



KIRKLEES COUNCIL

**BUILT LEISURE AND SPORTS FACILITIES STRATEGIC
FRAMEWORK**

APPENDIX C: GOLF NEEDS ASSESSMENT

FINAL REPORT: OCTOBER 2015

Integrity, Innovation, Inspiration

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KIRKLEES COUNCIL BUILT LEISURE AND SPORTS FACILITIES STRATEGY GOLF NEEDS ASSESSMENT

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EXECUTIVE SUMMARY

Introduction

In December 2014, Knight, Kavanagh and Page (KKP) was appointed by Kirklees Council to undertake an assessment of the formal indoor and built sports facility needs within the Kirklees authority area, and based on the findings, prepare a built leisure and indoor sports facility strategy.

An analysis of the supply and demand for golf course facilities was included in the initial scope of works carried out from December – April 2015. A copy of the supply and demand analysis from the initial study is contained in Appendix A. Subsequently, Kirklees Council commissioned a more detailed needs assessment for golf in the Kirklees Council area. KKP was specifically requested to investigate:

- ◀ Whether local demand to play golf and join golf clubs can be met via existing supply.
- ◀ The role played in meeting local demand by the golf clubs in Kirklees and surrounding local authority areas (Oldham, High Peak, Barnsley, Wakefield, Leeds, Bradford and Calderdale).
- ◀ The golf provision that the Kirklees Council area will need to meet existing and future local demand.

Findings

The golf club market in England

Golf is an important economic activity across Great Britain & Ireland (GB&I). In England the impact is estimated at £3.4 billion and it is calculated that the industry supports circa 49,500 jobs. One in 19 people in England is estimated to play golf.

Despite the high percentage of golfers in GB&I, the sport is in decline with fewer people seeking to play golf in a golf club environment. Since 2007 participation has fallen by 158,000 placing a financial strain on many clubs. England Golf, the National Governing Body (NGB) is targeted, by March 2017, to increase the number of people playing golf at least once per week from the baseline of 750,000 in 2014 to 910,000; a rise of 160,000 registered players. To help achieve this England Golf has developed a strategy around seven key themes:

- ◀ More players
- ◀ More members
- ◀ Stronger clubs
- ◀ Winning golfers
- ◀ Outstanding championships
- ◀ Improved image and
- ◀ Excellent Governance

This will, at many golf clubs, necessitate a change in attitude and approach to new players and significant investment by England Golf, golf club managers, Professional Golf Association (PGA) professionals and club volunteers to assist with teaching and coaching, and the recruitment and retention of new players/members.

In Kirklees the golf club market supports an estimated 125 full-time and over 70 part-time jobs. All clubs participate in fund raising for local charities, contributing an estimated £40,000 - £50,000 per annum to a range of good causes.

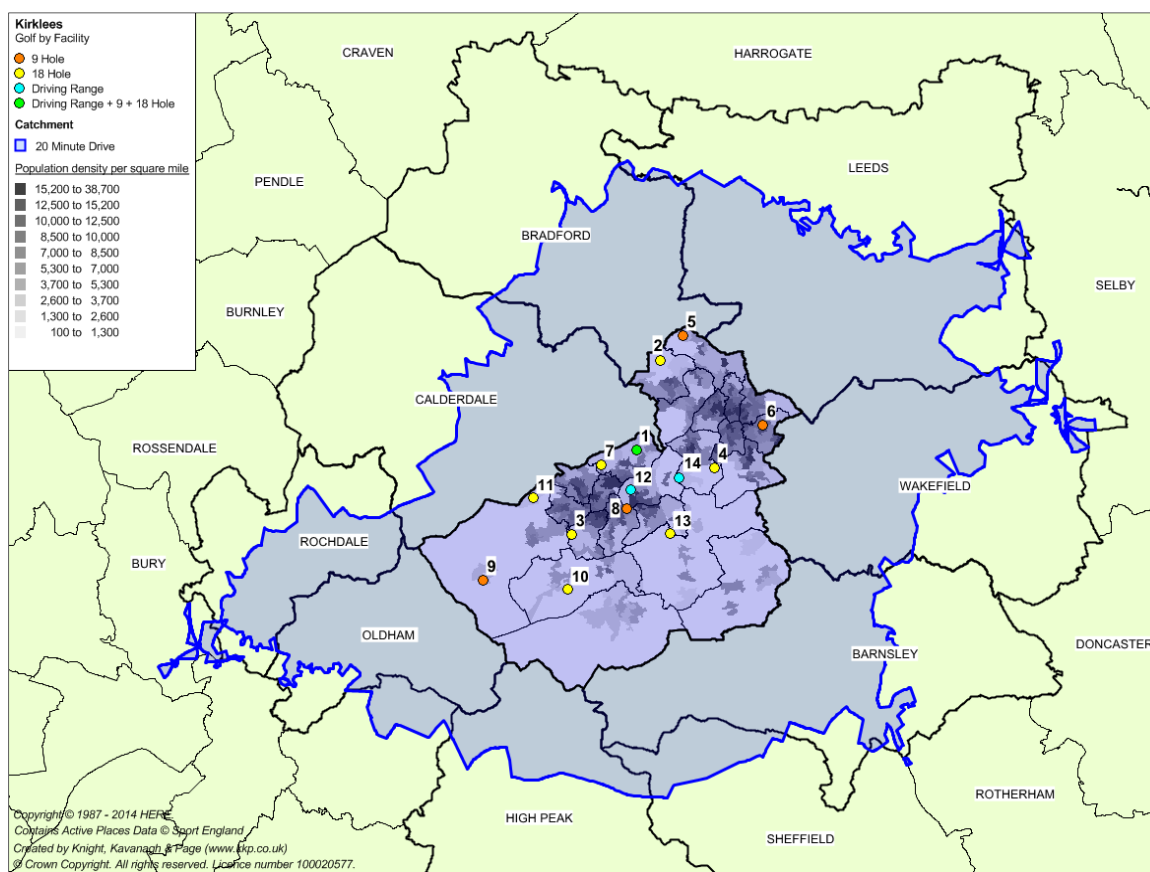
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Quantity

National, regional and local golf course provision is summarised in the tables below:

Facility	National	West Yorkshire	Kirklees	Neighbouring LAs
Golf courses	3,000	87	12	97
18 hole members clubs			7	23
9 hole members clubs			4	56
18 hole proprietary clubs			0	9
9 hole proprietary clubs			0	6
Municipal courses			1	7

Source: KKP research



Map ref	Site name	Facility	Tenure
1	Bradley Park Golf Club	Driving Range + 9 hole (Par 3) also used for Footgolf 18 Hole	Pay and play
2	Cleckheaton & District Golf Club	18 Hole	Members club
3	Crosland Heath Golf Club	18 Hole	Members club
4	Dewsbury & District Golf Club	18 Hole	Members club
5	East Bierley Golf Club	9 Hole	Members club
6	Hanging Heaton Golf Club	9 Hole	Members club

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Map ref	Site name	Facility	Tenure
7	Huddersfield Golf Club	18 Hole	Members club
8	Longley Park Golf Club	9 Hole	Members club
9	Marsden Golf Club	9 Hole	Members club
10	Meltham Golf Club	18 Hole	Members club
11	Outlane Golf Club	18 Hole	Members club
12	Stadium Golf	Golf Driving Range (GDR)	Pay and play owned by Direct Golf
13	Woodsome Hall Golf Club	18 Hole	Members club
14	Hopton Horse Centre	Golf Driving Range (GDR)	Proprietary Owned

Kirklees Council has mothballed two 9 hole golf courses, one in Spenborough and the other in Birstall.

Quality

There are no official national or county golf course rankings. Generally, the better the quality, the higher the joining/membership and green fees are likely to be. Some courses gain status through having high ranking professional and amateur players as Members and through hosting County, National and International golf events. Others feature in ranking articles or 'must play' lists put together by golf magazines.

Better quality courses tend to have higher quality and more extensive ancillary practice, catering and changing provision. 18 hole provision generally carries a higher status than 9 hole provision.

Some factors contributing to course quality and standards

Golf Club	Joining fee	Full membership (£)		Used for external events		Green fee per round (£)	
		Men	Women	County	National	M - F	S/S
Bradley Park Golf Club	n/a	520*	520*	No	No	18	20
Cleckheaton & District Golf Club	n/a	825	825	No	No	20	30
Crosland Heath Golf Club	200	798	734.50	Yes	No	20	30
Dewsbury & District Golf Club	n/a	798	734.50	No	No	20	30
East Bierley Golf Club	n/a	577	577	No	No	15	20
Hanging Heaton Golf Club	n/a	577	577	No	No	15	20
Huddersfield Golf Club	1200	1200	1200	Yes	Yes	50	75
Longley Park Golf Club	n/a	650	650	No	No		
Marsden Golf Club	n/a	399	110	No	No	10	15
Meltham Golf Club	n/a	870	870	Yes	No	30	40
Outlane Golf Club	n/a			No	No	20	30
Woodsome Hall Golf Club	1097	1097	1097	Yes	No	50	60

Season ticket price (limited availability)*

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Quality and course ranking in golf is very subjective. One person's favourite will be another person's least favourite and so on. Within Kirklees there are a range of different courses offering 18 and 9 holes and a selection of practice facilities at a range of different prices. All offer food and beverages, again at different times some through a franchise and other through an in-house operation. There is within Kirklees opportunities for a wide range of the community to access golf at different venues through a variety of membership and pricing structures. There are also many opportunities for 'nomadic golfers' who choose to play golf but not to join a club.

Availability

The existing supply of golf courses in Kirklees has the capacity to accommodate 5050 full playing members (see below).

Course type	Maximum no. of members	No. of courses in Kirklees	Golf club membership capacity in Kirklees
Eighteen Holes	550	7	3850
Nine Holes	250	4	1000
Pay & Play	200	1	200
Total	-	12	5050

Bradley Park GC supports a small members section, through season ticket sales (191), and remains available to the residents of Kirklees on a 'pay and play' basis.

The national British Inclusive Golf (BIG) is based at Longley Park Golf Club.

Accessibility (access to facilities not a reference to disability access)

The KKP club survey identifies that over 80% of golf club members' travel between 2 - 5 miles to play golf. Furthermore, less than 10% of club members' live in a neighbouring authority.

All Kirklees residents can access golf provision within a 20 minute drive time. In addition to the courses in Kirklees, six of the eight municipal courses in neighbouring authorities are within a 20 minute catchment area.

The demand for golf nationally and locally in Kirklees

Demand for golf has, over the past decade, been in decline. Between 2004 and 2013 club membership (affiliated members) fell from 882,184 to 707,424, a drop of 20% (174,760) (Source: *England Golf*).

Despite this dramatic fall in the number of participants, golf (0.73m participants per week) is still the 5th most popular participation sport in England. Source: *Active People Survey (APS) 8Q3-9Q2, Sport England 2014 – 15*.

It is played by both men and women. More men play than women. An average golf club has 6 males to every 1 female member and 8 junior boys to 1 junior girl with 96% of all club golfers being white.

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Golf is a mature market; many courses and clubs are over 100 years old. As supply is segmented, principally by accessibility, price and quality so demand is segmented by user type. KKP has identified the following golfer types:

- ◀ Avid
- ◀ Keen
- ◀ Club
- ◀ Seasonal
- ◀ Occasional
- ◀ Holiday / tourist
- ◀ Corporate
- ◀ New

Different types of golfer are attracted to a range of playing opportunities. Many golfing types will not find it necessary to join a club to fulfil their golfing requirements. These players are referred to by England Golf as 'Nomads' i.e. they have no golf home (a club membership) and buy into existing facilities to meet their golfing needs. England Golf estimates that some 2 million UK golfers are nomadic (i.e. non-members and not affiliated to a County Association).

With the exception of Huddersfield Golf Club, Woodsome Hall Golf Club and Crosland Heath, which are reported to be at capacity (in the full membership category) all courses in the Kirklees Authority area are accepting new members; several have initiatives and offers in place to attract them, notably targeting women and girls.

In Kirklees, Bradley Park Golf Club (operated by Kirklees Active Leisure (KAL)), Meltham and Crosland Heath Golf Clubs are actively engaged with the Yorkshire County Golf Partnership (YCGP) and the delivery of the NGB golf development programme 'Get into Golf'. Huddersfield GC ran a successful women's recruitment campaign in 2014, and is now full.

Assessment of the supply and demand for golf in Kirklees

Using the assumption that 550 full members are required to support an 18 hole course and 250 full members to support a 9 hole course, existing supply in Kirklees can theoretically accommodate 5050 members. Some clubs set lower limits, taking into account these local limits the adjusted figure is 4,431. Clubs in Kirklees can, therefore, accommodate a minimum 816 new members. See Table below.

Capacity at existing golf club/course provision in Kirklees

Golf Club / Course	Full member capacity	No. of full members	Deficit (-)	Accepting members
Bradley Park Golf Club	200	191***	0	N/a
Cleckheaton & District Golf Club	550	Unknown	-70*	Yes
Crosland Heath Golf Club	550 (531)	531	0	No
Dewsbury & District Golf Club	550	520	-30	Yes
East Bierley Golf Club	250	Unknown	-75*	Yes
Hanging Heaton Golf Club	250 (300)	285	-15	Yes
Huddersfield Golf Club	550 (520)	520	0	No
Longley Park Golf Club	250	180	-70	Yes
Marsden Golf Club	250	124	-134	Yes
Meltham Golf Club	550	Unknown	-25	Yes
Outlane Golf Club	550	Unknown	-75*	Yes
Woodsome Hall Golf Club	550 (480)	477	0	No

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Golf Club / Course	Full member capacity	No. of full members	Deficit (-)	Accepting members
Theoretical Total	5050	-	-	-
Adjusted figure: Kirklees capacity	4431	-	495	-

* Estimate

** Adjusted Figure – Full capacity at Huddersfield (520), Woodsome Hall (480) and Hanging Heaton (300).

*** Season Ticket Sales

Future demand

In conclusion, there is currently over-provision of golf to meet current demand. With the exception of Crosland Heath, Huddersfield and Woodsome Hall the remaining 3 x 18 hole and 4 x 9 hole members courses would all benefit from the recruitment of new, and the continued retention of existing members. Due to the older age profile of existing members, lifestyle and career changes recruitment to golf clubs needs to be an ongoing process.

With the rise in popularity of 'Nomadic Golf', golf clubs have become more flexible in what they offer, more customer orientated and friendlier. As the England Golf focus group research has identified golf clubs need to become service orientated, female and family friendly and offer packages that meet different family needs and circumstances at a price that is perceived to offer value for money accompanied by a range of benefits that meet members' needs.

The England Golf 'Get into Golf' programme can be effective in recruiting and retaining new members where it is club led, customer focused and engages the PGA professionals, managerial and volunteer workforce. It however, needs to be ongoing to continually attract new players.

Of the existing c.10, 000 golf players in Kirklees (SE segmentation data) it is estimated that 4,000 people are currently golf club members. This leads us to conclude that the other 6,000 players in Kirklees are Nomads.

Based on our understanding of the current supply and prevailing economic and market conditions and recent trends in sports participation and physical activity it is our belief that latent and future demand within Kirklees can be met through existing provision. KKP does not anticipate any new golf courses will need to be provided in Kirklees up to 2037, if at all. There is capacity within the existing supply to potentially accommodate displaced members should a facility be forced to close.

KIRKLEES COUNCIL BUILT LEISURE AND SPORTS FACILITIES STRATEGY GOLF NEEDS ASSESSMENT

1.0 INTRODUCTION

In December 2015, Knight, Kavanagh and Page (KKP) was appointed by Kirklees Council to undertake an assessment of the formal indoor and built sports facility needs within the Kirklees authority area, and based on the findings, prepare a built leisure and indoor sports facility strategy.

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Study objectives

KKP was invited to investigate:

- ◀ Whether local demand to play golf and join golf clubs can be met via existing supply.
- ◀ The role played in meeting local demand by the golf clubs in Kirklees and surrounding local authority areas (Oldham, High Peak, Barnsley, Wakefield, Leeds, Bradford and Calderdale).
- ◀ What level of golf provision the Kirklees Council area needs to meet existing and future local demand.

Methodology

The assessment has been prepared in accordance with Sport England Guidance contained in the document 'Assessing Needs and Opportunities Guide for Indoor and Outdoor Sports Facilities (ANOG, Sport England, published in December, 2013). Data has been obtained from on-line and published sources, Sport England's Active Power Places, through an online/postal survey to the golf clubs in Kirklees and through one-one interviews with golf facility providers, golf development staff and policy influencers. A list of consultees is contained in Appendix B.

