



# **Brentwood Borough Council Golf Course Needs Assessment**

**November 2019**

## **Content:**

Section 1: Introduction and Background (Dunton Hills Garden Village)  
Section 2: Planning Policy Context and Assessing Needs & Opportunities Guide  
Section 3: Supply Analysis  
Section 4: Demand Analysis  
Section 5: Conclusions  
Section 6: Next Steps

Appendix 1: Green Fees at Dunton  
Appendix 2: Map of golf courses within a 20-minute drive catchment area from Dunton Hills Golf Course  
Appendix 3: England Golf – Understanding Your Market  
Appendix 4: England Golf Report - Facility Planning Enquiry: Brentwood, Eastern

## **Executive Summary:**

Sport England has provided comments in response to Brentwood Borough Council's Draft Local Plan Preferred Allocations (January 2018). An objection was made on the proposal to develop the Dunton Hills Garden Village site on the grounds of the loss of Dunton Hills Golf Course, and there being no evidence to support whether or not there is appropriate golf course provision in the area if the golf course was developed. As a result, the Council has undertaken a Golf Course Needs Assessment.

The assessment concludes that there are 18 additional golf courses within a 20-minute drive catchment area from Dunton Hills Golf Course. These courses are located within Brentwood Borough, London Borough of Havering, Thurrock Borough, and Basildon Borough. Of these, 12 offer Pay-n-Play as an option, as available at Dunton Hills Golf Course.

Following the completion of the Draft Golf Course Needs Assessment, England Golf review the document and provided a report which includes additional information regarding the golf offer within Brentwood. A copy of the England Golf report is provided in Appendix 4. Both the Brentwood Golf Course Needs Assessment and the report from England Golf conclude that there is adequate provision of 18-hole golf courses. Dunton Hills Golf Course also provides the service of a 9-hole Par-3 course, of which there are two other courses which offer this service. Therefore, the proposal of Dunton Hills Garden Village would result in a reduction of the Par-3 golf provision. It is acknowledged that the Council does not have the authority to enforce existing courses to include a Par-3 provision to their existing offer. The Council is committed to continue to work with England Golf and Sport England to ensure Brentwood Borough provides good quantity and quality playing pitches, including golf courses, for residents. Golf England and the Council are currently in the process of developing a Statement of Common Ground with the end goal to agree on the most effective form of mitigation to encourage the uptake / provision of entry level golf within the borough.

## **Section 1: Introduction and Background**

- 1.1 Dunton Hills Golf Course is located east of the A128 and opened in 1997 with an 18-hole golf course. The golf course has made several improvements since opening, including the opening of the Clubhouse, a separate 9-hole golf course, driving range, and mini-golf facilities.
- 1.2 Despite the improvements, there has been a gradual decline in usership since 2012, as set out in Appendix 1.
- 1.3 The owners of Dunton Hills Golf Course put the site forward for consideration for development as part of the Brentwood Local Plan process. This site is considered to have potential in assisting with meeting the borough's housing needs.

### **Dunton Hills Garden Village:**

- 1.4 Large new settlements are seen as playing a pivotal role in delivering and meeting the country's housing needs. In response to this, in 2016 the Ministry of Housing, Communities and Local Government (MHCLG) and Homes England invited expressions of interest from local planning authorities to explore the feasibility of 'Locally-Led Garden Villages, Towns and Cities'. Brentwood Borough Council responded with an expression of interest for Dunton Hills to be awarded Garden Village status.
- 1.5 In early 2017 MHCLG and Homes England announced that Dunton Hills was one of 14 new garden villages selected nationwide. This was in response to demonstration of the site's ideal location for genuine garden village potential and included the awarding of capacity funding to bring forward a scheme on the site through the Local Plan process.
- 1.6 Government's 2017 Housing White Paper is strongly supportive of Garden Villages because of the potential to deliver community benefits over-and-above what can be achieved through urban extensions, with statements including "provided they are supported by the necessary infrastructure, they are often more popular with local communities than piecemeal expansion of existing settlements."
- 1.7 Para 138 of the NPPF is clear that any Green Belt review should take account of the need to promote sustainable patterns of development. A development at Dunton Hills Garden Village meets this criterion in that it:
  - Takes advantage of existing transport connections at West Horndon and the A127, with infrastructure improvements being less than that required elsewhere;
  - Has less impact on Green Belt in the longer-term, meaning it Green Belt not carved up by smaller isolated and unsustainable alternative options;

- Its location in South Essex takes advantage of the wider regional economic growth of the region with jobs to support the longer-term sustainability of communities;
- It retains the character of Brentwood Borough, a “Borough of Villages”; and
- It delivers the quantum needed within and beyond the plan period.

