



Welsh Golf Club Survey 2015/16



www.golfunionwales.org

The biennial Welsh Golf Club Survey was completed by **99 GUV-affiliated clubs** in 2015/16, a **66% response rate** with **86%** of clubs opting to use the online completion option.

Thank you to all these clubs for the time and effort they have put into completing the survey, and for the valuable information they have provided.



SECTION 1

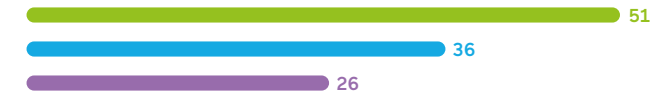
Course Management

Temporary Course Closures

Clubs were asked if they had been experiencing an increase or decrease in temporary course closures over the last two years.

With **39%** of clubs having attended the GUV workshop on Sustainable Greenkeeping, it was very positive to see a further reduction in the number of clubs reporting increases.

Clubs tending to have **more** course closures



Clubs tending to have **fewer** course closures



Clubs with a **similar** number of course closures

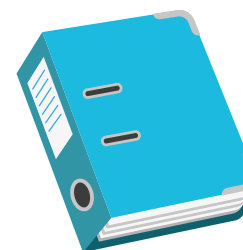


● 2008/2009 ● 2013/2014 ● 2015/2016



It is encouraging to see that **52%** of clubs now have a defibrillator on their premises, **up from 23% in 2013**.

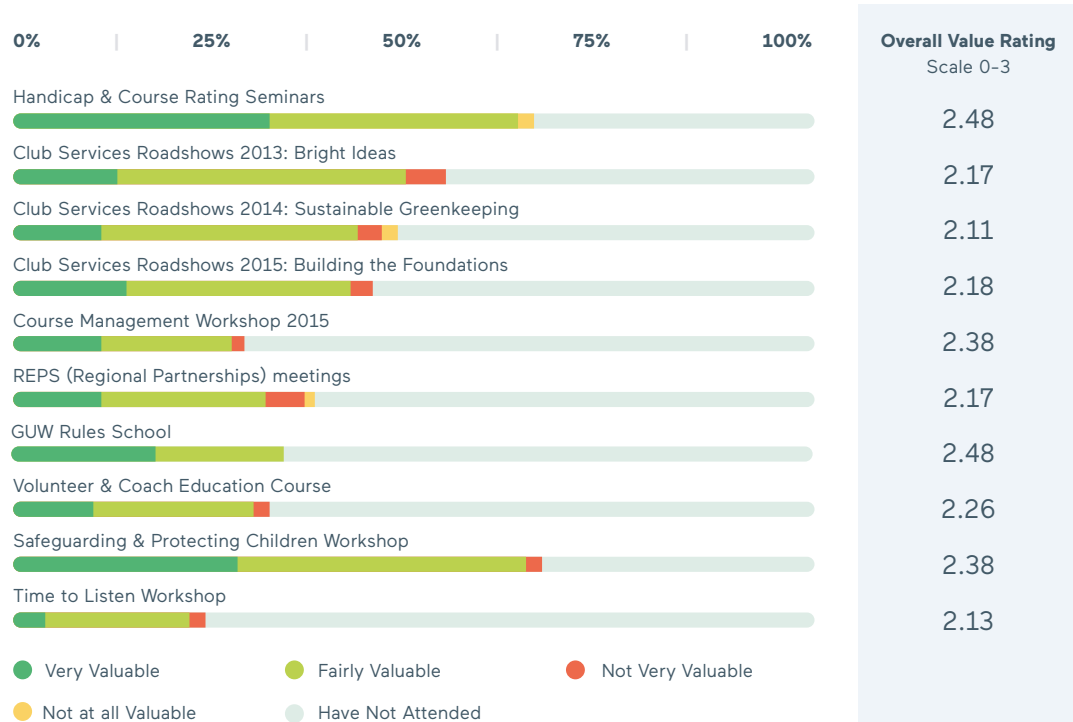
65% of Welsh golf clubs are now offering online booking, a **very small 3% rise since 2013**.



63% of clubs now have a written Course Management Policy, **up from 55% in 2013**.

GUW/GDW Activities & Initiatives

The chart below shows how valuable clubs have found the GUW/GDW Courses and Workshops that have run since 2013; all scored highly, with those on handicaps and course rating, rules, course management and safeguarding perceived as most valuable.



