and support the delivery of the relevant planning, sport and strategic policy priorities. The requirement for the needs assessment work to be compliant with the policy framework is therefore critically important. There needs to be a *'golden thread'* to demonstrate how facility priorities or development proposals connect and contribute to the relevant policy framework. Needs assessment and ultimately planning decisions should not therefore be viewed in isolation.

1.13 Golf is the fifth most popular participation sport in England with 1.15million people playing monthly and 750,000 playing weekly. England Golf is the national governing body for amateur golf in England and was formed in January 2012, following the merger of the English Golf Union (EGU) and the English Women's Golf Association (EWGA). There are approximately 675,000 members of England Golf within 1,900 affiliated clubs.

1.14 England Golf has a dedicated participation and club support department that supports golf clubs in their day to day operations, including areas such as advice around tax and legal issues, handicapping queries and environmental issues. The department also delivers an extensive development programme that aims to increase participation and membership in golf. Golf Mark and Get into golf are two examples of successful initiatives.

1.15 Like many other sports in England, golf faces some serious challenges. As a result of a combination of circumstances – a challenging economy, lifestyle changes and a shifting competitor and consumer landscape – the number of golf club members has been declining since 2004. Overall participation in golf has also been declining steadily since 2007.

1.16 These trends are significant and England Golf's strategy sets out ways to address these challenges.

RAISING OUR GAME – THE STRATEGIC PLAN FOR ENGLAND GOLF 2014-17

1.17 **Purpose** – improving lifelong involvement in golf.

1.18 **Vision** – England Golf at the heart of a network of partners, empowering and supporting a thriving community of golf facilities and golfers, and widely recognised as being a forward thinking and successful organisation.

Ambitions for 2017:

- Increasing the number of players playing 1x per week from 750,000 (2014) to 910,000 (2017) – England golf target as part of Whole Sport Plan
- Reverse the decline in club membership (from 2005) and stabilise at 2014 level (675,000)
- Strengthen talent development from club to national level
- Improve communication at all levels

Main issues:

- There has been a decline in golf club membership since 2004 (by 2014 total 675,000)
- There has been a steady decline since 2007 in golf participation due to lifestyle changes and competition from other sports
- 2.8m people currently play golf 1x per year, 1.15m 1x per month and 750,000 1x per week. SE APS data suggests that there are potentially 830,000 adults not playing who would like to
- The number of people playing golf independently and outside of club membership is about 2m.
- Active People survey – there are more people playing sport now than in 2005 but regular participation in golf has declined. Golf is the fifth biggest sport by participation, with 750k playing once a week and 1.15 once a month, but these figures have declined by 12% and 15% respectively.
- 27% of players stopping playing blame the lack of time. 11% of golfers would play more if there were more 9-hole courses.
- Latent demand from MS is for an additional 830,000 more players, but the issues preventing them are not knowing how to start (35%), the need for beginners only sessions (52%) and the availability of affordable lessons (61%)
- There is a correlation between club membership and regular participation. Current membership is 675k (2014) from 882k (2004). Only 15% of members are women. Junior membership has declined from 65k (2004) to 56k (2013)
- In the last decade the number of casual players has increased and now numbers 2m

- Financial sustainability – there are more than 1900 golf clubs, all facing challenges of lower membership, VAT, NNDR corporation tax, etc

- Economy – 27% of those playing less blame financial pressures, 36% of lapsed golfers have done so because of cost

- Image – golf has changed but the perception is still of elitism and poor customer relations and practices

- Political landscape – the NGBs are now working much more closely together and with others (e.g. Las) to promote golf

- Technology – booking systems, social media and live scoring are all impacting on the game

- Environmental/climate change – the impact of weather on course openings/closures and the implications for course management are all key issues

1.19 England Golf is focussed on sustainability and consolidating of the current clubs rather than expanding the market but also developing clubs to be more viable.

1.20 In October 2015 England Golf commissioned the development of a *Golf Facilities Strategy* to support the vision and ambitions set out above. Whilst still in progress (at the time of development of this study) the brief for the work identified an emerging categorization to enable golfers to differentiate between clubs, the brief suggested these might be along the lines of:

- Pitch and putt and 9-hole facilities, ideal for beginner and social golf

- Starter clubs, with shorter courses, academy courses, practice facilities, flexible and low cost membership and beginner friendly culture

- Improver clubs with strong member sections, active competition and well kept courses

- Traditional and more established clubs with excellent courses, traditional cultures, often suited to more experienced golfers

1.21 Within the market it is therefore important to consider the distinct roles that clubs play, it is not a case of *'one size fits all'.* In any balanced market there will be a need for starter clubs to contrast with improver and more traditional courses.

GROWING GOLF IN THE UK – SYNGENTA

1.22 Conducted in May 2013 by GfK, the fourth largest market research company in the world, this survey questioned more than 3,500 UK residents about golf. What made this survey different to previous golf market research studies was that it interviewed more than 2,000 non-golfers and lapsed players, as well as current golfers. A number of important themes emerged from the results. These offer golf clubs and courses opportunities and potential solutions to retain existing customers and attract new players, as follows:

- **Friendliness** – golfers require some level of customer care as with other leisure facilities

- **Flexibility** – 50% of responders felt intimidated by the rules and conventions, more flexibility is needed in membership, dress code, etc.

- **Female participation** – women prefer to play with friends and family (67%), and this is linked to children's participation. Need schemes that encourage more juniors and females.

- **Friends and family** – golf development needs family engagement and to encourage family memberships. Family responsibilities lead to golfers leaving the sport.

- **Course conditions** – 80% of golfers demand the best conditions, such as level greens, no long rough, compatibility with the environment

- **Getting into golf** – half of potential new golfers are in 15-39 age group, 1/3 do not know how to start and 61% would play if they could access cheap lessons. Clubs/courses need to make joining easy, to allow playing without a long-term commitment and make facilities welcoming and friendly, and allow participants to see a way to get involved.

Ashley Rump, Regional Manager, England Golf

1.23 The NGB are key to the development of golf in England. Alongside the strategic priorities set out, the views of the NGB are set out below.

1.24 Through the network of Regional Managers and County Development Officers (Bedfordshire has one County Development Officer), clubs are supported through facility development on a club by club basis. This process also involves the County Sports partnership (Team Beds&Luton), as well as Sport England.

1.25 Bedfordshire County Golf Union collects the membership numbers for Bedfordshire, and they work on a real time collection process. Meaning that they collect the numbers from the clubs when each member renews. They update their annual number in April of each year, so this year's figures are currently unknown. But membership of golf clubs has been falling between 2% and 4% per year across all categories.

1.26 There are a wide range of golfing facilities available, which range from 'beginner venues' through to 'elite venues'. The quantity of venues is at an acceptable level for the current demand level.

1.27 The golf clubs are generally located in rural areas or on the outskirts of urban areas. They are generally only accessible by car and not on public transport routes.

1.28 Existing facilities are in general 'fit for purpose' regarding club houses and course. In contrast however practice facilities such as driving ranges and short game areas are generally either not 'fit for purpose' or non-existent

1.29 Facilities are generally available when needed, but are reliant on weather conditions and daylight hours.

1.30 Price is in certain cases a barrier to participation in golf, as is geographical access and lack of practice/introductory facilities e.g. floodlit driving ranges or short courses.

1.31 The detailed NGB response is set out in the appendix.

Summary

1.32 There are therefore some clear strategic themes in evidence to develop the game of golf; namely clubs/courses need to make joining easy, to allow flexibility and make facilities welcoming and friendly. They need to be flexible and less formal, shorter, more family, gender and junior friendly in order for the game and in turn individual clubs to flourish.

1.33 The strategic analysis provides an insight into the type of clubs required and it is therefore important in looking at future needs across Central Bedfordshire to consider the supply in a far broader context than numbers but to look at the role and function of facilities. The NGB perceive a lack of practice facilities and starter courses across the area.

Structure

1.34 The remainder of the strategy is set out as follows:

- Section 2: Supply analysis
- Section 3: Demand analysis
- Section 4: Key issues and options
- Section 5: Conclusions and recommendations

Introduction

2.1 The analysis of the supply of golf courses is based on Active Places Power data, supplemented by website and other checks, plus discussions with the client group and local knowledge. It is accepted that that the APP database may exclude some facilities, but through the audit no further courses have been identified in the immediate area.

QUANTITY

2.2 The following golf facilities are identified in Central Bedfordshire in APP. The description of access type is considered inconsistent (in line with all golf data in APP), as some courses are described as 'pay and play' when they are clearly members' courses where visitors are permitted/encouraged on payment of a green fee. A more accurate description of accessibility to courses is set out later, based on the audit work and additional information on local courses, but the APP categorization has to be used if a comparison with provision in other wider areas is to be undertaken (see overleaf).

Table 2.1: Golf supply in Central Bedfordshire

Site Name	Facility Sub Type	Holes/ bays	Access	Ownership/ management	Year Built	Ward Name
ASPLEY GUISE AND WOBURN SANDS GOLF CLUB	Standard	18	Pay and Play	Sports Club	1914	Aspley and Woburn
BEADLOW MANOR GOLF AND COUNTRY CLUB (2)	Standard	2 x 18	Pay and Play	Commercial	1980	Ampthill
CADDINGTON GOLF CLUB[1]	Standard	18	Pay and Play	Commercial	1985	Caddington
CHALGRAVE MANOR GOLF CLUB	Standard	18	Pay and Play	Commercial	1994	Toddington
DUNSTABLE DOWNS GOLF CLUB	Standard	18	Pay and Play	Sports Club	1907	Caddington
HENLOW GOLF CLUB	Standard	9	Pay and Play	Commercial	1985	Arlesey
JOHN O'GAUNT GOLF CLUB (2)	Standard	2 x18	Sports Club / Community Association	Sports Club	1948	Potton
LEIGHTON BUZZARD GOLF CLUB	Standard	18	Sports Club / Community Association	Sports Club	1925	Heath and Reach
LUTON HOO HOTEL - GOLF & SPA	Standard	18	Registered Membership use	Commercial	2007	Caddington
MOUNT PLEASANT GOLF CLUB	Standard	9	Pay and Play	Commercial	1992	Arlesey
SOUTH BEDS GOLF CLUB (2)	Standard	18/9	Pay and Play	Sports Club	1975	Whipsnade
THE MILLBROOK GOLF CLUB	Standard	18	Pay and Play	Commercial	1980	Cranfield and Marston Moretaine
TILSWORTH GOLF CENTRE	Standard	18	Pay and Play	Commercial	1986	Heath and Reach
Total		**262**				
AMERICAN GOLF DRIVING RANGE	Driving Range	18	Pay and Play	Commercial	1994	Northill
BEADLOW MANOR GOLF AND COUNTRY CLUB	Driving Range	35	Pay and Play	Commercial	1980	Ampthill
TILSWORTH GOLF CENTRE	Driving Range	30	Pay and Play	Commercial	1986	Heath and Reach
Total		**83**				

2.3 There are no par 3 courses in Central Beds.

2.4 APP describes most of these facilities as 'pay and play' facilities, and this is certainly applicable to the some of the shorter courses and the Golf Driving Ranges (GDRs). As suggested above, it has been verified that most/all of the standard golf courses also allow some casual play on payment of a visitors' green fee. However, some courses are still run as members' clubs and in reality fewer clubs/courses than suggested in the table are fully pay and play - i.e. do offer facilities that are always available to full community access at all times on demand.

2.5 A fuller description of the local facilities within Central Beds is set out below, as a means of identifying the roles that all facilities play in meeting demand in the area for golf:

- **Aspley Guise and Woburn Sands GC** is a well established (1914) traditional private members' course, with 18 holes measuring 5558m/6100 yards. Adult membership

[1] A new 9-hole Academy course is set to open to the public at Caddington in September 2016

fees are £1214 pa (7 day) and current membership stands nearly at the limited capacity of at 590, with 90 social members. There has been no joining fee for at least five years. The club's website is still advertising membership and it can be confirmed that there is some spare capacity. There is no year one joining fee. Visitors are accommodated at a cost of £40-52 on weekdays and £56-72 at weekends, and societies are welcome

- **Beadlow Manor Golf and Country Club** is a commercial/proprietary golf facility with 2 18-hole courses and a 35 bay floodlit GDR, originally established in 1980, and forming part of a wider leisure and hotel complex. The two courses measure 6052m/6650 yards and 5552m/6100 yards. Membership is available for adults at £799 pa (7 day). Green fees are available for £915 on weekdays and £10-17.50 at weekends for 9/18 holes

- **Caddington GC** was established in 1985, but is currently closed for extension and redevelopment. The existing 18-hole course measures 5693m/6250 yards, but the new facility will comprise a remodelled 18-hole course and a 9 hole academy course with golf holes ranging from an 80 yard Par 3 to a 305yard Par 4, permitting a real but short golf course, particularly suitable for beginners and starter classes. There is no information at present on membership fees and green fees, but the course is a commercial concern, and intended for both play options

- **Chalgrave Manor GC** was opened in 1994 and comprises an 18-hole course measuring 5857m/6400 yards. It is a commercial facility with membership and pay and play options. Full membership costs £545 pa, but there are various membership options, including associate membership. There is no joining fee. Green fees are charged at £17/34/49 for 9/18 holes/day on weekdays and £20/42 at weekends, though there are reductions for associate members

- **Dunstable Downs GC** is a long established (1906) traditional private members club with 18 holes and measuring 6322 yards. Full membership is available at £1055 pa, and there is currently an entry fee of £600 payable up front or over 5 years. There are currently some offers for reduced fees for under 40s. Green fees are available for £30 per round in the winter, or £40- per round/£60 per day in summer

- **Henlow GC** is located on the RAF base at Henlow and comprises a short (5180m/5700 yards for 18 holes) 9-hole course with 10 greens. It is a club based facility, but membership is very low at about 100, and there is considered to be ample spare capacity. Casual use is available for all players by green fees, though usage is to some extent constrained by the course's location on an MOD site. Green fees cost £10 per day weekdays and £15 weekends, and societies are welcome

- **John O'Gaunt GC** is an established (1948) private members' facility with 2 18-hole courses measuring 5948m/6500 yards and 5295m/5800 yards. Full membership costs £1090 pa and there is currently a £1630 entrance fee. The membership limit is set at about 1200 playing members, and there are some vacancies at present. Green fees are available at a cost of £55/65 per round/day during the week and £50/70 at weekends

- **Leighton Buzzard GC** was established in 1925 and is a private members club course with 18 holes measuring 5398m/5900 yards. Full membership costs £927 pa and there is a £1150 joining fee. Associate membership is also available for £1066 with no joining fee, and similar privileges. Membership is full at present. Green fees are charged at £38 weekdays, and play at weekends is only available with a member. Societies are welcome