**Purpose of this report:**

1.8 Sport England has provided comments in response to Brentwood Borough Council’s Draft Local Plan Preferred Allocations (January 2018). An objection was made on the proposal to develop the Dunton Hills Garden Village site on the grounds of the loss of Dunton Hills Golf Course, and there being no evidence to support whether or not there is appropriate golf course provision in the area if the golf course was developed. As a result, the Council has undertaken a Golf Course Needs Assessment.

1.9 This study is a high-level assessment conducted by officers in order to provide the required evidence base to determine if there is adequate golf course provision within the local area or if an additional golf course would be needed to replace and off-set the loss of Dunton Hills Golf Course.

## **Section 2: Planning Policy Context and Assessing Needs & Opportunities Guide**

### **Planning Policy Context:**

2.1 This Golf Course Needs Assessment has been produced in line with the National Planning Policy Framework (NPPF), which requires that "...planning policies are based upon robust and up-to-date assessments of needs for open space, sport and recreation facilities and opportunities for new provision". (Para. 96)

2.2 Furthermore, Paragraph 97 states that existing open space, sports and recreational building and land, including playing fields, should not be built on unless:

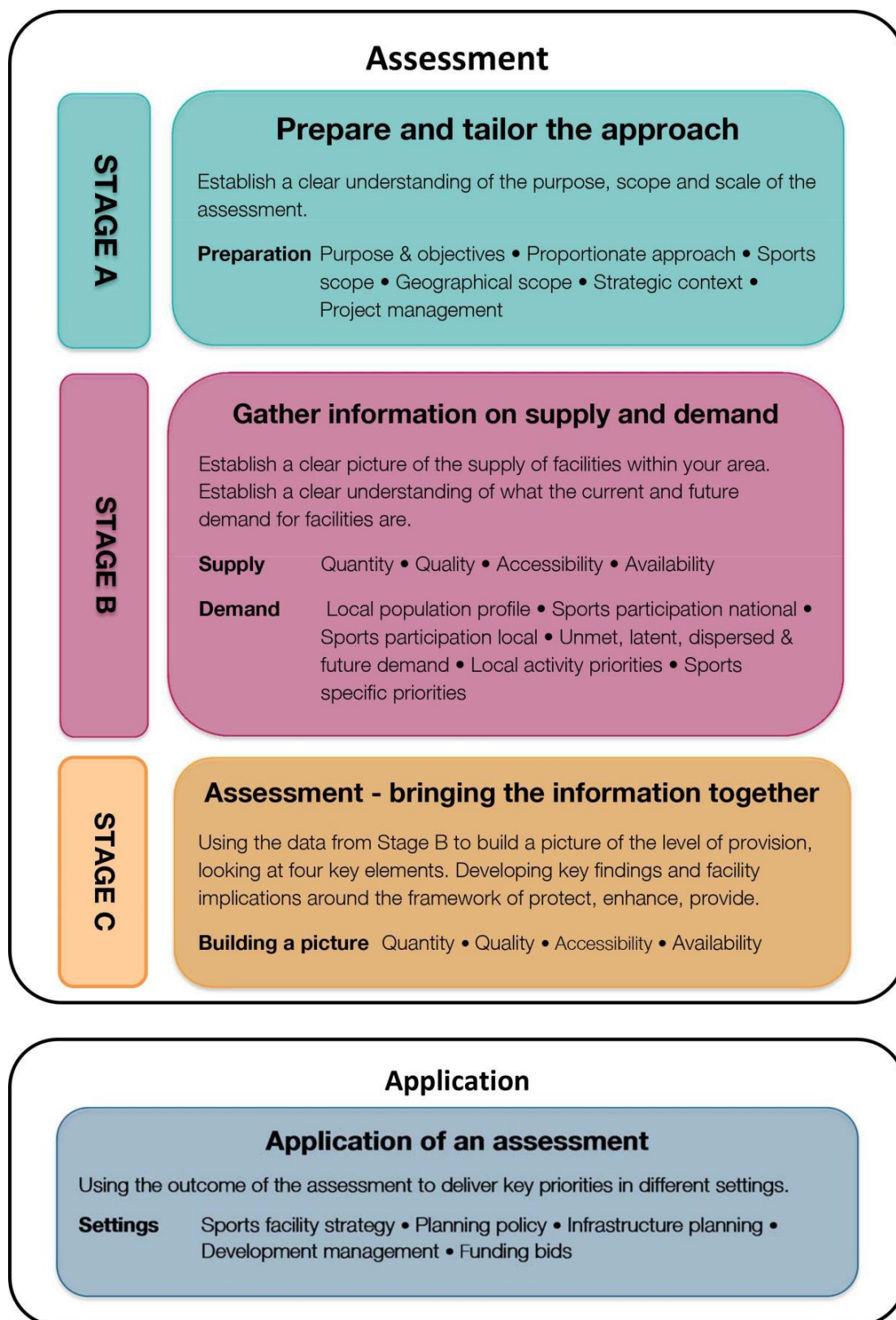
- An assessment has been undertaken which has clearly shown the open space buildings or land to be a surplus requirement; or
- The loss resulting from the proposed development would be replaced by equivalent or better provision in terms of quantity and quality in a suitable location; or
- The development is for alternative sports and recreational provision, the needs for which clearly outweigh the loss.

