

Private & Confidential

Bradley Park Municipal Golf Course

Bradley Road, Huddersfield

HD2 1PZ

Independent Golf Options Report for Kirklees Council

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1. Introduction

- 1.1 I have been asked by Kirklees Council ('the Council') to produce this report. My instructions came from Martin Gonzales, a Development Manager within the Council's Sport & Physical Activity Development Team. There is a possibility that Bradley Park Municipal Golf Course ('Bradley Park') will get allocated for housing development in the forthcoming Local Plan. If this happened, then the golf course could permanently close in the next few years.
- 1.2 I am to provide an independent view on future golf provision options for the Council given that Bradley Park might close. I have specialised in the property and business aspects of UK golf for the last 25 years and am a member of the Royal Institution of Chartered Surveyors plus a member of the Golf Consultants Association. From time to time I have given expert evidence at planning inquiries regarding the need for and viability of golf courses.
- 1.3 I am to look at the October 2015 Golf Needs Assessment prepared for the Council by Knight Kavanagh and Page ('the KKP report') plus a mitigation options paper prepared by the current operator of Bradley Park, Kirklees Active Leisure ('KAL').
- 1.4 I am also to consider what mitigation, if any, is necessary should Bradley Park close in the future.
- 1.5 As agreed, given the research already carried out by others and the time constraints, my report is to be a 'desktop exercise'. I have therefore not visited Bradley Park nor the other local golf venues and I haven't spoken to any stakeholders at this point in time (apart from the Council instructing me).
- 1.6 The structure of my report is as follows:
- In section two I have provided a brief description of Bradley Park.
 - In section three I have commented on the general trends in the UK golf market.
 - In section four I have highlighted my main observations from the KKP golf needs assessment and the KAL mitigation options paper.
 - In section five I have provided some supplementary comments on the existing golf supply in the locality.
 - In section six I have posed some questions regarding the local golf provision and provided answers to those questions.

- In section seven I have posed some questions regarding mitigation options open to the Council and have then provided answers to those questions.
- In section eight I have provided my concluding comments.
- In Appendix One I have provided a simple decision tree highlighting various options the Council might consider pursuing.

2. Brief Description of Bradley Park

- 2.1 It is located about 3½ miles north-east of the centre of Huddersfield and is about 2 miles away from Junction 25 of the M62 motorway. Access is from the A6017 Bradley Road.
- 2.2 According to the Golfer's Handbook the venue was built in the late 1970s and comprises an 18-hole course (length around 6,200 yards), a 9-hole par three course and a floodlit driving range. According to the statutory Rating List (used for setting business rates), the clubhouse has a net internal floor area of around 450 m² and the driving range has 14 bays.
- 2.3 I understand that the golf course was designed by Donald Steel. He is one of the UK's finest golf course architects.
- 2.4 I have looked at an aerial view of the property from Google maps and I have also looked at photographs available online. I have also looked at some of the online reviews from golfers who have played the course.
- 2.5 My first impression is that Bradley Park looks to be a good quality municipal golf venue which appears in generally good condition and repair. Online comments suggest that it is one of the best municipal courses in the north of England.
- 2.6 It has a good configuration for an open to all, affordable golf course. Importantly, as well as its 18-hole course, it has a floodlit driving range and a 9-hole par 3 course. These latter two elements are very helpful for introducing new golfers to the game in a user-friendly way. The 9-hole par 3 course is also used for 'Footgolf' which is growing in popularity.

3. General Trends in the UK Golf Market

- 3.1 As well as the useful information on this provided in the KKP report, it may be helpful if I outline my general thoughts.
- 3.2 It is helpful to consider the context of how golf provision has developed in the last 100 years or so in the UK. The golden era for golf course construction was between 1880 and 1940. Virtually all of these early golf courses were built as not for profit private members' clubs. Golf was generally elitist during this time and was not easily accessible to the then 'working class'.
- 3.3 As the game grew in popularity it became apparent that some people found it difficult to get membership at these private clubs. This led to quite a large number of councils building municipal golf courses in the 1930s to cater for the need to provide wider access. There was also another period during the 1960s and 70s where councils built more municipal courses to cater for the growing popularity of the game and to provide affordable golf for all. Bradley Park was one of them.
- 3.4 As at the late 1980s the UK had around 2,600 golf courses and broadly the make-up was as follows: 80% were private members' clubs, 15% were municipal venues and 5% were proprietary venues.
- 3.5 Proprietary golf venues are generally run for profit. They are owned by companies, families or individuals and can cover the whole golfing spectrum - from being affordable open to all venues right up to ultra-exclusive trophy venues (such as Wentworth) and large golf hotels.
- 3.6 As at the late 1980s the UK experienced massive pent up golfer demand. The private members' clubs often had waiting lists for golfers wanting to join lasting several years and municipal golf courses were generally extremely busy. At some venues there were stories of golfers sleeping in the car park to ensure they could get a tee time to play the next morning at their local municipal course.
- 3.7 The Royal & Ancient, the game's governing body, produced a report in the late 1980s entitled 'The Demand for Golf', recommending that 700 new venues needed to be built by the year 2000 in order to keep up with the demand.
- 3.8 We then had a massive golf construction boom in the 1990s and over 700 new venues did get built. Virtually all of these venues were proprietary venues. Many, however, got into severe financial difficulty in the 1990s and there were financial casualties.
- 3.9 Sadly, from around 2003 onwards, the UK golf industry has experienced general decline. At first the pace of decline was slow but things got significantly worse with the onset of the global financial

crisis in 2008 and the deep recession thereafter. Also, poor and erratic summer weather in recent years has adversely affected the industry.