The chart below shows how valuable clubs have found the other resources provided by GUW/GDW; resources for coaching and development of juniors and new golfers are very highly valued, along with business and community outreach support, the CDH, course rating, and championships organisation.



NEW Pilot Business Support Scheme (BSS)

56% of clubs wanted support in one or more areas of governance; GDW now offer an Intensive Governance Support Scheme, led by Amanda Bennett (GUW/GDW governance consultant) and the GDW team, including:

One day workshop, based on the Sport & Recreation Alliance's first 4 principles of governance and leadership	Scoping meeting with the working group
Members or committee workshop	Additional remote & face to face support on areas of need
Template resources	Additional workshops (available to ALL clubs)

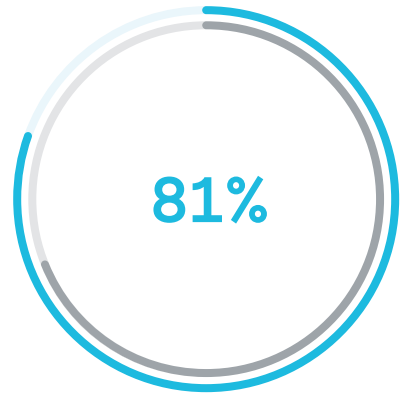
If you're interested in the scheme and would like further information about it, contact your GDW Development Officer.



The twice-yearly Regional Partnerships (REPS) meetings started in 2014 as a forum for Junior Organisers, PGA Professionals and other staff and volunteers involved with clubs' Junior Sections to share their ideas and concerns. These have proved popular with 99 GUW clubs attending at least one meeting. If your club would like to get involved, please contact your GDW Development Officer for details of the next meeting in your region.

Membership

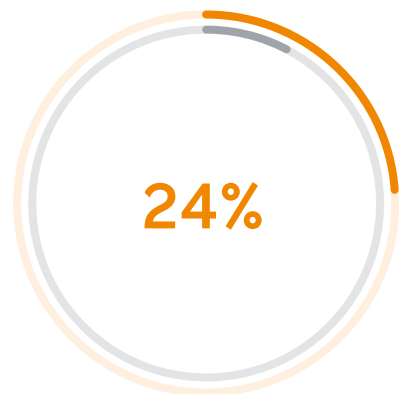
Since 2013/14 there has been an encouraging rise in the number of membership categories offered by clubs, making it more likely that a potential new member will find a category to suit them.



81% of clubs have an intermediate membership category between junior/student and adult, up from 69% in 2013/14



25% of clubs offer family membership, up from 9% in 2013/14



24% of clubs offer a flexible/lifestyle/points membership, up from 10% in 2013/14

Subscriptions

Category	Current Survey 2015/16		2013/14 Survey		% Change in Average
	Range of Fees	Average	Range of Fees	Average	
Adult Male	£60-£2055	£596	£300-£1386	£573	4%
Adult Female	£60-£2055	£582	£200-£1386	£560	4%
Junior Male	£0-£384	£90	£0-£385	£97	-7%
Junior Female	£0-£384	£89	£0-£385	£95	-6%

The average club subscription fee has risen slightly for adults and decreased slightly for juniors since 2013/14. Joint membership (where offered) gave an average saving of **12%** on 2 full memberships.

Where subscriptions are paid as a lump sum, an increasing number of clubs are moving toward an April due date (in line with G UW's move to an April-March financial year). A spring date rather than a winter date is generally recommended, as it's closer to the start of the playing season for many golfers.

Month When Subs Due	% of Clubs (2015/16)	% of Clubs (2013/14)
January	23	30
February	3	7
March	10	12
April	43	36
Other month	26	17
Month of joining	7	2

Note: Totals exceed 100% as some clubs offer more than one option

Over **90%** of clubs now offer payment by instalments, with **73%** providing the most affordable options of either 10, 11 or 12 instalments.



Visiting Golfers

There has been little change in average levels of green fees since the 2013/14 survey.

Summer Green Fees

Range	Maximum Green Fee	Minimum Green Fee
Highest	£178	£130
Lowest	£10	£10
Average	£33.91	£21.56

Winter Green Fees

Range	Maximum Green Fee	Minimum Green Fee
Highest	£70	£70
Lowest	£10	£7.50
Average	£23.26	£16.05

Visitor Numbers

Of the 40 clubs who were able to give a breakdown of their visitor numbers, the majority had increased visitor numbers from the previous year.