### **Assessing Needs and Opportunities Guide:**

2.3 Sport England's Assessing Needs and Opportunity Guide (2014) was used to inform this assessment. This guide sets out an approach to undertaking need assessments for sport and recreation facilities, in order to be compliant with the NPPF. The approach adopted to develop this needs assessment has utilised the process set out in the guide, as illustrated in Figure 1 below.

2.4 England Golf and Sport England were aware that the Council was undertaking this assessment. Both organisations were consulted with as part of its development. England Golf provided a report following a review of the Draft Golf Course Needs Assessment. A copy of this report can be found in Appendix 4.

Figure 1: Golf Course Needs Assessment Process<sup>1</sup>



<sup>1</sup> Sport England assessing needs and opportunities guide for indoor and outdoor sports facilities, July 2014

2.5 The guide's approach requires consideration of the following:

- **Quantity** – what facilities there are in the area, and how many there are. It is also necessary to look at different catchments to assess the quantity in a more segmented way, i.e. ratio of 'pay and play' courses as opposed to all courses. Relative supply can be assessed but this should not be adopted as a proxy for need and demand.
- **Quality** – how good facilities are, to include perceptions from users (where available on websites etc), and an age proxy from Sport England's Active Places Power data. An assessment of fitness for purpose could also be made, but this is subject to the same constraints as above.
- **Accessibility** – where facilities are located. This will include catchment areas and demonstrate whether there are sufficient courses in the area.
- **Availability** – how available facilities are based on the peak and off-peak tee times of the surrounding golf courses.

### Section 3: Supply Analysis

3.1 A desktop analysis of the golf courses within a 20-minute drive catchment area from Dunton Hills Golf Course, was conducted to determine the quantity, quality, accessibility, and availability of golf courses within the area. This was achieved by using the Sport England's Active Places Power data, supplemented by website and telephone conversations with the individual golf clubs. A map illustrating the locations for the other golf courses within the catchment area can be found in Appendix 2.

3.2 The following golf course facilities set out in Table 1, have been identified as being within a 20-minute driving catchment of Dunton Hills Golf Course. As illustrated in the table, there are 18 additional golf courses within a 20-minute drive catchment area. These courses are located within Brentwood Borough, London Borough of Havering, Thurrock Borough, and Basildon Borough. Of these, 12 offer Pay-n-Play as an option, as available at Dunton Hills Golf Course, which are highlighted in the Table 1 below.