- 3.10 The roots of the problem for those running golf venues are generally twofold. First is the general increase in the supply of golf courses of around 30% plus in the 1990s, giving around 3,500 venues today. Second is gradually falling participation rates by golfers.
- 3.11 The latter has been caused by lifestyles changes in the last decade. Busier and more frenetic lives for many people now mean that those who want to play golf simply don't have as much available time compared to years ago. Furthermore, there is increased pressure from other pastimes that are fast growing in popularity, such as cycling.
- 3.12 As a result of the above two factors many parts of the UK are experiencing golf course oversupply. In my view, about 80% of golf operators are finding trading conditions challenging. They find it hard to make good financial profits compared to what was achievable in the past. The remaining 20% that are still trading well tend to be those courses in great trading locations or which have prestige and history so they can still attract good business.
- 3.13 The financial powerhouse of a golf business is its annual golf revenue. For an 18-hole course this is the sum of membership subscriptions (or season tickets at municipal courses) and visitor green fees. This in turn is a function of the total number of rounds played times the average price per round.
- 3.14 Reasonably performing 18-hole municipal courses typically achieve around 30,000 rounds per year at an average price per round (net of VAT) of about £10. This gives a total annual golf income for the 18-hole course of £300,000.
- 3.15 When the golf market was much stronger in the late 1980s, some municipal 18-hole courses were achieving over 50,000 rounds per year. At this level, many were 'cash cows' for local authorities. However, today some municipal courses are doing less than 20,000 rounds per year and are now making substantial losses for local authorities. Annual golf revenue has fallen significantly yet the running costs are broadly fixed (greenkeeping wage costs and maintenance/greenkeeping machinery costs).
- 3.16 This is why quite a few golf courses have closed in recent years on viability grounds (both from the municipal and proprietary golf sectors). In my view if an 18-hole municipal golf course is incapable

of generating over £300,000 in annual golf revenue then there is likely to be a strong question mark over its long term financial sustainability.

4. The KKP Golf Needs Assessment and the KAL Mitigation Options Paper

4.1 I don't propose to write a commentary on these two papers but wanted to highlight a couple of observations I made from reading them.

4.2 Firstly, the KKP report generally concludes that there is adequate golf provision within the Kirklees district and that if a golf course were to close, golfers would have alternatives based on availability at other local golf venues.

4.3 Secondly, the KAL report indicates that annual golf revenue from visitor green fees and season ticket holders at Bradley Park is in the order of £375,000 for the 18-hole course (£300,000 from green fees and £75,000 from season tickets) and around £100,000 from the driving range plus around £70,000 from the 9-hole par three course (most of this income is from Footgolf).

4.4 Revenue figures of this magnitude indicate to me that Bradley Park is a popular and financially viable golf venue. However, these numbers also indicate that it is far from being an ultra-successful/ultra-busy golf venue from a financial perspective.

5. My Supplementary Comments on the Existing Golf Supply

5.1 Having read the KKP report I have done my own research regarding the local supply to get an understanding of the current situation. I set out below some of my findings.

5.2 If Bradley Park was to close in a few years' time, then one would want to be confident that there are adequate opportunities for the golfers at Bradley Park to play elsewhere on reasonable terms regarding price and accessibility.

5.3 The first place to look for these are at the golf courses closest to Bradley Park.

5.4 The nearest course to Bradley Park appears to be Huddersfield Golf Club, which is one of the premier clubs in the area. It is around two miles away. It is unlikely that golfers from Bradley Park would transfer over to here in large numbers, mainly for price reasons and the differing product

quality. For example, the standard 7-day season ticket at Bradley Park costs £520 whereas a 7-day membership at Huddersfield Golf Club costs £1,200.

- 5.5 I see that Willow Valley Golf Club is also located fairly close to Bradley Park. It lies around two miles to the north-east and is situated on the other side of the M62 motorway. Whilst it is nearby as the crow flies, car access looks to take a somewhat torturous route. Whilst Willow Valley is not within the Kirklees district (it is within Calderdale's), it does provide good golfing facilities that could accommodate some of the displaced play at Bradley Park.
- 5.6 Of particular interest is the fact that it is a proprietary golf venue and thus profit-driven. It will be hungry to attract as much golf custom as possible and is looking to cater for all sorts of golfers, from novices to avid players.
- 5.7 Willow Valley was built in 1993 and comprises:
- the good quality 18-hole Willow Valley Course aimed at experienced players (water features on 11 holes and host to the Yorkshire Professional Golfers' Association Championship between 2001 and 2013);
 - the 18-hole Pine Valley Course, measuring 5,154 yards aimed at players of more modest abilities and at a lower price point;
 - the 9-hole Fountain Ridge Course with six par 3 holes and three par 4 holes, aimed at those not proficient enough to play the Willow Course or who have less time to spare;
 - two spare holes;
 - a 24 bay floodlit driving range;
 - an academy area comprising three short holes to practice pitching, chipping and putting;
 - Footgolf.
- 5.8 Full unlimited use of all the courses costs £900 per year (gold package), which is significantly more than the £520 season ticket for Bradley Park. However, the golf offering is more comprehensive. Golfers can take a silver membership for £600 per year which allows unlimited play on the Pine Valley and Fountain Ridge courses, except that play is not permitted on the Pine Valley course until after 2pm on summer weekends and after 10pm in the winter. This package might appeal to quite a lot of the golfers at Bradley Park, and in particular the senior members who tend to play in the mornings during the week.

