



Wales Golf

Club Survey 2018



WALESGOLF.ORG

VISION



EVERYONE'S GAME,
ANYWHERE.

OUR PURPOSE STATEMENT

To create and support an environment in Wales where golf is safe and accessible for everyone to participate, enjoy and progress.

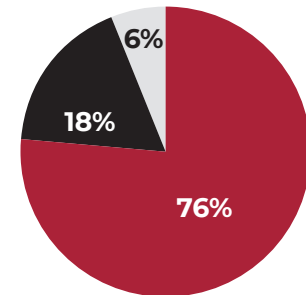
STRATEGIC PILLARS

1. More Golfers
2. Stronger Clubs
3. A Relationship with Every Golfer
4. Outstanding Events
5. Great People
6. Winning Golfers

Wales Golf sets annual objectives in line with these strategic pillars and continually monitors progress – one way of doing this is through our biennial club survey. In 2018, 71 golf clubs (around 50% of the total number of affiliated clubs) engaged with the survey. Every local authority area was represented apart from one, and there was a wide range in terms of both membership numbers (82 up to 1024) and income (from under £100,000 to over £700,000 per annum). Thank you to all clubs who took the time to complete the 2018 survey, and for the valuable information you have provided, which helps Wales Golf to help you!

CLUBS

TYPE OF GOLF CLUB



- Private Members
- Proprietary
- Other

76%

Over three quarters of responding clubs were Private Members clubs.

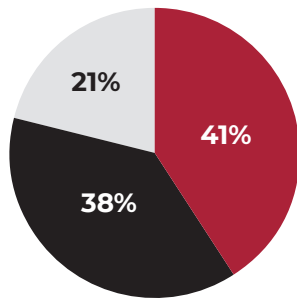
70%

70% of all affiliated clubs are Private Members clubs.

80%

of clubs now have a written Course Management Policy, up from 63% in 2016.

WHAT IS THE CURRENT LEGAL STATUS OF YOUR CLUB?



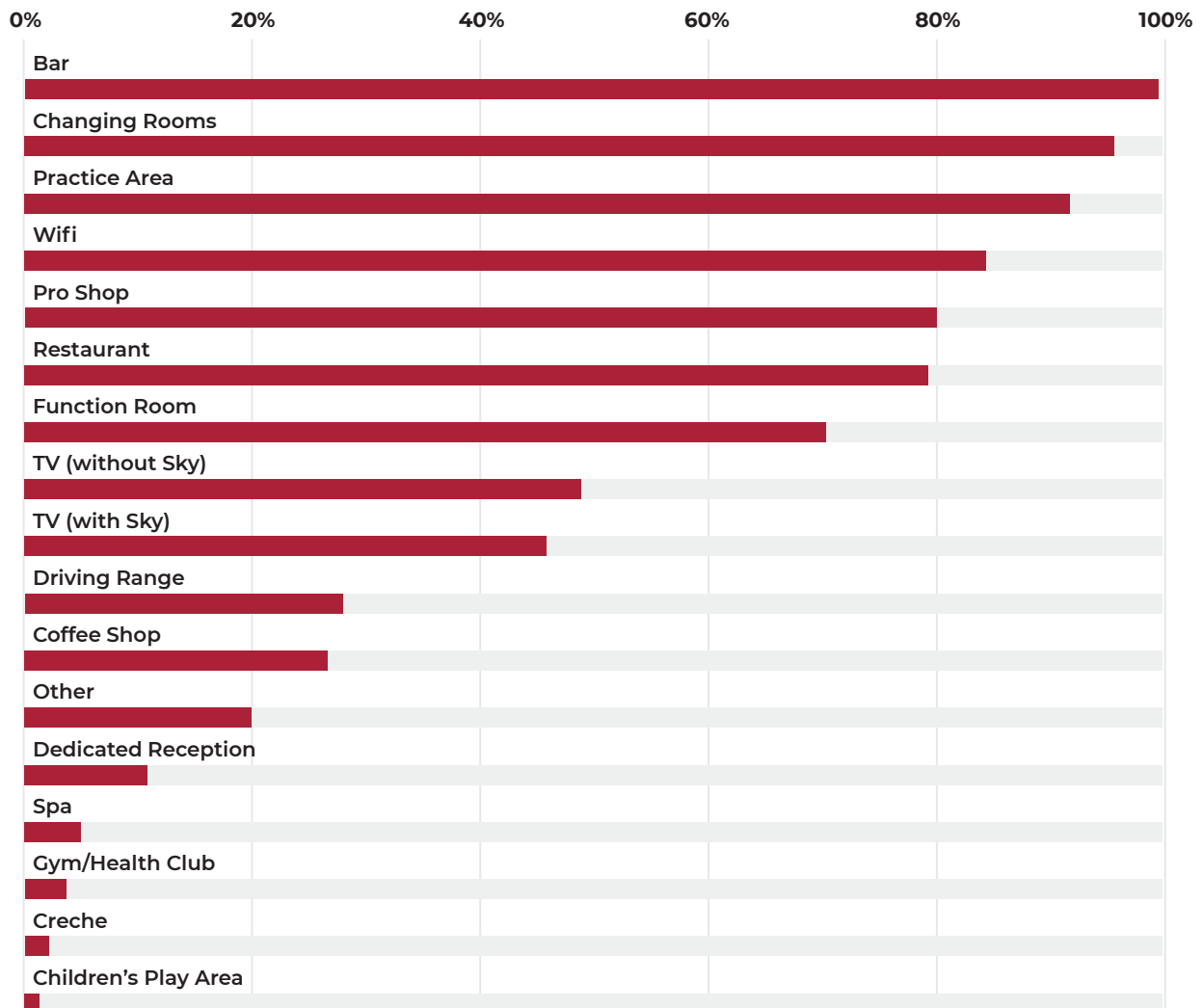
- **Limited Company/Partnership or other incorporated status**
- **Other/not stated**
- **Unincorporated Association**