*Table 1: Golf Courses within a 20-minute Drive catchment area of Dunton Hills Golf Course*

<b>Site Name</b>	<b>Holes</b>	<b>Length</b>	<b>Access</b>	<b>Local Authority</b>
Belhus Park and Country Club	18	46 acres	Pay-n-Play	Havering
Brentwood Golf Club	18	6,571 yards	Membership	Brentwood
Mayland Golf Course	18	5977 yards	Pay-n-Play/ Membership	Havering
Bentley Golf Course	18	6,703 yards	Pay-n-Play / Membership	Brentwood
Romford Golf Course	18	6383 yards	Membership	Havering
Risebridge Golf Course	18	6278 yards	Membership/ Pay-n-Play	Havering
Basildon Golf Course	18	6200 yards	Members / Pay-n-Play	Basildon
Stock Brook Country Club	27	6950 yards	Membership/ Pay-n-Play	Basildon
Orsett Golf Course	18	6693 yards	Membership	Thurrock
St Cleres Hall Golf Course	9	5934 yards	Pay-n-Play	Thurrock
Burstead Golf Club	9 and 18	6275 yards	Membership / Pay-n-Play	Basildon
South Essex Golf Centre	18	7072 yards	Membership/ Pay-n-Play	Brentwood
Warley Park Golf Course	9	3244 yards	Membership	Brentwood
Thorndon Park Golf Course	18	240 acres	Membership	Brentwood
Hartwood Golf Course	18	6139 yards	Membership / Pay-n-Play	Brentwood



Site Name	Holes	Length	Access	Local Authority
Mardyke Valley Golf Club	18	140 acres	Membership / Pay-n-Play	Thurrock
Top Meadow Golf Club	18	6228 yards	Membership / Pay-n-Play	Havering
Langdon Hills Golf and Country Club	18	6582 yards	Membership	Thurrock
Dunton Hills Golf Club	18	6252 yards	Pay-n-Play	Brentwood

3.3A fuller description of the local facilities within a 20-minute drive of Dunton Hills Golf Club that offer a Pay-n-Play option are set out in Table 2 below, as a means of identifying the roles that these facilities play in meeting demand in the area for golf that offer similar pricing schemes to Dunton Hill Golf Course.

*Table 2: Pay-n-Play Golf Course and Descriptions*

Golf Course	Description of Services Offered
Belhus Park and Country Club	Belhus Park Golf & Country Club is located in the grounds of former Belhus Mansion. It is a well establish 18-hole course which extends over 46 acres of parkland, with open fairways on the front 9 and more demanding tree-lined fairway on the back 9. The course is a par 69, suitable for beginners and experts. The green fees for a round of golf during the week is £15.00 and weekends £18.00 for non-members. The golf course is equipped with an 11-bay floodlit, automated driving range open to the general public. Tee times range from £5.00 to £6.25.
Mayland Golf Course	The Mayland Golf Course was established in 1936 and is an 18-hole, par 71 championship golf course. Green fees for non-members range from £15.00 to £30.00 depending on day and time.
Bentley Golf Course	Bentley Golf Course was established in 1972. The Club was purchased by the Members in 2004. The golf course extends to 6,703 yards (par 72) and comprises four par 3's, ten par 4's and four par 5's. The golf course also provides a practice ground, clubhouse and professional shop facilities. The golf course provides a verity of membership options depending on a person's household income to allow for the facilities to be open to the entire community. Concession Memberships are available for £10 a week; however further discounts are available for those who qualify due to low income status. For those wishing to use the golf course as a visitor the green fees for during the week for £37.50 and weekends £45.00 (reservation is required).