Report structure

The report is set out as follows:

- ◀ Section 2 - an overview of the golf club market in England.
- ◀ Section 3 - assessment of supply in Kirklees and neighbouring authorities
- ◀ Section 4 - review of national demand and assessment of local demand in Kirklees.
- ◀ Section 5 - review of supply and demand.
- ◀ Section 6 - conclusions

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2.0 THE GOLF CLUB MARKET IN ENGLAND

The economic impact of golf on the economy of England (SMS April 2014)

Even in difficult economic times and against a background of concern that the game may not be being played to the extent that it once was, golf makes an estimated economic contribution of £3.4 billion (2011/12) to the England economy. As the UK heads towards healthier economic times, the industry is considered likely to see boosted revenue from real estate values and tourism. With more robust targeting of new golfers, as well as golfer retention initiatives and campaigns to bring lapsed golfers back to the sport, it is hoped that the economic impact will be even greater moving forward, particularly if aided by increasing economic confidence and better weather than has been experienced in England in recent years.

Golf is estimated to generate a return of £61 for every man, woman and child to the national economy, as well as providing employment for more than 48,500 people. One person in 19 in England plays golf. Where the UK does, however, lag behind the other major European golfing nations is in the proportion of women who play. Plainly, if the appeal to women can be increased and the appeal to men maintained, the opportunity for further growth is immense.

TABLE 2: THE PROPORTION OF FEMALE AND MALE GOLFERS

RANK	COUNTRY	ALL GOLFERS	% FEMALE	% MALE	% JUNIORS
1	Germany	740,000	35.2%	56.1%	8.7%
2	Austria	120,000	34.9%	54.9%	10.2%
3	Switzerland	95,000	33.4%	57.6%	9.0%
4	Netherlands	395,000	31.4%	63.7%	4.9%
5	Denmark	198,000	29.2%	63.2%	7.6%
	GB&I	4,200,000	14.5%	75.2%	10.3%
	England	2,812,000	13.8%	77.8%	8.4%
	European Total	7,855,000	24.6%	65.3%	10.1%
	USA	26,200,000	17.3%	73.5%	9.2%
	Australia	1,140,000	21.7%	76.1%	2.2%

To put the £3.4 billion impact of golf on the English economy in context:

- ◀ The London School of Economics estimates the socio-economic benefits of cycling to the UK economy at £2.9 billion.
- ◀ The most recent Tennis Industry Association estimate from 2011 values the global tennis economy (not its economic impact) at £3.2 billion.
- ◀ In 2012, £3.7 billion was spent on NHS dentistry in England annually, making up 12% of all primary care budget expenditure and 3.5% of all NHS expenditure.
- ◀ In January 2013, Forbes reported that Manchester United had become the world's highest value 'sports franchise' worth £2.1 billion.
- ◀ The Premier League is reportedly generating £3.4 billion from domestic broadcasting over the next three years.

Source: Sports Marketing Surveys - 6 June 12, 2014

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Economic benefits of golf in Kirklees

The golf clubs in Kirklees provide the following employment:

Table 2.1 Employment in golf clubs in Kirklees

Club Name	Pro / Shop	Manager/ Secretary	Food & Beverage	Other	Green staff	Type	No.
Bradley Park GC	6	1 (PT KAL)	4* + C	1PT	5	Franchise	Yes
						FT	15
						PT	2
						Casuals (C)	Yes
Cleckheaton & District GC	2	1	2* + C	-	4.5	Franchise	Yes
						FT	6
						PT	0
						Casuals (C)	Yes
Crosland Heath GC	2	2	2* + 10C	2	5	Franchise	No
						FT	13
						PT	0
						Casuals (C)	Yes
Dewsbury District GC	1	1	1* + 4C	2	4	Franchise	Yes
						FT	9
						PT	0
						Casuals (C)	Yes
East Bierley GC**	1	-	1	2	2	FT	6
Hanging Heaton GC**	1	-	1	2	2	FT	6
Huddersfield GC	2	4	6*+20C	2	9	Franchise*	Yes
						FT	17
						PT	0
						Casuals (C)	Yes
Longley Park GC	-	-	3	1	2	Franchise	No
						FT	6
						PT	0
						Casuals (C)	Yes
Marsden GC	-	-	2 + C	1	3	Franchise	No
						FT	6
						PT	0
						Casuals (C)	Yes
Meltham GC	2	1	2* + 5C (F)	3	5	Franchise*	Yes
						FT	11
						PT	0
						Casuals (C)	Yes
Outlane GC	1	-	2 + C	-	4	Franchise*	No
						FT	7

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Club Name	Pro / Shop	Manager/ Secretary	Food & Beverage	Other	Green staff	Type	No.
						PT	0
						Casuals (C)	Yes
Woodsome Hall GC	1	2	3 + 20C	-	6	Franchise	No
						FT	12
						PT	0
						Casuals (C)	Yes
Totals	19	12	31	13.5	49.5		

Source: KKP Survey 2015

*Franchised operation not employees

** Estimated

The Golf Club market in Kirklees thus provides c. 108 full time positions, five franchised food and beverage operations providing a minimum 17 positions and a further 70+ casual roles mostly in food and beverage services. Green staff account for 49.5 of the 108 full time positions identified. There are 19 PGA professionals and assistants working in associated golf shops and 12 managerial positions. In some clubs volunteers help to deliver services and the Boards and Committees that manage and organise many aspects of golf club operations are serviced by volunteers.

Tournament golf and open competitions can lead to demand for overnight accommodation plus associated ancillary spend in local shops, bars and restaurants. Additionally, many clubs are available to hire for functions (e.g., weddings and celebrations, parties and funerals). These events can lead to demand for local accommodation. Woodsome Hall Golf Club has recently opened (August 2015) an onsite Dormy House offering B&B accommodation for up to 16 guests. Clubs are a valuable source of local community venues in which to host events and third party users help to generate additional income through room hire and food and beverage sales.

Many golf clubs also run a social membership section, fees are relatively modest £25 - £30. Social members can use the clubs non-playing facilities. Social committees organise member events, these range from Bridge afternoons to weekend dinners and parties and increasingly fine dining and wine tasting.

Golf club bar and catering operations tend to run either, in-house or through a franchise. All clubs support local suppliers, with many making the use of local fare a menu feature. Dewsbury District GC and Crosland Heath GC offer company packages/corporate benefits and develop partnerships with local business and commerce.

Charitable fund raising

Fund raising is an important element of golf club life and many golf clubs raise funds for good causes. Kirklees golf clubs are no exception; all district clubs either raise money directly for charity or provide facilities at which to host charity events. Some of the charities which benefit are:

- ◀ Kirkwood Hospice
- ◀ Goals for Hearts
- ◀ Breakthrough
- ◀ The Forget me not Trust

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- ◀ Help for Heroes.

Annual donations to charity by golf clubs in Kirklees are estimated to contribute to c. £40,000 - £50,000 to the charity sector. In addition many of the clubs 'lend' their courses and facilities to good causes to host events.

Policy Context

England Golf - Raising Our Game 2014 - 2017

The national governing body (NGB) for the sport is England Golf. The vision for golf, is contained in its Whole Sport Plan, (WSP) Raising Our Game 2014 – 2017.

Golf faces some serious challenges. The number of members has been declining since 2004 and this has put a financial strain on many clubs. Overall participation has also steadily declined since 2007.

Table 2.2: People Playing Golf once a week, every week, in England

Year	14 – 25 year olds	16 – 25 year olds	All ages (16+)
2009 – 10		95,700	860,900
2010 – 11		73,100	833,200
2011 – 12		55,900	850, 500
2012 – 13	61,400	52,400	751,900

Source: www.bbc.co.uk/0/golf/30491539

The England Golf strategy sets out ways to 'raise the game' to address these challenges working in partnership with all who care about golf. This is intended to inform the future work of the Board, Committees and staff of England Golf, the County Unions, County Associations and County Golf Partnerships, clubs and volunteers and to help to shape the way England Golf works with national and local partners. Its main tenets are:

Purpose

Inspiring lifelong involvement in golf

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

- ◀ 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.

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- ◀ To improve communications, governance and partnerships at all levels within England Golf.

Key themes

The Strategy is built around the seven key themes or priorities that emerged strongly through the consultation process and which require coordinated action at club, county and national levels:

- ◀ *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 /competitions for golfers of all levels
- ◀ *Improved image*: Changing perceptions of golf and improving internal communications.
- ◀ *Excellent governance*: Improving the governance, building the infrastructure and strengthening the partnerships to develop golf in England.



Participation

The Sport England Active People Survey (APS)

The Sport England Active People Survey (APS) is the largest survey of sport and active recreation in Europe allowing levels of detailed analysis that were previously unavailable. It identifies how participation varies from place to place and between different groups in the population. Table 2.3 shows the top 12 participation sports in which 1.73% of the population are regular golfers, the equivalent of 751,900 people.

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Table 2.3: Once per week participation in funded sports (aged 16+ years)

1 x 30 sport indicator (16+)	APS1 (Oct 2005-Oct 2006)		APS6 Q3 to APS7 Q2 (Apr 2012-Apr 2013)		APS7 (Oct 2012 - Oct 2013)		
	%	n	%	n	%	n	Statistically significant change from APS 1
Sport England 13-17 Funded sports							
Swimming	8.04%	3,273,800	6.65%	2,885,400	6.77%	2,934,200	Decrease
Athletics	3.33%	1,353,800	4.50%	1,953,500	4.65%	2,016,400	Increase
Cycling	4.02%	1,634,800	4.29%	1,861,700	4.62%	2,003,000	Increase
Football	4.97%	2,021,700	4.46%	1,935,200	4.25%	1,838,600	Decrease
Golf	2.18%	889,100	1.78%	771,000	1.73%	751,900	Decrease
Badminton	1.27%	516,700	1.15%	497,900	1.16%	500,500	Decrease
Tennis	1.12%	457,200	0.98%	423,400	0.94%	406,000	Decrease
Equestrian	0.77%	314,600	0.69%	300,100	0.72%	312,700	Decrease
Bowls ¹	2.21%	309,800	1.62%	246,200	1.73%	264,300	Decrease
Squash & racketball	0.74%	299,800	0.59%	257,100	0.55%	240,700	Decrease
Rugby Union	0.46%	185,600	0.38%	166,100	0.37%	159,900	Decrease
Boxing	0.28%	115,500	0.35%	149,700	0.36%	154,800	Increase

Source: Sports England APS 7

England Golf focus group findings (SMS 2013)

The objectives of the focus groups were to assess:

- ◀ Why attendees do or do not play golf.
- ◀ What those who play get out of the game.
- ◀ Whether they have encouraged others to take up the game and with what results.
- ◀ Attitudes to the golf club environment.
- ◀ Why attendees think the game currently has such a gender imbalance among players.
- ◀ If and how they believe that this imbalance can be addressed.

Group specifics

- ◀ Group 1: Sportswomen aged 18-30, not golfers.
- ◀ Group 2: Male independent golfers aged 30-44.
- ◀ Group 3: Male golf club members aged 60+.
- ◀ Group 4: Sportswomen aged 30-44, not golfers.
- ◀ Group 5: Female golf club members aged 45-60.
- ◀ Group 6: Female independent golfers aged 18-30.
- ◀ Group 7: Female independent golfers aged 45-60.
- ◀ Group 8: Female golf club members aged 30-44.

Summary of key messages from the England Golf focus groups

The key messages to communicate when promoting an opportunity to give golf a go to potential future women golfers were:

- ◀ Everyone in the group will be new to the game. This is important because there is a strong feeling that golf is difficult to learn and that it would feel uncomfortable to make first attempts in the presence of people who are already competent.

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- ◀ There is value in promoting the fact that golf can be as enjoyable to those who are not particularly good at it as well as to those who play to a high standard. It is considered to be a game which the athletic and non-athletic friend can play together and where, unlike most sports, physique and body shape has little impact.
- ◀ Equipment will be available and tuition will be from scratch. There is not, therefore, the need for significant investment in advance of giving the game a go, either financially or in terms of advance preparation.
- ◀ The event will be fun. Some people will play better than others, some people will take to the game, others will not, and all reactions are fine.
- ◀ There will be a social element afterwards, perhaps 'Tees and Wine'!

Game changer

The key challenge facing the game of golf in England as it seeks to broaden its appeal and increase the numbers of people participating is easy to identify.

How to make the game more attractive to more people than at present without alienating those for whom the game works perfectly as it currently is?

As with most challenges, the question is easier to put than it is to answer. There is, however, a way forward via the Get in to Golf initiative, which effectively has been independently verified by the focus groups that can broaden the appeal of the game without alienating all but the most intransigent traditionalist.

Membership recruitment and retention

England Golf commissioned research into the methods adopted by golf clubs which successfully recruit and retain members. It was carried out by Sports Marketing Surveys for the report, *Membership Recruitment & Retention: Key Themes for Implementation*.

It is clear that a number of English golf clubs are bucking the trend in enjoying success in growing membership and achieving pleasing retention rates. It is clear also that this is not an accident, but the result of steps they have deliberately taken to achieve this.

Flexibility in membership offerings has been key to success. Essentially clubs have recognised that one package no longer fits all and that the member who plays occasionally is still a member worth having. They also recognise that the member who is keen to play, but cannot make the financial commitment they might have made in the past and may make again in the future, is still worth holding on to even if this needs to be achieved by asking for a more modest financial contribution from them than would previously have been the case.

Accommodating these people achieves some revenue that would otherwise be lost. It also serves to retain interest in and an aptitude for golf and, crucially, feelings of goodwill and loyalty towards the club. It is anticipated that the full benefits of this will be gained in later years when the golfer has more time at their disposal and is more comfortable meeting a greater financial requirement.

This strategy is primarily aimed at the younger (up to 40) golfer and it is clear that, both in terms of membership retention and seeking to attract new people to the game and ultimately to membership, it is among the under 40's where the major effort is taking place.

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In seeking to retain memberships of people who played when younger, but are facing the demands on their pockets and on their diary that people face in their 20's and 30's, the focus is primarily on male golfers because it is they, primarily, who played when younger. If England Golf wishes to push strongly to attract women to the game, the starting point needs to be persuading clubs that this will be a fruitful area for them to look to.

Resistance to this is not thought to be based upon any inherent bias, simply on what club administrators consider to be practicalities. The presumption is; ask a largely male membership to encourage their friends to come to 'have a go at golf' days and it will be largely men that come along, bring potential new members into a heavily male environment and that it will feel more comfortable to men etc.

A strong argument encountered in resistance is that people like a course because it is difficult. Changing it to make it more women friendly, some will argue, would be expensive and counter-productive as the effect would be to reduce the degree of difficulty which, too many, is a key strength.

The constant interview subject references to 'friendliness' as a point of difference are worth noting. When examined more closely, what this means is that staff and existing members are being actively encouraged to welcome new members and to make social introductions.

Many clubs do involve members in 'have a go at golf' days including those not specifically aimed at members' friends primarily to encourage interaction which will make the club seem welcoming and, to use the key word for many, 'friendly'.

Greater encouragement of this way of thinking could have potential to achieve great things in recruitment. In summary, success is being achieved without taking any hugely radical steps, though this is not to say that radical steps are not necessary and would not pay dividends in the future.

The three key principles which the interviewees have applied, however, could easily be deployed across the country and could potentially reap rich rewards without profoundly changing the way the clubs operate.

- ◀ Every member is important and finding ways of accommodating each person's requirements, lifestyle and pocket is key to achieving high retention levels.
- ◀ Finding ways of helping people to give golf a try without huge initial expense will pay dividends because they don't necessarily know what we know - that golf is fun, most people can play well enough to enjoy it and the social side related to it can be hugely enjoyable.
- ◀ The feeling that the Club offers a friendly, convivial environment where it would be easy to socialise and find people to have a round of golf with, is hugely important in determining the extent to which people will take the plunge and try membership.

Source: SMS / www.England Golf

Summary of key findings

Golf is an important economic activity across GB&I. In England the impact is estimated at £3.4 billion and it is calculated that the industry supports circa 49,500 jobs. 1 in 19 people in England is estimated to play golf.