Summer 2015



Of 31 clubs providing data, **18 had increased their summer green fee income in 2015** over 2014 while for 6 the income had remained similar.

Winter 2014/15



Of 29 clubs providing data, **17 had increased their winter green fee income in 2014/15 over 2013/14** while for 6 the income had remained similar.

Juniors

91% of clubs were aware of the G UW Junior Coaching Centres set up in 2014. 8 of the 9 G UW Coaching Centre clubs who answered the survey had already seen some impact on their junior membership through increases in skill levels, enthusiasm, and/or numbers.

The Welsh Junior Tour, introduced in 2016, attracted entries for one or more of its 4 regional events from 188 players representing 56 different clubs. Over **20%** of entrants were female.



The **Junior GolfCert** accreditation recognises those clubs attempting to increase the number of young players by providing a quality and fun experience, and acts as a model for a junior section to strive towards. The full application process can be completed on the GDW website.

The **Junior Golf Guide** is a comprehensive resource for running a successful junior section. Download it FREE from the GDW website, or buy the hard copy for £10!

The NEW '**Junior Club of the Year**' award will recognise the outstanding work of one junior section in Wales at the Welsh Golf Awards. Any section that has shown an increase in membership or participation, had outstanding individual or team achievements or made a significant contribution in the community will be considered.

Golfers with a Disability

Awareness of the R&A publication 'A Modification of the Rules of Golf for Golfers with a Disability' has disappointingly not risen since the 2013/14 survey. Just over half the responding clubs (**53%**) were aware of the publication, with **55%** making active efforts to inform members of the Modified Rules but only 17 clubs implementing them in competition. The G UW has made the Modified Rules of Golf available, for players with a disability, in the newly established Welsh Junior Tour and will look to make these rules available in a wider range of events in 2017.



G UW/GDW have achieved the **Disability Sport Wales InSport 'Silver' Award**. We provide support and advice to clubs on accessibility and providing opportunities for individuals with a disability e.g. implementing the adapted rules; inclusive training for volunteers and professionals; funding to run inclusive and disability sessions for beginners.

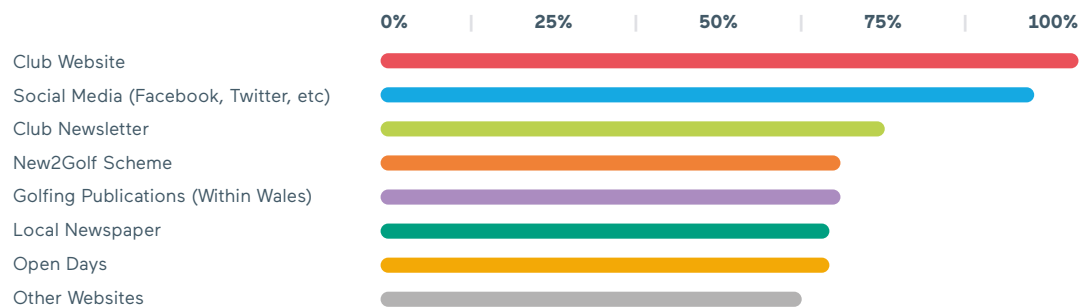
Marketing & Communications

56% of clubs (the same percentage as in 2013/14) have a specific Committee or Board members responsible for Marketing. However the number of clubs with a Marketing Budget has **improved from 53% in 2013/14 to 66%** in 2015/16.

Of those clubs who had neither a Marketing Budget nor someone specifically responsible for Marketing, two thirds were in the lowest income category (< £100,000 per annum).

Main Methods of Advertising & Promotion

The use of social media has greatly increased since the last survey, with **92%** of clubs using social media in their advertising and promotion, and **81%** using it to communicate with members. This makes social media the most widely-used marketing tool after the club's own website (used by 100% of clubs). The next most popular marketing tool is a club newsletter (two thirds of clubs). Other websites, local newspapers, Welsh golfing publications, open days, and New2Golf are all used by between 50% and 60% of clubs.



GDW's **Mystery Shopper** service helps clubs to improve their customer service, as well as recruitment and retention of members and visitors. The shoppers visit the facility and complete a survey on their experiences pre, during and post visit; results are then fed back to the club.