<b>Golf Course</b>	<b>Description of Services Offered</b>
Risebridge Golf Course	Risebridge Golf Course was founded in 1972. The course is built on 156 acres of land and has a total play length of 6,278 yards. There are an 18-hole and 9-hole rounds of golf and a driving range available. Prices range between £16.50 to £25.00 per game for an 18-hole round of golf and £10.00 to £14.00 per game for 9-hole round of golf. Memberships are also available ranging between £555 (5 day season ticket) to £715 (7 day season ticket) per annum. Driving range prices range from £3.00 (for 30 balls) to £5.00 (for 90 balls).
Basildon Golf Club	The Basildon Golf Course was established in 1958 and is an 18-hole course. The fees for a round of gold vary - £17 for seniors, £20 for Basildon residents, and £22 for non-Basildon residents.
Stock Brook Country Club	The Stock Brook Country Club consists of 18 holes of golf on a 6,950-yard course. The course is a par 35. For a round of golf the green fees are £35.
St Cleres Hall Golf Course	St Cleres Hall Golf Course is a newly refurbished, flood lit 19 bay driving range and 9-hole golf course. Golfers have the choice between paying £6 per round of golf or £10 per day. The driving range consists of a multi-shot with 6 target greens ranging from 50 yard pitch to a 300 yard drive. The range has 19 under cover bays. The driving range costs £2.00 for 30 balls.
Burstead Golf Club	Burstead Golf Club was designed by Patrick Tallack in 1993. The cost for a round of 18-holes of golf is £15 during the week and £20 on weekends.
South Essex Golf Centre	South Essex Golf Centre consists of 18-hole round of golf open to members and non-members. The course is 7,000 yards. The Club offers a number of different green fees depending on the time of day and day of the week a golfer books their tee time. Green fees range between £19-£25. There is a driving range which consists of 12-bay flood lit covered driving range and footgolf. Footgolf cost £15.00 per player over the age of 16 or £10 per play under the age of 16, with a £5.00 deposit for the ball.
Hartswood Golf Course	Hartswood Golf Course is a municipal 18-hole golf course. The golf course offers both membership and pay-n-play options. Concessionary rates are available for those over 60 years old and under 18 years old, as well as a junior annual membership for £52. Annual season members range from £715 for a seven day a week access pass to £602 Monday to Friday access pass. Pay-n-Play adult fees range from £10-£19 weekday

<b>Golf Course</b>	<b>Description of Services Offered</b>
	depending on the time of day, £11-£25 for weekends and public holidays, and a concession price of £10-£16.
Mardyke Valley Golf Club	The Mardyke Valley Golf Club is an 18-hole par 70 course with a golf clubhouse. There are a number of membership options available, with monthly payment plans to make it more accessible for people to obtain a seasonal pass. The golf course also offers pay-n-play rates, £18 weekdays and £25 weekends.
Top Meadow Golf Club	Top Meadow Golf Club offers both a 9-hole and 18-hole rounds of. The club also offers banquet and conference halls, hotel, and restaurant facilities. During weekdays 9-hole round of golf is £9.00 and 18-hole round of golf is £16.00 and includes breakfast. The price for a round of golf on weekends is £11.00 for 9-holes and £19.00 for 18-holes.

3.4 All the above listed golf courses have indicated that they have additional capacity to accept new members and those wishing to utilise the pay-n-play option during both peak and off-peak tee times.

## Section 4: Demand Analysis

- 4.1 Sport England have produced results from a number of surveys to highlight the participation rates for individuals' sports. Although the most recent report illustrates that those who participate in golf at least once a week has remained stable between 2014 and 2016, when comparing the data collected between 2006 and 2014 there was a decline in the overall participation rate in golf.
- 4.3 As previously mentioned in section 1 of this report, the Dunton Hills Golf Club has been experiencing a gradual decline in players since 2012, which corresponds with the national trends for the decline participation rates for golf.
- 4.4 This decline is most likely due to the number of other golf clubs within the area and competing additional services and facilities as identified in tables 1 and 2 above.
- 4.5 The England Golf publication, 'Understanding Your Market', highlights a number of additional services that golf clubs have introduced in an effort to maintain membership. The study also outlines the different types of golfers and the impact that the weather can have on participation rates. A copy of this assessment is included in Appendix 3. Upon review of the golf courses within the 20-minute catchment area, a majority of courses do offer other services and facilities such as footgolf, restaurants, banquet and conference hall hires, and so on. Where more services and facilities are offered this allows for additional revenue streams and diversification.
- 4.6 All of the clubs identified within the 20-minute catchment area have indicated their capacity to take on additional golfers during both peak and non-peak times, whether this be through the form of a membership or as a visitor (pay-n-play). Therefore, those individuals who currently use the Dunton Hills Golf Course would have access to alternative golf courses, both within Brentwood Borough and outside in the wider local area.