- **Luton Hoo Hotel Golf and Spa** was established in its current form in 2007, and is a commercial members' course which is also widely available for pay and play, and part of a wider leisure venue. It comprises an 18-hole course measuring 6498m/7100 yards. Full membership is available for £1350 pa, and there is no joining fee. Membership is capped at 200, and although there is spare capacity for a further 50 members, much of the course's use is devoted to corporate and casual play. Green fees range from £28-32.50 in midweek and £32.50-42.50 at weekends, and there are various offers including for residential guests

- **Mount Pleasant GC** was established in 1992 as a 9-hole course measuring 6200 yards (18 holes). It is a commercial members' and play and play course. Usage is currently shared equally between members and casual players. There is a range of memberships from £795 full membership (gold) and no green fees, to £175 and reduced fees (bronze). There are currently 280 members, and there is spare capacity for a further 220. Green fees are charged at £11-19.50 weekdays for 9/18 holes and £14-24.50 at weekends, with bronze membership fees at about half these. Currently the course accommodates about 40,000 rounds per year. *Planning permission has recently been granted which will enlarge the course to 18 holes, which is required to help the course compete with 18 hole courses nearby*

- **South Beds GC** was established originally in 1892, and extended in 1975, and comprises one 18-hole and one 9-hole course measuring 6767m/7400 yards and 2157m/2400 yards respectively. Memberships are available for both courses and there are pay and play options on both. Full membership of the club costs £920 with no joining fee, while the short course membership fee only is £350, with £50 for juniors. Membership is about 800, and the club has said that there are some vacancies (though number not specified). Green fees at the main course cost £18-45 midweek and £22-65 at weekends – the shorter course costs £7.50-13 per round

- **The Millbrook GC** was established in 1977/80 and is owned by its members, with opportunities for pay and play. It incorporates an 18-hole course of 5950m/6750 yards. Annual full fees are £935. Green fees are £15-35 summer and £12-20 winter per round midweek and £20-40 and £15-30 in summer

- **Tilsworth Golf and Conference Centre** was first established in 1975 as a GDR and an 18-hole course added in 1986. Course length is 4851m/5300 yards, and the GDR has 30 bays. It is privately owned and operates as a learn to play centre. Membership is available with a range of options – family, individual (£717 or £184 with reduced green fees). There are some vacancies – membership is unknown but there are 154 members with handicaps. Green fees are £14-25 all week for 9/18 holes, although there are currently autumn offers. Juniors pay £7-8

- **American GDR** is the only free standing GDR in Central Beds and operates on a pay and play basis.

2.6 There are reciprocal arrangements for members of a number of local golf clubs with other local courses, either free of charge or for a reduced green fee.

Potential future golf facilities

2.7 Central Beds Council has supplied information on current proposals for additional golf facilities (which form the main reason for this strategy), and if implemented, these would increase the supply of golf facilities in the district.

Table 2.2: Current golf development proposals

SITE LOCATION	FACILITY TYPE/ DESCRIPTION OF DEVELOPMENT
1. Caldecote Farm, Caldecote Green, Upper Caldecote, Biggleswade SG18 9BX	Extraction of sand & gravel, importation of inert fill to construct the landform for a 9-hole golf course and the construction of a 9-hole golf course, clubhouse & ancillary facilities.
2. Caddington Golf Course, Chaul End Road, Caddington LU1 4AX	6 new holes & remodelling of existing course to provide enhanced 18-hole course & new 9-hole academy golf course.
3. Mount Pleasant Golf Course, Station Road, Lower Stondon, Henlow SG16 6JL	9-hole extension to existing golf course through importation of inert waste.
5. Beadlow Manor Golf Course, Ampthill Road, Clophill SG17 5PH	Extension to existing golf driving range utilising imported inert waste.

Categorisation of courses

2.8 The existing courses/facilities in Central Beds can be categorised as follows, to highlight their main function and usage/availability:

Well established (old style) clubs where the main use is by members but with green fees available for visitors.

- Aspley Guise and Woburn Sands
- Dunstable Downs
- John O'Gaunt
- Leighton Buzzard
- South Beds (but with 9 hole starter course)

Proprietary/commercial courses (i.e. newer courses) where membership is available, but casual/pay and play access through payment of green fees are equally acceptable.

- Beadlow Manor (including GDR)
- Luton Hoo
- Millbrook

Public/municipal pay and play courses, originally provided by the LA and available usually on a casual basis, though season tickets/membership may also be available, particularly beneficial to local residents – there are none in Central Beds.

Starter clubs, with shorter courses, academy courses, practice facilities, flexible and low cost membership and beginner friendly culture, usually relatively recently provided since 1990 to meet the 'golf boom', and commercially operated.

- Caddington
- Chalgrave Manor
- Mt Pleasant
- Tilsworth (including GDR)
- Henlow

Pitch and putt/par 3 and 9-hole facilities, ideal for beginner and social golf, either free-standing or as part of a wider golf facility and usually commercially provided There are no par 3 courses in Central Beds.

Free standing Golf Driving Ranges, valuable for practice, coaching and teaching and for golfers without the time to play a full round, and supplementing GDRs at other golf facilities.

- American GDR

FACILITIES OUTSIDE CENTRAL BEDS

2.9 In addition to courses in Central Beds, there are a large number of other golf facilities outside the district, which are very likely to offer opportunities for Central Beds residents to play golf in its various forms. The table below includes all facilities within a 30 minute driving catchment of the middle of the district, for convenience – it should be noted that some residents on the edges of Central Beds will be much closer than 20/30 minutes drive to some of these facilities, and indeed those outside the district may well be the most local facility to some of these residents.

Table 2.3: Golf supply in the wider catchment

Site Name	Range (in mins)	Facility Sub Type	Holes	Access	Ownership/ management	Year Built	Local Authority
THE BEDFORD GOLF CLUB	10-15	Standard	18	Pay and Play	Other/ commercial	1999	Bedford
BEDFORD AND COUNTY GOLF CLUB	15-20	Standard	18	Pay and Play	Sports Club	1912	Bedford
BEDFORDSHIRE GOLF CLUB (2)	15-20	Standard	18/9	Pay and Play	Commercial	2000	Bedford
CHESFIELD DOWNS GOLF AND COUNTRY CLUB	20-25	Standard	18	Pay and Play	Commercial	1991	North Hertfordshire
LETCHWORTH GOLF CLUB	20-25	Standard	18	Pay and Play	Sports Club	1911	North Hertfordshire
MOWSBURY GOLF & SQUASH COMPLEX	20-25	Standard	18	Pay and Play	Local Authority/Trust	1975	Bedford
PAVENHAM PARK GOLF CLUB	20-25	Standard	18	Pay and Play	Commercial	1994	Bedford
STOCKWOOD PARK GOLF CENTRE	20-25	Standard	18	Pay and Play	Local Authority/Trust	1971	Luton
WAVENDON GOLF ACADEMY	20-25	Standard	18	Pay and Play	Commercial	1992	Milton Keynes
WOBURN GOLF CLUB (3)	20-25	Standard	3 x 18	Sports Club / Community Association	Commercial	1975	Milton Keynes
WYBOSTON LAKES GOLF COURSE	20-25	Standard	18	Pay and Play	Commercial	1982	Bedford
ABBEY HILL GOLF CENTRE	25-30	Standard	18	Pay and Play	Commercial	1970	Milton Keynes
ABBOTSLEY GOLF AND COUNTRY CLUB (2)	25-30	Standard	2 x 18	Pay and Play	Commercial/ sports club	1979	Huntingdonshire
COLMWORTH AND NORTH BEDFORDSHIRE GOLF CLUB	25-30	Standard	18	Pay and Play	Commercial	1991	Bedford
COLWORTH CLUB	25-30	Standard	9	Pay and Play	Industry (for employees)/ sports club	1985	Bedford
HARPENDEN GOLF CLUB	25-30	Standard	18	Pay and Play	Sports Club	1894	St Albans
KNEBWORTH GOLF CLUB	25-30	Standard	18	Pay and Play	Sports Club	1908	North Hertfordshire
REDBOURN GOLF CLUB	25-30	Standard	18	Pay and Play	Commercial	1971	St Albans

Site Name	Range (in mins)	Facility Sub Type	Holes	Access	Ownership/ management	Year Built	Local Authority
ST NEOTS GOLF CLUB	25-30	Standard	18	Pay and Play	Sports Club	1890	Huntingdonshire
THREE LOCKS GOLF CLUB	25-30	Standard	18	Pay and Play	Sports Club	1992	Aylesbury Vale
WINDMILL HILL GOLF CENTRE	25-30	Standard	18	Pay and Play	Local Authority/in house	1971	Milton Keynes
Total			**432**				
BEDFORDSHIRE GOLF CLUB	15-20	Driving Range	24	Pay and Play	Commercial	2000	Bedford
CHESFIELD DOWNS GOLF AND COUNTRY CLUB	20-25	Driving Range	25	Pay and Play	Commercial	1991	North Hertfordshire
LETCHWORTH GOLF CLUB	20-25	Driving Range	35	Pay and Play	Sports Club	1970	North Hertfordshire
MOWSBURY GOLF & SQUASH COMPLEX	20-25	Driving Range	13	Pay and Play	Local Authority/Trust	1972	Bedford
STOCKWOOD PARK GOLF CENTRE	20-25	Driving Range	18	Pay and Play	Local Authority/Trust	1971	Luton
TEA GREEN GOLF	20-25	Driving Range	22	Pay and Play	Commercial	1990	North Hertfordshire
WAVENDON GOLF ACADEMY	20-25	Driving Range	36	Pay and Play	Commercial	1992	Milton Keynes
WOBURN GOLF CLUB	20-25	Driving Range	15	Sports Club / Community Association	Commercial	1990	Milton Keynes
WYBOSTON LAKES GOLF COURSE	20-25	Driving Range	20	Pay and Play	Commercial	1982	Bedford
ABBEY HILL GOLF CENTRE	25-30	Driving Range	21	Pay and Play	Commercial	1975	Milton Keynes
ABBOTSLEY GOLF AND COUNTRY CLUB (2)	25-30	Driving Range	20/30	Pay and Play	Commercial/sports club	1979	Huntingdonshire
REDBOURN GOLF CLUB	25-30	Driving Range	20	Pay and Play	Commercial	1995	St Albans
WINDMILL HILL GOLF CENTRE	25-30	Driving Range	23	Pay and Play	Local Authority/in house	1971	Milton Keynes
Total			**322**				
CHESFIELD DOWNS GOLF AND COUNTRY CLUB	20-25	Par 3	9	Pay and Play	Commercial	1991	North Hertfordshire
STOCKWOOD PARK GOLF CENTRE	20-25	Par 3	9	Pay and Play	Local Authority/Trust	2005	Luton
TEA GREEN GOLF	20-25	Par 3	9	Pay and Play	Commercial	1990	North Hertfordshire
THE LETCHWORTH PAR 3 FAMILY GOLF CENTRE	20-25	Par 3	9	Pay and Play	Commercial	1920	North Hertfordshire
WAVENDON GOLF ACADEMY	20-25	Par 3	9	Pay and Play	Commercial	1992	Milton Keynes
ABBEY HILL GOLF CENTRE	25-30	Par 3	9	Pay and Play	Commercial	1970	Milton Keynes
ABBOTSLEY GOLF AND COUNTRY CLUB	25-30	Par 3	9	Pay and Play	Commercial/ sports club	1979	Huntingdonshire
COLMWORTH AND NORTH BEDFORDSHIRE GOLF CLUB	25-30	Par 3	9	Pay and Play	Commercial	1991	Bedford
REDBOURN GOLF CLUB	25-30	Par 3	9	Pay and Play	Commercial	1971	St Albans
Total			**81**				

2.10 In terms of current usage, the clubs/courses elsewhere in the county/within 25 minutes were investigated to ascertain any spare capacity as follows, categorised as above:

Well established (old style) clubs where the main use is by members but with green fees available for visitors.

- Bedford & County GC – members club with 600 members and some spare capacity
- Bedfordshire GC – members club still accepting membership applications
- Letchworth GC – members course, with new academy opening in July 2016. Current membership about 860, capacity at present for an additional 60 members, so some small spare capacity. Academy course may accommodate additional 200 members.

Proprietary/commercial courses (i.e. newer courses) where membership is available, but casual/pay and play access through payment of green fees are equally acceptable.

- The Bedford GC – proprietary course with membership of about 550, limited spare capacity at certain times, but busy at weekend
- Chesfield Downs GC – proprietary members and pay and play course, as part of wider leisure facility. Membership about 1000+, current spare capacity of about 25% overall
- Colmworth and North Beds GC – proprietary members' course, with pay and play. No detailed information on membership levels, but no joining fee or waiting list so some assumed capacity
- Pavenham Park GC - proprietary course, with members and pay and play
- Wavendon GC – proprietary members and pay and play course, no information on membership, but no waiting list or joining fee, so assumed spare capacity
- Woburn GC – commercial/proprietary course, mainly members, but with high daily rates for visitors
- Wyboston Lakes GC – commercial/proprietary club, mainly pay and play with membership option to join club, significant spare capacity.

Public/municipal pay and play courses

- Mowsbury GC – LA pay and play, with membership available. About 50/50 members/casual play. Some spare capacity
- Stockwood Park GC – LA municipal course, with membership and pay and play. Significant new memberships available, course overall probably has 25% spare capacity.

Starter clubs, with shorter courses, academy courses, practice facilities, flexible and low cost membership and beginner friendly culture.

- Colworth Club GC – members club (previously provided by major employer), limited membership of 250, spare capacity for about 100 additional members, no waiting list and no joining fee.

Pitch and putt/par 3 and 9-hole facilities, ideal for beginner and social golf

- Tea Green GC - a par 3 course with one longer hole of 250 yards, the course is run as a pay and play course, but membership is available and allows certain privileges. Limited current membership and probably significant spare capacity, but course under threat from potential housing development

- Letchworth Family Par 3 C - provides a small venue for experienced golfers or novices, with an accent on family or friends. The course has 9 holes ranging in length from 56 to 108 yards. Annual membership is available for those wishing to play on a regular basis, and there is significant spare capacity for additional players – the club currently has only 20 members.

Free –standing GDRs – there are none in the wider area, all GDRs are attached to other golf facilities.

2.11 Facilities within 25-30 minutes' drive, and outside the county, have not been assessed in detail.

CLOSED COURSES

2.12 Two courses in the wider area are understood to have closed recently:

- Ouse Valley GC, which operated from the previous site of Bedfordshire GC in Biddenham, and took over the management of the course in the mid/late 1990s as an interim measure pending construction on site for housing/roads, which has now begun

- Mentmore GC in Aylesbury Vale, which closed for financial reasons, but is understood to have been reopened with new owners.