31% of clubs gave their tax status as CASC (Community Amateur Sports Club).

Golfers in Wales are estimated to have spent £258 million on the game in 2014 and more than half of this was channelled through golf clubs. As such, golf clubs are small to medium enterprises, with significant assets, and so many clubs are choosing to incorporate as it limits the liability faced by those running the club in the case of insolvency. Wales Golf Development Officers are able to advise any clubs who are concerned about the risks of being unincorporated.

CLUB FACILITIES

WHICH OF THESE ADDITIONAL FACILITIES DOES YOUR CLUB HAVE?



MEMBERSHIP

KEY NUMBERS

Average number of club members: **429**

Over the last 2 years:



30% of clubs had increased membership, with an average net gain of 45 members



In 36% of clubs, membership had decreased, with an average net loss of 19 members

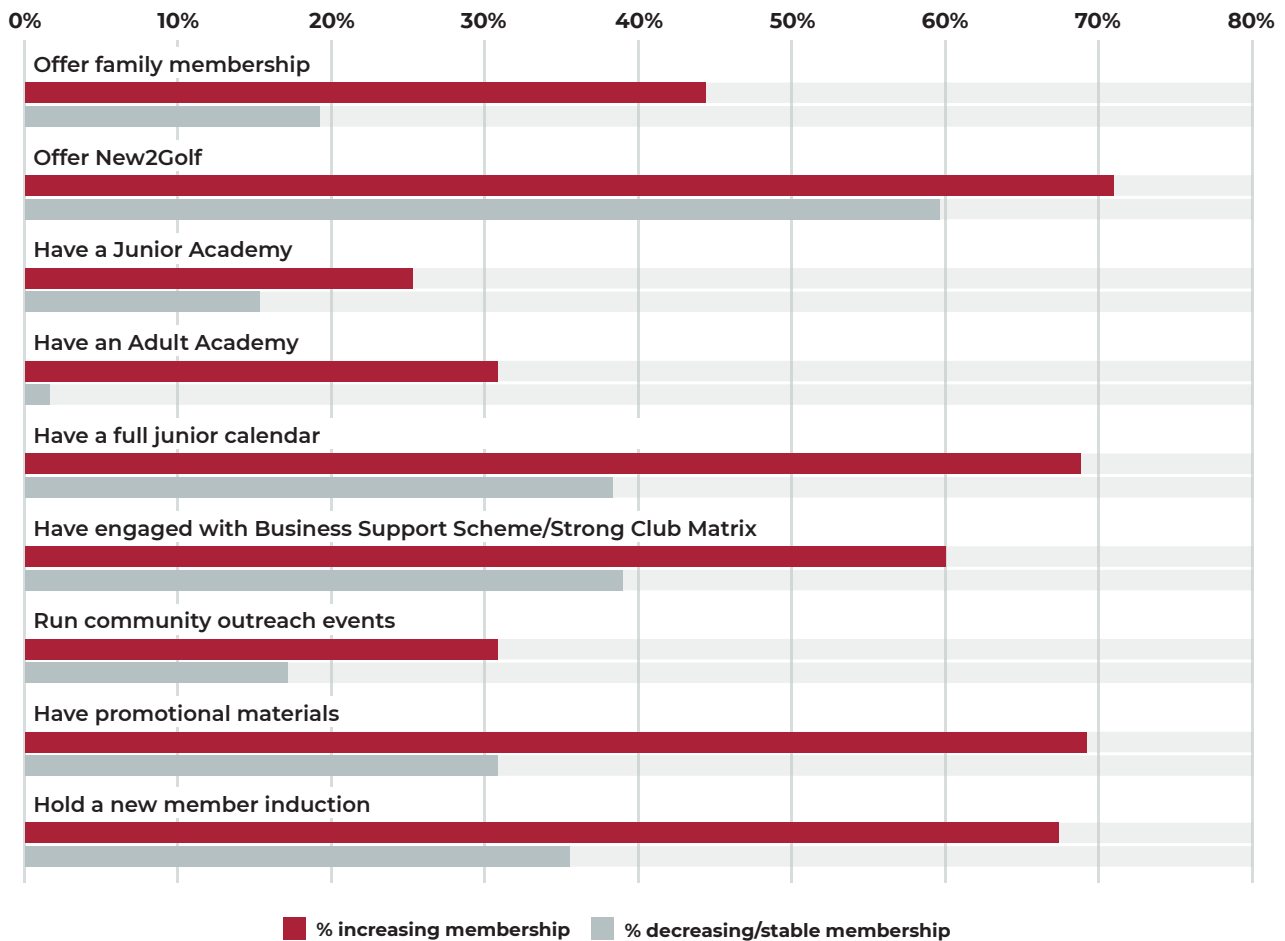


In 34% of clubs, membership had remained stable

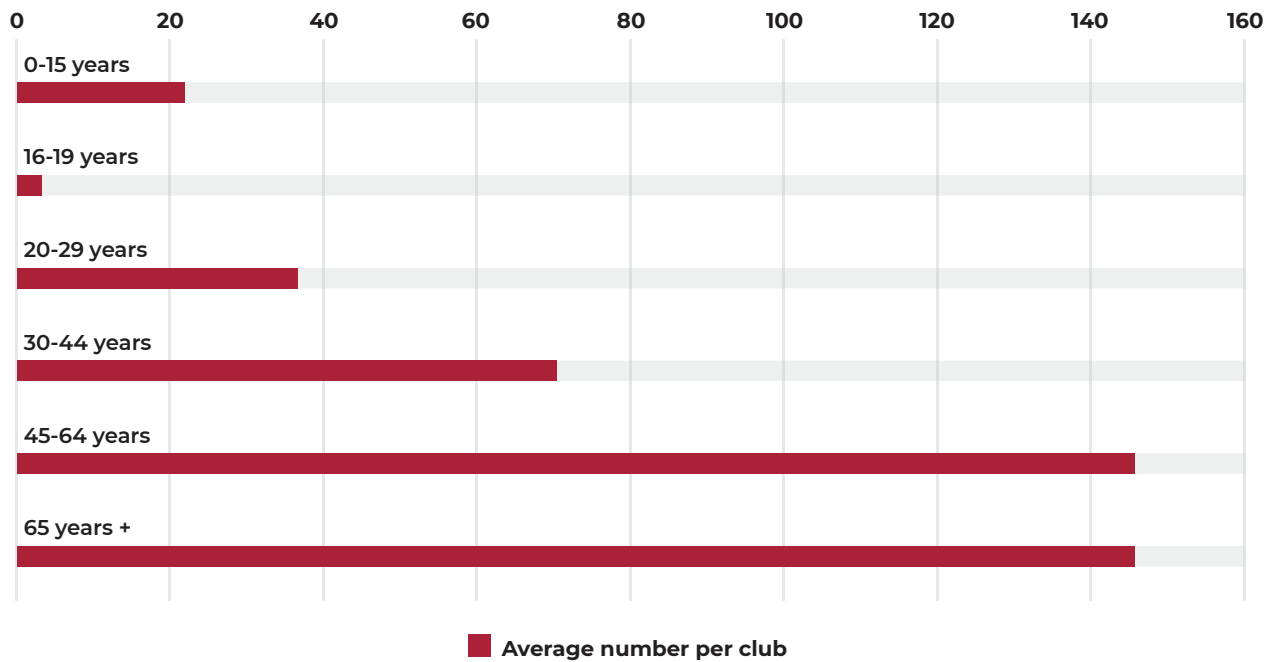
There were some noticeable differences between clubs which had increased membership and others. The survey identified a clear correlation between clubs engaging with the offers/schemes shown in the graph, and rising membership levels.

In response to membership concerns during the last survey and via data collected by our development officers using the matrix system and customer feedback tracker, Wales Golf have run several workshops to help address this. From membership recruitment & retention to governance and digital marketing, clubs that attended found these extremely valuable. If your club was unable to attend, your Development Officer can supply you with support and notes from these.

RELATIONSHIPS BETWEEN CLUB OFFERS/SCHEMES AND MEMBERSHIP LEVELS



HOW MANY OF YOUR MEMBERS ARE IN EACH OF THE FOLLOWING AGE CATEGORIES?



RETAINING JUNIOR GOLFERS

The Golf Foundation's GolfSixes League was introduced to Wales in 2018 and has had a positive effect on the clubs involved, stimulating growth in junior membership and attendance and increasing parental engagement. The initiative is expanding – if your club would be interested in getting involved, contact your Wales Golf Development Officer.



RETAINING TEENAGE GOLFERS

As with many sports, golf club membership dips in the late teens. What can clubs do to retain their junior members as they get older?