- 5.9 About three miles to the north of Bradley Park and just north of Brighouse is Crow Nest Park Golf Club. Like Willow Valley it lies just outside the Kirklees district in Calderdale's. It comprises a 9-hole course with an 8 bay floodlit driving range built in 1995. According to the club's website, in 2009 the National Club Golfer magazine listed Crow Nest Park in the top 10 of Britain's best 9-hole courses. Such accolades are somewhat subjective.
- 5.10 Whilst originally a proprietary venue the club's website suggests it is more of a membership based club following a change of ownership in 2011. Membership prices are not quoted on the website but it says there are a small number of vacancies for full male membership with more vacancies for ladies and juniors. The summer visitor rate for 9 holes of golf is £13 rising to £24 during the week. Some golfers displaced from Bradley Park might choose to play here.
- 5.11 About four miles south east of Bradley Park is Dewsbury District Golf Club, which is within Kirklees district. This is an 18-hole private members' club founded in 1891. The course length is around 6,300 yards. Full 7-day membership costs £815 and midweek membership costs £570. Some displaced Bradley Park golfers could play here.
- 5.12 Around five miles to the west of Bradley Park is Elland Golf Club. This appears to be a 9 hole private members' club founded in 1910. Full playing memberships cost £576 (frozen prices since 2012), which is nearer to Bradley Park's £520 season ticket price, although the latter has 18 holes and a course length of over 6,000 yards. Elland Golf Club is quite short (18-hole length around 5,500 yards).
- 5.13 The above venues cover the main golf courses which are closest to Bradley Park and will be on the radar for golfers living very close by to Bradley Park. The next area to consider is the options open to golfers living nearer the centre of Huddersfield. If Bradley Park was to close, then it may be more convenient for such golfers to look at playing at a venue on the west or south side of the town. These options include the venues below.
- 5.14 Outlane Golf Club is located about four miles west of Huddersfield town centre and is close to Junction 23 of the M62 Motorway. It is an 18-hole private members' club founded in 1906. The course length is around 6,000 yards. Whilst the club's website doesn't quote prices, it is evident that it is keen to attract new members with reduced subscription rates of 25% and 10% for the first and second years.

- 5.15 Crosland Heath Golf Club is located around three miles south west of Huddersfield town centre. It comprises an 18 hole private members' club founded in 1914. The course length is around 6,100 yards. Full 7-day membership costs £835 and 6-day membership (no play on Saturdays) costs £716.
- 5.16 Longley Park Golf Club is located just south of the town's ring-road and is close to the University of Huddersfield. It is a short 9-hole private members' club which was founded in 1910 (18-hole length 5,212 yards). Memberships are available and the full 7-day cost is £650.
- 5.17 Woodsome Hall Golf Club is located around three miles south east of the town centre. It was founded in 1922 and comprises an 18-hole course with a 16th century Grade 1 listed clubhouse. Full 7-day membership costs £1,210 so the venue is unlikely to attract golfers displaced from Bradley Park in significant numbers.
- 5.18 The final area to consider is golfers living in the north eastern section of the Kirklees district (i.e. living north east of Bradley Park), where there are some significant population settlements. Within the Kirklees district are the courses below.
- 5.19 Cleckheaton & District Golf Club is an 18 hole private members' club founded in 1900. The course is around 6,000 yards long and is located close to Junction 26 of the M62 Motorway. Full 7-day membership costs £963 and 5-day membership costs £687.
- 5.20 East Bierley Golf Club was founded in 1909 and is a 9-hole private members' club. The course is quite short (18-hole length 5,224 yards) and is located just south of Bradford. Full 7-day membership costs £560.
- 5.21 Hanging Heaton Golf Club is also a 9-hole private members club and is located just outside Dewsbury. Full 7-day membership costs £585.

6. My Questions and Answers Regarding Local Golf Provision

- 6.1 I have summarised my thoughts on the local golf provision by giving my answers to a number of questions I have posed.
- 6.2 *Question 1 – Is there a quantitative oversupply of golf courses in the Kirklees district?*
- 6.3 My answer is as follows:

- 6.4 'Quantitative supply' relates to the sheer number of golf courses in the district, as opposed to the make-up of the supply in terms of differing types of venue. I will look at the latter, which relates to 'qualitative supply' in a later question.
- 6.5 I see from the KKP report that the Kirklees district has a total of twelve golf courses. Out of the twelve courses, eight have 18-holes and four have 9-holes. This is the equivalent of ten 18-hole courses.
- 6.6 I also see from the KKP report that the 2014 population of the Kirklees district was 428,279. As a rough indicator this gives the equivalent provision of one 18-hole course per 42,800 people.
- 6.7 There is a general quantitative yardstick which has historically been used in the UK golf industry. It arose from the Royal & Ancient report in 1988 entitled 'The Demand for Golf'. For golf supply/demand to be broadly in equilibrium, the equivalent provision should be around one 18-hole course per 25,000 resident population.
- 6.8 In many parts of the UK the equivalent provision is less than one 18-hole course per 25,000 resident population, indicating likely oversupply in those areas.
- 6.9 The fact that the ratio is one 18-hole course per 42,800 people suggests that the Kirklees district does not suffer from significant golf course oversupply. The ratio is healthy. Furthermore, if Bradley Park was to close down there would only be the equivalent of nine 18-hole courses in the district, increasing the ratio to one 18-hole course per 47,500 resident population.
- 6.10 What the ratio doesn't take account of is the local population's propensity to play golf. If a local population is of modest means compared to the UK average, then the probability is that there will be less golfers as a percentage of the whole. Likewise, if a population has a higher than average ethnic make-up then this is likely to skew the number of people who play golf. Despite concerted efforts by many golf venues and the game's governing bodies to change the situation, golf is still played mainly by white males aged 45 plus.
- 6.11 Question 2 – Is there quantitative local oversupply specifically in relation to Bradley Park?
- 6.12 My answer is as follows:
- 6.13 Given the data available to me at the moment I am unable to answer this question in a way that I normally would.