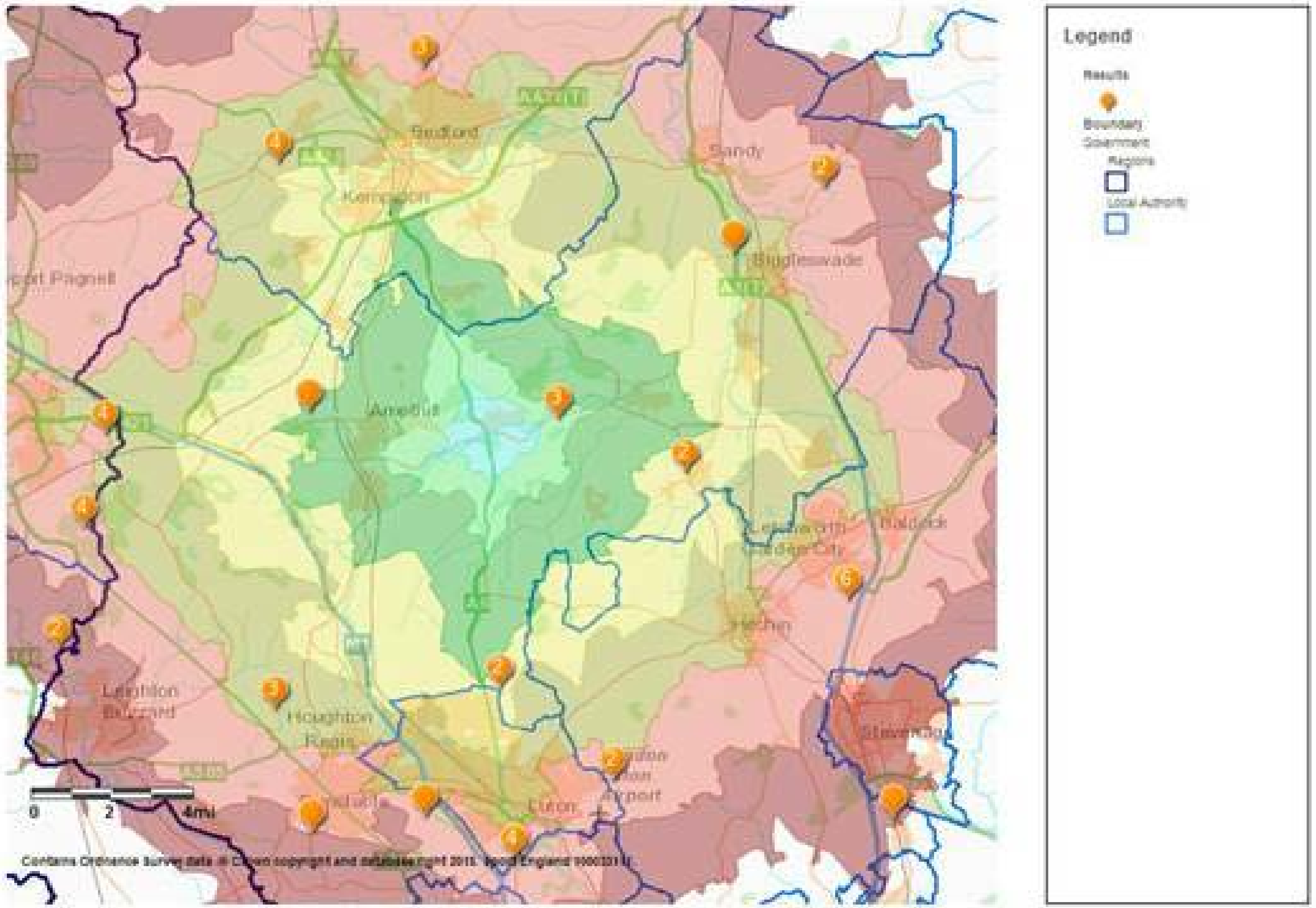
2.13 In summary, the supply of golf facilities in the wider area within a 30-minute drive, including Central Beds, is as follows:

Table 2.4: Overview of supply

Catchment	Standard Courses	Holes	GDRs	Bays	Par 3 courses	Holes
Central Beds	**16**	**262**	**3**	**83**	**0**	**0**
Other facilities 10-15 minutes	1	18	0	0	0	0
Other facilities 15-20 minutes	3	45	1	24	0	0
Other facilities 20-25 minutes	10	180	8	184	5	45
Other facilities 25-30	11	189	5	114	4	36

Catchment	Standard Courses	Holes	GDRs	Bays	Par 3 courses	Holes
minutes						
Total 0-30 minutes	**41**	**694**	**17**	**405**	**9**	**81**

Map 2.1: Location of golf facilities in and around Central Bedfordshire



Sport England assumes no responsibility for the completeness, accuracy and currency of the information contained on this map/report. This information is taken from the Active Places Power website and its terms and conditions apply. 30/12/2015 15:22

OVERVIEW OF LOCAL PROVISION

2.14 **Central Beds** is well provided with 16 standard courses in total (13 sites), and three driving ranges. There is a range of different types of standard golf course. There are 5 well-established (from 1892 to 1948) private clubs with a main emphasis on catering for the needs of their members, but mostly with availability for visitors on payment of green fees. These range from £18-70 per round/day and therefore are aimed at different levels of users. Annual membership fees vary from £920 – 1214 pa and 3/5 clubs still charge an entrance fee, though this is less prevalent than in former years where demand exceeded supply. Most standard courses in the area are 18 holes, varying in length from 4850 to 6767m, on varied topography as far as is possible in Bedfordshire, and one of these private members' clubs also has a shorter 9-hole course aimed at juniors and relative beginners on a green fee basis. One course (Millbrook) is newer, operated in a similar way for the benefit of its members, is longer but offers cheaper green fees for visitors.

2.15 Three courses are attached to country clubs or hotels where the main business is not necessarily golf, which forms part of an overall package of offers. Pay and play and membership options are available at both.

2.16 Four courses have been provided in the last 20 years, primarily as commercial concerns, with membership options but high pay and play usage, and generally more aimed at relative newcomers to the sport. One other course is a short 9-hole course on an RAF base available to members and casual players. These often fulfill the need for a facility for the less formal, lapsed, family oriented golfer at a value for money (cheap) cost. The additional 9 holes at Caddington, which is due to open in September 2016 would increase these types of facility.

2.17 There are three GDRs across the district serving different parts of Central Beds, two at venues with other golf facilities and one free-standing.

2.18 There are no outright pay and play facilities, and no municipal course (i.e. run by the local authority) in Central Beds – the nearest are Mowsbury Park in Bedford, Stockwood Park in Luton and Windmill Hill/Abbey Hill (MK).

2.19 With the new Caddington facility there are therefore five courses that might be considered starter courses, including a (shorter) main course, academy and practice facilities offering pay and play opportunities, or low cost membership, together with a shorter 9-hole course at South Beds offering similar amenities.

2.20 There are no short/par 3 courses, which are aimed at absolute beginners to learn skills, and the mainly recreational or family oriented golfer. There may well therefore in principle be a niche in the local area for a short, relatively informal, learning facility available to all at a reasonable cost, with a full range of playing, teaching and social opportunities.

2.21 **Wider area** – in the area within a 10-20 minute drive from the middle of the district (apart from the courses in Central Beds above), there are 4 standard golf courses (on 3 sites), comprising 3 courses on club based sites and 1 on a proprietary/commercial site, totalling 63 holes. In addition, there is one GDR with 24 bays.

2.22 In the area between 20-30 minutes drive, there are 21 additional standard courses, on 18 sites), comprising 5 clubs, 4 municipal/public, 8 proprietary and 1 starter course, with 369 holes. In addition, there are 13 GDRs on 12 sites (298 bays) and 9 par 3 courses (81 holes). This wider area has a more varied provision of golf facilities than Central Beds or the smaller catchment, with a good range of GDRs and par 3 courses suitable for beginners, as well as a wide choice of standard 9 and 18 hole courses, with varied accessibility.

RELATIVE SUPPLY

2.23 Relative provision of golf facilities in the local and wider area, regionally and nationally is set out below (these figures are produced manually and they include all operational courses included in the APP database). It should be emphasised that this assessment only comprises existing supply; relative provision of courses is a useful indicator of how well an area is doing for facilities, but is only a benchmark against which to judge supply. This section makes no comments at this stage on the local (or wider) demand for golf, which is dealt with below.

All standard courses

2.24 This first assessment overleaf is given as context to allow comparison of the main golf courses in the area (the figures include all facilities currently operational). The catchments refer to travel time by car from the centre of Central Beds.

Table 2.5: Overall comparison of provision

	Courses	Holes	Population 2014	Holes per 1000 population
Central Beds	16	262	265,220	0.99
Luton	1	18	213,456	0.08
Bedford	9	144	163,724	0.88
Beds CSP	26	424	643,220	0.66
Within 20 minute drive	13	199	376,560	0.53
Within 30 minute drive	41	694	969,300	0.72
East Region	282	4303	6,039,771	0.71
England	2080	32552	54,472,081	0.60

2.25 Local relative provision for all standard courses in Central Beds is very high compared with the regional and national average, slightly higher than neighbouring Bedford, and much better than Luton where there is only one course. The county average is better than the national though below the East region, and is affected by high provision in Central Beds and Bedford but low in Luton. Provision for standard courses is higher than the national and regional averages for a catchment within 30 minutes of the middle of Central Beds, though slightly lower for a smaller catchment. Provision at the edge of a 30-minute catchment is normally outside a reasonable travel time to a course for most people, but this catchment is measured from the middle of the district. There are a large number of courses 'over the border' in neighbouring LA areas, but geographically close to many Central Beds residents. Standard golf course provision in Central Beds is therefore very good.

Pay and play standard courses

2.26 Note this is the definition included in APP (see notes above).

Table 2.6: Comparison of pay and play standard courses

	Courses	Holes	Population 2014	Holes per 1000 population
Central Beds	11	172	265,220	0.65
Luton	1	18	213,456	0.08
Bedford	9	144	163,724	0.88
Beds CSP	21	334	643,220	0.52
Within 20 minute drive	12	181	376,560	0.48
Within 30 minute drive	33	550	969,300	0.57
East Region	240	3619	6,039,771	0.60
England	1753	27473	54,472,081	0.50

2.27 Pay and play provision (but subject to the anomalies of the definition in APP) broadly follows the overall situation, and the Central Beds ratio of courses is higher than the average, while the wider catchments have about average levels of provision.

Members' club standard courses

2.28 See proviso above.

Table 2.7: Comparison of members' club standard courses

	Courses	Holes	Population 2014	Holes per 1000 population
Central Beds	5	90	265,220	0.34
Luton	0	0	213,456	0
Bedford	0	0	163,724	0
Beds CSP	5	90	643,220	0.14
Within 20 minute drive	1	18	376,560	0.05
Within 30 minute drive	8	144	969,300	0.15
East Region	42	684	6,039,771	0.11
England	327	5079	54,472,081	0.09

2.29 Similarly, members' club provision (again subject to the definitions) is higher than average in Central Beds and about average for the wider catchments.

Starter courses

Table 2.8: Comparison of starter courses

	Courses	Holes	Population 2014	Holes per 1000 population
Central Beds	6	82	265,220	0.31
Luton	0	0	213,456	0
Bedford	2	18	163,724	0.11
Beds CSP	8	100	643,220	0.16
Within 20 minute drive	5	54	376,560	0.14
Within 30 minute drive	9	117	969,300	0.12
East Region	na	na	6,039,771	na
England	na	na	54,472,081	na

2.30 It is not possible from the APP information available to do an assessment of the relative supply of 'starter' courses (see definition above) in Central Beds compared with larger areas because of the lack of information and knowledge of the precise use and nature of courses in the region and nationally (APP does not define starter courses as such, and it is not possible to find a proxy e.g. length status, etc. from the information available). A manual assessment has been undertaken comparing Central Beds with the immediate area alone, but this should be treated with some caution. Relative provision of starter courses in Central Beds is higher than each of the surrounding areas, but this is mainly because most of the 'starter' courses in the area are located in Central Beds itself.

Par 3 courses

Table 2.9: Comparison of par 3 courses

	Courses	Holes	Population 2014	Holes per 1000 population
Central Beds	0	0	265,220	0
Luton	1	9	213,456	0.04
Bedford	1	9	163,724	0.05
Beds CSP	2	18	643,220	0.03
Within 20 minute drive	0	0	376,560	0
Within 30 minute drive	9	81	969,300	0.08
East Region	44	417	6,039,771	0.07
England	250	2547	54,472,081	0.05

2.31 There are no par 3 (usually 9 hole) courses in Central Beds, although the ratio of these smaller learner facilities within the 30 minute catchment is above average.

GDRs

Table 2.10: Comparison of GDRs

	Ranges	Bays	Population 2014	Holes per 1000 population
Central Beds	3	83	265,220	0.31
Luton	1	18	213,456	0.08
Bedford	3	57	163,724	0.35
Beds CSP	7	158	643,220	0.25
Within 20 minute drive	3	77	376,560	0.20
Within 30 minute drive	17	405	969,300	0.42
East Region	102	1977	6,039,771	0.33
England	601	11829	54,472,081	0.22

2.32 The provision of GDRs in Central Beds is at about the regional average and above the national, while the wider 30 minute catchment is well above average.

OVERVIEW OF QUANTITY

2.33 As suggested above, relative supply is only a useful indicator in terms of benchmarking local provision alongside other similar areas. Standard golf course provision in Central Beds is very high compared with the average in the region and England, though this is true also of the whole of Bedfordshire. This also means that standard course provision in the wider area around Central Beds (within a 20/30 minute catchment of the middle of the district) is relatively good. Residents of Central Beds can therefore access courses both within and outside the district. This situation is reflected if access to courses is considered – this is based on the definition of courses used above and not the APP definition, which must be treated with caution.

2.34 There is a good supply of 'starter courses' in Central Beds and the local area, but it is not possible to compare relative supply because of the lack of relevant information.

2.35 Other facilities for training/coaching and the development of skills are less good – relative provision of GDRs is about the average, but there are no short par 3 courses within the district. However, there is a good range of these facilities outside Central Beds and within 20/30-minute drive that may accommodate usage by Central Beds residents.

2.36 However, the need for facilities in the area also needs to take into account demand, and this is addressed in section 3.