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Despite the large number of golfers in GB&I, the sport is in decline with less and less people wanting to play in a golf club environment. Since 2007 participation has fallen 158,000 placing a financial strain on many clubs. England Golf, the NGB plans, by March 2017, to increase the number of people playing golf at least once per week from the baseline of 750,000 in 2014 to 910,000 an increase of 160,000 registered players. To help achieve this target it has developed a Strategy based upon seven key themes:

- ◀ More players
- ◀ More members
- ◀ Stronger clubs
- ◀ Winning golfers
- ◀ Outstanding championships
- ◀ Improved image and
- ◀ Excellent governance

This will at many golf clubs require a change in attitude and approach to new players and significant investment by England Golf, golf club managers, Professional Golf Association (PGA) professionals and volunteers to help with teaching/coaching, and the recruitment and retention of new players/members.

In Kirklees the golf club market supports 108 full time jobs, five franchises catering operations and provides over 70 part-time and casual bar/catering roles. All clubs participate in fund raising for local charities, contributing an estimated £40-50,000 per annum to a range of good causes.

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3.0 ASSESSMENT OF SUPPLY IN KIRKLEES AND NEIGHBOURING AUTHORITIES

Quantity

National provision

There are an estimated 3,000 golf courses in Britain, covering about 1,500 km², at least 0.5% of the land area. Approximately 90 courses in England are designated as Sites of Special Scientific Interest (SSSI's) because apart from the intensively managed trees and greens they have other habitats with high wildlife value. Many other golf courses exist within designated Heritage Coast sites, Areas of Outstanding Natural Beauty, or listed Historic Parklands.

West Yorkshire provision

The website Golf Today (www.golftoday.co.uk) lists over 3,000 courses in the United Kingdom; in West Yorkshire 87 courses are identified. Of these 21 have a golf driving range (GDR) or practice ground. There are a further six stand-alone Golf Driving Ranges (GDR's). See listing in Appendix C.

<http://www.golftoday.co.uk/clubhouse/coursedir/yorks4.htm>

Affiliated golf clubs

The number of affiliated clubs differs to that related to overall golf provision. This is because some courses do not support a club, for example proprietary owned and hotel/resort courses. In other cases facilities have more than one course but only one affiliated club, for example, Woburn which is one club with three courses. Affiliation is to England Golf, the NGB, clubs pay a per capita sum.

Table 3.1 Affiliated golf clubs

Area	Yorkshire	North	National
No of affiliated golf clubs	191	563	1941

Source: Golf Club Membership Survey 2012: Yorkshire Breakdown

Kirklees authority area provision

As identified in Table 3.2 there are 12 affiliated golf clubs located within Kirklees District, one stand-alone golf driving range (GDR) in Huddersfield town centre and a GDR in Mirfield, co-located at the Horse Centre.

Table 3.2 Golf facilities in Kirklees

Map ref	Site name	Facility	Tenure
1	Bradley Park Golf Club	Driving Range + 9 hole (Par 3) also used for Footgolf 18 Hole	Pay and play
2	Cleckheaton & District Golf Club	18 Hole	Members club
3	Crosland Heath Golf Club	18 Hole	Members club
4	Dewsbury & District Golf Club	18 Hole	Members club

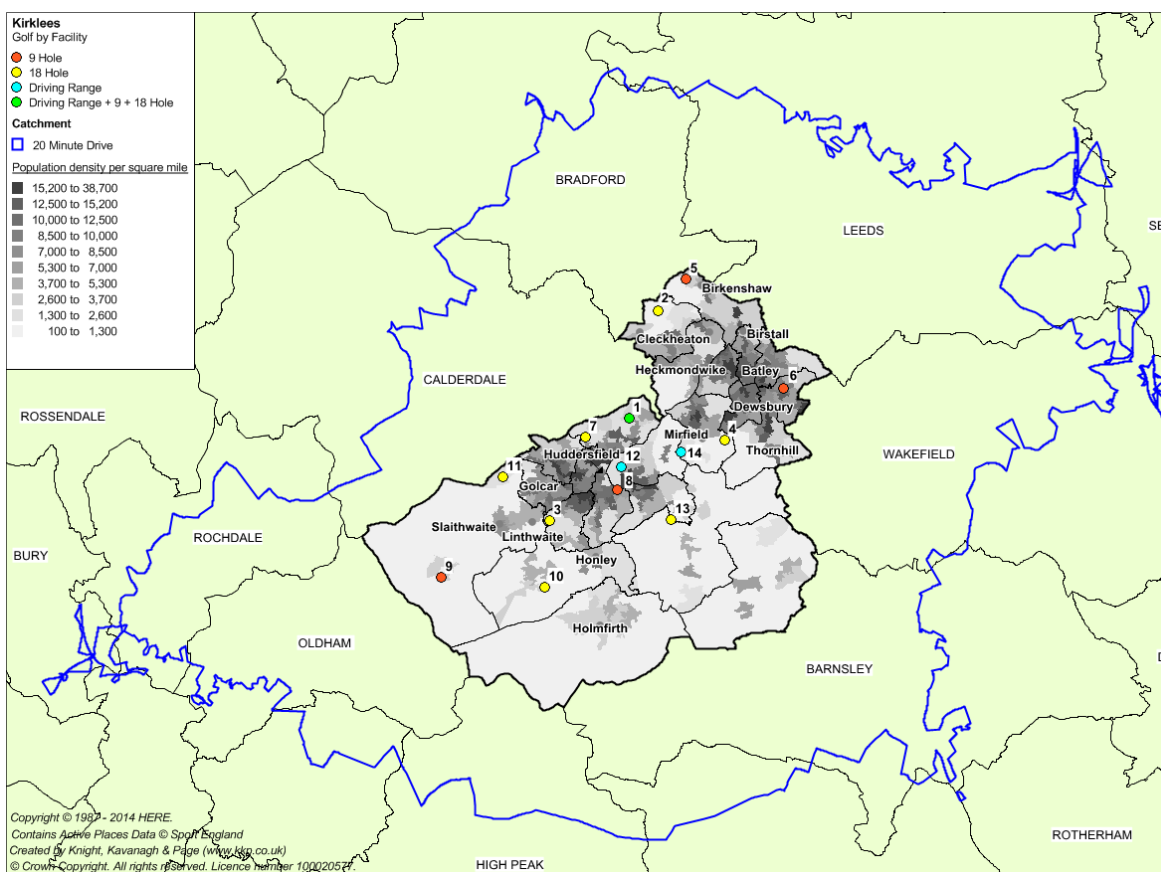
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Map ref	Site name	Facility	Tenure
5	East Bierley Golf Club	9 Hole	Members club
6	Hanging Heaton Golf Club	9 Hole	Members club
7	Huddersfield Golf Club	18 Hole	Members club
8	Longley Park Golf Club	9 Hole	Members club
9	Marsden Golf Club	9 Hole	Members club
10	Meltham Golf Club	18 Hole	Members club
11	Outlane Golf Club	18 Hole	Members club
12	Stadium Golf	Golf Driving Range (GDR)	Pay and play owned by Direct Golf
13	Woodsome Hall Golf Club	18 Hole	Members club
14	Hopton Horse Centre	Golf Driving Range (GDR)	Proprietary Owned

Kirklees Council has mothballed two 9 hole golf courses, one in Spenborough and the other in Birstall.

The KKP club survey identifies that over 80% of golf club members' travel between 2 - 5 miles to play golf. Furthermore, less than 10% of club members' live in a neighbouring authority. Figure 3.1 below illustrates the golf courses in Kirklees and neighbouring authorities together with a 20 minute drivetime (bold blue line).

Figure 3.1 Golf course provision in Kirklees District with a 20 minute drive time catchment area.



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Club facilities

Eleven of the twelve golf courses in Kirklees are members clubs. In all cases visitors are welcome, outside of competition times, to pay a green fee to play the course. Visitors to private members clubs are expected to have a registered handicap certificate (a certificate issued by The Council of National Golf Unions (CONGU) indicating a level of play and competence enabling competition at all levels, dress appropriately and be familiar with the rules and etiquette of the game. This requirement is not rigorously enforced as clubs compete with each other to attract visitors.

All of the clubs have some form of practice facilities, for the associated Professional to teach on and for Members to practice on. Facilities will include a practice field, short game area with practice bunkers and chipping areas, a putting green and warm-up nets. Bradley Park is the only club with a purpose built and floodlit GDR.

Increasingly golf clubs' are installing swing analysis centres; indoor areas equipped with flight scope technology and a practice net/area where lessons can be taught and golf played using golf simulator technology. Teaching golf is an important element of a PGA Professionals income stream. Swing rooms have helped many to continue teaching in the winter when the outside weather condition can significantly mitigate against teaching.

In Kirklees, swing analysis centres are available at Huddersfield Golf Club, Meltham Golf Club and on the golf driving range at Bradley Park.

The golf course at Bradley Park is owned by Kirklees Council and operated by Kirklees Active Leisure (KAL) alongside the other Council owned sport and leisure facilities. There is a club membership facility for season ticket holders (191), however the course operates on a predominantly 'pay and play' basis, meaning that anybody can turn up and play. The only requirement is that players have their own golf bag/clubs and golf shoes.

The facility mix at Bradley Park includes an 18 hole course and a 9 hole/par 3 short course with synthetic turf greens. This area is also used for Footgolf, (a hybrid of golf played with a football and a players feet), a golf driving range, two putting greens and a short game area. Bradley Park offers a good mixture of golf facilities at which the game of golf can be played, taught and practiced at all ability levels.

Prior to KAL's involvement the golf course was managed by PGA Professional, Parnell Reilly. An ex-Captain of the PGA, Parnell was highly respected, and built an excellent reputation for Bradley Park Municipal Golf Course over the 25 years plus he was in post.

Kirklees currently supports three golf driving ranges, two in Huddersfield and one at Mirfield. When the HD1 commercial leisure development proposal goes ahead at the Stadium site, the Stadium golf driving range is scheduled to close.

Ranges are traditionally open to anyone to attend with participant 'hiring' a bucket of golf balls to hit at the targets. They are popular locations at which to have golf lessons and learn to play. Experienced golfers often use a range to warm up before play, take lessons and practice. In winter months, floodlights extend the potential hours of use.

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Accessibility – fees and charges

Appendix E lists the different categories of membership and the fees charged by the clubs in Kirklees.

A key issue for the wider Kirklees population is whether golf courses are available for the general population at a price which is accessible to the majority of residents. The general downturn in numbers of golfers joining clubs has resulted a wide variety of different packages and deals. The situation is further complicated as the range of membership opportunities and pricing strategies offered by clubs become more flexible.

This trend has increased the opportunities for nomadic golfers and consultation suggests that the increase in flexible packages and cheap green fees is leading to a reduction in the actual number of club members, leading to:

- ◀ A reduction in regular income levels for many golf clubs.
- ◀ Clubs being open to market fluctuations
- ◀ The impact of the weather becoming greater as more reliance is placed on nomadic golfers rather than club members.

The situation is more acute at lower standard clubs than higher standard clubs where high quality enables the club to maintain a premium price.

Quality of provision

There are no official national or county golf course rankings. Generally, the better the quality, the higher the joining/membership and green fees are likely to be. Some courses gain status through having high ranking professional and amateur players as Members and through hosting County, National and International golf events. Others feature in ranking articles or ‘must play’ lists put together by golf magazines.

Better quality courses tend to have higher quality and more extensive ancillary practice, catering and changing provision. 18 hole provision generally carries a higher status than 9 hole provision.

Table 3.3: Factors contributing to course quality and standards

Golf Club	Joining fee	Full membership (£)		Used for external events		Green fee per round (£)	
		Men	Women	County	National	M - F	S/S
Bradley Park Golf Club	n/a	520*	520*	No	No	18	20
Cleckheaton & District Golf Club	n/a	825	825	No	No	20	30
Crosland Heath Golf Club	200	798	734.50	Yes	No	20	30
Dewsbury & District Golf Club	n/a	798	734.50	No	No	20	30
East Bierley Golf Club	n/a	577	577	No	No	15	20
Hanging Heaton Golf Club	n/a	577	577	No	No	15	20
Huddersfield Golf Club	1200	1200	1200	Yes	Yes	50	75
Longley Park Golf Club	n/a	650	650	No	No		

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Golf Club	Joining fee	Full membership (£)		Used for external events		Green fee per round (£)	
		Men	Women	County	National	M - F	S/S
Marsden Golf Club	n/a	399	110	No	No	10	15
Meltham Golf Club	n/a	870	870	Yes	No	30	40
Outlane Golf Club	n/a			No	No	20	30
Woodsome Hall Golf Club	1097	1097	1097	Yes	No	50	60

Season ticket price* (limited availability)

Quality and course ranking in golf is very subjective. One person's favourite will be another person's least favourite and so on. Within Kirklees there are a range of different courses offering 18 and 9 holes and a selection of practice facilities at a range of different prices. All offer food and beverages, again at different times some through a franchise and other through an in-house operation. There is within Kirklees opportunities for a wide range of the community to access golf at different venues through a variety of membership and pricing structures. There are also many opportunities for 'nomadic golfers' who choose not to join a club to play.

Current supply

Based on the assumption that an 18 hole golf course can support 550 adult members and a 9 hole golf course can support 250 adult members, the current supply of golf courses in Kirklees has the capacity to accommodate 5050 adult members (see Table 3.5)

The 550 figure was originally used in The Demand for Golf, a R&A Report produced in the 1990's. 550 is the number of full time members that an 18 hole course can support, without demand at peak time making it impractical for all those wanting to play. Daylight hours in the winter months is a limitation on the number of players able to get around 18 holes in daylight hours. The 550 is a guide and some clubs will go beyond this number whilst others may choose to go below.

Table 3.4 Golf course membership theoretical capacity at Kirklees golf clubs

Course type	Maximum no. of members	No. of courses in Kirklees	Club membership capacity in Kirklees
Eighteen Holes	550	7	3850
Nine Holes	250	4	1000
Pay & Play	200	1	200
Total	-	12	5050

Whilst Bradley Hall is a pay and play facility it offers 200 annual season tickets, the equivalent of a membership in a Members Club.

Accessibility – ownership and club management

Golf courses are principally owned and managed in one of three ways:

- As a Members Club (owned or leased by the Members and run by a Board of Directors or Trustees, usually volunteers). Employees of the club operate at the

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direction of the Board. Members' fees and any third party income is expected to cover all the operational costs.

- ◀ By a Local Authority (Municipal provision) run by the Local Authority directly or contracted out to a third party operator. Income and expenditure are the responsibility of the LA or third party operator.
- ◀ Privately owned (known as a proprietary club). Run by the owner who is responsible for all income and expenditure, taking profits and subsidising any losses.