- 6.14 In my view the most robust way to look at this would be to consider the 20-minute drive time area immediately surrounding Bradley Park. The demographic data for this area could be obtained from data providers, CACI Ltd. As well as showing the 20-minute drive time boundary the data would also show the total resident population within this area together with a commentary on the economic groupings in comparison to the Great Britain average (affluent, less affluent etc.).
- 6.15 One would then plot all of the existing golf venues within the 20-minute drive time calculating the quantitative ratio, seeing how it correlates to the yardstick of equilibrium being the equivalent of one 18-hole golf course per 25,000 resident population.
- 6.16 Bearing in mind the ratio for the Kirklees district at one 18-hole course per 42,800 people, it is a fair probability that the ratio of courses to head of population within the Bradley Park 20-minute drive time is unlikely to show substantial golf oversupply.
- 6.17 Question 3 – Is the qualitative make-up of courses within the Kirklees district fairly typical for the UK?
- 6.18 My answer is as follows:
- 6.19 Within the district there are twelve golf venues, eight of which are 18-hole venues and four are 9-hole venues. The split between 18-hole venues and 9-hole venues is therefore 2:1, which shows a high proportion of 9-hole courses in the area. Given twelve local courses, then in my view the UK market norm would be for around ten of them to be 18-hole courses and two of them to be 9-hole courses.
- 6.20 What is very unusual is that the Kirklees district has no proprietary golf venues at all. Of the twelve venues, eleven are traditional not-for-profit private members' clubs built a long time ago and one is Bradley Park, the municipal course.
- 6.21 Thus, 92% of the supply of golf courses in the Kirklees district are private members' clubs and only 8% of the stock is municipal. This compares to the 80% private members' clubs, 15% municipal courses and 5% proprietary courses make-up for the UK in the late 1980s before the golf construction boom.
- 6.22 After over 700 new golf courses got built in the 1990s, virtually all of which were proprietary venues, the UK's split of golf courses is now roughly 60% private members' clubs, 5% municipal venues and 35% proprietary venues.

- 6.23 What one needs to be wary of, when looking to promote a good proportion of truly open to all access for golf in a district, is that ultimately the traditional private members' golf clubs are run by their members for the benefit of their members. Thus, whilst many of them are working hard to boost their membership numbers and do take green fee visitor play, at times they have a tendency to look after their own members over and above the interests of casual green fee players. This is only natural and to be expected given their constitutional set up.
- 6.24 This can manifest itself in limited tee time availability for casual non-member golfers at peak times when the bulk of the members want to play. This typically occurs at weekends and particularly in the mornings. Also, overly strict and antiquated dress code policies can apply at some clubs. Whilst the clubs are entitled to run their affairs in the way that they choose, from a broader golf provision perspective, this is not conducive to getting some people (and in particular youngsters) to want to have a go at the game in a user-friendly, modern environment.
- 6.25 This is where the proprietary sector can provide a very good counterbalance and fills an important role. Whilst some of them can be upmarket and exclusive proprietary membership based clubs, many target the affordable sector of the golf market, and in particular novices or those who do not want to be a full member of a club. Often they have very relaxed policies relating to dress code and the use of mobile phones. They are effectively fulfilling the role that municipal golf courses have played in the past.
- 6.26 Also, the proprietary golf sector tends to adapt and try new things much quicker than the traditional private members' clubs, who tend to be rather slow to change their ways. For example, Footgolf is taking off fast in the UK and is played at quite a lot of the proprietary golf venues and many municipals but to date I cannot think of any private members' golf clubs who have introduced it.
- 6.27 Even though the traditional private members' clubs may have the well-being of their members as their main priority, some of them are still very good at encouraging youngsters to play the game and some are working really hard at recruiting lady members. This is because they know that in order to prosper for the long term they need to be creating the golfers of the future. Also, England Golf, the umbrella administrative body for golf clubs in England, is strongly promoting such a strategy.
- 6.28 In the Kirklees district, the proprietary golf sector does not provide the counterbalance to the higher than normal provision of private members' clubs. It is important to point out that Bradley Park is

currently the only affordable open to all golf course in the district. If it did close in a few years' time, then the only provision within the district will be the traditional private members' golf clubs, which would be a highly unusual situation.

6.29 It is worth noting that even though we had the huge golf course construction boom in the 1990s, no new proprietary golf courses were built in the Kirklees district at all. This implies that the market during the 1990s felt that there was no need to build proprietary golf courses in the area or that they were deemed financially unviable propositions.

6.30 I need to point out that my analysis above relates purely to the Kirklees district. From a golfers' perspective, one must remember that two proprietary golf courses have been built in the 1990s very close to Bradley Park. These are Willow Valley Golf Club and Crow Nest Golf Club, both falling within the district of Calderdale.

6.31 Golfers are unlikely to take any notice of administrative boundaries when choosing to play golf. Thus whilst there may be no proprietary golf courses within the Kirklees district itself, golfers can play proprietary golf courses just outside of its area.

6.32 *Question 4 - Are there reasonable alternative choices for avid golfers from Bradley Park if it closed?*

6.33 My answer is as follows:

6.34 I would describe avid golfers at Bradley Park as those that play 50 times or more a year at the venue (i.e. at least once a week play).

6.35 I see from the KKP report that Bradley Park has around 191 season ticket holders (numbers are capped at 200). Season ticket holders pay a lump sum for their year's golf as opposed to paying a green fee each time they play. Season tickets will get sold to the avid golfers since they get their money's worth by paying this way rather than paying an individual green fee each time they play.

6.36 The fact that the limit of 200 sales hasn't been reached suggests that whilst there is fair demand (most have been sold) they are not in really high demand, otherwise the full amount of 200 would presumably have been reached.