QUALITY

2.37 When assessing quality, it is necessary to review both condition and fitness for purpose.

2.38 APP data on age/refurb can be used to inform quality, but in the case of golf this is not a valid proxy and in any case details of refurbishment of golf courses are either not collected or not considered relevant. It would be useful to highlight course conditions across Central Beds, and also at other similar facilities in the local catchment to ascertain whether there is a quality issue overall. It has not been possible to undertake site surveys of all courses, and in any case it would be unlikely that course owners would permit access on site, and there is no acknowledged methodology for doing this.

2.39 The general feeling is that because of the nature of golf, the predominance of clubs in managing their own facilities, and the demands of users, most if not all course themselves are of high quality or in good condition.

2.40 England Golf, through its Regional Manager has suggested that:

- There are a wide range of golfing facilities available, which range from 'beginner venues' through to 'elite venues'. The golf clubs are generally located in rural areas or on the outskirts of urban areas. They are generally only accessible by car and not on public transport routes

- Existing facilities are in general 'fit for purpose' regarding club houses and course. In contrast however practice facilities such as driving ranges and short game areas are generally either not 'fit for purpose' or non-existent

- Facilities are generally available when needed, but are reliant on weather conditions and daylight hours.

2.41 In terms of fitness for purpose, it may be necessary to look at quality from a wider perspective and consider the need for say good quality entry-level golf in line with strategic priorities of the NGB and the needs in the catchment. The aspirations of beginners to the game will be different from those who have played golf at a members' club for years. In this way quality would be linked to purpose, and the criteria would differ between golf course needs of different types. This is set out previously.

ACCESSIBILITY

2.42 Given the amount and distribution of various types of facilities, all residents within Central Beds have access by car to a choice of a number of facilities to use.

AVAILABILITY

2.43 Availability needs to consider the following (see ANOG):

- how much existing courses are actually used, how full they are;

- how much they could be used; and

- what scope is there for increasing their availability.

2.44 These are in turn influenced by a number of factors, including:

- The management and ownership e.g. whether facilities are public, private or education based

- A programming and sports development policy e.g. is availability given over to specific sports, initiatives and range of activities at certain times. Some facilities may be programmed only for specific sports, users or activities

- The cost of use e.g. a high cost may result in a facility having very little use

- Patterns of use e.g. a popular facility that is always full, a facility that is heavily used but only for a limited period across the week, is the nature of use changing over time?

- Hours of use e.g. opening times available for public use, this will be linked to the programming policies above

- Facility design e.g. the physical design and layout of a facility may limit or prevent use by specific users.

2.45 There are vacancies at nearly all the clubs, with very beneficial new members' fees being asked and very little evidence of joining fees being charged. There is little precise information on the usage of commercial and other pay and play courses. Overall however it is considered that there is significant spare capacity in the surrounding courses and no lack of availability for traditional 18-hole golf, and this is confirmed from the information available above.

2.46 It appears that there is good supply and overall spare capacity in the system for the normal 18-hole experience (for both members and visitors), but that there is less availability for those looking to start and take-up the game.

Summary of Supply

2.47 **Quantity** – there is a very good and varied supply of golf facilities (standard courses, 'starter courses' and GDRs) in Central Beds if benchmarked against other areas locally, regionally and nationally, with the exception of a small par 3 course for beginners. In the wider 20/30-minute catchment from the middle of Central Beds, relative provision is also above average across the whole range of facilities. Central Beds residents can access golf facilities of all types whether in the district or neighbouring areas, for the whole range of golf, though there is no municipal/public standard course in the district or a small par 3 starter facility as elsewhere.

2.48 **Quality** – the quality of golf facilities is not considered an issue in the context of this study – by the nature of their provision and ownership, all facilities are considered to be in a good condition and fit for their various purposes. This is confirmed by the NGB.

2.49 **Accessibility** – there are 19 golf facilities at 16 sites in Central Beds, and a further 23 sites in the wider catchment, and all residents with a car can access a choice of facilities, whether they be members courses, commercial/LA pay and play. However, there are no 'municipal' full length courses available for pay and play within 20 minutes.

2.50 **Availability** – there are vacancies for members advertised at most clubs in the area, and joining fees are currently not widespread. Waiting lists at clubs are few, and most clubs have spare membership slots. Detailed information on the usage of primarily pay and play courses is not generally forthcoming, but some courses have spare capacity of 25% and above. There is certainly no evidence that courses are accommodating 80,000 rounds a year that they used to achieve in the 1990s when course numbers were fewer. The overall conclusion is that there is significant spare capacity at most facilities in Central Beds and the wider area.

2.51 There may well therefore in principle be a niche in the district itself for one or a small number of relatively informal, starter and training facilities (par 3 or longer) available to all at a reasonable cost, with a full range of playing, teaching and social opportunities. This is generally in accord with the NGB views.

Introduction

3.1 To understand future needs and priorities ANOG considers it is also important to consider demand, which is explored in this section.

3.2 Future demand will have a large bearing on the future need and sustainability of any new provision. The detailed trends and key issues are set out in an appendix. The key demand issues are highlighted in this section. Detailed findings are set out in the appendices.

3.3 Since the 1990s golf boom, the supply of and demand for golf has fluctuated up and down. The figures are by no means conclusive (due mainly to the different means of data collection), but it is highly likely that there are more golfers now than 20 years ago, but probably no more rounds being played. Over 300 new courses have been open/constructed in this time, and generally it is considered that there are sufficient golf facilities in most areas to meet demand. There has been a distinct move away from traditional golf course membership to more casual (and less frequent) pay and play participation.

CURRENT PARTICIPATION

3.4 As part of its Active People Surveys, Sport England has been collecting data on adult participation in sport in general and in individual sports since 2005/6. Overall participation in golf once per week is set out in the table below.

Table 3.1: Active People participation in golf rates

	Overall		Male		Female	
APS1 (Oct 05/06)	889,100	2.18%	xx	xx	xx	xx
APS2 (Oct 07/08)	948300	2.29%	805800	3.99%	142500	0.67%
APS3 (Oct 08/09)	897600	2.15%	758200	3.72%	138700	0.65%
APS4 (Oct 09/10)	860900	2.04%	738800	3.59%	122100	0.57%
APS5 (Oct 10/11)	833200	1.96%	723200	3.49%	110000	0.51%
APS6 (Oct 11/12)	850,500	1.97%	733,000	3.48%	117500	0.53%
APS7 (Oct 12/13)	751,900	1.73%	xx	xx	xx	xx
APS8 (Oct 13/14)	730,300	1.67%	xx	xx	xx	xx
APS9 (Oct14/Sept 15)	740,100	1.68%	xx	xx	xx	xx

3.5 Regional and more local figures (where they are available) demonstrate a similar downwards long-term trend, although for the most part local participation in the area and region is higher than the national average.

Table 3.2: Local Active People participation in golf rates

	2005/06 (APS1)	2007/08 (APS2)	2008/09 (APS3)	2009/10 (APS4)	2010/11 (APS5)	2011/12 (APS6)	2012/13 (APS7)	2013/14 (APS8)	2014/15 (APS9)
East	2.54%	2.60%	2.47%	2.00%	2.32%	2.24%	2.08%	1.95%	1.97%
Bedfordshire	2.50%	1.99%	2.22%	2.06%	*	*	2.18%	2.36%	2.02%
Central Bedfordshire	3.09%	*	3.21%	*	*	*	*	*	*

3.6 As set out in section one, the NGB report that membership has been dropping between 2-4% per year across all categories.

RECENT COMMENTARY FROM ENGLAND GOLF

'New figures reinforce stabilisation in golf participation

3.7 Golf participation appears to be continuing to stabilise after the latest Active People Survey figures from Sport England. The encouraging news comes from the results for the year to October 2015, which has just been released. They consolidate the previous year's results which had indicated that the downward trend was slowing. The results give cause for optimism that the focus on creating more players, more members and stronger clubs is having a positive impact.

3.8 The survey shows:

- Overall 740,100 people, aged 16-plus, play golf in England for at least 30 minutes once a week. That's up slightly on the previous year (730,300) and this is the first, small, increase in participation since October 2012.

- The growth is among young people, with 50,400 aged between 16 and 25 now involved in weekly golf, compared to 38,400 a year ago.

- Other encouraging signs include a slight increase in the number of male golfers; among black and minority ethnic (BME) groups; and in club membership.

3.9 Sandy Jones, Chief Executive of the PGA, said: *'It is heartening to see these results and especially, to see the recovery in the numbers of young people who are playing golf. But there is still much more to be done to consolidate these results and to grow the game. That is why there is ever closer collaboration across the industry to ensure our collective efforts are focused on the right priorities for the future.'*

3.10 David Joy, Chief Executive of England Golf, said: *'A great deal of hard and coordinated work is taking place at club, county and national levels, to recruit and retain more players and members, to provide the right coaching opportunities and to show that golf really is a game for all. These results will encourage all who are involved in this work to continue their efforts and to keep moving in the same direction.'*

3.11 Initiatives include:

- County action plans which attracted over 92,000 people to try golf in the six months to September. Over 36,000 took structured coaching courses with PGA professionals and 40% went on to play once a week.

- Increased capacity for the network of County Development Officers who work closely with the PGA and the Golf Foundation to support clubs.

- The Get into golf campaign was opened up to all clubs in 2015 and over 760 promoted coaching opportunities for beginners and improvers.

- Trials of new approaches to make the sport more accessible, such as Golf Express which promotes nine-hole golf.

- A pilot project involving 100 clubs to attract more women and girl members.

- Increased club support and education, including Business Growth Forums and a new guide to all resources available.

- The launch of the #ThisGirlGolfs video campaign which challenges perceptions and inspires participation.

3.12 **Commentary from Sport England** suggests that full course golf represents 90% of total usage, par 3/pitch and putt 6% and golf driving ranges 5%.

3.13 People tend to drop in/out altogether rather than use a GDR when they cannot fit in a full 18 hole round.

3.14 Overall therefore participation by adults in golf has declined since detailed figures were first obtained in 2005/6.

FUTURE PARTICIPATION AND DEMAND

3.15 Demand for golf in the future up is affected by a number of factors:

- The characteristics of the local area and the propensity of the population to take part in golf.

- The changing demographics.

- Initiatives by Sport England and golf's governing bodies to promote additional participation

MARKET SEGMENTATION

3.16 As part of its research work, Sport England has developed 19 market segments within the overall <u>adult</u> population to help understand the nation's attitudes towards sport and its motivation for taking part (or not). It is based on the Active People's Survey, DCMS's 'Taking Part' Survey and Mosaic data from Experian.

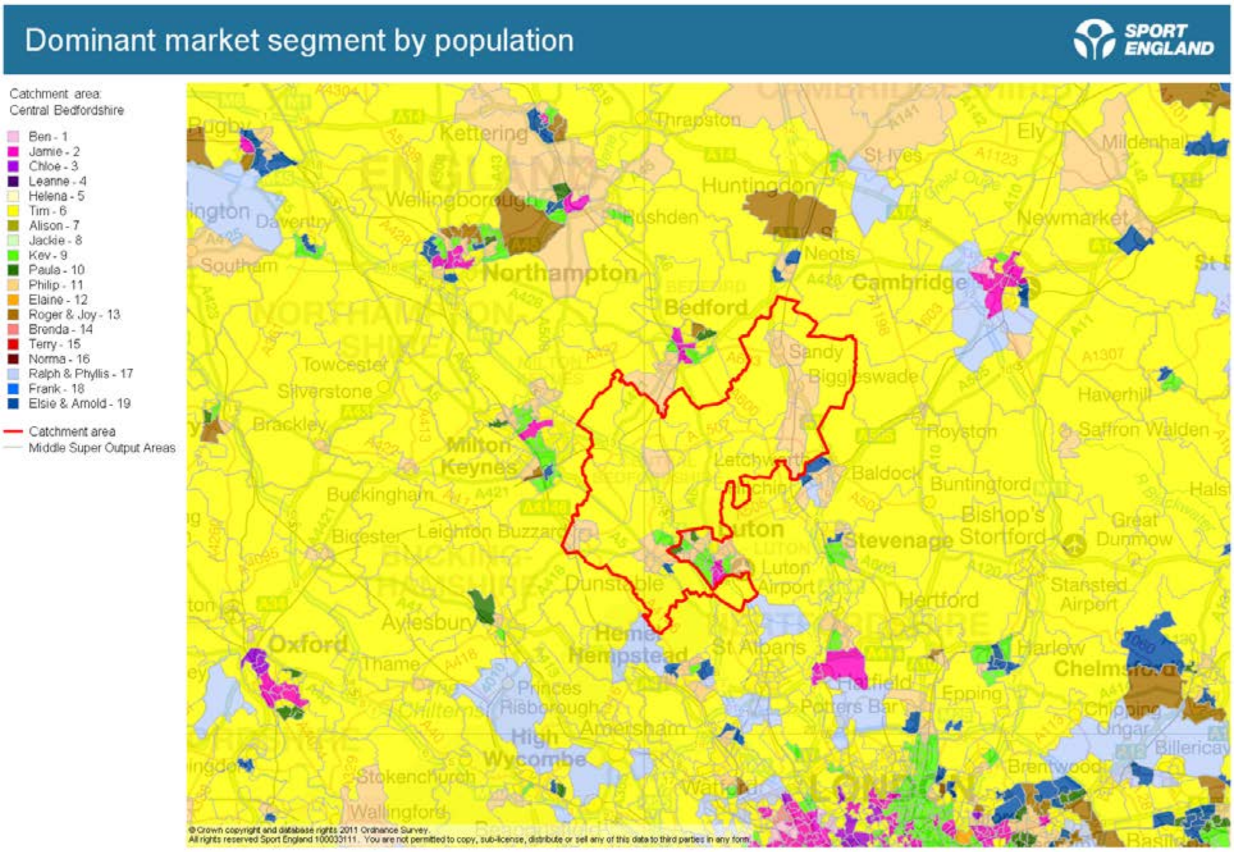
3.17 In terms of current participation in sport, it is possible to highlight the characteristics of the local population within Central Beds district. The illustrations all demonstrate the three main market segments in Central Beds are as follows:

- **Tim** – known as a 'sporty male professional', Tim is very active (2/3 take part in sport once a week compared with 40% overall). Again not his major sport, but Tim plays golf (about 75% above the average) and would like to play more.

- **Phillip** – 'mid life professional, sporty male', with above average activity levels. While not his top sport, golf however is popular (twice the average play golf) and he would like to play more.

- **Roger and Joy** – 'early retirement couples', slightly less active than average but with relatively high interest on golf (1.5 times the average).

3.18 Tim, Philip and Roger and Joy are the three highest segments nationally participating in golf, and would like to play more.