Table 3.5 Golf course provision and club management type in adjoining authority areas

Local authority area	Population 2014 (MYE)	(A) Members clubs		(B) Proprietary clubs		Pay & Play	Total Clubs (A+B)	Golf clubs per head of population	Municipal golf holes per head of population
		9	18	9	18				
Kirklees	428,279	4	7	-	-	1	11	1:38,934	1:23,793
Barnsley	237,834	-	4	-	-	1.5	4	1:59,459	1:8,809
Bradford	528,155	8	7	1	-	0	16	1:33,010	0
Calderdale	207,376	7	5	1	2	0	15	1:13,825	0
High Peak	91,364	2	5	-	-	0	7	1:13,052	0
Leeds	766,399	1	15	2	4	2.5	22	1:34,836	1:17,031
Oldham	228,765	-	5	-	-	0	5	1:45,753	0
Rochdale	212,962	2	3	1	1	1	7	1:30,432	1:11,831
Wakefield	331,379	2	5	1	2	2	10	1:33,138	1:9,205
Total	3,035,513	26	56	6	9	8	97	1:31263	1:21,059

Source: Active Power Places / KKP Insights

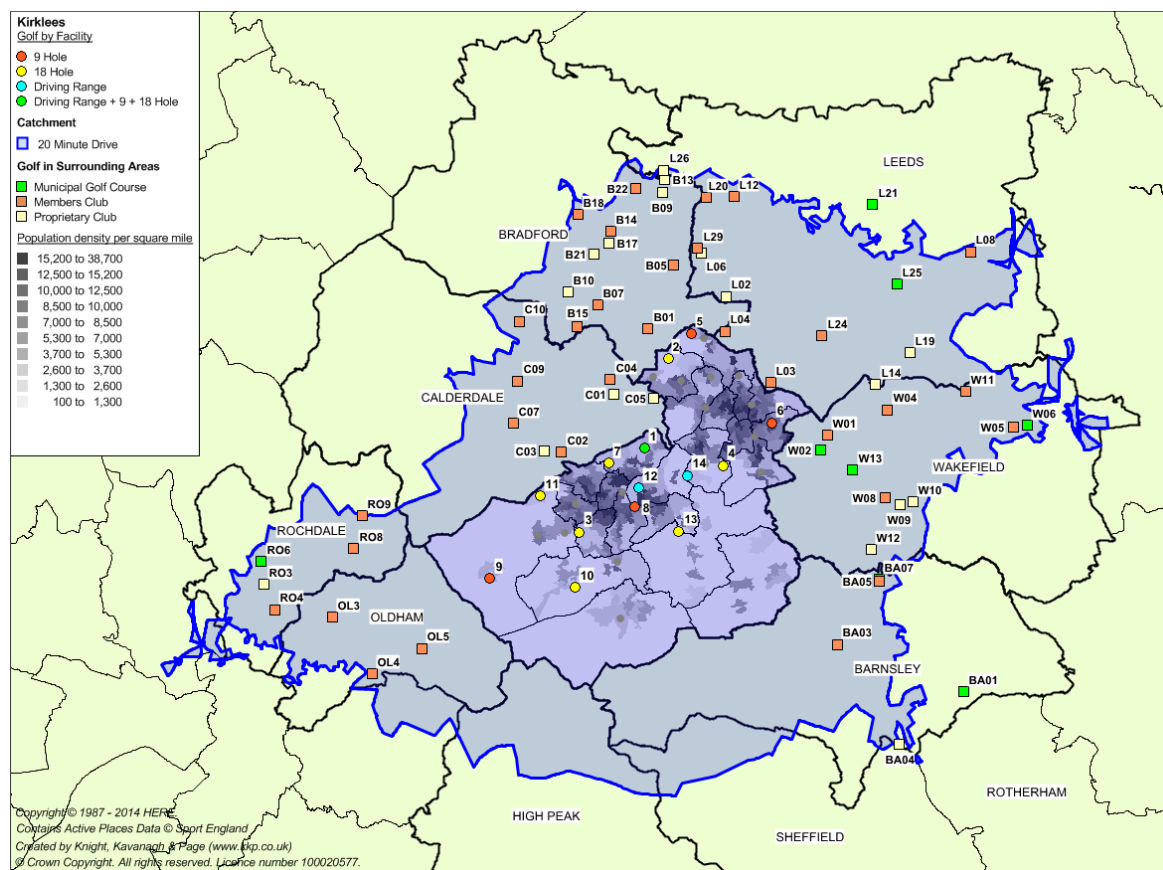
Table 3.5 above sets out current provision in adjoining authorities, it identifies that:

- ◀ Within Kirklees and its neighbouring authorities there are over 3 million people
- ◀ There is one municipal course in Kirklees and seven municipal golf facilities in neighbouring authorities.
- ◀ There are four 9-hole and seven 18-hole Members Clubs in Kirklees with twenty two 9-hole and forty nine 18-hole Members Clubs in neighbouring authorities
- ◀ There are no Proprietary Clubs in Kirklees and six 9-hole and nine 18-hole Members Clubs in neighbouring authorities.
- ◀ Kirklees has the 3rd lowest ratio (1:39,000) of courses per head of population behind Barnsley and Oldham. (The best ratio is to be found in Calderdale - 1:14,000).
- ◀ Of those with municipal provision Kirklees has the worst ratio of population to municipal golf courses (1:24,000). This is also below the regional average (1:21,000).
- ◀ Four neighbouring authorities (Bradford, Calderdale, High Peak and Oldham) offer no municipal provision.

Neighbouring authority Member, Proprietary and Municipal courses within a 20 minute drive time catchment area of Kirklees are illustrated in Figure 3.2.

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Figure 3.2 Golf clubs within 20 minute drive of Kirklees



Key: Municipal, Members and Proprietary golf clubs within 20 minute drive of Kirklees

Map Ref	Site Name	Facility		Club Type	
B01	South Bradford Golf Club	Standard	9 Hole	Bradford	Members
B05	Bradford Moor Golf Club	Standard	9 Hole	Bradford	Members
B07	Clayton Golf Club	Standard	9 Hole	Bradford	Members
B09	Ghyll Beck Golf Driving Range	Driving Range	18 Bay	Bradford	Proprietary
B10	Headley Golf Club	Standard	9 Hole	Bradford	Proprietary
B13	Marriott Leisure & Country Club	Standard	18 Hole	Bradford	Proprietary
B14	Northcliffe Golf Club	Standard	18 Hole	Bradford	Members
B15	Queensbury Golf Club	Standard	9 Hole	Bradford	Members
B17	Shay Grange Golf Centre	Driving Range	32 Bay	Bradford	Proprietary
B17	Shay Grange Golf Centre	Standard	9 Hole	Bradford	Proprietary
B18	Shipley Golf Club	Standard	18 Hole	Bradford	Members
B21	West Bradford Golf Club Ltd	Standard	18 Hole	Bradford	Proprietary
B22	Baildon Golf Club	Standard	18 Hole	Bradford	Members
BA01	Hillies Golf Course	Standard	9 Hole	Barnsley	Municipal

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Map Ref	Site Name	Facility		Club Type	
BA03	Silkstone Golf Club	Standard	18 Hole	Barnsley	Members
BA04	Tankersley Park Golf Club	Standard	18 Holes	Barnsley	Proprietary
BA05	Woodlands Driving Range	Driving Range	24 Bays	Barnsley	Members
BA07	Barnsley Golf Club	Standard	18 Holes	Barnsley	Municipal
C01	Crow Nest Park Golf Club Ltd	Standard	9 Holes	Calderdale	Proprietary
C02	Elland Golf Club	Standard	9 Holes	Calderdale	Members
C03	Halifax Bradley Hall Golf Club	Standard	18 Holes	Calderdale	Proprietary
C04	Lightcliffe Golf Club	Standard	9 Holes	Calderdale	Members
C05	Willow Valley Golf & Country Club	Standard	18 Holes	Calderdale	Proprietary
C05	Willow Valley Golf & Country Club	Driving Range	22 Bays	Calderdale	Proprietary
C05	Willow Valley Golf & Country Club	Standard	18 Holes	Calderdale	Proprietary
C05	Willow Valley Golf & Country Club	Standard	9 Holes	Calderdale	Proprietary
C07	Ryburn Golf Club	Standard	9 Holes	Calderdale	Members
C09	West End Golf Club	Standard	18 Holes	Calderdale	Members
C10	Halifax Golf Club	Standard	18 Holes	Calderdale	Members
L02	Fulneck Golf Club	Standard	9 Holes	Leeds	Proprietary
L03	Howley Hall Golf Club	Standard	18 Holes	Leeds	Members
L04	The Manor Golf Club	Standard	18 Holes	Leeds	Members
L04	The Manor Golf Club	Driving Range	20 Bays	Leeds	Members
L06	Calverley Golf Club	Standard	9 Holes	Leeds	Proprietary
L06	Calverley Golf Club	Standard	18 Holes	Leeds	Proprietary
L08	Garforth Golf Club	Standard	18 Holes	Leeds	Members
L12	Horsforth Golf Club	Standard	18 Holes	Leeds	Members
L14	Lofthouse Hill Golf Club	Standard	18 Holes	Leeds	Proprietary
L19	Oulton Hall	Driving Range	16 Bays	Leeds	Proprietary
L19	Oulton Hall	Standard	18 Holes	Leeds	Proprietary
L19	Oulton Hall	Standard	9 Holes	Leeds	Proprietary
L20	Rawdon Golf & Lawn Tennis Club	Standard	9 Holes	Leeds	Members
L21	Roundhay Golf Club		9 Holes	Leeds	Municipal
L24	South Leeds Golf Club	Standard	18 Holes	Leeds	Members
L25	Temple Newsam Golf Club	Standard	2 x 18 Holes	Leeds	Municipal
L26	The Bradford Golf Club Ltd	Standard	18 Holes	Leeds	Proprietary
L29	Woodhall Hills Golf Club	Standard	18 Holes	Leeds	Members
OL3	Crompton & Royton Golf Club	Standard	18 Holes	Oldham	Members
OL3	Crompton & Royton Golf	Driving Range	12 Bays	Oldham	Members

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Map Ref	Site Name	Facility		Club Type	
	Club				
OL4	Oldham Golf Club	Standard	18 Hole	Oldham	Members
OL5	Saddleworth Golf Club	Standard	18 Hole	Oldham	Members
RO3	Castle Hawk Golf Club	Standard	9 Hole	Rochdale	Proprietary
RO3	Castle Hawk Golf Club	Driving Range	30 Bay	Rochdale	Proprietary
RO4	Manchester Golf Club	Standard	18 Hole	Rochdale	Members
RO6	Marland Golf Club	Standard	18 Hole	Rochdale	Municipal
RO8	Tunshill Golf Club	Standard	9 Hole	Rochdale	Members
RO9	Whittaker Golf Club	Standard	9 Hole	Rochdale	Members
W01	Low Laithes Golf Club	Standard	18 Hole	Wakefield	Members
W02	Spring Mill Golf Course	Standard	9 Hole	Wakefield	Municipal
W04	Normanton Golf Club	Standard	18 Hole	Wakefield	Members
W05	Pontefract And District Golf Club	Standard	18 Hole	Wakefield	Members
W06	Pontefract Park Golf Course	Standard	9 Hole	Wakefield	Municipal
W08	Wakefield Golf Club	Standard	18 Hole	Wakefield	Members
W09	Walton Driving Range	Driving Range	16 Bay	Wakefield	Proprietary
W10	Waterton Park Golf Club	Standard	18 Hole	Wakefield	Proprietary
W11	Whitwood Golf Course	Standard	9 Hole	Wakefield	Members
W12	Woolley Park Golf Club	Standard	9 Hole	Wakefield	Proprietary
W12	Woolley Park Golf Club	Standard	18 Hole	Wakefield	Proprietary
W013	City of Wakefield Golf Course	Standard	18 Hole	Wakefield	Municipal

Leeds have recently closed two municipal courses which were underutilised and running at a deficit. Some provision was also sold/leased to incumbent clubs during the 1990's golf boom. This was the case in Bradford which no longer provides municipal golf, and relies on the proprietary and members club sectors to meet residents' golfing needs.

In summary, all Kirklees resident can access provision within a 20 minute drive time. Adjoining authorities are well provided with members and proprietary golf clubs, less so with 'pay and play' venues.

Transport links

Many golf clubs, by the nature of the landscape and topographical requirements, are located in the countryside and are therefore only readily accessible by car. This can act as a discriminatory factor for non-car owners and young people who can only get to the course with a car driver. Bradley Park is on a primary transport route and is accessible by a regular bus service, as is Cleckheaton & District GC and East Bierley GC. By nature of the equipment required to play golf most golf players are drivers and access courses accordingly. Groups of visitors may travel together by coach.

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Disability golf

The national organisation British Inclusive Golf ((BIG) previously the British Disabled Golf Association (BDGA)) is based at Longley Park having moved from the Acanthus Complex in Leeds which closed down.

BIG aims to bring disabled and non-disabled people together on the golf course through a programme of taster sessions, organised range games and organised on-course golf events, enabling better social inclusion and aiding rehabilitation. In October 2012 BIG became a HMRC charitable company and is presently applying for full charity status with the Charities Commission.

An elderly and ageing membership is a characteristic of golf clubs with many members retired and ageing and often carrying disabilities brought about by old age. The CONGU handicapping system is designed to enable all players to play fairly against each other, so despite ageing, members can compete with one another effectively. Golf clubs are a great source of companionship and friendship for more elderly people, particularly those who have lost partners through divorce or bereavement.

The use of golf club trollies and buggies allows golfers who may have hip and knee damage to prolong their playing careers and enjoy golf into old age. Many golf clubs have golfers in the 70 - 85 age bracket.

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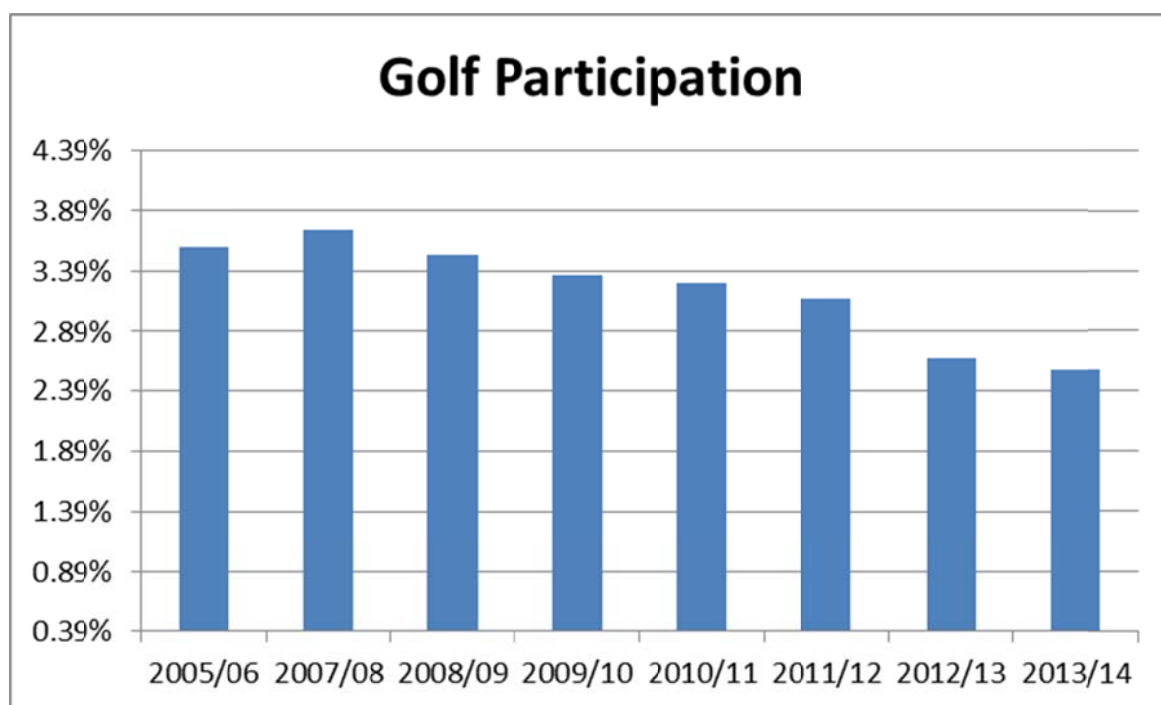
GOLF NEEDS ASSESSMENT

4.0 AN ASSESSMENT OF THE DEMAND FOR GOLF IN KIRKLEES

Demand

As set out in Section 1, the demand for golf has, over the past decade, seen a significant decline. This is illustrated graphically in the participation data in Figure 4.1. Between 2004 and 2013 club membership (affiliated members) fell 882,184 to 707,424, a drop of 20% (174,760). Despite this, golf (0.73m participants per person) is still the 5th most popular participation sport after swimming (2.5m) running (2.2m), cycling (2.1m) and football (1.9m).

Figure 4.1: Sport England's APS data regarding golf participation from 2005/6-2013/14



Source: Sport England Active People Survey (APS) 8Q3-9Q2: 2014 – 15

Gender differences

Golf is played by men and women although as Table 4.1 illustrates that significantly more men than women play. At u.16 levels gender differences are very marked with many more junior boys attracted to the sport than junior girls.

Table 4.1: Sport England APS – Golf Participation by Gender

Golf by Gender								
Sport	2005/06	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14
Male	6.37%	6.62%	6.24%	5.94%	5.95%	5.65%	4.75%	4.59%
Female	0.94%	0.98%	0.93%	0.90%	0.76%	0.78%	0.70%	0.65%

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The England Golf Membership Questionnaire 2014 found that:

- Female members only make up 15% of golf club membership (as opposed to 50% of the population) and are, thus, a potential growth market that would enable clubs to increase participation and membership.
- 55% of golf clubs report a decrease in adult female membership compared to only 21% that show an increase. 38% of golf clubs have reported a decrease in junior girls compared to only 20% that have shown an increase.

Figure 4.2 Club membership average number of members per club



Source: England Golf Membership Questionnaire 2014 (SMS)

As noted in Figure 4.2, the average golf club has 499 members. There are six males to every one female member and eight junior boys to one junior girl with 96% of all golfers being white.

Golfer segmentation

Golf is a mature market with many golf courses and golf clubs over 100 years old. As supply is segmented, principally by accessibility, price and quality so demand is segmented by user type. To aid understanding of this concept KKP has identified a number of key 'golfer' types or market segments as denoted in Table 4.3.