6.37 I am confident that if Bradley Park did close then these avid golfers could join other local clubs. They are likely to want to join one of the other nearby courses. Their ultimate choice will depend on a number of factors including where they live, the cost of membership, where their friends have chosen to relocate to and which is their favoured venue from a golf playing perspective.

- 6.38 The KKP report clearly demonstrates that a number of the local private members' golf clubs are looking to take on new members, so there are realistic options for these golfers. Also, I am confident that the nearby Willow Valley Golf Club would be keen to take on new members from Bradley Park.
- 6.39 If they are avid golfers, then most of them will have an official golf handicap certificate, which eases the way for getting new membership at the traditional private members' clubs.
- 6.40 An issue will be price. These golfers, unless they join one of the cheaper nearby 9-hole courses (which have similar prices to Bradley Park), will end up paying a higher annual membership subscription. This could amount to a few hundred pounds. Depending on how often they play and how important their golf is to them, the additional cost is likely to be worth paying for most people.
- 6.41 Question 5 - Are there reasonable alternative choices for the occasional golfers from Bradley Park if it closed?
- 6.42 My answer is as follows:
- 6.43 This category of golfer at Bradley Park is the most vulnerable. There is, however, an argument to say that if they do not play golf that much anyway, would they really miss Bradley Park if it closed compared to those avid golfers who see Bradley Park as an important part of their social/sporting life?
- 6.44 The irregular golfer can also be described as a nomadic golfer. They choose not to be a full member of a golf club but instead prefer to pay for their golf as and when they play. If they are not an experienced golfer or do not have a certified golf handicap certificate, then they will find restrictions in playing at some of the traditional private members' clubs.
- 6.45 They will also find it hard, if not impossible, to book tee times to play at peak times at the private members' clubs (typically weekend mornings).
- 6.46 Also, if they are novices they may find playing at one of the private members' golf clubs somewhat intimidating, whereas playing at a municipal venue or a lower quality proprietary course causes less anxiety.
- 6.47 From a purely Kirklees district perspective, if Bradley Park did close then these occasional golfers will have limited choices to play elsewhere in the district given that there are no proprietary golf venues within it. However, one must remember that only a couple of miles of way from Bradley

Park is Willow Valley Golf Club, the proprietary venue which has a wide variety of options to cover all golfing needs (50 holes of golf and a 24 bay floodlit driving range). The costs to play Willow Valley Golf Club are likely to be a little higher than at Bradley Park, however if golfers only play occasionally the additional cost is probably justified.

6.48 Question 6 - What about the provision of ancillary golf facilities such as floodlit driving ranges and par 3 courses?

6.49 A significant benefit of Bradley Park is that it has ancillary golf facilities to complement its 18-hole course. This includes the 14 bay floodlit driving range and the 9-hole par three course with the ability to play Footgolf.

6.50 These facilities enable people to have a go at the game without having to venture out onto a full-scale 18-hole course. They also provide useful practice facilities. Covered driving ranges are particularly good if the weather is bad and floodlighting means that they can be used by golfers after dark.

6.51 The first point I wish to make is that the driving range at Bradley Park is quite small with only 14 bays. Typically, good commercial driving ranges would look to have anything from 24 to 36 bays and some of the UK's super-ranges have 50 bays plus (sometimes built double-decker style).

6.52 Thus, whilst it is good to have the driving range at Bradley Park, it is currently on the small side.

6.53 The KKP report identifies two other driving ranges within the Kirklees district. These are Stadium Golf and Hopton Horse Centre.

6.54 Stadium Golf is located at the John Smith's Stadium and is close to Huddersfield's town centre. It comprises a 30 bay floodlit driving range together with a golf superstore run by Direct Golf. The KKP report mentions that there are proposals for a commercial development at this location which would mean the permanent closure of this driving range in due course.

6.55 The Hopton Horse Centre is a livery yard located at Mirfield which has a small, self-service driving range. Given its location and size it is fairly insignificant compared to the larger commercial golf driving ranges found in built-up areas.

6.56 Given the existing supply above, if both the driving ranges at Bradley Park and Stadium Golf were to close (a loss of 44 covered bays), this would be a major dent in the provision of open to all golf driving ranges in the Kirklees district. This is because whilst the private members' clubs will have

practice grounds and in some instances, a few covered bays, these are generally not open to the general public.

- 6.57 Again, golfers are not particularly interested in administrative boundaries when choosing a driving range and one must bear in mind that there are two floodlit driving ranges nearby to Bradley Park. One is a reasonable size (24 covered bays at Willow Valley) and the other is small (8 covered bays at Crow Nest Park).

7. My Questions and Answers Regarding Mitigation Options

- 7.1 I have summarised my thoughts on possible mitigation options for the Council if Bradley Park was to be developed for housing in the future by giving my answers to a number of questions.
- 7.2 *Question 7 - Should local authorities be in the business of providing municipal golf facilities these days?*
- 7.3 Before the golf construction boom of the 1990s, which saw over 700 new proprietary golf venues built in the UK, local authority municipal golf provision was particularly important. This was because before the 1990s the bulk of supply was the traditional private members' clubs where general affordable to all golf was pretty limited. As of the late 1980s around 15% of the UK's golf course stock were municipal golf courses.
- 7.4 Today only around 5% of the UK's golf course stock are municipal golf courses and in most parts of the UK affordable open to all proprietary venues provide good access to golfers who are not members of traditional private members' clubs.
- 7.5 Due to the high pent-up golfer demand in the late 1980s municipal golf courses in many cases were cash cows for local authorities. It was thus a 'win-win' situation: local authorities were serving the needs of some golfers whilst at the same time generating hefty cash surpluses from their courses.
- 7.6 As the UK golf industry has moved into decline over the last decade or so, the underlying profitability in running golf courses has fallen dramatically. In most cases, given the stiffer golf competition, this has meant that many municipal golf courses have now become loss-making for local authorities.