SUMMARY OF MARKET SEGMENTATION

3.19 The MS data confirms that the three main segments within Central Beds are golfers, and that overall participation is therefore likely to be above the national and regional average in terms of the profile of the area. Current anticipated participation is about 2-5% and the profile of the population suggests that there is some latent demand for an additional 1-2% to take up the sport, though this is considered a generous proportion and is based solely on the aspirations of the current profile of the area. It would be safe to assume that there would be a limited increase in participation in accordance with MS data if some latent demand were realised.

3.20 Potential demand for golf from the MS data confirms that it is the same groups that currently play that would like to participate more, totalling about 3300 participants, an increase of about a further 43% though these figures should be qualified as they represent a theoretical representation of latent demand for golf.

FUTURE POPULATION TRENDS

3.21 The latest population estimates have been supplied by Central Beds Council, and the 2019 and 2024 forecasts are from the most recent 2011-based forecasts. These should be treated with caution because they based on old information. These forecasts are trend based, and therefore do not take housing provision directly into account. The

Council is currently working on a new set of population projections based on the 2014 Mid Year Estimates, but these are not yet available. Given the surge in CB's MYE over the past few years, the initial figures from the new projections are suggesting higher population growth than the attached figures. However, for the purposes of this study at the present time, this data is acceptable.

3.22 The potential implications of these changes for participation in golf could be significant:

- Impact of overall population change – it is estimated that the total population will increase from 265,000 in 2014 to 281,000 in 2019 (6.0%), and 296,000 in 2024 (11.7%). At the same participation rates, this could increase demand by 6-12% over the 5/10 years.
- Demand among younger people (under 20 could increase slightly less than overall (5-11%(40-65)
- Demand among middle aged people who tend to play golf more frequently could increase by 3-5%
- Significant increases might be expected among 65+, where the population is estimated to increase by 14-29%.

Central Bedfordshire 2011-based population forecast

	2014	2019	2021	2024
0-4	17,150	17,880	17,870	17,830
5-9	16,230	17,870	18,470	18,580
10-14	14,830	16,470	17,060	18,170
15-19	15,040	14,060	14,490	15,750
20-24	14,010	13,160	12,750	12,250
25-29	16,300	17,790	17,300	16,770
30-34	16,600	18,640	19,820	20,180
35-39	17,030	18,490	18,860	20,540
40-44	19,390	17,890	18,560	19,370
45-49	21,050	19,700	18,880	18,260
50-54	20,110	21,020	20,420	19,750
55-59	16,840	19,780	20,800	20,730
60-64	15,080	16,400	17,580	19,280
65-69	15,040	14,430	14,500	15,730
70-74	10,720	14,210	14,750	13,680
75-79	8,530	9,670	10,810	12,920
80-84	5,960	7,060	7,050	8,140
85-89	3,470	4,180	4,580	5,100
90+	1,860	2,420	2,730	3,230
Total	**265,220**	**281,100**	**287,290**	**296,260**

Note: Official 2014 MYE is 269,100

3.23 By applying existing activity rates from APS to the population and age groups, it is possible to estimate the additional numbers of golfers who might be attracted to the game by virtue of population change. Figures relate to once per week activity rates:

- By 2021 there could be an additional 400 adult golfers from 2014

- By 2024 there could be an additional 850 adult golfers from 2014

Summary

3.24 **Population** – the population of Central Beds is estimated at 265,000. There is no appreciable difference in the age and gender distribution from national and regional averages.

3.25 **Market segments** - The three main market segments in Central Beds are Tim (sporty male professional), Philip (mid life professional sporty mail) and Roger and Joy (early retirement couples). In terms of people within the district who (it is estimated by MS) do play golf, the data confirms that the major participants are indeed the main segments set out above, Tim, Philip and Roger and Joy, who in total comprise nearly 61% of the total golfers in the area. The MS data for the district estimates that total participation in golf is about 7600 adult players, almost exactly the same as the APS data suggests. This is between 2 and 5% of the population of the district, and is spread evenly across the whole of Central Beds.

Golf participation

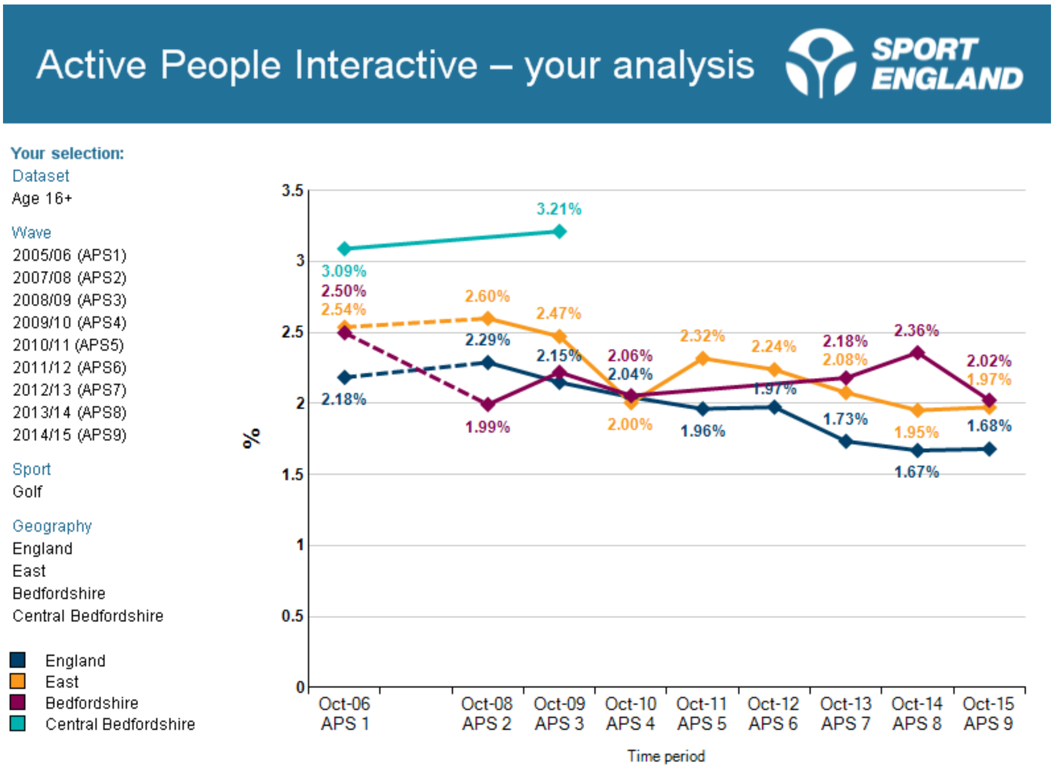
3.26 An estimate of overall demand has been undertaken using generic information from national and regional data, and based on other golf studies done recently.

3.27 **Historic** – Since the 1990s golf boom, the supply of and demand for golf has fluctuated up and down. The figures are by no means conclusive (due mainly to the different means of data collection), but it is highly likely that there are more golfers now than 20 years ago, but probably no more rounds being played. Over 300 new courses have been open/constructed in this time, and generally it is considered that there are sufficient golf facilities in most areas to meet demand. There has been a distinct move away from traditional golf course membership to more casual (and less frequent) pay and play participation.

3.28 **Current and recent** – Sport England data suggests that over the years from 2005/6 to 2014/15 regular participation in golf (once per week) in England declined from 890,000 adult participants (16+) to about 740,000. Currently, about 1.68% of the population (mainly male) now play golf regularly (figures from latest annual data from APS9). However, England Golf believes that the participation levels appear to have stabilised.

3.29 East regional participation (with the exception of 2010 – APS4) has consistently been slightly higher than national, although this has declined steadily since 2011, but is still about 20% higher than the national average. Conversely participation in golf in the area covered by the Beds and Luton CSP (effectively the old county of Bedfordshire) increased from 2010 to 2014, but has since declined to the same level as the region, and is now about 20% higher than the national average. Central Beds data has not been recorded since 2009 (because of sampling numbers), but at that stage was about 50% higher than the national average, and considerably above regional and county levels.

3.30 Based on the trends in participation over the past nine years in Bedfordshire, the current participation in golf among adults in Central Beds may well be about 3.5%. It is estimated that there may be 7500 current regular golfers in the district. This is very similar to the MS profiles and it is likely that golf participation in Central Beds is therefore much higher than the national average, albeit that this has not increased since 2006.



Unmet, latent, displaced and future demand

3.31 **Latent -** MS data suggests that there is latent demand from an additional 3300 adults in the district (or over 40% extra to those which MS suggests might currently play). These are aspirations and considered to be optimistic, as they tend to overestimate the numbers who will eventually find their way into the sport, but an allowance should be made to accommodate some potential latent demand in the area.

3.32 **Future** – the population of Central Beds is estimated to increase from 265,000 in 2014 to 281,000 by 2019 and 296,000 by 2024. This increase of 6-12% overall masks different population changes among young people (0-20) of 5-11%, middle aged (40-64) of 3-5% and older people (over 65) of 14-29%. If the overall increase in population took part in golf at the same levels as at present, this could increase the number of regular golfers by 400 in 2019 and 850 in 2024. Young people's participation would also increase by 5-11% but there is no data on current participation rates among people under 16.

3.33 The England Golf strategy suggests a target of 21% increased participation over the three years to 2017, an increase nationally of 160,000 regular golfers. If this is extrapolated to the local area, this could result in an increase of over 750-1000 additional golfers (adults and young people). This is an ambitious target, but a factor for increased participation should be built in. As the target is increased participants, it is likely that a large proportion of these would be beginners and young people learning the game, for which courses of the type envisaged would be particularly suitable.

3.34 Some of these targets/likely future participation levels are coterminous. For the purposes of the study therefore, an ambitious target (bearing in mind declining participation numbers over the past 5 years and a particular increase in the proportion of older people) is an additional 1000 golfers in the Central Beds area by say 2024, an overall increase of about 13%.

DEMAND SUMMARY

3.35 **Current levels of participation** - participation in golf in Central Beds, extrapolated from APS data suggests that there are about 7500 regular golfers in the area, a higher proportion than the national average rate. This is compatible with the MS profile, though the latter data does confirm that the area is characterised by a high proportion of people within golf playing segments.

3.36 **Recent trends in participation** – despite the higher participation in Central Beds, APS data confirms that participation has dropped slightly in the last 9 years, in accordance with national and regional trends and conventional wisdom from NGBs and other commentators.

3.37 **Latent and future demand** – MS data suggests that there is significant potential latent demand from people in golf-playing segments who would like to take up the sport, in the order of 45%. This is not considered reasonable. Future demand from population increases could increase by 6-12% over the next ten years. This may well be mitigated by the ageing of the population, although it is acknowledges that golf is a popular sport among older people. It is reasonable to assume therefore that there will be an increase in participation in the future from population increase and latent demand.

3.38 **NGB targets from strategy** – EG has a target of a 7% increase in participation over the next three years of its strategy, and although this may well be ambitious, it may have particular implications for the type of course required in the area, as additional participants will be mainly new players needing to learn and develop their skills.

3.39 Overall it is therefore suggested therefore that demand for golf in Central Beds, although it may well have fallen in the last 9 years, is still higher than the average, and that with future and latent demand increasing, and EG actively promoting additional participation, particularly among new players, demand may increase in the area for the types of course suitable for beginners and high handicap players.

4: Key Issues and Options

Introduction

4.1 ANOG sets out the need for the supply and demand assessment to be brought together and the key issues arising analysed.

Overview

4.2 Overall the supply and demand analysis suggests there is a good supply of golf courses, particularly in terms of the traditional offering. The picture is less clear in terms of par 3, beginner and starter courses.

4.3 Despite national trends there are good levels of demand across the Central Beds area, and allied to population increases there is likely to be some growth in demand across the area and probably some justification for new small learner facilities (starter courses or par 3) in the future.

4.4 There may well therefore in principle be a niche in the district itself for one or a small number of relatively informal, learning facilities available to all at a reasonable cost, with a full range of playing, teaching and social opportunities. This could incorporate new provision or be developed alongside existing provision to support future sustainability.

4.5 There are minor deficiencies in accessibility in the district, with particular gaps in starter provision in the east of the district, area around Biggleswade/Sandy, and the west, near Ampthill/Flitwick.

4.6 This is generally in accord with the NGB views, and the Regional Manager for England Golf considers that the quantity of venues is at an acceptable level for the current demand level overall.

Issues and Options

Is there a demand for additional courses and other facilities overall in Central Beds at the present time?

4.7 There is good supply of golf facilities in Central Beds and the wider area within which local residents may play golf outside the district. At the same time participation levels are also high in the district, a function no doubt of both the socio-economic and market profile and the existence of ample facilities. Because of the lack of golf facilities in some neighbouring districts, Central Beds is a considerable importer of demand, particularly from Luton where only one course exists, but also further afield, according to evidence from clubs and courses. There is undoubtedly a balance between supply and demand at present – few clubs have waiting lists or joining fees, and there are many examples of membership or playing incentives to attract more users. The commercial/proprietary/'municipal' courses in the wider area, from the information available, do have some spare capacity for additional users. Conversely there is no evidence that clubs and courses are struggling to continue to exist. There are two examples of existing courses with plans to add additional holes. At the present time, there is no justification for additional standard, club based or commercial full length courses. However, there is a shortage in Central Beds of absolute beginners' courses (par 3).

Is there a demand for additional courses and other facilities overall in Central Beds in the future?

4.8 In the future there is some justification in considering some additional facilities, to meet increased demand from population increases, development initiatives and identified latent demand. However, it is difficult to be precise about actual numbers. If spare capacity at existing (club and commercial) facilities overall is say 20%, then these could accommodate a similar amount of additional use, but this would not be sufficient to meet the estimated demand from a further 1000 golfers. Additional golf facilities could be justified in this case, but it is suggested that the particular need is for easily accessible, pay and play courses available to the NGB's target groups, beginners, young people and women, on a pay and play basis, with the option of membership packages.

Is the provision of golf facilities sufficient to meet future demand arising from housing development and additional population?

4.9 The population projections used in this study are trend based data from ONS (supplied by the Council) and do not take into account housing growth and population increases associated with this. Further analysis will be necessary to take into account approved housing figures in the future, and this should be undertaken as a regular monitoring exercise when more up-to-date data is forthcoming.

Are there any development initiatives from clubs/NGB/LA/others that might affect future participation and demand?

4.10 The targets set out in the national golf strategy are taken into account in this study, but any local initiatives from the CGU, LAs, clubs and others will also need to be built in.

What type of additional golf facilities are required to meet demand?

4.11 The supply/demand balance now and in the future, reinforced by the views of the NGB, and recent trends in golf participation, indicate that there is a particular demand in general for the development of facilities for informal recreational and teaching suitable for beginners and young people, as well as practice facilities, such as GDRs. These are not being fully met at present in Central Beds. The particular omission in local provision in Central Beds is for absolute beginners' courses, such as 9 holes par 3 courses.