Table 4.3: Golfer type KKP golf segmentation model

Golfer 'type'	Description
Avid golfers	Golfers who play a lot and who like to practice on a regular basis. These are likely to be club members who play and practice all year round. They might also visit a golf driving range or practice area to warm up prior to taking part in a competition. Typically they will play / visit the range 3-4 times per week.
Keen golfers	Club members who play 2-3 rounds of golf per week and typically go to the range maybe once a week (more so in Winter). Likely to engage in a series of lessons.

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Club golfers	Golfers who typically play once a week. They tend to go to the range when their game is not going so well and will book lessons accordingly.
Seasonal golfers	More likely to play in good weather and will typically use the golf range as a way of getting back into golf after a winter layoff. They tend to play in good weather between May – September.
Occasional golfers	Likes to play golf but may be short of time and therefore have limited opportunities to play. Typically play on weekends away, at corporate/ society day and occasionally after work.
Holiday/tourist golfers	Visitors to an area who go for short breaks and weeks away playing golf at home and abroad. Typically a mix of club and occasional golfers.
Society visitors	Often contains keen golfers. These groups can arrive at a venue early and together for a 'package' 18/27 holes plus food and beverages. Charged an all in price and make it a day out.
Corporate markets	This segment will often choose a venue with good practice facilities as it provides additional facilities at which to entertain customers/clients with either balls to hit prior to playing or a 10 minute lesson with the Professional.
New golfers	New golfers are attracted to a play through the opportunity to take golf lessons in either a 1-1 situation with a Golf Professional or in a group situation. Having started lessons, new golfers are likely to visit a golf range to practice the skills they are being taught and to develop their skills to the point when they feel confident to go out onto a course to play. New golfers traditionally started at Adult Learning Courses (Night School) or at Pay & Play Courses. The golf learning or development opportunity is now more likely to be provided by a PGA Pro at a golf club.

Source: KKP

Different types of golfer are attracted to different types of playing opportunities. Many golfers do not find it necessary to join a golf club to fulfil their golfing requirements and are referred to by England Golf as 'Nomads' i.e. they have no golf home (a club membership) and buy into existing facilities to meet their golfing needs.

England Golf estimates that some 2 million UK golfers are nomadic (i.e. non-members and not affiliated to a county association). This figure is expected to continue to rise as the fixed cost of golf membership remains unattractive to those other than 'avid' and 'keen' segments who want to play 2 – 4 times per week and participate in organised competitions where a CONGU handicap is required.

'Nomads', it seems, prefer not having to pay a membership fee, the flexibility of playing different courses, only playing when the weather is good and playing with friends and family and therefore feel no need to obtain or maintain an official handicap, which is only accessible through club membership and club 'qualifying' competitions.

In Kirklees, Bradley Park has successfully tapped into the nomadic market, catering for nomadic individuals and a number of visiting nomadic societies.

An oversupply of golf courses in many areas has resulted in low price green fees. Nomadic golfers would appear to be taking advantage of low price golf and offers such as 2-4-1 green fee offers and Groupon offers to access comparatively cheap off-peak golf rather than pay a membership fee. Nomads it appears are often prepared to travel further (30 – 60 minutes) to access a bargain, or a course with a good reputation.

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One way to reverse this trend might be for the cost of access to club golf courses via green fees to rise. This relentless golf offers trend and the need for savings in local government budgets may be one of the underlying causes of the problems that are leading to the closure of municipal courses which cannot compete on price and quality with the array of green fee offers for non-members.

Table 4.4: Current demand for golf in Kirklees (adult membership)

Golf Club	Joining fee	Full membership (£)		No of adult members			Accepting new members	EG Get into Golf Initiative
	£	Men	Women	M	F	Total	yes/no	yes/no
Bradley Park GC	No	520*	520*	163	28	191	N/a	Yes
Cleckheaton & District GC	No	930	930	-	-	-	Yes	No
Crosland Heath GC	200	798	734.50	468	63	531	Yes (women only)	Yes
Dewsbury District GC	No	798	734.50	497	39	536	Yes	No
East Brierley GC	No	577	577	-	-	-	Yes	No
Hanging Heaton GC	No	577	577	259	26	285	Yes	No
Huddersfield GC	1000	1200	1200	400	120	520	No	No
Longley Park GC	No	650	650	150	30	180	Yes	No
Marsden GC	No	399	110	100	24	124	Yes	No
Meltham GC	No	870	870	-	-	-	Yes	Yes
Outlane GC	No	760	760	-	-	-	Yes	No
Woodsome Hall GC	1190	1190	1190	377	100	477	Yes (not 7 day)	No

(All clubs in Kirklees offer a wide range of membership packages. This analysis covers full / 7 day membership).

Season ticket fees*

All clubs/courses in Kirklees, with the exception of Huddersfield Golf Club, Woodsome Hall Golf Club and Crosland Heath, who are at capacity (in the full membership category), are accepting new members; several clubs have initiatives and offers to attract new members, most notably women and girls.

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Golf development initiatives



Get into Golf is a development initiative that brings together England Golf and the PGA and works to grow the game with the support of the Golf Foundation, Sport England and Lottery funding. Through its network of County Golf Partnerships (CGPs) it offers low cost golf taster sessions, beginner courses and improvers courses across England, and supports the plan to make England the world's leading golf nation by 2020.

These coaching sessions are available for mixed groups, women-only and families and are all run by PGA professionals. They offer a basic introduction to the game together with information about club membership and follow-on coaching opportunities. Equipment is provided so all participants have to do is book-on (on-line) and turn up on the day in comfortable clothing. Track suits, jeans and casual sportswear are encouraged.

The CGP network was created by England Golf to support development of golf at county level and is fundamental to the delivery of the participation outcomes within England Golf's Whole Sport Plan 2013 to 2017.

In Kirklees, Bradley Park Golf Club (operated by KAL), Meltham Golf Club and Crosland Heath are actively engaged with the Yorkshire County Golf Partnership (YCGP) and the delivery of 'Get into Golf'. (Source: Yorkshire County Golf Partnership). Huddersfield GC ran a successful women's recruitment campaign in 2014 and are now full and will soon be re-introducing a waiting list for all membership categories.

Sport England Market Segmentation

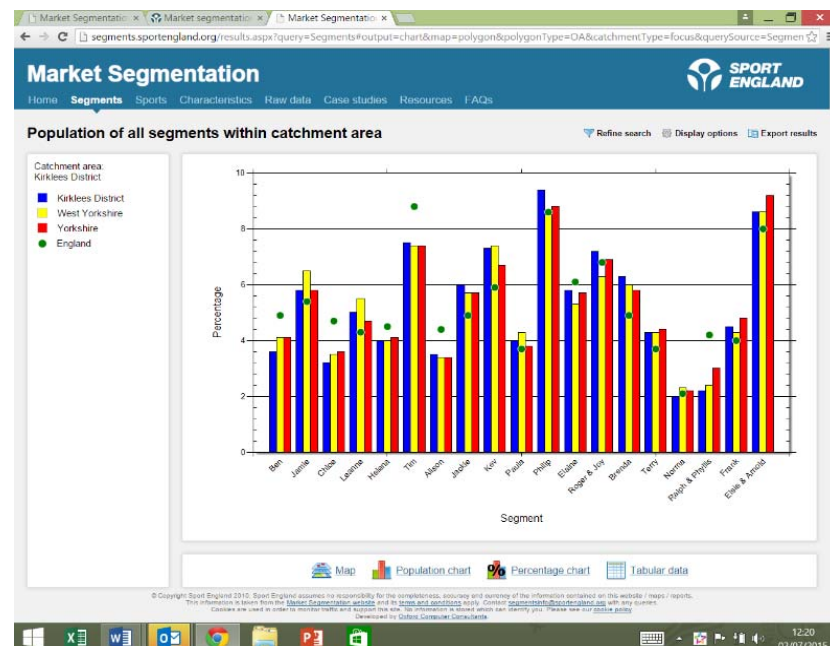
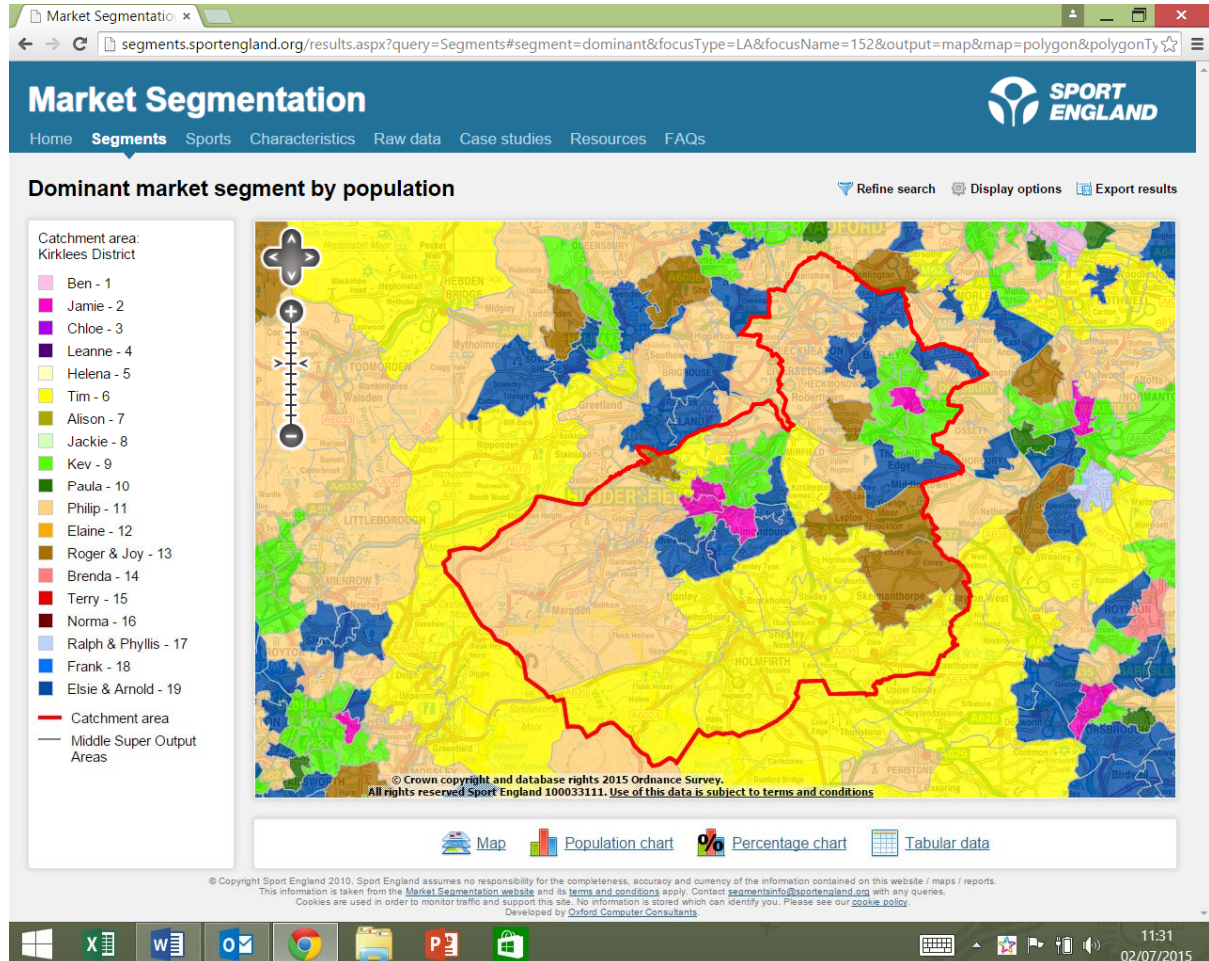
Sport England has developed nineteen sporting segments to help understand the nation's attitudes to sport, their motivations and barriers (see Appendix 5). The market segmentation data builds on the results of Sport England's Active People survey; the Department of Culture, Media and Sport's [Taking Part Survey](#); and the Mosaic Tool from Experian and presents a picture of the dominant social groups in each area, and puts people's sporting behaviour in the context of complex lives. Propensity modelling – a statistical technique that matches the probability of displaying a particular behaviour or attitude to each demographic category is used to link the survey data to wider population groups.

Kirklees Council has reservations about Sport England's Market Segmentation model. With the available segments not considered to be wholly representative of the population and not reflecting some significant population groups for whom there are additional factors to consider.

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Dominant profiles in Kirklees

Figure 4.1 Dominant market segments by population



The dominant profiles in Kirklees are:

- ◀ Philip
- ◀ Elsie & Arnold
- ◀ Tim
- ◀ Kev
- ◀ Roger & Joy
- ◀ Brenda

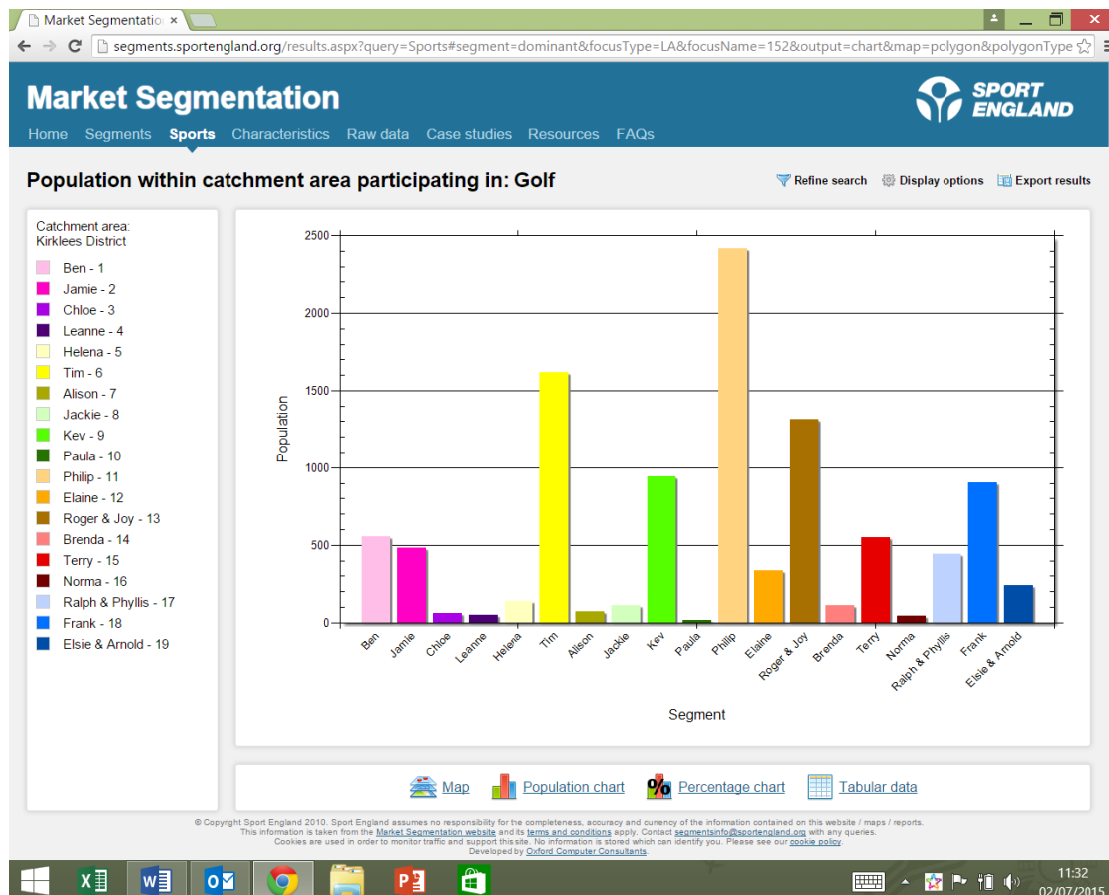
Profile details are contained in Appendix D.