- 7.7 As a result, over the last decade many local authorities sought to outsource the operation of their municipal golf courses by either leasing them or giving management contracts to third parties, such as specialist golf operators or leisure trusts. Indeed, Kirklees Council has outsourced the management of Bradley Park to a leisure trust.
- 7.8 Part of the reason why financial trading losses started to mount at municipal golf courses is that over the last 15 years or so, running municipal golf courses has not been seen as a core service for local authorities. There have more pressing priorities on their time and cash resources. As a result, this exacerbated the fall in trading performance for many because they were outmanoeuvred by the proprietary golf operators keen to grow their market share and also many municipal golf courses suffered from a lack of capital investment over a number of years.
- 7.9 This led to a number of local authority courses starting to look very tired and dated compared to the expectations of golfers. In particular, investment in clubhouses suffered. This caused a decline in usage as golfers started to play elsewhere.
- 7.10 Since the global financial crisis of 2008 there has been a period of financial austerity in the UK with many public bodies being forced to cut their public expenditure budgets in an effort to decrease the UK's level of national debt. This puts even more pressure on local authorities running municipal golf courses, particularly if they are loss-making. It begs the question: why are they continuing to run or own them?
- 7.11 My view is that if local authorities have municipal golf courses that are loss-making they need to think very carefully about whether to retain them in the future. There are political/strategic reasons why they do keep running them (no one likes to see leisure facilities close without very good reason for closure) but as a principle the social need for local authorities to provide open to all access golf is nowhere near as important as it has been in the past.
- 7.12 Of course, if a municipal golf course is still providing revenue surpluses to a local authority then it is not a drain on financial resources. From the documentation I have seen it appears that Bradley Park is making a modest financial surplus and so is not a financial drain on the Council.
- 7.13 Thus, whilst in many cases it is a fairly easy decision to offload/close a municipal golf course if it is losing a council several hundred thousand pounds per year, losing Bradley Park is a different proposition. Firstly, it is still quite popular as a municipal golf course and appears in good order, secondly it is the only affordable open to all golf course in the Kirklees district, thirdly it has a driving

range which would be the only reasonably sized one in the district if the 30 bay driving range at the John Smith's Stadium closes in due course and fourthly it does not appear to be losing lots of money.

7.14 Thus, if it were to close there would be some significantly adverse impacts. The question then is what mitigation options are available to Kirklees Council and what are their relative merits.

7.15 Question 8 - Should the Council consider a reduced scale golf operation at Bradley Park?

7.16 If houses were to be built at Bradley Park, at this stage I do not know whether it will be a mandatory requirement for the land take for housing to be the whole golf site or just part of it. Clearly, if the whole existing site is needed then the golf course would automatically disappear in its entirety.

7.17 However, if it was an option to retain some of the existing golf venue, would this be a good idea?

7.18 If say just 9-holes of the existing 18-hole golf course were lost to housing and it was then possible to keep a full-length 9-hole golf course with little capital expenditure required to convert it to 9 holes plus the existing driving range, the par three course and the clubhouse, then this would still be a worthwhile venue to have.

7.19 It would be a good starter centre configuration for golf and would be in line with England Golf's objectives to grow the game. However, losing the 18-hole course to a reduced size 9-holes will adversely affect the profitability of Bradley Park and it is likely that it will only operate at around breakeven from a financial perspective, whereas I understand that the surplus is currently in the order of £70,000 to £100,000 with the full-length 18-hole course.

7.20 If the scale was reduced further to say just the 14 bay driving range, the 9-hole par 3 course and the clubhouse (i.e. lose the entire 18-hole course) my concern is that this is likely to become loss-making because of a lack of scale to support the relatively high fixed costs of the remaining operation.

7.21 Rather than close Bradley Park in its entirety for housing a mitigation option might be to close it in phases as the housing development progresses. For example, the clubhouse area and the driving range/par-3 area might be planned as the last phase of the housing development and therefore could remain open for many years to come.

- 7.22 Indeed, one might even consider that developing this area for housing might be an optional phase, so that if the clubhouse, driving range and par three course proved to be popular in their own right and cash positive (unlikely but not impossible) it might be deemed a good leisure asset to retain.
- 7.23 If the housing development is such that the only way that golf can continue to be played at Bradley Park is for major capital investment to be spent reconfiguring the golf layout at the venue (say for example, moving the clubhouse or other expensive elements) then I think there is a big question mark over the financial viability of doing this, and it is highly unlikely to be worth it.
- 7.24 Of course, there would be a large capital receipt from the sale of housing land but whether the Council should recycle some of this money back into Bradley Park is another matter. If municipal golf provision is to be retained in some form in the Kirklees district, it might be better to choose a new alternative site closer to the centre of Huddersfield.
- 7.25 The reason I say this is that there are substantial golf facilities at the nearby Willow Valley Golf Club (50 holes of golf and a 24 bay driving range) which is only around two miles away. I accept that car access to Willow Valley is not great and it is further away from the centre of Huddersfield, but to me it seems a little wasteful to spend a large amount of money rebuilding golf facilities at a reconfigured Bradley Park with Willow Valley being so nearby.
- 7.26 Question 9 - Assuming full closure of golf at Bradley Park what is the range of mitigating options?
- 7.27 The spectrum ranges from doing nothing to replacing Bradley Park by building another substantial municipal golf course elsewhere within the district.
- 7.28 Doing nothing is the cheapest option for the Council, although it will still have some costs involved. As closure of Bradley Park nears, the venue is likely to see declining trading performance due to the uncertainty over closure. Staff working at Bradley Park will be concerned about their futures and golfers may choose to play there less often or not at all. Thus, whilst the golf centre is currently making a revenue surplus this is likely to erode in the coming years to a loss.
- 7.29 I imagine that KAL will be concerned about the financial implications of closure on them and the Council will need to sort out arrangements to deal with this.
- 7.30 Impending closure will mean that it will no longer make economic sense to make substantial capital expenditure on golf matters at Bradley Park, as this will simply be wasted money. Whilst golf venues do need significant capital expenditure over time, it seems to me that Bradley Park is in quite good