4.12 However, given the investment required to develop such a facility, the need to ensure that facilities are sustainable in the longer term and the need for progression among beginners towards the full length course, it would be more appropriate to consider the provision of one or two slightly more developmental facilities which comprised both a short 9 hole par 3 course, together with a longer starter course. There is also some merit in accommodating a small GDR at each facility, to improve the overall offer and support long-term sustainability.

Where should these facilities be located?

4.13 The analysis has identified relative gaps in provision for beginners/starter courses in the areas around the main towns of east of the district (Biggleswade/Sandy) and west (Ampthill/Flitwick area). Locations near to these main built up areas will improve accessibility and subsequent sustainability. There is some merit in accommodating these additional requirements in conjunction with existing facilities, in terms of the overall offer available and long term sustainability, but this will depend on a number of factors, including availability of land, the desires of the existing club/course/members and finance.

Is there a need for additional GDRs?

4.14 The supply assessment concluded that there are three GDRs across the district serving different parts of Central Beds, two at venues with other golf facilities and one free-standing, and that local provision of GDRs in Central Beds is at about the regional average and above the national, while the wider 30 minute catchment is well above average. The demand solely for GDRs is difficult to estimate, and relatively few golfers solely play at GDRs – they are more often used for practice, coaching/teaching and development, or for a 'quick swing' for existing golfers when time is short. There is only one free standing GDR in the whole area, and the development of additional GDRs can best be accommodated where a demand is identified, and more often in conjunction with an existing or proposed new facility.

Is quality of courses an issue in Central Beds?

4.15 The Syngenta study concluded that golfers, existing and potential, demand the best conditions, such as level greens, no long rough, and compatibility with the environment. Quality is not considered an issue in Central Beds to the extent that facilities are in such poor condition that they are unfit for purpose. Future courses may not however need to be built to the same stringent levels of design etc. if they are intended to cater more for beginners and improvers.

Summary

4.16 **Current situation** — there is a balance between supply and demand in general. There is spare capacity at existing courses, and none is as busy as it was 10-20 years ago. Conversely there do not appear to be any courses that are struggling in Central Beds (there may be the odd one outside the district). There is a good supply of a range of courses; standard, club based, starter, GDRs. Starter clubs, with shorter courses, academy courses, practice facilities, flexible and low cost membership and beginner friendly culture, usually relatively recently provided since 1990 to meet the 'golf boom', and commercially operated include; Caddington, Chalgrave Manor, Mt Pleasant, Tilsworth (including GDR), Henlow. To these you can add the 9-hole extension at South Beds. There is a shortage in Central Beds at present of par 3 courses (as opposed to starter courses), however par 3 courses are very prevalent in the wider local area (and regionally and nationally).

4.17 **Future demand** — if demand increases up to 2024 by say 1000 golfers, there may be justification for additional courses, as the spare capacity at present would not accommodate all this. But in line with NGB targets, any additional courses should be starter/beginners/par 3 courses to attract priority groups. This could increase further with any anticipated additional housing/population.

4.18 **Type of courses/facilities required** — there is a particular shortfall, according to the evidence (see above) of par 3 courses at present, but these are often no more than recreational facilities, and would be unlikely to be sustainable without additional facilities. Any future provision should therefore include par 3 courses (for which there is a shortfall) together with ancillary 9-hole starter courses to meet future need.

4.19 **Potential locations** - include the built up areas around Biggleswade/Sandy in the east and Ampthill/Flitwick in the west as the areas with least good provision. Plugging these gaps would ensure good accessibility throughout the district. Whilst it is acknowledged that golfers tend to travel by car (e.g. need to carry clubs etc), new locations for courses specifically aimed at juniors/other current non-participants, should be close to built up areas in parts of the district not currently provided for.

4.20 Extensions to existing facilities are preferable, but this does depend on location. If there is a proven need for a new type of golf venue in a locality then new build can be justifiable but it is becoming harder to justify new build facilities with conviction, given that many areas still have golf oversupply and sustainability of existing facilities is seen as key.

4.21 Also, it makes sense to extend/convert existing golf venues as it will generally be cheaper and quicker than new build, plus there will be the benefits of economies of scale, and infrastructure already being in place (clubhouse, car parking etc).

4.22 Whilst the key shortfall across Central Beds is for par 3 courses, the inclusion of a 9-hole starter course and maybe GDR, to meet additional need in the future, is a more sustainable development option.

4.23 In terms of what this means in relation to priorities is set out in the next section.

5: Conclusions & Recommendations

Introduction

5.1 To achieve its planning aims Sport England have established a number of planning objectives, which are to seek to protect sports facilities from loss as a result of redevelopment, to enhance existing facilities through improving their quality, accessibility and management and to provide new facilities that are fit for purpose to meet demands for participation now and in the future. 'Protect, provide and enhance' provides a framework for developing the district-wide priorities for golf.

Action Plan Recommendations

5.2 Set out overleaf are action plans reflecting the needs and framework set out previously.

PROTECT				
	Objective	**Rationale**	**Priority Action**	**Measuring Success**
Protect 1	**Protect the existing network of golf courses and facilities across Central Bedfordshire.**	Supply and demand is in balance and a good spread of facilities. Growth is anticipated.	Development of planning policy to support protection.	Network of golf facilities protected and maintained.
Protect 2	**Protect public access to a range of facilities.**	Ensure network is well used and facilities are viable and sustainable.	EG and CSP to work with clubs on participation programmes.	Membership numbers and numbers of rounds increasing across clubs and C Beds.

ENHANCE				
	Objective	**Rationale**	**Priority Action**	**Measuring Success**
Enhance1	**Seek to support developments at existing facilities which deliver priority facility types; par3, starter courses and GDRs.**	Type of course required based on the needs and evidence. Enhancing provision at existing courses will help to support the sustainability of existing courses.	Support through planning policies.	Development of sustainable facilities in line with needs.
Enhance 2	**Access by new golfers to a range of facilities.**	Ensure network is well used and facilities are viable and sustainable.	EG and CSP to work with clubs on participation programmes.	Membership numbers and numbers of rounds increasing across clubs and C Beds.

PROVIDE				
	Objective	**Rationale**	**Priority Action**	**Measuring Success**
Provide 1	**Seek to support the development of new par 3/starter provision in east of district near Biggleswade/Sandy preferably as part of existing developments to support the sustainability of existing provision.**	In line with facility needs and geographical gaps. Development at existing sites supports sustainability.	Support in development planning process.	Provision of sustainable developments.
Provide 2	**New par 3/starter provision and GDR in west of district near Ampthill/Flitwick preferably as part of existing developments.**	In line with facility needs and geographical gaps. Development at existing sites supports sustainability.	Support in development planning process.	Provision of sustainable developments.

Delivery

5.3 The report conclusions, which refer to the option of developing existing facilities to incorporate appropriate beginner facilities is supported as a sustainable solution however clubs will need to consider their governance structures and financial health before embarking on investment and ensure a clear business case is developed before any projects are undertaken.

5.4 A number of golf clubs, through their governance rules, may have some difficulty in securing grant funding. Many grant funders, including Sport England, will only support clubs and organisations that have a not for profit status. A number of the Golf Clubs will not be set up this way and may therefore be looking to secure capital through either borrowing money, equity injection or retained profits.

5.5 Clubs should therefore critically evaluate the underlying financial strength of the business, before seeking investment through these sources. This will be important before any significant investment is considered, which may threaten the long-term viability of the club.

Monitoring and Evaluation

5.6 Monitoring and evaluation and implementation of the strategy findings and action plan, will require identification of a cross Council group to progress and commitment to regular review of progress. The action plan should be updated annually, with a formal review of the strategy after 3 years, particularly taking into account progress on linked agendas including golf course development, population growth, housing development etc. England Golf should be encouraged to join the group.

Conclusion

5.7 The needs and evidence base, strategy and action plan have been developed according to national best practice and therefore provide Central Beds with a firm base on which to assess future planning applications and support future delivery and enhancement of golf facility provision.

NGB Pro-forma

The pro-forma set out overleaf is designed to capture NGB views on golf provision in the Central Bedfordshire area. The headings follow the guidance set out in the Assessing Needs and Opportunities Guide (ANOG) and is designed to capture NGB information on golf facility supply, facility demand and key priorities for the CB area.

1. Relevant plans and strategies (Context)	
1.1 What are your Whole Sport Plan priorities? (List high level outcomes etc)	**England Golf Partnership Whole Sport Plan 2013 – 2017** To allow England to become the leading golf nation in the world by providing more opportunities for people to start, stay and succeed in the game • Grow golf in schools, colleges and community groups • Increase more play at clubs and ranges • Increase more women and girls • Increase people with disabilities • Offer high quality coaching • Promote partnership working at national, regional and county levels • Effective marketing **England Golf Strategy 2014 – 2017 'Raising Our Game'** **Vision** England Golf at the heart of a network of partners, empowering and supporting a thriving community of golf facilities and golfers and widely recognised as being a forward thinking and successful organisation. **Ambitions** • To increase the number of people who play golf at least once a week from the baseline of 750, 000 in 2014 to 910,000 by March 2017 • To reverse the decline in club membership which has been occurring annually since 2005 and stabilise club membership at the July 2014 level of 675,000 members • To strengthen the talent development pathway from club to national level, leading to even more international success for English players • To improve communications, governance and partnerships at all levels within England Golf **Key Themes** **MORE PLAYERS:** Increasing the number of players who play golf regularly **MORE MEMBERS:** Increasing the number of players in club membership **STRONGER CLUBS:** Supporting clubs to attract and retain members and to achieve a sustainable business model **WINNING GOLFERS:** Identifying and developing talented golfers at every level, leading to international amateur success **OUTSTANDING CHAMPIONSHIPS:** Providing excellent championships and competitions for golfers of all levels **IMPROVED IMAGE:** Changing the perception of golf and improving communications within the sport **EXCELLENT GOVERNANCE:** Improving the governance, building the infrastructure and strengthening the partnerships to develop golf in England
1.2 Is CB a priority area for your sport?	Yes

1. Relevant plans and strategies (Context)	
1.3 What strategic facility statements does your WSP include (list)	None, but clubs and their facilities are central to the development of golf.
1.4 Does your sport have an agreed Facility Strategy?	No. It is currently being developed by LCMB who have been commissioned by England Golf
1.5 Is CB area identified in this? If so, please summarise here and insert weblink if possible.	No. As the facility strategy is yet to be finalised, signed off and published, no specific area has been identified within it.
1.6 Is there a more specific local facility plan or strategy? Please list these and attach weblink or electronic copy;	No
1.7 Please list and any specific local priorities in these plans	N/A
1.8 Does your plan have any capital or revenue investment earmarked for this area? Please list.	N/A
1.9 Any other comments?	Through the network of Regional Managers and County Development Officers (Bedfordshire has one County Development Officer), clubs are support through facility development on a club by club basis. This process also involves the County Sports partnership (Team Beds&Luton), as well as Sport England.

2. Facility supply	
2.1 Do you have sufficient QUANTITY of facilities for your sport in CB? Are there any specific requirements such as competition venues? Please list the key venues used.	There are a wide range of golfing facilities available, which range from 'beginner venues' through to 'elite venues'. The quantity of venues is at an acceptable level for the current demand level.
2.2 Are the facilities well located and ACCESSIBLE to meet the needs of your sport? If there are any areas with access issues or geographical gaps in provision please list.	The golf clubs are generally located in rural areas or on the outskirts of urban areas. They are generally only accessible by car and not on public transport routes.

2. Facility supply	
2.3. What is the QUALITY of the existing facilities? Are they *'fit for purpose'*. Please summarise here.	Existing facilities are in general fit for purpose regarding club houses and course. Practice facilities such as driving ranges and short game areas are generally either not fit for purpose or non-existent.
2.5 AVAILABILITY: does your sport own or control facilities? Do you rely on school facilities? Council facilities? HE/FE facilities?	No. Golf Club facilities are split in to three categories. 1. Members Club, owned and run by the members of the golf club 2. Proprietary, owned and run by a business or business individual 3. Municipal, owned and run by a local authority Golf does not rely on school/council/HE/FE facilities
2.5.1 How available are the facilities that you use when you need them? **2.5.2 Any other issues e.g. pricing, quality, general availability?**	Facilities are generally available when needed, but are reliant on weather conditions and day light hours. Price is in cases a barrier to participation in golf, as is geographical access and lack of practice/introductory facilities e.g. floodlit driving ranges or short courses.
2.9 Are any of the facilities your sport uses at risk? Or are there any planned developments which will change the SUPPLY. For example, threatened with closure; change of surface; change of operator/ownership? Please list.	Not that we are aware of at this point in time. Golf clubs have been known to close without much prior notice e.g. Mentmore Golf Club. As the golf clubs are not owned and run by England Golf, the financial situation of clubs is not readily available to us
2.10 Any other comments?	

3. Demand issues	
3.1 Please provide an overview of your sport in CB using data such as Active People, club membership. How important is your sport in CB?	Active People doesn't measure as far down as Central Bedfordshire for golf participation, but it does measure Bedfordshire on County Sport Partnership Boundaries. The figures over the last 3 Active People Survey results are: - • APS7 10,800 • APS8 12,000 • APS9 10,300 These figures are for people aged 14+ participating in golf once a week.

3. Demand issues	
	Bedfordshire County Golf Union collect the membership numbers for Bedfordshire, and they work on a real time collection process. Meaning that they collect the numbers from the clubs when each member renews. They update their annual number in April of each year, so this year's figures are currently unknown. But membership of golf clubs has been falling between 2% and 4% per year across all categories.
3.2 Please provide any insight you have on latent and future demand in CB. Are any interventions planned that will increase demand for facilities?	We don't have latent demand numbers specifically for the Central Bedfordshire area, but through Sports Marketing Survey we know that there is latent demand for golf nationally of 12million people. We also know that nationally there are 2.1million golfers who are not members of golf clubs who play golf at least once a month The Bedfordshire County Development Officer, with the support of the Bedfordshire Golf Development group and England Golf, work with clubs on a club centric approach to increase the usage of the clubs facility, and the participation levels at the club. The main focus is using the Get into Golf initiative to drive participation in golf through introductory coaching and or intermediate coaching. The clubs are also supported widely on their business needs including marketing and communication to increase footfall, as well as local segmentation to help them offer the right golfing experience for their geographical area.
3.3 What performance programmes operate in CB? What level – local, regional, national etc? Please list the site(s) used.	Both the Bedfordshire County Golf Union and Bedfordshire Ladies County Golf Association run talent programmes covering junior, adult and senior ages. These pathways feed in to England Golf's regional and national pathways.
3.4 Any other comments?	