For more details, contact your GDW Development Officer!

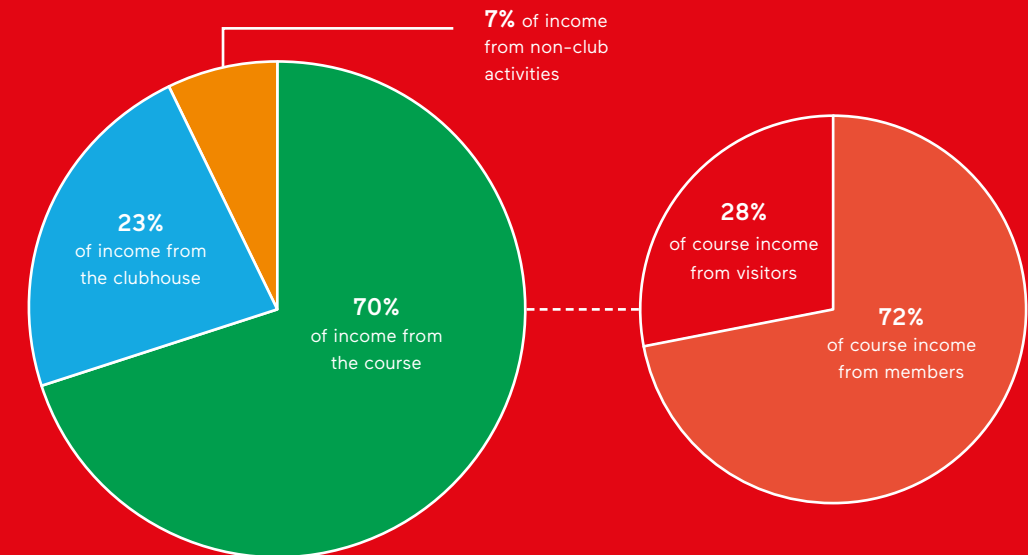
New2Golf Summer Swing

New2Golf participants are invited each year to this fun, social, 36 shot flag competition. Ladies European Tour player, Amy Boulden, takes the participants' first tee shot and local volunteers, companies and sponsors get involved to make it a fun-packed event.



Club Income

55 clubs gave details of their sources of income. On average, clubs receive:



47% of clubs stated that their expenditure had increased over the past 2 years, with the main reasons being increased costs of equipment maintenance and repairs, course and clubhouse maintenance and improvement, fuel bills and wages. Where clubs had reduced expenditure (22% of clubs), in 6 cases this had been the result of a specific policy of tightening up on spending, while 3 clubs had reduced their number of staff.



52% of clubs stated that their income had increased over the past 2 years; increased income from subscriptions, green fees, and clubhouse activities (food and beverage, room hire, machines) were all mentioned frequently as reasons for this. Of the **22%** whose income had decreased, three quarters of them cited a reduction in membership income as a factor.

36%↑

36% of clubs stated that they were tending to generate more of a surplus over the last 2 years than previously.

28%↓

28% of clubs stated that they were tending to generate less of a surplus over the last 2 years than previously.

Staff

Over the last two years the trend has been for clubs to employ more full-time workers and fewer part-timers.

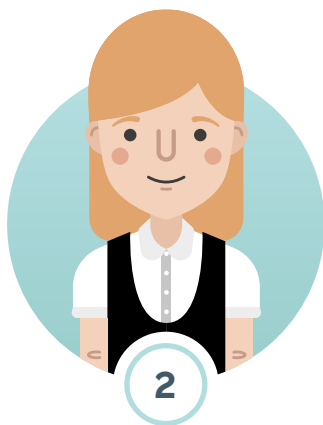
The average club now employs **8 full-time staff**, twice as many as in 2013



Management & Admin



Cleaner



Bar & Catering



PGA Professional



Greenkeeper

The average number of **part-time staff** employed has gone **down from 7 to 5**

Volunteers

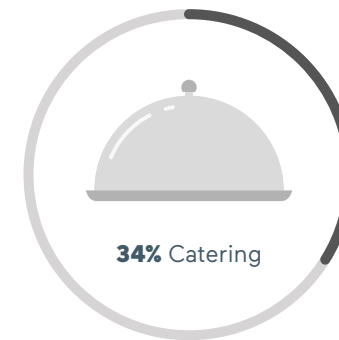
1 in 5 clubs affiliated to the **Golf Union of Wales** are managed by volunteers only.