- Student/intermediate/flexible/family memberships
- Keeping in touch with junior members who go away to university
- Have a youth representative on club committee to ensure club meets the needs of this age group

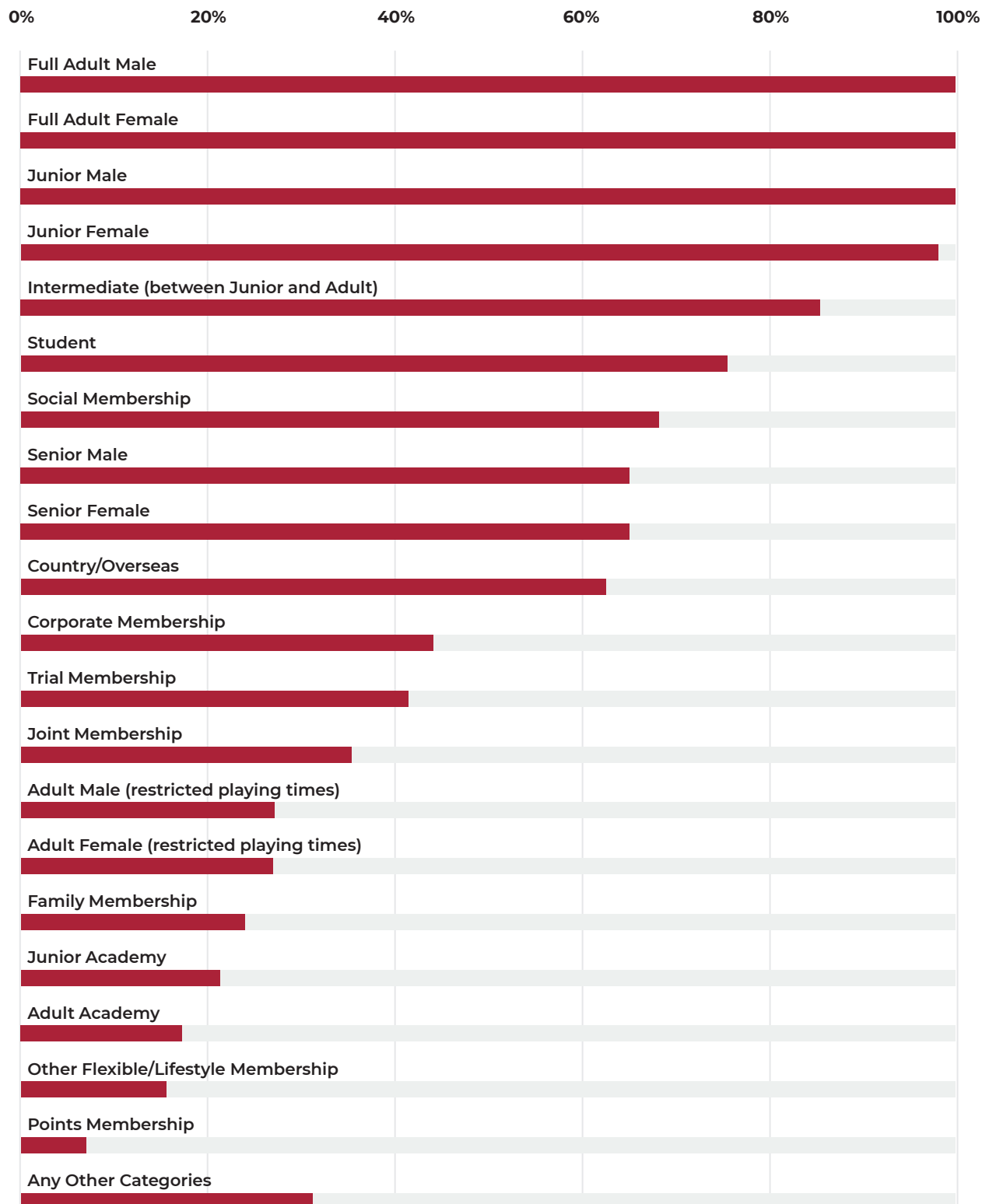
On average, clubs have over **twice as many golfers in each of the 45-64 and 65+ age categories as there are in any lower age-groups**. Only 4 clubs in this sample had more members under 45 than 45+.



MEMBERSHIP CATEGORIES

The number of clubs offering an intermediate membership continues to rise, from 81% in the last survey to almost 86%. In contrast, the number of clubs offering family membership remains low. Additional categories offered included a 'young' membership for ages up to 45 years, 9 hole membership, second club membership, and a membership for service personnel.