4. Summary/conclusions	
4.1 What are the key challenges and opportunities for your sport in CB?	Challenges for golf remain the perception of golf to those who do not participate in the game. Also the perceived lack of value for money or cost of playing golf. But most importantly the issue of time, the time it takes to play golf and peoples ever shortening leisure time. The opportunity for golf is that with high quality facilities, especially club houses, is that golf can be more than just a sport, but can also offer people a social interaction. Golf also caters to a wide range of ages and our purpose is to 'Inspire lifelong involvement in golf'. Golf is a sport that can help keep people fit, healthy and active in to their 80's and 90's. It is also a sport that can be played in an hour, and we are developing shorter forms of the game to appeal to a wider market, but this will need the facilities to match.

4. Summary/conclusions	
4.2 What are the facility priorities for your sport in CB using the Sport England planning criteria?	**PROTECT** Protect the existing facilities that are available **PROVIDE** Provide a high quality facility to those participating in golf **ENHANCE** Enhance the facilities available to those who participate in golf or who wish to. Enhance the practice facilities and short courses available to enable more people to participate in golf, no matter what their leisure time constraints are.
4.3 Is there any NGB funding potentially available to support the delivery of your facility priorities in CB?	Up until April 2017, no. But England Golf will be submitting their Whole Sport Plan for 2017 – 2021 in the summer of 2016. This will be in line with DCMS strategy and Sport England Strategy.
4.4 Any other comments?	

HISTORICAL OVERVIEW

1. The history of golf course supply and demand over the past 20-30 years is well documented, though not necessarily clear-cut. In the late 1980s, it was generally accepted that traditional private members' clubs (the bulk of facilities at that time) had long membership waiting lists, and that existing pay and play courses (which were relatively few in number) nonetheless had high throughputs with long queues to play. Popularity in golf in the previous 10 years had increased due among other factors to the emergence of British and European golf tour winners, and success at the Ryder Cup. Supply was effectively less than the apparent demand.

2. In 1989, the Royal and Ancient produced its report 'The Demand for Golf' which suggested the need for 700 additional courses to meet demand by 2000. Indeed, in the 27 years since then, it is estimated that over 700 courses have been constructed, representing an increase of 30%.

3. At around the time of the R & A report, a variety of estimates calculated demand/ participation in golf as follows:

   - 1986 General Household Survey, 2.7% of the adult population had played golf within the previous 4 weeks (compared with 2% in 1977, 1980 and 1983) representing 1.2 million adults in the UK (at the time the GHS provided the only official measure of participation in activities, but with many provisos).

   - Sports Council research in 1990 (in connection with its report 'A Study of Golf in England') indicated that 5% of the adult population of England and Wales had played golf in the previous 4 weeks (2 million people) and a further 5% (2 million) within the previous year.

   - Sports Marketing Surveys Limited calculated that in 1991, there were 1.25 million regular golfers (playing at least fortnightly) and a further 2 million occasionally (1-25 times per annum). In addition, up to a further 8 million used golf driving ranges, pitch and put and par 3 courses.

EVIDENCE OF MORE RECENT CHANGES IN DEMAND/PARTICIPATION

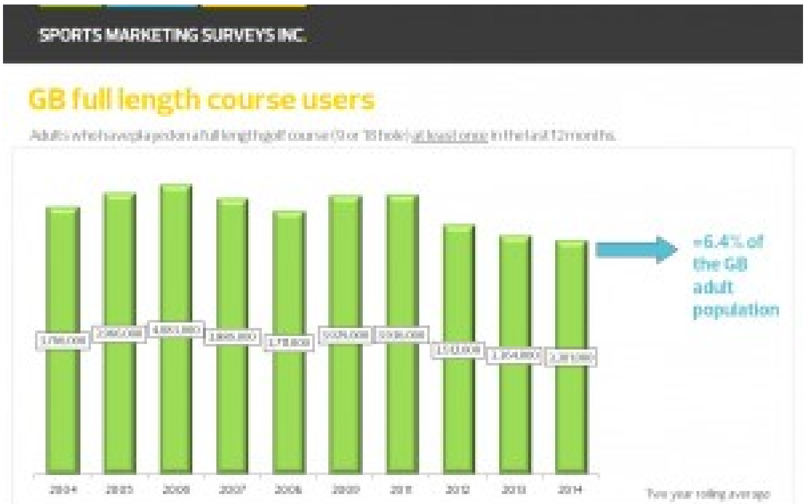
4. More recent documentary evidence for changes in activity levels include:

   - **British Golf Industry Association (July 2012)** – the number of golfers playing on full-length courses is now about 4 million, which increases with those playing on par 3 and other facilities, representing about 8% of the adult population. The number of core golfers (playing more than 12 times per annum) is the same as in 1998. The decrease of almost 400,000 core golfers since the peak of 2004 has been partially offset by an increase of 340,000 casual players playing less frequently. Driving range usage has decreased slightly in 2008 to about 3 million, but 15% more than 5 years previously. Female participation has stabilised after 2 years decline, while the game is becoming more popular among young players than those over 55.

- **KPMG Golf Participation Survey (2010)** highlighted a 4% decrease in players over 10 years in UK and Ireland (compared with a threefold increase in Europe in the last 25 years and a doubling of courses). From 2000 to 2010, the report estimated that the number of golfers in England had decreased by 63,800 and in Wales by 14,500. The study recommended smaller shorter courses to encourage new participation. The more up to date 2013 study suggests that the European golf market improved slightly in 2014, recording a slowdown in the decrease in golf participation as well as stabilisation in the number of available golf courses across Europe. In over half of the European countries included in the KPMG report, the number of registered golfers decreased in 2014. This includes key golf markets such as England. In 2014 the number of golf courses remained stable.

- **England Golf** – decline in golf club membership since 2004 (in 2014, stood at 675,000), decline in golf participation since 2007, due to lifestyle changes and competition from other sports

- **Sports Marketing Surveys** undertake an investigation into the British Golfer and their playing habits, a review which has been run annually since the mid-90's. The 2013 survey suggested that currently 2.8m people playing golf once a year, 1.15m every month and 750,000 once a week. The 2014 survey updated this as follows:



5. Golf participation in GB finally stabilised in 2014, just above the 3.3 million mark, offering hope to the golf industry after a decade of decay. This succeeds news that 2014 saw an increase in the number of rounds played by 3.5% compared to 2013 following a warm and dry summer, without any major UK based major sporting events. A local and victorious Ryder Cup in Scotland – with good weather around it – will have boosted interest and play frequency.

6. Although golf participation remains at its lowest level for over a decade, the study signposts clear progression and opportunities for the sport to grow. For the second consecutive year female participation has risen, as has the number of 'avid' golfers (who play at least once a week on average). It is this group of golfers (Avid) who define and guide the sport, so the industry should be buoyed by the additional 53,000 players whose play frequency brought them into this dedicated category in 2014. As per the 2013 statistics, a cause for concern is the number of 'infrequent' golfers, who play less than 12 times a year, which is at its lowest on record in this millennium (1,786,000). Time is a major factor influencing player numbers, and may be the significant reason behind the decline in infrequent golfers.

- Since the start of the 'boom' in the early 1990s, there have been movements up and down in supply of facilities and demand for golf. Smith Leisure (in a proof of evidence relating to a golfing appeal) suggest that there may well be more golfers in the country now than 20 years ago, but that no more rounds are being played – i.e. golfers are playing less often. If there are 30% more courses and a similar number of rounds are being played overall, there are 30% fewer rounds being played on the courses that existed then and remain. The proof of evidence quotes that the typical municipal pay and play course in the early 1990s may have accommodated 50,000 rounds per annum (some many more) while today the norm is 35,000 (i.e. 30% fewer).

- There is clearly a definitive move towards more casual pay and play activities, which over the years has been caused by the desire by golfers for more variety in courses played, the need to roam and better flexibility. At the same time, since 1990 and with additional courses, only the 'best' clubs now have waiting lists for membership and more pay and play courses offer deals to attract casual golfers. Over the past 5 years, golf facilities have experienced difficult times, with poor summer weather, other sports events competing for golfers' time, the economic down turn and less appetite to play golf.

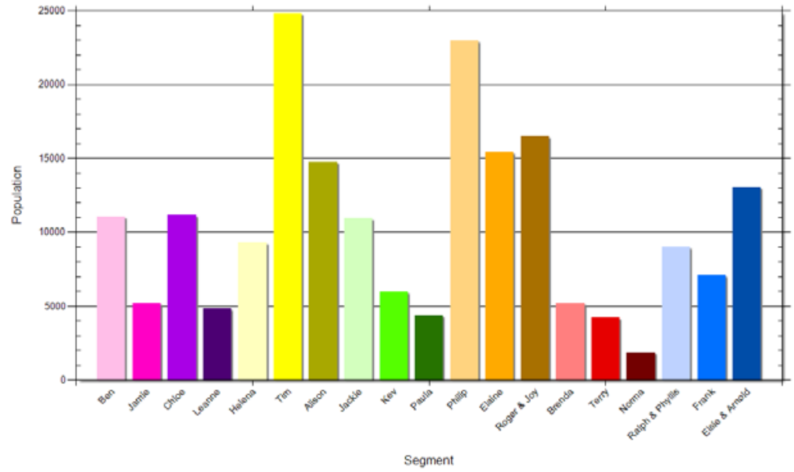
- **Smith Leisure** suggest that in the near future, the UK in general has marginally more golf courses than it needs (i.e. supply exceeds demands). There is no need for the mass closure of facilities, but golf courses are less profitable than in the early 1990s. There is a generally ageing population, but this bodes well for future growth as those over 50 have more time and disposable income, from which existing courses can benefit. Data collated for their report suggests that memberships neither rose nor fell by any significant numbers over the past five years, but that masks changes that have occurred in the sport, either forced or organic. Few clubs now have waiting lists, and a declining number have joining fees. Many believe the game is not as conducive to modern life as time and cost are the major barriers, but golfers can now play shorter forms of the game or on simulators indoors.

- **MINTEL** in its annual Golf UK Report for 2009 suggested that golf is a sport and leisure pastime that is affected more by economic conditions than most, and given the severity of the current recession, the game is 'facing an uncertain 2009'. A widely held view in the industry is that golf is recession-proof, and while this has proven to be true during past recessions, the current climate does not offer the same reassurances.

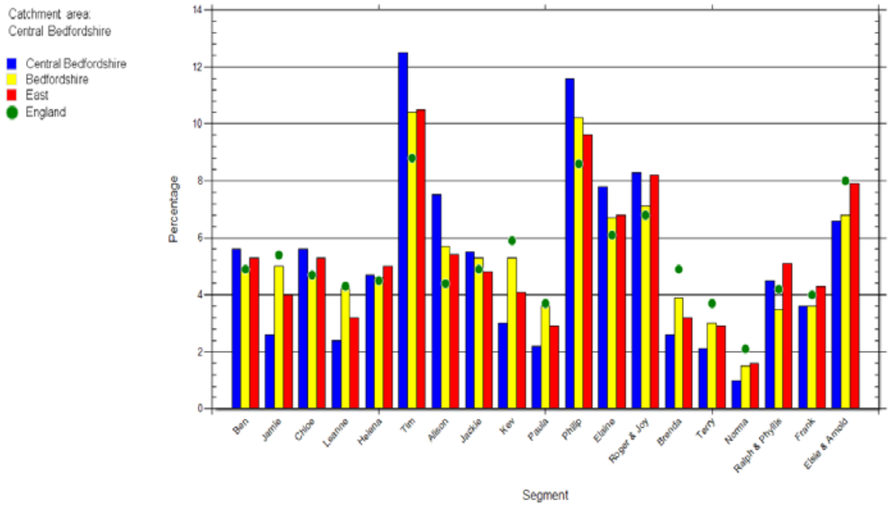
Market Segmentation

7. As part of its research work, Sport England has developed 19 market segments within the overall adult population to help understand the nation's attitudes towards sport and its motivation for taking part (or not). It is based on the Active People's Survey, DCMS's 'Taking Part' Survey and Mosaic data from Experian.

Population of all segments within catchment area



Population of all segments within catchment area

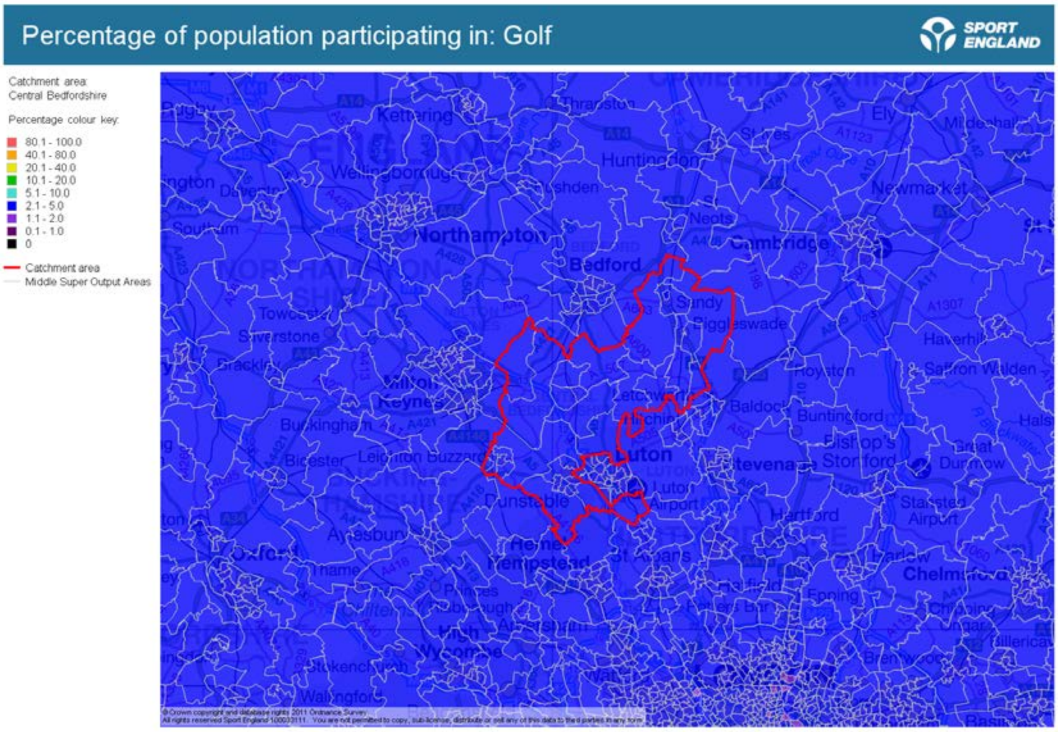


Segment	Catchment Pop.	Catchment %	CSP %	Rgn %	Nat %
Ben	11049	5.6	4.9	5.3	4.9
Jamie	5178	2.6	5	4	5.4
Chloe	11162	5.6	4.7	5.3	4.7
Leanne	4824	2.4	4.3	3.2	4.3
Helena	9316	4.7	4.6	5	4.5
Tim	24811	12.5	10.4	10.5	8.8
Alison	14764	7.5	5.7	5.4	4.4
Jackie	10963	5.5	5.3	4.8	4.9
Kev	5981	3	5.3	4.1	5.9
Paula	4387	2.2	3.6	2.9	3.7