order anyway and is probably not in need of imminent major capital expenditure. Therefore, provided annual maintenance continues in the normal way to keep the venue in as good a condition as is reasonably possible then this policy should suffice until ultimate closure.

- 7.31 Even if the land is allocated for housing in due course it is probable that it will be several years before the diggers start moving in for house building. It should therefore still be possible for the golf venue to trade in the interim for a good while.
- 7.32 At the other end of the scale is a complete rebuild of a new municipal golf centre elsewhere in the district. To build a new 18-hole golf course with a clubhouse, say a 30 bay floodlit driving range and a new 9-hole par three course, if done to a decent specification, is likely to cost in the order of £3 million to £4 million including freehold land acquisition costs. Around 140 to 170 acres of land is likely to be needed and the prices that the Council would be able to charge golfers for the new facility would be fairly similar to those at Bradley Park. The new venue might operate at a small surplus before any allowance for financing costs but is highly unlikely to be very profitable.
- 7.33 Clearly, if the Council already owned a suitable piece of land on which to build a new golf course then there would be no land acquisition costs (say £500,000 to £1 million for a freehold purchase of land).
- 7.34 It is the norm in the golf market these days that it is cheaper to buy an existing golf course compared to building one from scratch. The reason for this is the low underlying profitability of the end product. If golf courses do not make much money, then end buyers will not pay over the odds to buy them. Typically, reasonable quality 18-hole golf courses sell for anything between £750,000 and £2 million.
- 7.35 Also, building one from scratch is likely to take several years in terms of planning, building and opening.
- 7.36 Thus, unless the Council is particularly willing to use some of the large funds generated from selling the residential land at Bradley Park to fund a full-scale relocation, building from scratch is not a particularly attractive or financially viable proposition.
- 7.37 There is one exception to this. Over the last decade or so, using inert landfill has been the only way to subsidise building major extensions and alterations to golf courses, and indeed some entire new golf courses have been built from scratch in this way.

- 7.38 Inert landfill is created from building sites. Rubble and earth removed from construction sites for housing/commercial development typically ends up at a registered landfill site where the haulage contractors pay for the right to dump the material. This produces a tipping royalty income for the registered landfill site.
- 7.39 Provided the inert fill material is suitable for golf course construction (i.e. straightforward soil and rubble which is not contaminated), it can be used as shaping to create a new golf course. This is actually a good way of recycling because the inert fill material has to go somewhere anyway.
- 7.40 Typically, haulage contractors will pay anything from £30 to £100 per load to dump suitable inert fill material onto a golf course construction site. If 50,000 loads were dropped at an average price of £40 per load, then this would generate £2 million worth of revenue to go towards the construction of the golf centre. Thus, a £4 million build cost not using spoil importation might be reduced to around £2 million with it.
- 7.41 One might expect delivery rates at an average of 50 lorry loads per day so dropping 50,000 loads is likely to take around four years of spoil importation.
- 7.42 The Council may or may not be interested in a scheme of this nature. It partly depends on how much construction work is going on in the district and the potential supply of inert fill material. Whilst the Council might not want to run such an operation itself, if it had an alternative piece of land on which to build a golf course it could lease the land to a golf developer who would then look to build the new golf centre using inert fill material to subsidise the cost.
- 7.43 This might then be an effective way of replacing Bradley Park. With inert landfill schemes on golf courses one needs to be extremely careful about choosing a good contractor to do the work. Whilst there are some excellent contractors out there who do a good job, unfortunately there are some unreliable/unscrupulous operators as well.
- 7.44 If the Council is interested in building a replacement Bradley Park in some form, then it may not be necessary to build a full-length 18-hole golf course. Instead, it could consider building a starter centre format which includes a full-length 9-hole course, a 9-hole par three academy course, a floodlit driving range (say 30 bays), Footgolf and a small light and airy cafe style clubhouse. This would probably need around 60 to 100 acres of land. Its aim would be to encourage new golfers into the game and in particular ladies and juniors. As these golfers progressed, they would then move on to the bigger clubs in the area.