CATEGORY OF MEMBERSHIP OFFERED BY CLUBS



BUILDING FAMILY FRIENDLY PACKAGES:

Lifestyle factors such as time constraints impact heavily on family sports participation - but golf provides an opportunity to combine family time and leisure! Families taking part in golf are less likely to do so just to 'play the game' - it's the whole golf experience that is key. So clubs creating a family membership should consider:

ENSURING THE CLUB ENVIRONMENT SUPPORTS FAMILY PARTICIPATION

THE NEEDS OF THE WHOLE FAMILY

ESTABLISHING A REGULAR AND REPEATED CALENDAR OF FAMILY EVENTS FOR PARTICIPATION TO BECOME ROUTINE

GOOD VALUE FOR MONEY

GIVING OPPORTUNITIES TO LEARN

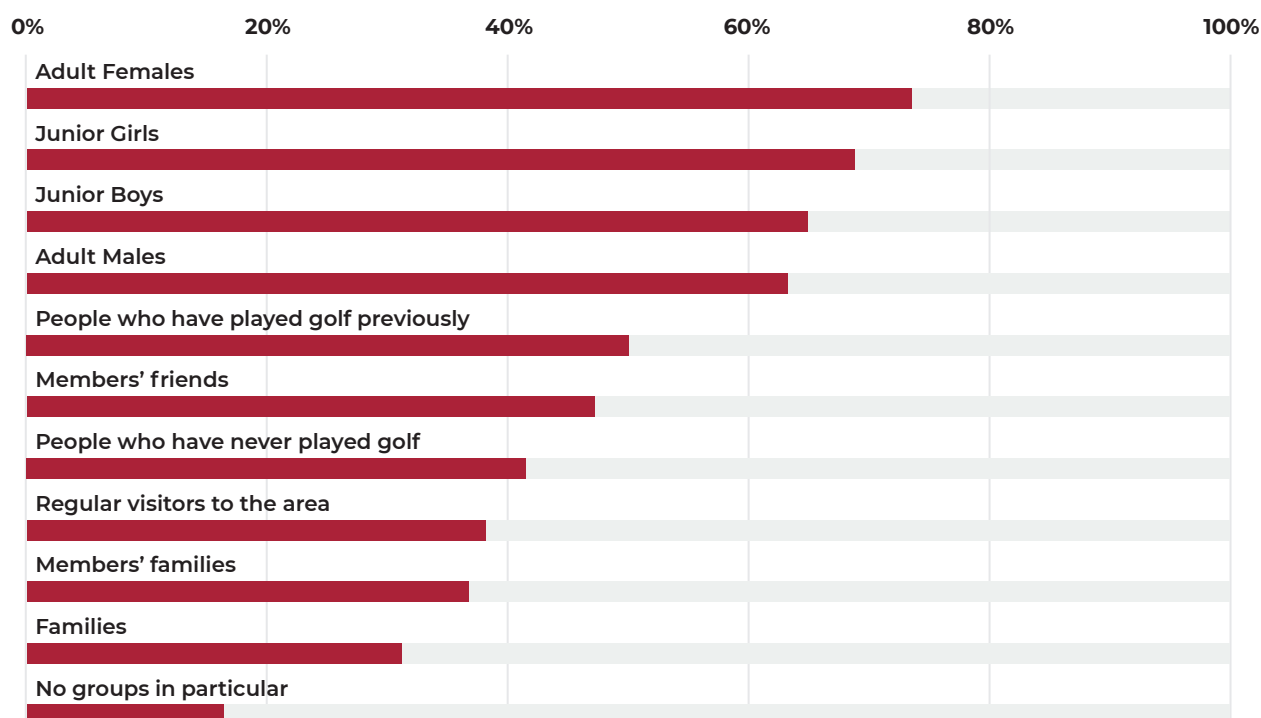


Wales Golf now has a partnership with PlayMoreGolf (PMG), which links individual clubs across the United Kingdom under one flexible membership and provides choice, value, flexibility and convenience with all the benefits of golf club membership. Ten Welsh clubs have already signed up and are reaping the benefits of PMG's targeted marketing campaigns to gain new members. If your club wants to know more, please contact your Wales Golf Community Development Officer.

TARGETING AND COMMUNICATING WITH MEMBERS AND POTENTIAL MEMBERS

83% of clubs had a targeted marketing strategy, with the vast majority targeting multiple groups (an average of 5 different groups per club, with females being the most sought after).

ARE YOU TARGETING ANY OF THE FOLLOWING GROUPS?



CASE STUDY – INCREASING FEMALE MEMBERSHIP LLANISHEN GOLF CLUB

In 2017 and 2018, Llanishen GC ran New2Golf schemes for women, specifically aimed at increasing the number of lady members.

The schemes were promoted widely throughout the local area by the ladies' section, putting up GDW posters in post office, leisure centres, chip shops, etc.

The taster day included a 'meet and greet' with the scheme organiser, PGA professional, and volunteers from the ladies' section; a taste of golf; a clubhouse tour; New2Golf packs available and the opportunity to sign up for lessons (6 weeks for £30).

Club members were asked to support the initiative by being more relaxed about dress codes, welcoming and encouraging the new golfers and highlighting the benefits of membership. Some existing lady members were present at each New2Golf session.