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Existing demand for golf in Kirklees

In respect of participation in golf in Kirklees the dominant profiles are as follows:



Figure 4.3 Population within catchment area participating in golf



The characteristics of the three most likely golf participant types are set out below:

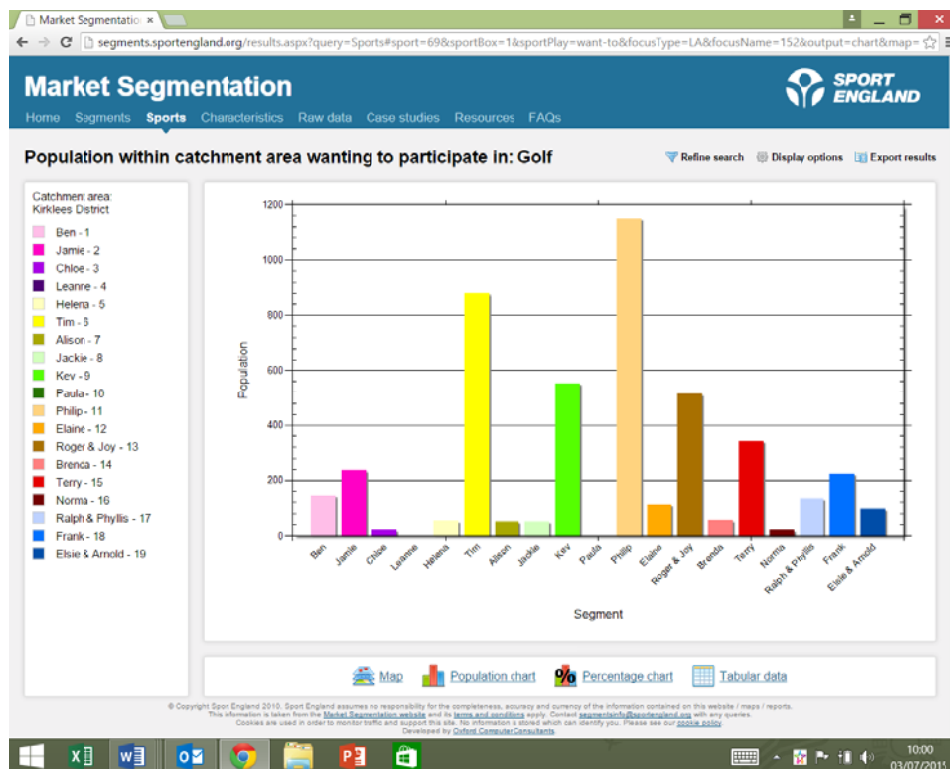
<p>Tim</p> 	<p>Settling Down Males</p> <p><i>Sporty male professionals, buying a house and settling down with partner</i></p> <p><i>Mainly aged 26-45, professional, may have children, married or single</i></p> <ul style="list-style-type: none"> • <i>Top sports: cycling, keep fit/gym, swimming, football, golf</i> • <i>Like to do more: swimming, cycling, football, keep fit/gym, athletics</i> • <i>Most satisfied with: release and diversion, social aspects, exertion and fitness</i> • <i>Least satisfied with: coaching, facilities</i>
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<p>Philip</p> 	<p>Comfortable Mid-Life Males</p> <p>Mid-life professional, sporty males with older children and more time for themselves. Mainly aged 46-55, full-time job and owner-occupier, children, married</p> <ul style="list-style-type: none"> • Top sports: cycling, keep fit/gym, swimming, football, golf • Like to do more: swimming, cycling, keep fit/gym, golf, athletics • Most satisfied with: release and diversion, social aspects, exertion and fitness, and people and staff within the sporting experience • Least satisfied with: facilities and coaching
<p>Roger & Joy</p> 	<p>Early Retirement Couples</p> <p>Free-time couples nearing the end of their careers Mainly aged 56-65, full-time job or retired, married</p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, golf, angling • Like to do more: swimming, keep fit/gym, cycling, golf, athletics • Most satisfied with: release and diversion, exertion and fitness, social aspects, ease of participation, people and staff • Least satisfied with: facilities, coaching

The segmentation model calculates that within Kirklees 10,406 people participate in golf.

Latent demand for golf in Kirklees



Source: Sport England

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In respect of latent demand four profile types dominate: Philip, Tim, Kev and Roger and Joy. In total the model estimates latent demand from 4,636 'would be' players.

Summary

Over the last decade, demand for golf, particularly club membership, has declined significantly. Between 2004 and 2013 club membership (affiliated members) fell 882,184 to 707,424, a drop of 20% (174,760). Despite this it is still the 5th most popular participation sport in England with 0.73 million participants.

Significantly more men than women play golf. At u.16 levels the gender differences are very marked with many more junior boys attracted to the sport than junior girls.

Golf is a mature market with many golf courses and golf clubs over 100 years old. As supply is limited, principally by accessibility, price and quality so demand is segmented by user type.

Different types of golfer are attracted to different playing opportunities. Many golf types do not find it necessary to join a golf club to fulfil their golfing requirements and England Golf estimates that some 2 million UK golfers are nomadic (i.e. non-members and not affiliated to a County Association).

All courses/clubs in Kirklees apart from Huddersfield Golf Club, Woodsome Hall Golf Club and Crosland Heath, are accepting new members; several have initiatives and offers to attract new members, most notably women and girls.

Bradley Park Golf Club, Meltham Golf Club and Crosland Heath Golf Club are actively engaged with the Yorkshire County Golf Partnership (YCGP) and the delivery of 'Get into Golf'. Huddersfield Golf Club also ran a successful women's recruitment campaign in 2014 and is now full and intends to re-introduce a waiting list.

The segmentation data has identified c.10, 000 existing players and 4,600 potential players.

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5.0 REVIEW AND ANALYSIS OF SUPPLY AND DEMAND FOR GOLF IN KIRKLEES

Supply

Using the assumption that an 18 hole course can support 550 full members and that a 9 hole course can support 250 members, the golf courses in Kirklees (see Figure 3.1 and Table 3.2) which can accommodate 4850 full golf members. A further 200 players are accommodated at Bradley Park. Membership capacity in Kirklees is therefore 5050 members.

The segmentation data identifies c.10, 000 existing golfers in Kirklees.

Courses in Kirklees range in quality. This variation and associated pricing accommodates all types of golfer as defined in the KKP golfer segmentation (see Table 4.2).

The 'pay and play' 18 hole course, par 3 course and golf driving range at Bradley Park is one of few remaining municipally owned courses in either Kirklees or the neighbouring authority areas.

The facilities at Bradley Park provide teaching and golf development opportunities for people who wish to learn to play golf. The Par 3 course is helpful for new players to build the confidence to play full size 9 and 18 hole courses. Several clubs are involved in the England Golf 'Get into Golf' initiative to bring new players into the game and the PGA Professionals at all clubs offer individual lessons for those who want to learn to play the sport.

All Kirklees residents can access a golf facility within a 20 minute drive time. Adjoining authorities are also well provided for with members and proprietary golf clubs, but less so with 'pay and play' venues.

Kirklees has a variety of provision (courses at different price and quality) to meet the development requirement of new golfers (see Table 3.3).

Several municipal courses in Leeds and Wakefield have recently closed, and many more have transferred from local authority ownership to become members clubs. In total, there are eight municipal courses serving Kirklees and its neighbouring authorities.

Demand

Demand for golf, and in particular membership of a golf club, has fallen significantly over the past decade. This fall has witnessed a rise in 'Nomads', i.e. golfers who like to play golf but are not interested in affiliating to the NGB, obtaining a CONGU handicap or joining a golf club, preferring instead to play a variety of courses, mostly in good weather with friends and family, taking advantage of offers and discounts to play off-peak.

Based on a 6% penetration rate there are in Kirklees an estimated 25,700 golfers. The population is projected to rise by 14.8% (+62,804) through to 2037, taking the total to 491,083. If golf penetration remains at 6% the number of golfers in 2037 will rise to 29,500; an additional 3,800 (all other things being equal).

England Golf is leading a number of national golf development initiatives e.g. Get into Golf and National Golf Week to encourage young people aged 25 – 44 to take up the sport. Golf clubs are increasingly engaging with the Yorkshire County Golf Partnership

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(YCGP) and offering more flexible membership packages to accommodate new members.

The Sport England Market segmentation tool calculates that there are 4,600 potential players within Kirklees whom, if contacted or could be made aware of the opportunities to learn to play golf, would have a propensity to do so.

Summary of key findings

On the assumption that it requires 550 full members to support an 18 hole course and 250 full members to support a 9 hole course, existing supply in Kirklees can accommodate a minimum 828 new members (see Table 5.1).

Table 5.1 Capacity at existing golf club/course provision in Kirklees

Golf Club / Course	Full member capacity	No. of full members	Deficit (-)	Accepting members
Bradley Park Golf Club	200	191***	0	N/a
Cleckheaton & District Golf Club	550	Unknown	-70*	Yes
Crosland Heath Golf Club	550 (531)	531	0	No
Dewsbury & District Golf Club	550	520	-30	Yes
East Bierley Golf Club	250	Unknown	-75*	Yes
Hanging Heaton Golf Club	250 (300)	285	-15	Yes
Huddersfield Golf Club	550 (520)	520	0	No
Longley Park Golf Club	250	180	-70	Yes
Marsden Golf Club	250	124	-134	Yes
Meltham Golf Club	550	Unknown	-25	Yes
Outlane Golf Club	550	Unknown	-75*	Yes
Woodsome Hall Golf Club	550 (480)	477	0	No
Theoretical Total	5050	-	-	-
Adjusted figure: Kirklees capacity	4431	-	495	-

* Estimate

** Adjusted Figure – Full capacity at Huddersfield (520), Woodsome Hall (480) and Hanging Heaton (300).

*** Season Ticket Sales

In conclusion, there is currently over-provision of golf to meet current demand. With the exception of Crosland Heath, Huddersfield and Woodsome Hall the remaining 3 x 18 hole and 4 x 9 hole members courses would all benefit from the recruitment of new, and the continued retention of existing members. Due to the older age profile of existing members, lifestyle and career changes recruitment to golf clubs needs to be an ongoing process.

With the rise in popularity of 'Nomadic Golf', golf clubs have become more flexible in what they offer, more customer orientated and friendlier. As the England Golf focus group research has identified golf clubs need to become service orientated, female and family friendly and offer packages that meet different family needs and circumstances at a price that is perceived to offer value for money accompanied by a range of benefits that meet members' needs.

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The England Golf 'Get into Golf' programme can be effective in recruiting and retaining new members where it is club led, customer focused and engages the PGA professionals, managerial and volunteer workforce. It however, needs to be ongoing to continually attract new players.

Of the existing c.10, 000 golf players in Kirklees (SE segmentation data) it is estimated that 4,000 people are currently golf club members. This leads us to conclude that the other 6,000 players in Kirklees are Nomads.

Based on our understanding of the current supply and prevailing economic and market conditions and recent trends in sports participation and physical activity it is our belief that latent and future demand within Kirklees can be met through existing provision. KKP does not anticipate any new golf courses will need to be provided in Kirklees up to 2037, if at all. There is capacity within the existing supply to potentially accommodate displaced members should a facility be forced to close.

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6.0 CONCLUSIONS

In response to the key questions posed by Kirklees Council, the following conclusions have been reached:

Can local demand to play golf and join golf clubs can be met through existing supply?

Yes - local demand to play golf and join golf clubs can be met through existing supply.

What role is played in meeting local demand by golf clubs in Kirklees and surrounding local authority areas (Oldham, High Peak, Barnsley, Wakefield, Leeds, Bradford and Calderdale)?

Oversupply in Kirklees is replicated in the adjoining authorities. With less than 10% of golf club members travelling more than 5 miles to play, supply in each local authority area will continue to meet local demand.

What golf provision will the Kirklees Council area need to meet existing and future local demand?

Existing supply of golf provision is estimated to be able to meet existing and future demand. It is, however, possible that some existing supply will be lost. Current oversupply is estimated at 495 memberships, the equivalent of a 18 hole course (550 members). The courses under greatest pressure to recruit new members at this time are:

- ◀ Marsden GC
- ◀ Cleckheaton GC
- ◀ Dewsbury District GC
- ◀ East Bierley GC and
- ◀ Outlane GC

The current situation is putting some strain on clubs'/courses' financial and operation management arrangements. Third party income from green fees and social events is an important revenue stream and some clubs may require a bank overdraft or loan and budget cuts to help the business continue to break even or make a small surplus.

Within the existing supply, Bradley Park GC (operated by KAL) has a unique role as a municipal 'pay and play' facility, providing both playing and learning facilities. As seen from the analysis of neighbouring supply, traditional pay and play facilities are being closed as the demand for municipal provision is reduced. At Bradley Park, however, the quality of the product is good and the demand for its playing, teaching and social facilities remains strong.

Based on our understanding of the current supply and prevailing economic and market conditions, the recent trends in sports participation and physical activity it is our belief that latent and future demand within Kirklees can be met through existing provision. KKP does not anticipate any new golf courses will need to be provided in Kirklees up to 2037, if at all. There is capacity within the existing supply to potentially accommodate displaced members should a facility be forced to close.

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APPENDIX A

BUILT LEISURE AND SPORTS FACILITIES – ASSESMENT REPORT, JUNE 2015

SECTION 13: GOLF

Golf is one of few sports that is not played on a standardised playing surface, meaning that, providing you have a hole, a teeing ground, a club and a ball, it can, theoretically, be played anywhere.

A golf course usually consists of nine or 18 holes. Play starts on a teeing ground and ends when the golfer gets his ball into the hole cut into the ground on the green or putting surface. A flagstick displays the location of the hole.

Different heights of grass are cut between the teeing ground and green to increase difficulty and punish bad shots. The tee provides a level stance and closely mown grass so the golfer has every chance to make a decent attempt for the first stroke at each hole. The fairway provides short grass and good lies. The rough provides progressively longer grass and other forms of variation that increase the difficulty of recovery the further you are away from the fairway. The green will always be the area most closely mown to create a smooth surface suitable for putting.

A considerable number of new golf courses were built in the 1980s and early 1990s in response to a perceived demand for additional facilities. Although the rate of development has slowed down considerably in recent years, there remains a steady throughput of golf related proposals in the planning system.

13.1 Supply

13 golf clubs are located within Kirklees district - as identified in Table 13.1 below.

Table 13.1 Golf facilities in Kirklees

Map Ref	Site Name	Facility	Tenure
1	Bradley Park Golf Club	Driving Range + 9 Hole + 18 Hole + Footgolf	Pay and play
2	Cleckheaton & District Golf Club	18 Hole	Members club
3	Crosland Heath Golf Club	18 Hole	Members club
4	Dewsbury & District Golf Club	18 Hole	Members club
5	East Bierley Golf Club	9 Hole	Members club
6	Hanging Heaton Golf Club	9 Hole	Members club
7	Huddersfield Golf Club	18 Hole	Members club
8	Longley Park Golf Club	9 Hole	Members club
9	Marsden Golf Club	9 Hole	Members club
10	Meltham Golf Club	18 Hole	Members club
11	Outlane Golf Club	18 Hole	Members club
12	Stadium Golf	Driving Range	Pay and play owned by Direct Golf
13	Woodsome Hall Golf Club	18 Hole	Members club

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Map Ref	Site Name	Facility	Tenure
14	Hopton Horse Centre	Golf Driving Range (GDR)	Proprietary Owned

In summary golf facilities in Kirklees comprise:

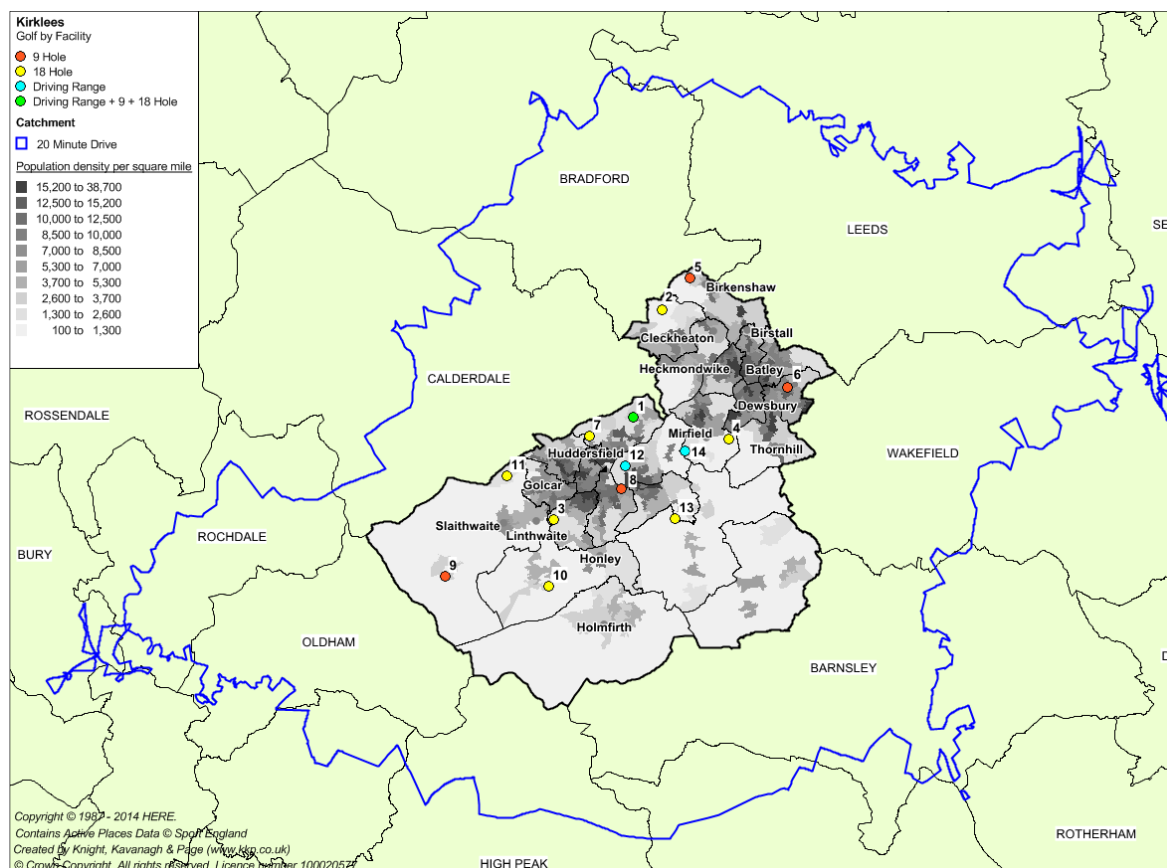
- ◀ Three golf driving ranges
- ◀ One par 3 course
- ◀ Six - 9 hole courses and
- ◀ Eight - 18 hole courses.