- 7.45 Again this type of facility could be subsidised by using inert fill material to build if the Council so wished. The likely build cost, excluding inert fill material importation and land purchasing, is likely to be in the order of £1.5 million. Once completed and up and trading it might operate at a small annual surplus before financing costs but again is unlikely to be significantly profitable.
- 7.46 It might also be appropriate to include an adventure golf course. These are a new phenomenon in the UK golf market and have been around about five years. They are adventure putting courses located next to the clubhouse and often revolve around the theme of pirates. As examples see www.piratebayadventuregolf.com and www.championshipadventuregolf.com. They are serious businesses, often costing around £500,000 to build but can be highly profitable with a fast payback period. Like many leisure businesses, finding the right location for them is critically important to success. The quality of the chosen location is everything.
- 7.47 If the Council is not interested in rebuilding Bradley Park elsewhere in some form, or is simply not in a position to do so, then in theory an alternative option is to consider acquiring an existing golf course within the Kirklees district. In my view this is likely to be a non-starter. This is because the other eleven golf courses within the district are all traditional private members' golf clubs which rarely get sold. It is therefore highly unlikely that they would be interested in selling their golf courses unless they were in a really difficult financial position.
- 7.48 If there were one or two proprietary golf venues within the district then they would be more likely to be receptive to a sale, because they are for-profit businesses. This, however, is not the case within the Kirklees district.
- 7.49 If the Council is not looking to replace its municipal golf course provision in some form, then the next mitigation option is to consider ways of finding alternative places for the Bradley Park golfers to play. The question then is how active a role should the Council play in doing this? Should it simply let market forces prevail - i.e. if Bradley Park closes, golfers will have to find their own solutions and hopefully the nearby golf courses will be proactive in picking up their business? Or should it take a more proactive role - if so, then what might it be?
- 7.50 If the Council decides to leave matters to market forces then I am reasonably confident that the avid golfers from Bradley Park will find other courses to join, although they are likely to be disgruntled that their golf is likely to cost them more. Turning to the less frequent golfers, some

will probably choose to play at Willow Valley or to a lesser extent might play at the private members' clubs, although again, their golf is likely to cost them more.

- 7.51 Unfortunately, there are also likely to be some golfing casualties. If Bradley Park does close, then some of its users may simply decide to give up playing golf altogether. This would be a shame, but in the context of the larger picture whole, may have to be a price to be paid.
- 7.52 If the Council wanted to take a more proactive role to find new golfing homes/options for displaced golfers at Bradley Park, then my main recommendation would be for the Council to talk to the proprietor of Willow Valley Golf Club about coming up with a co-ordinated scheme to accommodate golfers here. I would expect the proprietor to be very receptive to the idea of taking on golfers from Bradley Park as it will be improving his/her business. I am sure they will have spare capacity.
- 7.53 Likewise, the Council could also talk to the nearby private members' golf clubs who are looking to attract new members. Again, it should be possible to come up with some kind of co-ordinated scheme to introduce Bradley Park golfers into their clubs either by way of a full membership or some form of flexible membership offering.
- 7.54 Flexible membership offerings are increasing in the UK golf industry as venues try and tailor packages to suit the needs of some golfers who may not want or do not have the time to take up a full membership. For example, instead of paying a full annual membership subscription of say £800 per year some more forward thinking golf clubs might offer an option where for around £350 per year new golfers have a right to play a certain number of rounds per year at the club instead of unlimited access.
- 7.55 Mitigation options such as the above should not cost the Council any meaningful money but instead would simply mean allocating some resources in terms of personnel going out to talk to the nearby golf clubs, engaging with stakeholders and trying to find some workable solutions.
- 7.56 Question 10 - What happens if the driving ranges at Bradley Park and the John Smith's Stadium both close?
- 7.57 I would be concerned for the Kirklees district if both these driving ranges closed in the next few years due to redevelopment proposals. This would mean that there would be no open to all driving range provision in the district, which given its size would be somewhat unusual.

- 7.58 I am not suggesting that the Council should take a proactive approach and commit to building a new floodlit driving range at its own cost (unless the cost can be easily justified by the sale of housing land at Bradley Park) but it would be preferable to see something built in the area.
- 7.59 Market forces may mean that an entrepreneurial developer may think that there is a commercial opportunity to build a new golf driving range in the district in a good trading location (i.e. near to a large catchment population with good road access). In such a situation one may get built anyway.
- 7.60 Alternatively, if the Council owned some suitable land in the district (probably around 10 to 20 acres) which was ripe for a golf driving range then it might wish to promote this as a development opportunity by leasing the land to a developer who then builds and operates the range and pays the Council an annual rental. Depending on the size of the site there might be scope to build other ancillary golf facilities such as a 9-hole par three course/Footgolf and perhaps add an adventure golf course.

8. Concluding Comments

- 8.1 If Bradley Park was losing the Council a lot of money or was hardly used, then closing it in its entirety would be a logical decision. However, it is still popular and it does appear to be one of the best municipal golf courses in the north of England. If it has to close, either partially or in full, to meet the area's pressing strategic needs for new housing then so be it, although I can fully understand the big disappointment for golfers who have used and enjoyed Bradley Park over the years.
- 8.2 Strategic decisions and choices are rarely black or white matters and the ultimate course of action will depend on a number of variables, many of which will conflict with each other.
- 8.3 Normally I would say that these days local authorities should not be overly committed to providing municipal golf facilities, as it is not a core public service and in the vast majority of cases there is plenty of affordable for all golf provision in a locality from the proprietary golf sector. However, the circumstances in the Kirklees district are somewhat unusual in that Bradley Park is the only municipal golf course in the district and the other eleven remaining venues are traditional private members' golf clubs, where open public access tends to be restricted.
- 8.4 There are in my view mitigation options to pursue in the event of the closure of Bradley Park, and to the extent that the Council wants to pursue these, depends on its attitude to a number of

variables. Whilst I can set out the various mitigation options available to the Council and provide a general commentary on their merits, ultimately the Council needs to decide for itself what route or routes it wishes to pursue, as it largely depends on the relative weight it attaches to its differing priorities.

- 8.5 Hopefully this report will help the Council in being able to make objective and informed decisions in relation to Bradley Park. Whilst not intended to be a substitution for my commentary within the main body of this report, I have attached as Appendix 1 a simple decision tree highlighting various options the Council might consider pursuing. It may help clarify the Council's decision making process.
- 8.6 If you need any further information or explanation on the points I have made in this report, then please let know.



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21st April 2016

Appendix 1 – Simple Decision Tree for Bradley Park Golf Course and Mitigation Options