The New2Golf group was kept engaged by:

- Having their own WhatsApp group
- Joining Llanishen Ladies Facebook group
- Each being assigned a mentor who takes them out on the course
- Constant communication – lesson reminders, follow ups if lessons missed
- Varied weekly competitions with small prizes
- Away days
- Continued lessons
- A fashion show of golf clothing at the end of the New2Golf sessions

Of 33 ladies who signed up for New2Golf in 2017, 16 took up membership, and of the 17 who signed up in 2018, 10 are now full club members. 26 new female members in two years!

CLUB NOTICEBOARD

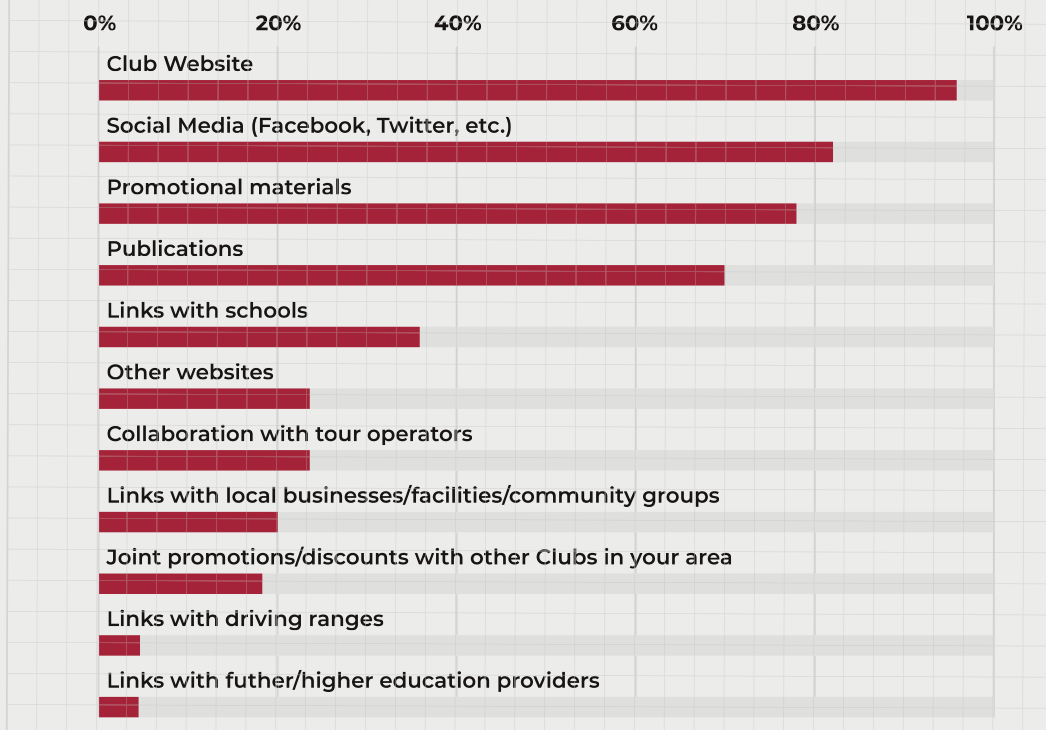
The most popular means of communicating with members

The club noticeboard is closely followed by email newsletters and social media. As in the last survey, the club website and social media are by far the most commonly used promotional methods.

🐦 If your club needs some help getting started with social media, look out for Wales Golf's next 'Digital Marketing for Golf Clubs' workshop!

ALMOST 20% OF CLUBS DO NOT USE SOCIAL MEDIA AT ALL

HOW DOES THE CLUB PROMOTE ITS FACILITIES AND MEMBERSHIP OPPORTUNITIES?



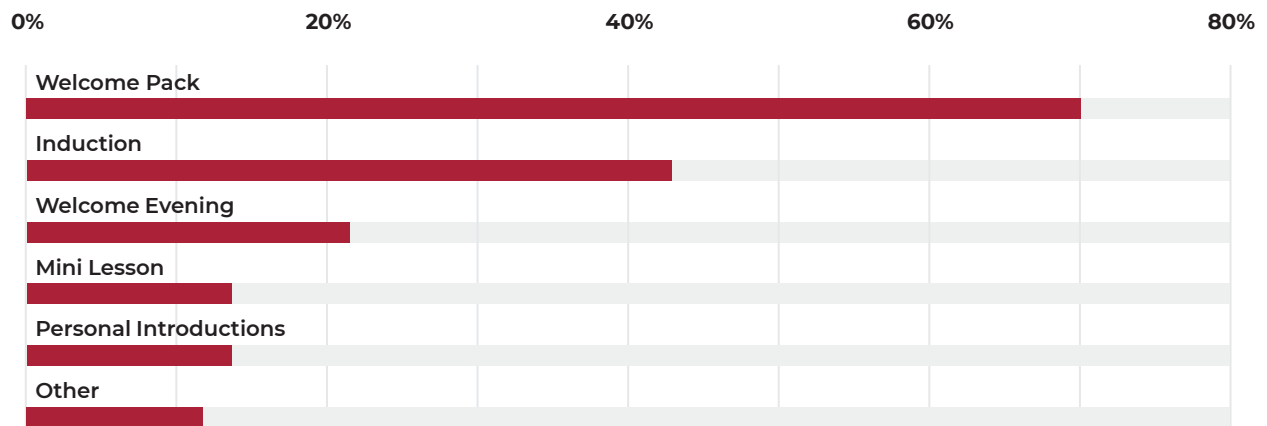
Langland Bay G.C have a social media audience of over 17,000 people across Facebook, Instagram and Twitter. They share insight into day-to-day life at the golf club and also promote open events and New2Golf opportunities. This has been so successful that the club are able to directly measure that these platforms have generated the club over £95,000.