The golf course at Bradley Park is owned by Kirklees Council, and whilst it does offer a club membership facility it is predominately a 'pay and play' course. Within the facility mix is an 18 hole course, a 9 hole short course with synthetic turf greens which is also used for Footgolf, a golf driving range (GDR), two putting greens and a short game area. Bradley Park offers a good mixture of facilities at which the game can be taught and practiced.

The remaining eleven courses are members clubs. In all cases visitors are welcome to pay a green fee to visit and play the course. The area supports two golf driving ranges, both in Huddersfield. GDR's are traditionally free to attend with participant buying golf balls to hit at the targets.

The golf course facilities are illustrated on Figure 13.1 below together with a 20 minute drive time catchment area around each facility.

Figure 13.1 Golf course provision in Kirklees with a 20 minute drive time catchment area



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All resident can access golf provision within a 20 minute drive.

13.2 Demand

The past decade has seen a decline in regular participation in golf and a decline in the number of people who want to become members of golf clubs. Between 2004 and 2013 golf club membership in England dropped by 20%. As a result there is an increasing over supply of golf provision, with generally less people joining golf clubs year on year.

To date this has not manifested itself in the closure of any golf facilities in Kirklees but all of the clubs identified could accommodate new members and will encourage visitors to pay green fees to play the course. The decline in members makes clubs more dependent on generating third party income from green fees, visiting parties and social activities.

England Golf, the NGB, has a range of initiatives to rebuild participation levels and encourage club membership. The trends of the last decade suggest that a change in the direction for golf membership may be difficult to achieve, with many players choosing to remain 'nomadic', playing with friends at different venues rather than being tied into a club membership package.

13.3 Supply and demand analysis

The decline in the popularity of joining a golf club and becoming a regular (x1 per week) golfer is placing a financial burden on many golf clubs which are seeing revenues decline, whilst costs continue to rise. To date the number of golf clubs in Kirklees remains stable.

However, unless the decline in membership requirements is reversed over the next few years and the demand for club membership increases it is possible that demand may fall to the point where there is an unsustainable oversupply of golf course facilities and one or more clubs may be forced to close.

13.4 Summary of key facts and issues

- ◀ There are 12 golf clubs in the Kirklees Council area. Eleven are traditional members clubs and one is a 'pay and play' facility.
- ◀ There are three golf driving range facilities, two located in Huddersfield and one in Mirfield. If the HD One proposals for the stadium go ahead the driving range at the Huddersfield Stadium would be lost.
- ◀ Demand for golf club membership has been in decline over the past decade.
- ◀ All of the golf clubs in Kirklees have capacity to take on new members.
- ◀ England Golf has a number of initiatives to raise golf participation levels.
- ◀ Unless there is a reverse in the trend to join golf clubs then it is possible that supply will outweigh demand and one or more clubs may be forced to close.

Since this study was started, Bagden Hall Hotel has closed its golf course. A new GDR has opened alongside the Hopton Horse Centre in Mirfield and it has emerged that Kirklees Council has two 'mothballed' 9 hole golf course in Spenborough and Birstall.

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APPENDIX B: PROJECT CONSULTEES

Name	Organisation	Role	Date Interviewed
Adrian Ashworth	Meltham GC	Secretary	27/ 05 / 2015
Richard Brown	England Golf	Senior Regional Manager (Yorkshire)	30 / 06 / 2015
David Chapman	Outlane GC	Professional	30 / 06 / 2015
Richard Lambert	Crosland Heath GC	Professional & General Manger	27/ 05 / 2015
Tom Freeland	Yorkshire Golf Partnership	Development Officer	30 /06 /2015
Dick Guiver	Cleckheaton GC	Secretary	28/ 05 / 2015
Alex Keighley	The Huddersfield GC	Professional	30 / 06 /2015
Warren Lockett	Cleckheaton GC	Professional	28/ 05 / 2015
Simon Race	Meltham GC	Professional	27/ 05 / 2015
Lindsay Salvini	Crosland Heath GC	Administrator	27/ 05 / 2015
Mike Thorpe	Wakefield & District GC	General Manager	28/ 05 / 2015
Barry Turnball	Kirklees Active Leisure	Business Development Manager	16/ 06 / 2015
Tom Wild	Bradley Park GC	Professional & General Manager	16/ 06 / 2015

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APPENDIX C GOLF COURSES IN WEST YORKSHIRE (SOURCE: GOLF TODAY)

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6/23/2015 Golf Courses and Driving Ranges in West Yorkshire



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Course Guide England West Yorkshire West Yorkshire Map

Golf Courses in West Yorkshire

Tee time search Powered by Teeofftimes.co.uk

Postcode Distance 25 Miles ▾
Date 23 Jun 15 ▾

Acanthus Golf Centres, previously Shirleywood,
Thorpe Lane, Tingley, Nr Wakefield WF3 2SL

Alwoodley,
Wigton Lane, Alwoodley, Leeds, LS17 8SA

Search

Society Day?

<http://www.golftoday.co.uk/submitcourseedit/york4.htm> 16

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02/20/2015 Golf Courses and Driving Ranges in West Yorkshire

Bagden Hall Hotel, Wakefield Road, Scissett, Nr Huddersfield, HD8 8SZ Bagden Hall has now closed its golf course			
Baildon, Moorgate, Baildon, Shipley, BD17 5PP			
Ben Rhydding, High Wood, Ben Rhydding, Ilkley, LS9 8SB			
Bingley St Ives, St Ives Estate, Harden, Bingley, BD16 1AT			
Bracken Ghyll, Skipton Road, Addingham, Ilkley, LS29 0SL			
Bradford, Hawksworth Lane, Guiseley, LS20 8NP			
Bradford Moor, Scarr Hall, Pollard Lane, Bradford, BD2 4RW			
Bradley Park, Bradley Road, Huddersfield, HD2 1PZ			
Branshaw, Branshaw Moor, Oakworth, Keighley, BD22 7ES			
Calverley, Woodhall Lane, Pudsey, LS28 5QY			
Castlefields, Rastrick Common, Brighouse, HD6 3HL			
City, Redcote Lane, Leeds, West Yorkshire, LS4 2AW			
City of Wakefield, Lupset Park, Horbury Road, Wakefield, WF2 8QS			
Clayton, Thornton View Road, Clayton, Bradford, BD14 6Jgarforth			
Cleckheaton & District, 483 Bradford Road, Cleckheaton, BD19 6BU			
Cookridge Hall, Cookridge Lane, Cookridge, Leeds, LS16 7NL			
Crosland Heath,			

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6232015 Golf Courses and Driving Ranges in West Yorkshire

Felks Stile Road, Crosland Heath, Huddersfield, HD4 7AF		
Crow Nest Park, Coach Road, Hove Edge, Brighouse, HD6 2LN		
Dewsbury District, The Pinnacle, Sands Lane, Mirfield, WF14 8HJ		
East Bierley, South View Road, Bierley, Bradford, BD4 6PP		
Elland, Hammerstones Leach Lane, Hullen Edge, Elland, HX5 0TA		
Fardew Golf Course/East Morton GC, 4 Nursery Farm, Carr Lane, East Morton, Keighley, BD20 5RY		
Ferrybridge 'C', PO Box 39, Stranglands Lane, Knottingley, WF11 8SQ		
Fulneck, Fulneck, Pudsey, LS28 8NT		Golf Today Blog: Chambers Bay... or "Chamber of Horrors"
Garforth, Long Lane, Garforth, Leeds, LS25 2DS		
Gotts Park, Armley Ridge Road, Armley, Leeds, LS12 2QX		US Open - Complete coverage from Chambers Bay starts here
Halifax, Union Lane, Ogden, Halifax, HX2 8XR		
Halifax Bradley Hall, Holywell Green, Halifax, HX4 9AN		
Hanging Heaton, White Cross Road, Bennett Lane, Dewsbury, WF12 7DT		Latest Official World Golf Ranking
Headingley, Back Church Lane, Adel, Leeds, LS16 8DW		
Headley, Headley Lane, Thornton, Bradford, BD13 3LX		Current European Tour Race to Dubai Standings
Hebden Bridge, Great Mount, Wadsworth, Hebden Bridge, HX7 8PH		
Hollins Hall Marriott Hotel & Country Club, Hollins Hill, Baildon, Shipley, BD17 7QW		

<http://www.golftoday.co.uk/ci/clubhouse/coursesdir/yorks4.htm>

39

























































































































































































































































































































































































































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9292016 Golf Courses and Driving Ranges in West Yorkshire

Horsforth, Layton Rise, Layton Road, Horsforth, Leeds, LS18 5EX	                                	Current PGA Tour FedEx Cup Standings	
Howley Hall, Scotchman Lane, Morley, Leeds, LS27 0NX	                                		
Huddersfield, Fixby Hall, Lightridge Road, Huddersfield, HD2 2EP	                                	Current 2016 Olympic Games Golf Rankings	
Ilkley, Myddleton, Ilkley, LS29 0BE	                                		
Keighley, Howden Park, Utley, Keighley, BD20 6DH	                                	KPMG Women's PGA Has Major Energy	
Leeds, Elmete Lane, Leeds, LS8 2LJ	                                		
Leeds Golf Centre, Wike Ridge Lane, Shadwell, Leeds, LS17 9JW	                                		
Lightcliffe, Knowle Top Road, Lightcliffe, HX3 8SW	                                	100 days to Solheim Cup	
Lofthouse Hill, Leeds Road, Lofthouse Hill, Wakefield, WF3 3LR	                                		
Longley Park, Maple Street, Huddersfield, HD5 9AX	                                		
Low Laithes, Parkmill Lane, Flushdyke, Ossett, Nr Wakefield, WF5 9AP	                                	Interview with Brittany Lincome	
The Manor, Bradford Road, Drighlington, Bradford, BD11 1AB	                                		
Marsden, Hemplow, Mount Rd, Marsden, Huddersfield, HD7 6NN	      		

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http://www.golfoday.co.uk/clubhouse/courses/nyorkis4.htm 49

6/23/2015 Golf Courses and Driving Ranges in West Yorkshire

Midgley Lodge Bar Lane, Wakefield, WF4 4JJ		A life less ordinary - Miguel Angel Jimenez	
Moor Allerton Coal Road, Wike, Leeds, LS17 9NH			
Moortown Harrogate Road, Leeds, LS17 7DB			
Normanton Harfeild Hall, Aberford Road, Stanley, Wakefield, WF3 4JP		Spieth's Open Victory Paints The Sky	
Northcliffe High Bank Lane, Shipley, Bradford, BD18 4LJ			
Otley West Busk Lane, Otley, LS21 3NG		USGA Using Technology To Improve Golf Experience	
Oulton Hall (De Vere) Oulton, Rothwell, Leeds, LS26 8HN			
Outlane Slack Lane, New Hey Road, Outlane, Huddersfield HD3 3FQ			
Painthorpe House Painthorpe Lane, Crigglestone, Wakefield, WF4 3HE		Tiger's Poor Play Befuddles Everyone	
Phoenix Park Phoenix Park, Thornbury, Bradford BD3 7AT			
Pontefract & District Park Lane, Pontefract, WF8 4QS		Wilson Staff FG Tour V4 irons	
Pontefract Park Park Side, Pontefract, WF8 4RB			
Queensbury Brighouse Road, Queensbury, Bradford, BD13 1QF			
Rawdon Buckstone Drive, Micklefield Lane, Rawdon, Leeds LS19 6BD		Do you struggle to take your 'range game' onto the golf course?	
Riddlesden Howden Rough, Riddlesden, Keighley, BD20 5QN			
Roundhay Park Lane, Leeds, LS8 2EJ			
Ryburn Norland, Sowerby Bridge, Halifax, HX6 3QP			

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Worrald, Sowerby Bridge, Halifax, HX6 3QP

<http://www.golfoday.co.uk/clubhouse/courses/nyorks4.htm> 59

6292215 Golf Courses and Driving Ranges in West Yorkshire

Sand Moor, Alwoodley Lane, Leeds, LS17 7DJ		
Scarcroft, Syke Lane, Leeds, LS14 3BQ		
Shipley, Beckfoot Lane, Cottingley Bridge, Bingley, BD16 1LX		
Silsden, High Brunthwaite, Silsden, Keighley BD20 0NH		
South Bradford, Pearson Road, Odsal, Bradford, BD6 1BH		
South Leeds, Parkside Links, Ring Road, Beeston, Leeds, LS11 5TU		
Temple Newsam, Temple Newsam Road, Halton, Leeds, LS15 0LN		
Todmorden, Rive Rocks, Cross Stone, Todmorden, OL14 8RD		
Wakefield, 28 Woodthorpe Lane, Sandal, Wakefield, WF2 6JH		
Waterton Park, The Balk, Walton, Wakefield, WF2 6QL		
West Bowling, We have been advised that this Club has now closed.		
West Bradford, Chellow Grange Road, Haworth Road, Bradford, BD9 6NP		
West End (Halifax), Paddock Lane, Highroad Well, Halifax, HX2 0NT		
Wetherby, Linton Lane, Linton, Wetherby, LS22 4JF		
Whitwood, Altofts Lane, Whitwood, Castleford, WF10 5PZ		
Willow Valley Golf, Clifton, Highmoor Lane, Brighouse, HD6 4JB		

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APPENDIX D

Technical report – Sport England Market Segmentation

The Sport England market Segmentation is built primarily from the 'Taking Part' and 'Active People' surveys¹, and helps explain individual's motivations, attitudes, behaviour and barriers towards sport and active recreation. It is underpinned by key socio-demographic variables, thereby ensuring that the segments can be geographically quantified and appended to both customer records and the Electoral Roll. Therefore every adult in England can have a Sport England segment appended to them, whilst a market segment profile can be counted at any geographic level within England down to postcode.

It was this key requirement to be able to geographically quantify and append the classification to customer records which drove the methodology adopted for this project. Key socio-demographic variables were used as the link between the sport and active recreation details in the two sport surveys. It was also this common set of indicators that enabled us to link our sport data to other datasets. This enabled us to apply the classification outside the restricted set of individuals who responded to Active People and Taking Part.

Using the 'Taking Part' survey a series of propensity models were built to predict the likelihood an individual would have to take part in an activity or have a particular motivation or attitude towards sport and active recreation. The 'Taking Part' survey was used as it contained attitude and motivation questions and therefore provided the most comprehensive insight, whilst 'Active People' insight was used to enhance our understanding of each segment. Propensity modelling is a statistical technique that assigns the probability of displaying a particular behaviour/attitude to each demographic category. The differences in these probabilities are measured for significance by comparing across the sample population as a whole. Those models which show the most significance are subsequently extrapolated across the whole England adult population.

The key demographic variables used within this propensity modelling process were selected based on the assumption that they were available in both surveys and on Experian's consumer database of all adults. This was essential to ensure that the final sport segmentation solution could be linked to 'Active People', the Electoral Roll and geographic "bricks".