### Cost comparison:

- 4.7 As seen in Table 2, the cost for an 18-hole round of golf ranges from £10 to £35. Dunton Hills Golf Course currently charges £12.50 for a round of golf on the main golf course during weekdays and £20 on weekends.
- 4.8 As illustrated in the Table 3 below, Dunton Hills Golf Course typically offers a reduced green fee during the week compared to the rest of the courses. However, Belhus Park, Basildon, Burstead, and Top Mead Golf Course all offer comparable green fees on the weekends to that of Dunton Hills Golf Course.

Table 3: Green Fees Charges for Adults\*

Golf Course	Pay-n-Play Green Fees (18-holes)		
	Weekdays	Weekends	Concession
Belhus Park Golf Course	£15.00	£18.00	£12.00
Mayland Golf Course	£15.00	£30.00	
Bentley Golf Course	£37.50	£45	
Risebridge Golf Course	£16.50	£25.00	
Basildon Golf Course	£20.00 Basildon resident £22.00 non-Basildon resident	Same as weekday rates	£17.00
Stock Brook Golf Course	£35.00	£35.00	
Burstead Golf Course	£15.00	£20.00	
South Essex Golf Course	£19.00	£25.00	
Hartswood Golf Course	£19.00	£25.00	£16.00
Mardyke Valley Golf Course	£18.00	£25.00	
Top Meadow Golf Course	£16.00	£19.00	
Dunton Hills Golf Course	£12.50	£20.00	

\*The rates displayed are based on the adult day time rates as published on the individual golf course websites at September 2018. There are varying prices depending on a persons age (concession rates) and time of day of the tee time (i.e. twilight tee times are less then those displayed above).

4.9 Belhus Park Golf Course, Basildon Golf Course and Hartswood Golf Course all offer concession green fees based on a persons age and/or financial situation, to allow golf to be more accessible to those who otherwise may not be able to afford it.

4.10 The majority of golf courses also offer a payment plan / monthly fee for those who wish to buy membership. Belhus Park and Mardyke Valley Golf Club both offer concession membership rates for those of low-income status.

## Section 5: Conclusion

- 5.1 The Council was informed that due to the decline in golfers at the Dunton Hills Golf Course, the club does not have the financial resources to make any further improvements, such as those suggested within the Understanding Your Market document published by England Golf (Appendix 3).
- 5.2 There are 18 additional golf courses within a 20-minute drive catchment area from Dunton Hills Golf Course, 12 of which offer a pay-n-play option.
- 5.3 Although Dunton Hills Golf Course's green fees are less than most of the other courses within the catchment area during weekdays, Belhus Park and Hartswood Golf Courses offer concession pay-n-play options for those of low-income status. A number of the golf courses also offer reduced green fees for those golfers interested in a 'twilight' round of golf during weekdays. Belhus Park, Basildon, Burstead, and Top Mead Golf Course all offer comparable green fees on the weekends to that of Dunton Hills Golf Course.
- 5.4 The Brentwood Golf Course Needs Assessment was reviewed by England Golf. They produced a report on the assessment which also includes additional information regarding the golf course offer within Brentwood, found in appendix 4. There is no official 'sign off' process which is required for such an assessment; however, England Golf have stated they agree with the conclusions of this assessment and confirm that Brentwood does have adequate 18-hole golf course provision.
- 5.5 In addition to the 18-hole golf course, Dunton Hills Golf Course also provides a 9-hole Par 3 course. There are two additional Par-3 golf courses within the catchment area. The development of Dunton Hills Garden Village would result in the reduction of Par 3 golf course provision. It is acknowledged that the Council does not have the authority to enforce existing courses to include a Par-3 provision to their existing offer; the Council does encourage existing course to consider providing this service.

## **Section 6: Next Steps**

- 6.1 The information in this assessment has been prepared by officers to illustrate the golf course provision within a 20-minute drive catchment area from Dunton Hills Golf Course, to determine whether an additional golf course would be needed due to the loss of this facility. This report concluded that there is sufficient 18-hole golf course provision. It has been reviewed and signed off by England Golf.
- 6.2 As part of the Council's Play Pitch Strategy (PPS), a steering group has been established and the Essex England Golf representative has been invited to attend the steering group meetings. This will allow for any Golf provision related concerns to be address and act as a forum for continued engagement. Brentwood Borough Council will continue to work with NGB's, such as England Golf, and Sports England to ensure the quantity and quality of the play pitches (including golf courses) are provided within the borough.
- 6.3 The Council is committed to continue to work with England Golf and Sport England to ensure Brentwood Borough provides good quantity and quality playing pitches, including golf courses, for residents. Golf England and the Council are currently in the process of developing a Statement of Common Ground with the end goal to agree on the most effective form of mitigation to encourage the uptake / provision of entry level golf within the borough.