The club are also using paid Facebook adverts to promote their New2Golf classes for 2019 and have completely filled their classes. By January 2019 they already had 40 women and 10 men signed up to start New2Golf lessons in March.

The number of clubs offering online teetime booking has risen to 71%, from 65% in the last survey.

TARGETING AND COMMUNICATING WITH MEMBERS AND POTENTIAL MEMBERS

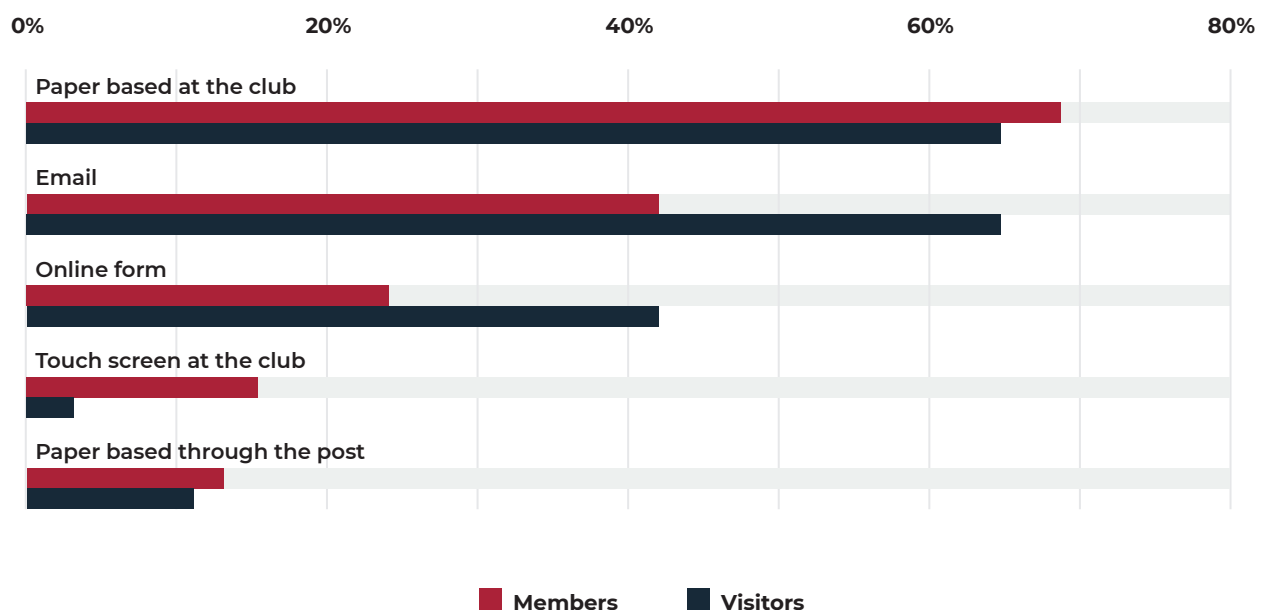
HOW ARE NEW MEMBERS WELCOMED TO YOUR CLUB?



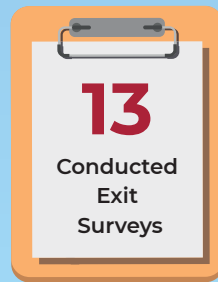
Other responses were a welcome letter or text, bag tag, membership booklet, a buddy system, and the chance to play with the relevant section of the club before joining.

90% of clubs collect and store contact details for members; 40% of clubs communicate with members weekly and a further 29% monthly. Paper-based collection still predominates, however clubs collecting visitor data as well as member data are more likely to use electronic methods.

IF YOU COLLECT DETAILS FROM MEMBERS/VISITORS, HOW DO YOU DO SO?



30 CLUBS STATED THAT THEY CONDUCTED SURVEYS; OUT OF THESE



SURVEY METHODS USED



Over the phone



Face-to-face



Wales Golf Customer
Feedback Tracker



Other online
survey



By email

Wales Golf provide a free automated service to all affiliated clubs called the Customer Feedback Tracker (CFT). This tool allows golf clubs to engage and better understand their membership, providing insight into the things they do well, what they can improve on and how to improve. The CFT allows golf clubs to survey current members, new members and visiting golfers.