A proprietary technique known as Mosaic-Pixel grid (MPG) methodology was used to create the propensity models. This technique has been successfully employed by Experian for many years and on hundreds of other person-level segmentations. It is based on the principle that within tightly defined lifestyle and life stage groups people do display similar traits. Mosaic identifies the postcode-based socio-demographics whilst Pixel is a person level combination of key variables that define people as unique and different to their partner, spouse, children and neighbours. Mosaic has 61 categories and Pixel in the region of 6,300 combinations, which when combined provides a grid of c.380,000 pre-defined 'cells'. It is these c.380,000 'cells' which were clustered to create the unique Sport England segments.

As part of this process the actual combination of demographic variables and behavioural and attitudinal information to be used was tested. It became evident that all the variables assessed contributed to explaining sports behaviour and attitudes. Therefore a key challenge was to match the variable classes defined in 'Taking Part' as closely as possible to those found on Experian databases. The final set of individual demographic variables used were:

- Gender (Male, Female)
 - Age (18-25, 26-35, 36-45, 46-55, 56-65, 66+)
-

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- Marital status (Single, Married, Unknown/missing)
- Tenure (Owner occupied, Private rented, Council/HA rented)
- Employment status (Employed full-time/Other, Student/Unemployed, Employed part-time/Housewife, Retired)
- Households with children (No, Yes)

Once this large set of propensity models had been built they were analysed in two ways. Firstly, statistical analysis was undertaken to identify those models that provided the most 'significance', in terms of probability of displaying certain behaviour or attitude. Secondly, across all the models the levels of correlation were analysed, thereby identifying those models that worked well independently and also collectively to provide a rounded picture of insight. Once completed, a subset of these models which represented a cross-section of all the characteristics was selected as the clustering variables.

A cluster analysis of the Taking Part survey was then carried out using the values of the selected propensity models as the input variables, across these pre-defined 380,000 cells. "K-means clustering", an industry-recognised clustering technique, was used that clusters the centroids of each observation based on how 'close' they are to each other – this therefore enables the user to pre-determine the number of clusters required from the final solution.

A segmentation containing about 8-10 clusters was sought after by Sport England, with the initial solution created by Experian having 11 clusters. However, it became clear that more clusters were needed to fully explain and interpret the variety of sporting attitudes and behaviours in the population. Therefore, solutions with 15-20 clusters were looked at and a final classification of 19 clusters was selected as the one which was the "best" explanation of the data. These were analysed by average age and grouped into 4 super-groups on this basis.



Once this 19 segment solution was agreed, additional socio-demographic, attitude and behavioural datasets were profiled to provide the additional 'colour' and insight on the segments – in essence, to help provide the indices and percentiles that would bring the segments 'to life'. These datasets included the 'Active People' survey, Experian's Mosaic, True Touch and Financial Strategic Segmentation solutions, Experian's national consumer surveys, Hospital Episodes Statistics and the Indices of Multiple Deprivation from the ONS.

This additional research and socio-demographic data is appended to the segments through the Mosaic-Pixel methodology as previously outlined. In essence, each respondent from these surveys is assigned one of the 380,000 Mosaic-Pixel cells, which in turn have been allocated to one of the 19 Sport England segments.





As earlier suggested, the segments have been constructed in a manner enabling them to be appended to the electoral roll. As such, for each segment we are able to identify the counts (and therefore percentages and indices) of actual names. We can then select those names that are over-represented for each segment and that are also perceived to encapsulate that segment – similarly, the 'marketing' phrase for segment is defined through analysis of all the variable indices and is intended to provide a strapline for each segment.

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Sport England Market Segmentation Profiles

Segment	Summary of key characteristics
<p data-bbox="355 443 411 477">Ben</p> 	<p data-bbox="555 365 914 398">Competitive Male Urbanites</p> <p data-bbox="555 432 1281 499"><i>Male, recent graduates, with a 'work-hard, play-hard' attitude Mainly aged 18-25, graduate professional, single</i></p> <ul data-bbox="555 521 1359 689" style="list-style-type: none"> • Top sports: football, keep fit/gym, cycling, athletics, swimming • Like to do more: swimming, football, cycling, tennis, athletics • Most satisfied with: release and diversion, social aspects, exertion and fitness • Least satisfied with: facilities, coaching and value for money
<p data-bbox="339 757 427 790">Jamie</p> 	<p data-bbox="555 723 794 757">Sports Team Lads</p> <p data-bbox="555 790 1106 857"><i>Young blokes enjoying football, pints and pool Mainly aged 18-25, vocational student, single</i></p> <ul data-bbox="555 880 1359 1081" style="list-style-type: none"> • Top sports: football, keep fit/gym, athletics, cycling, swimming • Like to do more: swimming, cycling, football, keep fit/gym, athletics • Most satisfied with: release and diversion, exertion and fitness, social aspects • Least satisfied with: coaching, officials and facilities
<p data-bbox="339 1149 427 1182">Chloe</p> 	<p data-bbox="555 1104 842 1137">Fitness Class Friends</p> <p data-bbox="555 1171 1185 1238"><i>Young image-conscious females keeping fit and trim Mainly aged 18-25, graduate professional, single</i></p> <ul data-bbox="555 1261 1359 1485" style="list-style-type: none"> • Top sports: keep fit/gym, swimming, athletics, cycling, equestrian • Like to do more: swimming, keep fit/gym, cycling, athletics, tennis • Most satisfied with: release and diversion, social aspects • Least satisfied with: performance, facilities, officials, value for money
<p data-bbox="331 1529 435 1563">Leanne</p> 	<p data-bbox="555 1485 810 1518">Supportive Singles</p> <p data-bbox="555 1552 1359 1619"><i>Young busy mums and their supportive college mates Mainly aged 18-25, student or PT vocational, likely to have children</i></p> <ul data-bbox="555 1641 1359 1843" style="list-style-type: none"> • Top sports: keep fit/gym, swimming, athletics, cycling, football • Like to do more: swimming, keep fit/gym, athletics, cycling, tennis • Most satisfied with: release and diversion, social aspects • Least satisfied with: performance, value for money, officials, coaching





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Segment	Summary of key characteristics
<p>Helena</p> 	<p>Career Focused Females</p> <p><i>Single professional women, enjoying life in the fast lane Mainly aged 26-45, full-time professional, single</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, athletics, equestrian • Like to do more: swimming, keep fit/gym, cycling, athletics, tennis • Most satisfied with: release and diversion, social aspects, exertion and fitness • Least satisfied with: coaching, facilities, performance
<p>Tim</p> 	<p>Settling Down Males</p> <p><i>Sporty male professionals, buying a house and settling down with partner Mainly aged 26-45, professional, may have children, married or single</i></p> <ul style="list-style-type: none"> • Top sports: cycling, keep fit/gym, swimming, football, golf • Like to do more: swimming, cycling, football, keep fit/gym, athletics • Most satisfied with: release and diversion, social aspects, exertion and fitness • Least satisfied with: coaching, facilities
<p>Alison</p> 	<p>Stay at Home Mums</p> <p><i>Mums with a comfortable, but busy, lifestyle Mainly aged 36-45, stay-at-home mum, children, married</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, athletics, equestrian • Like to do more: swimming, keep fit/gym, cycling, athletics, tennis • Most satisfied with: release and diversion, social aspects, exertion and fitness • Least satisfied with: performance, facilities, coaching, value for money
<p>Jackie</p> 	<p>Middle England Mums</p> <p><i>Mums juggling work, family and finance Mainly aged 36-45, vocational job, may have children, married or single</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, athletics, badminton • Like to do more: swimming, keep fit/gym, cycling, athletics, tennis • Most satisfied with: release and diversion, exertion and fitness • Least satisfied with: performance, facilities, coaching




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Segment	Summary of key characteristics
<p style="text-align: center;">Kev</p> 	<p>Pub League Team Mates</p> <p><i>Blokes who enjoy pub league games and watching live sport. Mainly aged 36-45, vocational job, may have children, married or single</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, football, cycling, swimming, athletics • Like to do more: swimming, cycling, keep fit/gym, athletics, golf • Most satisfied with: release & diversion and social aspects • Least satisfied with: performance, facilities and coaching
<p style="text-align: center;">Paula</p> 	<p>Stretched Single Mums</p> <p><i>Single mums with financial pressures, childcare issues and little time for pleasure. Mainly aged 26-45, job seeker or part time low skilled worker, children, single</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, athletics, football • Like to do more: swimming, keep fit/gym, athletics, tennis, badminton • Most satisfied with: release and diversion, social aspects, exertion and fitness • Least satisfied with: performance, facilities, coaching
<p style="text-align: center;">Philip</p> 	<p>Comfortable Mid-Life Males</p> <p><i>Mid-life professional, sporty males with older children and more time for themselves. Mainly aged 46-55, full-time job and owner-occupier, children, married</i></p> <ul style="list-style-type: none"> • Top sports: cycling, keep fit/gym, swimming, football, golf • Like to do more: swimming, cycling, keep fit/gym, golf, athletics • Most satisfied with: release and diversion, social aspects, exertion and fitness, and people and staff within the sporting experience • Least satisfied with: facilities and coaching
<p style="text-align: center;">Elaine</p> 	<p>Empty Nest Career Ladies</p> <p><i>Mid-life professionals who have more time for themselves since the children left home. Mainly aged 46-55, full-time job and owner-occupier, married</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, athletics, tennis • Like to do more: swimming, keep fit/gym, cycling, badminton, athletics • Most satisfied with: release and diversion, social aspects, exertion and fitness • Least satisfied with: facilities, performance

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Segment	Summary of key characteristics
<p>Roger & Joy</p> 	<p>Early Retirement Couples</p> <p><i>Free-time couples nearing the end of their careers Mainly aged 56-65, full-time job or retired, married</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, golf, angling • Like to do more: swimming, keep fit/gym, cycling, golf, athletics • Most satisfied with: release and diversion, exertion and fitness, social aspects, ease of participation, people and staff • Least satisfied with: facilities, coaching
<p>Brenda</p> 	<p>Older Working Women</p> <p><i>Middle aged ladies, working to make ends meet Mainly aged 46-65, part-time job, married</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, athletics, badminton • Like to do more: swimming, keep fit/gym, cycling, badminton, athletics • Most satisfied with: release and diversion, exertion and fitness, social aspects, people and staff • Least satisfied with: performance, facilities, coaching
<p>Terry</p> 	<p>Local 'Old Boys'</p> <p><i>Generally inactive older men, low income, little provision for retirement Mainly aged 56-65, job Seeker, married or single</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, angling, golf • Like to do more: swimming, keep fit/gym, cycling, golf, athletics • Most satisfied with: release and diversion, social aspects • Least satisfied with: facilities, coaching
<p>Norma</p> 	<p>Late Life Ladies</p> <p><i>Older ladies, recently retired with a basic income to enjoy the lifestyles Mainly aged 56-65, job seeker or retired, single</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, cycling, bowls, martial arts • Like to do more: swimming, keep fit/gym, cycling, tennis, badminton • Most satisfied with: exertion and fitness, release and diversion, social aspects • Least satisfied with: facilities

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Segment	Summary of key characteristics
<p>Ralph & Phyllis</p> 	<p>Comfortable Retired Couples</p> <p><i>Retired couples, enjoying active and comfortable lifestyles Mainly aged 66+, retired, married or single</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, golf, bowls, cycling • Like to do more: swimming, keep fit/gym, golf, cycling, tennis • Most satisfied with: release and diversion, social aspects, ease of participation • Least satisfied with: facilities, coaching
<p>Frank</p> 	<p>Twilight Years Gent</p> <p><i>Retired men with some pension provision and limited exercise opportunities Mainly aged 66+, retired, married or single</i></p> <ul style="list-style-type: none"> • Top sports: golf, keep fit/gym, bowls, swimming, cycling • Like to do more: swimming, cycling, golf, keep fit/gym, bowls • Most satisfied with: release and diversion, social aspects, ease of participation • Least satisfied with: facilities, coaching
<p>Elsie & Arnold</p> 	<p>Retirement Home Singles</p> <p><i>Retired singles or widowers, predominantly female, living in sheltered accommodation. Mainly aged 66+, retired, widowed</i></p> <ul style="list-style-type: none"> • Top sports: keep fit/gym, swimming, bowls, golf, cycling • Like to do more: swimming, keep fit/gym, cycling, tennis, bowls • Most satisfied with: release and diversion, social aspects and ease of participation in their sport. • Least satisfied with: facilities and coaching.

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APPENDIX E

Kirklees golf clubs - categories of membership and fees

Bradley Park Golf Club	Pay & Play Course		
	Midweek	Adult	Junior
	18 Holes		
	with a KAL Card	£18.00	£9.50
	without a KAL Card	£21.60	£11.40
	10 Holes		
	with a KAL Card	£9.50	£4.80
	without a KAL Card	£11.40	£5.75
	Weekend	Adult	Junior
	18 Holes		
	with a KAL Card	£19.50	£10.50
	without a KAL Card	£23.40	£12.60
	10 Holes		
	with a KAL Card	£11.50	£6.50
	without a KAL Card	£13.60	£7.80
	Anytime	Adult	Junior
	Par3		
	with a KAL Card	£4.00	£2.70
	without a KAL Card	£4.80	£3.35
	Footgolf		
	with a KAL Card	£5.00	£5.00
	without a KAL Card	£6.25	£6.25
	Buggy Hire		
	18 Holes		
	with a KAL Card	£15.50	
	without a KAL Card	£18.60	
	10 Holes		
with a KAL Card	£9.50		
without a KAL Card	£11.40		
Driving Range Prices	Adult	Junior	
90 balls			
with a KAL Card	£4.00	£2.70	
without a KAL Card	£4.80	£3.35	
40 balls			
with a KAL Card	£2.20	£1.40	
without a KAL Card	£2.65	£1.70	
10 Basket Booklet (saving 20%)			
with a KAL Card	£32.00	£21.50	
without a KAL Card	£38.40	£24.80	
Driving Range Membership			
with KAL Card	£25 pm		
without a KAL Card	£28 pm		
7 baskets per week			
Season Ticket Holders			
£520 (Maximum 200 per annum)			

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<p>Cleckheaton & District Golf club</p>		<p>Full Playing Membership £930 7-day member who can if so wishes play in any club competition, these members have full voting rights.</p> <p>5 Day Plus Membership £731 5 ½ Day member, who will play the 5 days of the week Monday to Friday and after 12pm on Sunday, and have full voting rights.</p> <p>5 Day Membership £664 5 Day membership entitles the member to play Monday to Friday and can play in midweek club competitions. These members have full voting rights.</p> <p>Country Membership £280 Country membership is available to members of another golf club which is located more that 50 miles from the club. This category does not carry voting rights.</p> <p>Distance Membership £380 This category of member will be allowed to play in any club competition but must live more that 75 miles for the Club. This category does not carry any voting rights.</p> <p>999 Membership £448 This is available to employees of the Emergency Services. 999 members are able to play Monday to Friday but not between 7.30-9.30am and 12-1.30pm. They are not able to enter club competitions and do not hold a CONGU handicap</p>
<p>Crosland Heath Golf Club</p>		<p>Full Membership: £825 6 Day: £707 5 Day: £589 Young Adult: £289 Country Member: £222 Student: £222 Junior: £118 Twilight: £275</p>
<p>Dewsbury & District Golf Club</p>		<p>Full Membership: £798 Midweek: £570.50 Lady Full Playing: £734.50 Lady Midweek: £519 Intermediate (22-23): £490.50 Youth: £331 Junior: £25 Social: £25</p>
<p>East Bierley Golf Club</p>		<p>Full Male Membership (Over 25): £550 Full Female Membership (Over 25): £515 5 Day: £420 3 Day: £240 Junior: £52 Intermediate 1 (18-21): £215 Intermediate 2 (22-25): £292.50</p>

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Hanging Heaton Golf Club		Full Playing (Male/Female) : £577 5 Day: £433 Junior: £75 Social: £15
Huddersfield Golf Club		N/A
Longley Park Golf Club		Full Playing: £650 Full Playing 80+ £332 Midweek: £510 Midweek 80+ £263 Student: £214 Twilight: £177
Marsden Golf Club		Male (36-65): £399 Male Pensioner: £335 Young men: Ranges from £60-280 Ladies (19+): £99
Meltham Golf Club		No data
Outlane Golf Club		No data
Woodsome Hall Golf Club		Full Playing: £1097 Six Day: £900 Intermediate (19-29): £152-1071 Junior: £119 Social: £214