## Appendix 1: Green Fees at Dunton

Date	No of Green Fee Cards	Driving Range Tokens	No. of Mini-Golf Cards
2004-2005	68805	13839	-
2005-2006	67509	15863	1598
2006-2007	64794	16665	1901
2007-2008	61546	19508	2028
2008-2009	58754	19040	1858
2009-2010	57767	16484	1813
2010-2011	49937	16782	1533
2011-2012	64581	18938	2021
2012-2013	45534	16646	1313
2013-2014	36745	12394	1444
2014-2015	35487	11754	1533
2015-2016	36691	11101	1325
2016-2017	31905	12049	1224
2017-2018	35815	12335	1067



## Appendix 2: Map of golf courses within a 20-minute drive catchment area from Dunton Hills Golf Course



### **Appendix 3: England Golf – Understanding Your Market**

<https://www.englandgolf.org/page.aspx?sitesectionid=327>

**Appendix 4: England Golf Report**  
Facility Planning Enquiry: Brentwood, Eastern

## Facility Planning Enquiry: Brentwood, Eastern

### 1. Background

Golf is the fifth largest participation sport in the Country, with around 650,000 members belonging to one of 1900 affiliated clubs and a further 2 million people playing golf independently outside of club membership. Since 2004, participation and club membership has been in decline and has only recently shown signs of levelling off.

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

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

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

### 2. Methodology

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

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

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

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

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

### 3. Analysis

Within Brentwood there are 6 affiliated clubs and 3 non-affiliated facilities.



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

Profile Name	Average number of people per club/facility/local authority (within 20 minute drive time*)	
	Local Authority	Region
	Brentwood	Eastern
1: Relaxed Members	9118	5886
2: Older Traditionalists	8058	5232
3: Younger Traditionalists	8934	5705
4: Younger Fanatics	8611	5627
5: Younger Actives	8776	5665
6: Late Enthusiasts	8381	5461
7: Occasional Time Pressed	8870	5702
8: Social Couples	8427	5459
9: Casual Fun	8686	5738

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

In addition, the following outlines the demand for each of the clubs and facilities;

Profile Name	Average Number of People per Affiliated Facility (within 20 minute drive time*)				
	<u>Affiliated Club</u>	<u>Affiliated Club</u>	<u>Affiliated Club</u>	<u>Affiliated Club</u>	<u>Affiliated Club</u>
	Bentley Golf Club	Brentwood Golf Club	Hartswood Golf Club	Stapleford Abbotts Golf Club	Thorndon Park Golf Club
1: Relaxed Members	2767	2368	7525	8392	9563
2: Older Traditionalists	2653	2280	6912	7043	8506
3: Younger Traditionalists	2584	2229	7303	8161	9413
4: Younger Fanatics	2935	2532	7560	7304	9120
5: Younger Actives	2708	2323	7313	7953	9227
6: Late Enthusiasts	2791	2397	7226	7311	8841
7: Occasional Time Pressed	2676	2303	7356	8026	9342
8: Social Couples	2645	2256	7008	7728	8830
9: Casual Fun	3146	2710	7827	7186	9204

Profile Name	Average Number of People per Affiliated Facility (within 20 minute drive time*)			
	<u>Affiliated Club</u>	<u>N/Affiliated Club</u>	<u>N/Affiliated Club</u>	<u>N/Affiliated Club</u>
	Warley Park Golf Club	Brentwood Park Golf Range	Dunton Hills Golf Course	South Essex Golf Centre
1: Relaxed Members	11559	7188	16351	16351
2: Older Traditionalists	10192	6491	14223	14223
3: Younger Traditionalists	11396	6986	16166	16166
4: Younger Fanatics	10896	7038	15058	15058
5: Younger Actives	11129	6953	15689	15689
6: Late Enthusiasts	10590	6778	14746	14746
7: Occasional Time Pressed	11279	7002	15922	15922
8: Social Couples	10643	6674	15028	15028
9: Casual Fun	10943	7223	14967	14967