The number of volunteers working within clubs has gone up from 500 to 600 over the last 2 years.



Franchising & Contracting Out

The aspects of the golf club most frequently franchised or contracted out are:

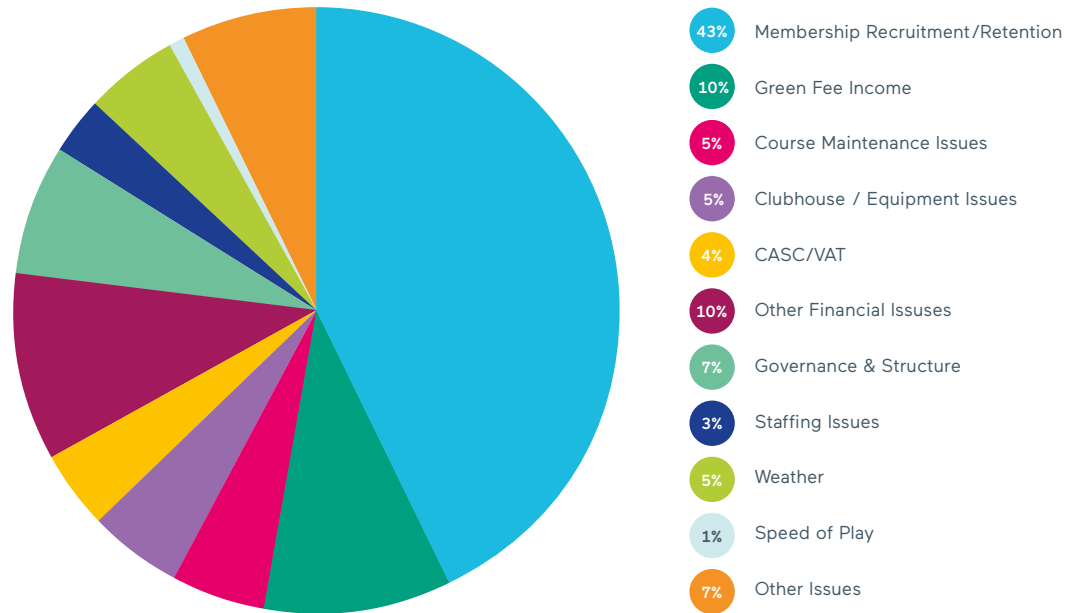


Club Solutions

Sport Wales' new website - www.clubsolutions.wales has been set up as a source of help for sports clubs and volunteers in Wales. It is a 'kitbag full of guidance and free to download policies and planning tools', covering management, finance, promotion, staff, volunteers and facilities.

Club Concerns

Clubs were asked to state their three main concerns: **membership issues were by far the biggest concern overall.**



6% of clubs specifically mentioned junior membership and 4% specifically mentioned female membership.

44 clubs provided suggestions as to how G UW/GDW could help to address the issues they had identified. These have been passed to the relevant G UW/GDW personnel.

Details of clubs who wished to be contacted by G UW/GDW to discuss their concerns have also been passed on to the relevant Development Officers.

Club Matrix

The 'Club Matrix' helps clubs analyse their current strengths and areas for improvement within the business but also benchmark against the national average. It was created through consultation with club managers, PGA professionals, industry consultants and GDW staff, focusing on **9 key areas** in which best practice guidance and resources can be provided.

To find out more please contact your GDW Development Officer.

CLUB MATRIX			
1	Governance		
2	Participation		
3	Marketing		
4	Visitors		
5	Recruitment & Retention		
6	Customer Service		
7	Compliance		
8	Course Management		
9	Course Rating		

Our **Youth Panel** is a group of innovative young people, aged 14+, who are helping to shape the future of Welsh golf. Their role includes supporting the staff team in monitoring and evaluating current initiatives and creating of new ones. Members of the panel report into the G UW Board.

We hope that this summary has given you some interesting insights into different aspects of golf clubs in Wales.

If you would like more detail on any section of this report, please contact our Research Officer Fiona Davies at fiona.davies@golfunionwales.org. We would value the participation of all G UW-affiliated clubs in our next survey.

A downloadable copy of this report is available from the G UW website

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For more information, please visit our websites:
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