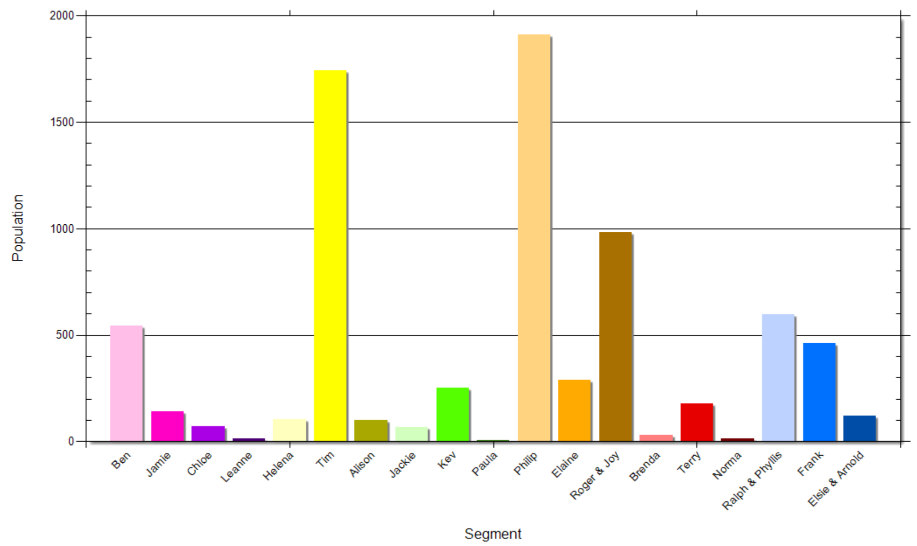
Segment	Catchment Pop.	Catchment %	CSP %	Rgn %	Nat %
Philip	22967	11.6	10.2	9.6	8.6
Elaine	15413	7.8	6.7	6.8	6.1
Roger & Joy	16494	8.3	7.1	8.2	6.8
Brenda	5219	2.6	3.9	3.2	4.9
Terry	4227	2.1	3	2.9	3.7
Norma	1881	1	1.5	1.6	2.1
Ralph & Phyllis	8992	4.5	3.5	5.1	4.2
Frank	7083	3.6	3.6	4.3	4
Elsie & Arnold	13044	6.6	6.8	7.9	8
Total	197755	99.7	100.1	100.1	99.9

Participation in golf – those who play

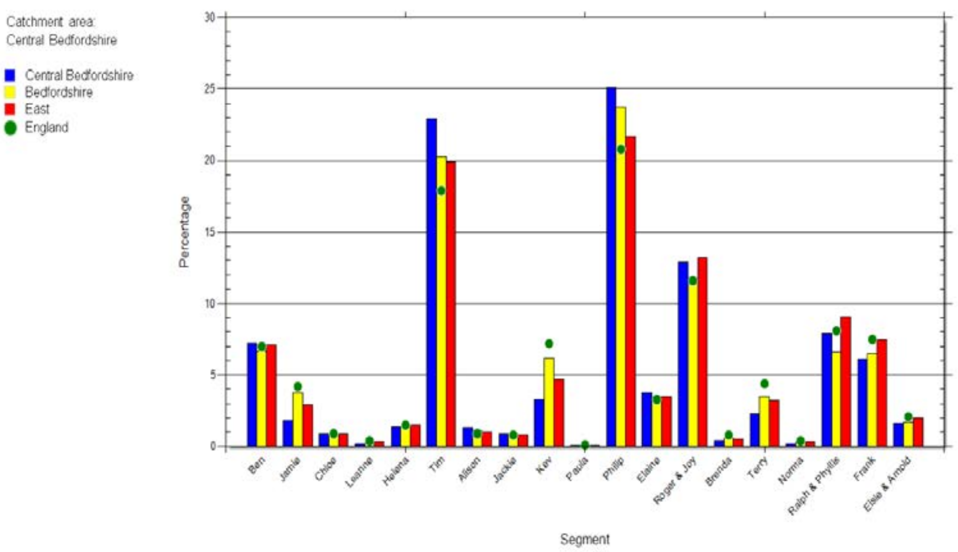
8. In terms of people within the district who (it is estimated by MS) do play golf, the data confirms that the major participants are indeed the main segments set out above, Tim, Philip and Roger and Joy, who in total comprise nearly 61% of the total golfers in the area. The MS data for the district estimates that total participation in golf is about 7600 adult players, almost exactly the same as the APS data suggests. This is between 2 and 5% of the population of the district, and is spread evenly across the whole of Central Beds.



Population within catchment area participating in: Golf

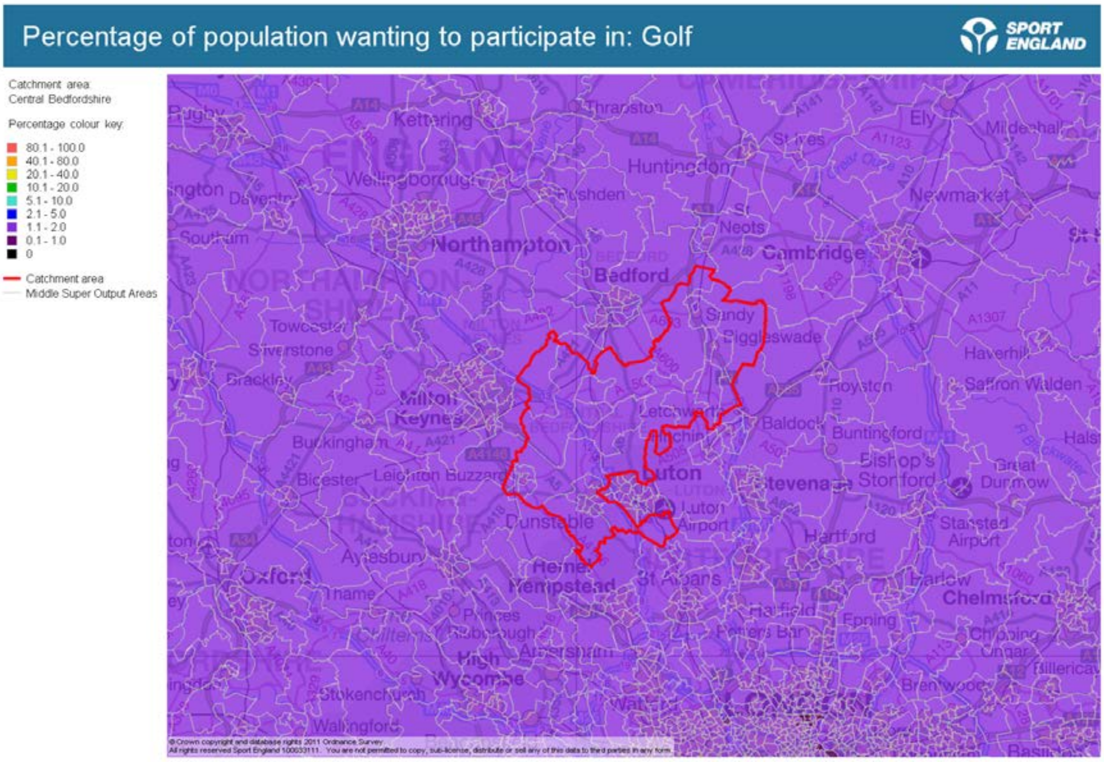


Population within catchment area participating in: Golf

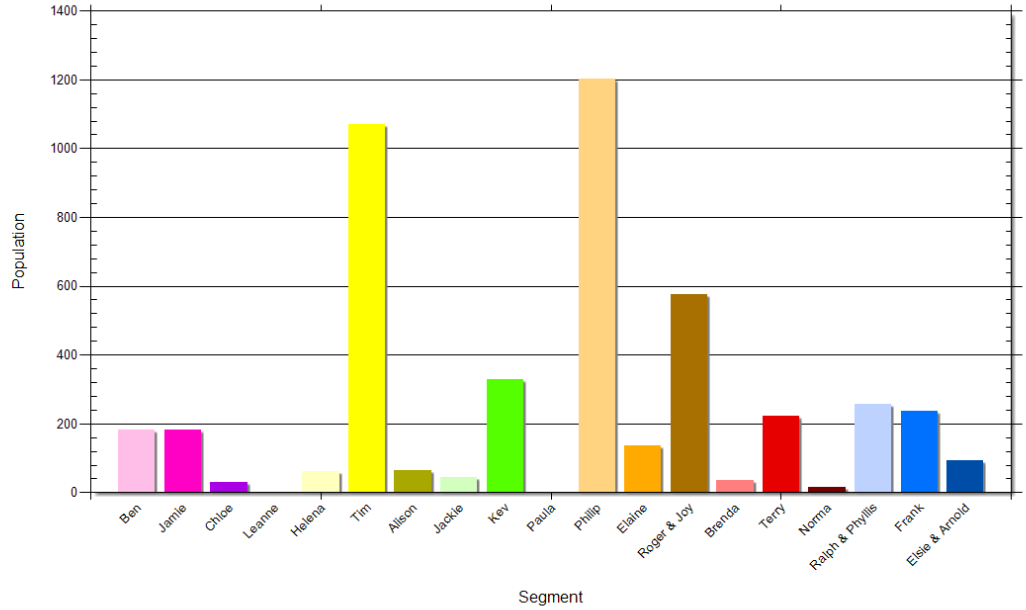


Segment	Catchment Pop.	Catchment %	CSP %	Rgn %	Nat %
Ben	545	7.2	6.7	7.1	7
Jamie	139	1.8	3.8	2.9	4.2
Chloe	71	0.9	0.8	0.9	0.9
Leanne	15	0.2	0.4	0.3	0.4
Helena	105	1.4	1.4	1.5	1.5
Tim	1742	22.9	20.3	19.9	17.9
Alison	100	1.3	1.1	1	0.9
Jackie	66	0.9	0.9	0.8	0.8
Kev	250	3.3	6.2	4.7	7.2
Paula	5	0.1	0.1	0.1	0.1
Philip	1909	25.1	23.7	21.7	20.8
Elaine	290	3.8	3.5	3.5	3.3
Roger & Joy	981	12.9	11.8	13.2	11.6
Brenda	30	0.4	0.6	0.5	0.8
Terry	177	2.3	3.5	3.2	4.4
Norma	14	0.2	0.3	0.3	0.4
Ralph & Phyllis	598	7.9	6.6	9.1	8.1
Frank	461	6.1	6.5	7.5	7.5
Elsie & Arnold	119	1.6	1.7	2	2.1
Total	7617	100.3	99.9	100.2	99.9

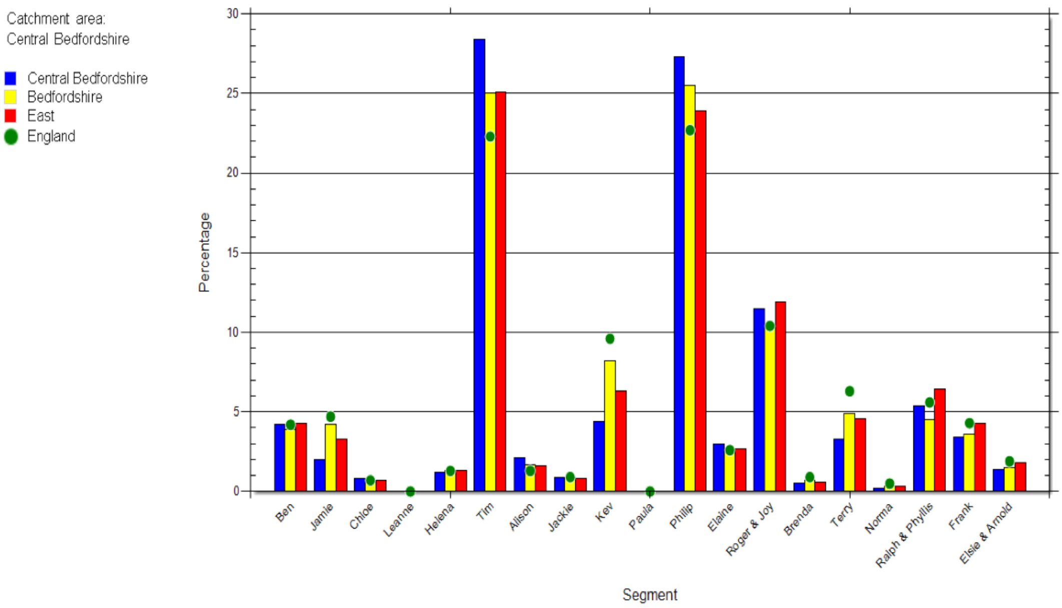
Those who would like to play



Population within catchment area wanting to participate in: Golf



Population within catchment area wanting to participate in: Golf



Segment	Catchment Pop.	Catchment %	CSP %	Rgn %	Nat %
Ben	141	4.2	3.9	4.3	4.2
Jamie	68	2	4.2	3.3	4.7
Chloe	25	0.8	0.6	0.7	0.7
Leanne	0	0	0	0	0
Helena	40	1.2	1.3	1.3	1.3
Tim	945	28.4	25	25.1	22.3
Alison	69	2.1	1.7	1.6	1.3
Jackie	30	0.9	0.9	0.8	0.9
Kev	147	4.4	8.2	6.3	9.6
Paula	0	0	0	0	0
Philip	909	27.3	25.5	23.9	22.7
Elaine	99	3	2.7	2.7	2.6
Roger & Joy	383	11.5	10.4	11.9	10.4
Brenda	15	0.5	0.7	0.6	0.9
Terry	110	3.3	4.9	4.6	6.3
Norma	7	0.2	0.3	0.3	0.5
Ralph & Phyllis	181	5.4	4.5	6.4	5.6
Frank	114	3.4	3.6	4.3	4.3
Elsie & Arnold	47	1.4	1.5	1.8	1.9
Total	3330	100	99.9	99.9	100.2

9. Potential demand for golf from the MS data confirms that it is the same groups that currently play that would like to participate more, totalling about 3300 participants, an increase of about a further 43% though these figures should be qualified as they represent a theoretical representation of latent demand for golf.