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

<b>Affiliated Club Name</b>	<b>2015 Numbers</b>	<b>2016 Numbers</b>	<b>2017 Numbers</b>
Bentley Golf Club	472	458	441
Brentwood Golf Club	-	306	277
Hartswood Golf Club	81	74	67
Stapleford Abbotts Golf Club	545	434	421
Thorndon Park Golf Club	577	602	612
Warley Park Golf Club	548	600	612
Brentwood Park Golf Range	Non-Affiliated		
Dunton Hills Golf Course	Non-Affiliated		
South Essex Golf Centre	Non-Affiliated		

Bentley Golf Club is a private members Club, established 1972 with a traditional 18-hole member offer. Healthy and stable number of members and a weekend green fee rate of £45. Not a big beginner golf facility, although full PGA Professional service available.

Brentwood Golf Club is a proprietary club offering an 18 hole course. Membership has been growing from a low number since new owners bought the club c. 4/5 years ago, although very few female members. Good for green fees with online booking available, and the club also actively promote functions. Not a big beginner golf facility, although full PGA Professional service available.

Hartswood Golf Club is a municipal golf course featuring pay and play golf. The members club which is in decline has just 70 members at present. Otherwise good facility for pay and play golf, although poorly promoted through Brentwood.Gov webpage. No or very little PGA coaching.

Stapleford Abbotts Golf Club is owned and operated by the Crown Golf Group, offering 36 holes. Membership has declined, but is still reasonably strong. Good for green fees and functions and the facility also offers beginner adult coaching and junior lessons.

Thorndon Park Golf Club is a private members club offering 18 hole and is perceived as the No. 1 course in Essex. It is very traditional and very expensive with a large joining fee, it has a strong membership and a waiting list. Not a club for green fees/societies.

Warley Park Golf Club is a proprietary owned, modern golf club, with 27 holes and driving range. Strong membership, good for green fees and proactive with new adult golfers and juniors catered for by 3 PGA Professionals. Weddings and functions also feature highly.

Brentwood Park Golf Range has recently been refurbished and is the home of UK Golf Academy. The well-equipped range features LED flood lighting and practice mirrors in the bays and also features a well-stocked shop and on site custom fitting. Loyalty cards are available for regular users and they offer a discount to members from local clubs. It's a busy centre with PGA Professional tuition available.

Dunton Hills offers a traditional 18 hole course, Par 3 course and a 20 bay floodlit driving range. It is a family friendly centre, offering affordable pay and play prices. England Golf have had little to no engagement with this facility to date.

South Essex Golf Centre is the sister club of Stapleford Abbots as part of the Crown Golf Group. Unlike Stapleford Abbots, membership is weak, so pay and play features heavily. The club offers a 27 holes and a covered driving range. There are 2 to 3 PGA Professionals at the club who are proactive in recruiting new adults/juniors into golf.

#### **4. Conclusion**

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

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

Within Brentwood there is significant demand for golf, which is also greater than the average for the Eastern region. The demand cuts across all 9 golfing profiles, both club based and independent. Membership numbers are mixed compared with the national average, but worth noting that each club will have a different financial model in terms of income generation from membership vs green fees etc.

There is a good level of golf provision within the area, and alongside a large number of traditional 18 hole courses, there are two Par 3 courses and three driving ranges. Maintaining entry level facilities that offer more informal playing opportunities would be key, as without them the playing opportunities in Brentwood would be limited to traditional 18 holes. Based on our initial analysis, some clubs are proactively targeting new audiences through coaching programmes and a wider range of membership/playing options, which is something that we will continue to support and encourage.

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

Further analysis at club or facility level, along with some additional England Golf tools can be used to better understand the existing members and visitors of each venue. This in turn may help to establish a clearer picture of the overall facility landscape and how well it caters for the local demographic. We believe success is reliant upon utilising a combination of the customer profiles, the mapping tool and local knowledge and experience.