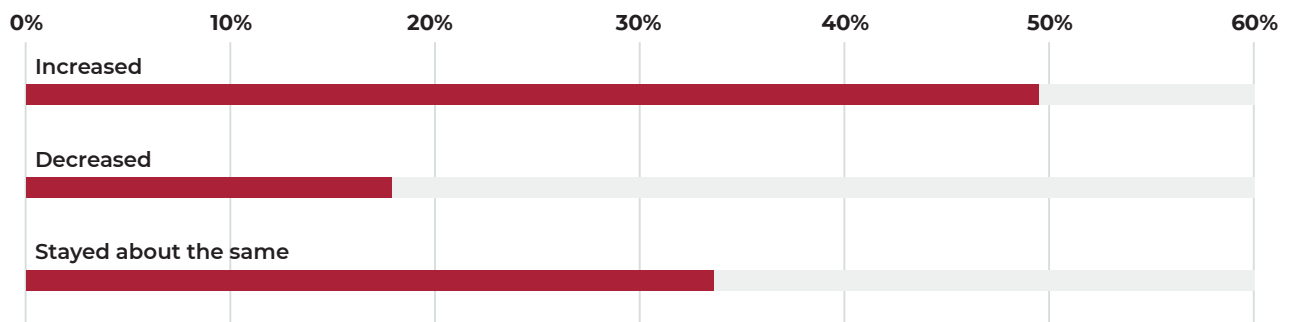
The results allow golf clubs to compare themselves to other clubs in their area and benchmark to the national average.



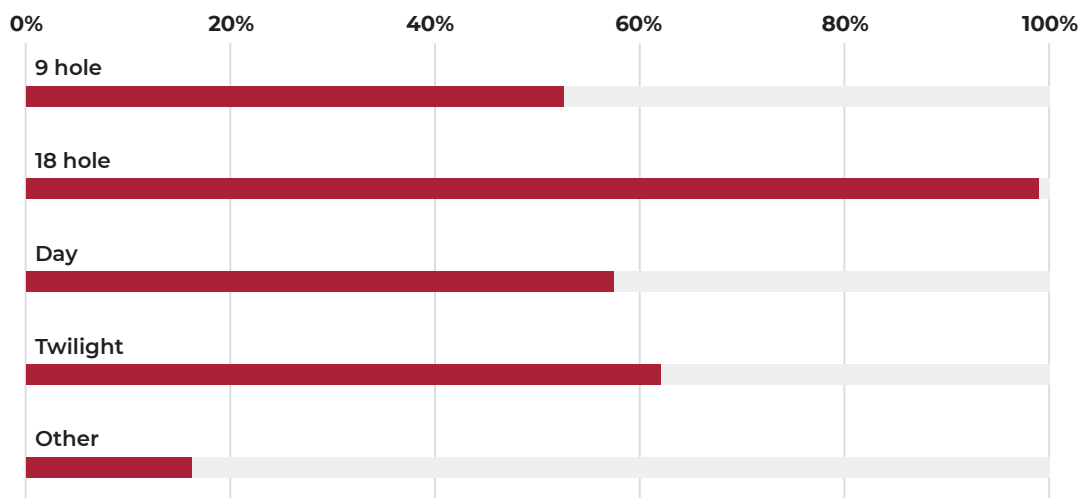
VISITORS

Almost half of clubs had seen an increase in visitor numbers over the last two years. 53% of clubs are now offering a 9-hole option for visitors.

HAS THE NUMBER OF VISITORS PLAYING AT YOUR CLUB INCREASED OR DECREASED OVER THE LAST TWO YEARS?



WHICH OF THE FOLLOWING VISITOR PLAYING OPTIONS (GREEN FEES) DO YOU OFFER?



Of the 30% of clubs that had increased membership numbers, **88% of them had also increased visitor numbers**, against only 34% of those who had not increased membership.

Visitors are most commonly contacted on an ad hoc basis (34% of all clubs) – **BUT 45% of clubs don't collect visitor data at all, and 19% of clubs who collect visitor contact data never use it!** So a lot of clubs are missing out on opportunities to promote themselves to visiting golfers who may well be potential members/repeat visitors!

Contact your Wales Golf Development Officer if you'd like some insight and support on collecting/using your visitor data. NGCAA can also advise on compliance of your data collection procedures.



SUMMER GREEN FEES

Once again, there has been little change in average levels of green fees since the last survey.

SUMMER GREEN FEES		
RANGE	MAXIMUM GREEN FEE	MINIMUM GREEN FEE
Highest	£161	£60
Lowest	£10	£6
Average	£35.96	£20.52
Average (2015/2016 survey)	£33.91	£21.56
Average (2013/2014 survey)	£34	£14

So during a 5-year period 2012/13 to 2017/18 over which average prices of goods and services have increased by 12%, green fee levels have remained static. A number of clubs commented that golf was being sold too cheaply, creating a price-driven marketplace.

Does your club find itself slashing prices on green fees / memberships to keep up with competition? Why not think about adding value first by providing greater benefits to the customer?

Wales Golf can help. Ask your Development Officer!

AVERAGE SPLIT OF COURSE INCOME



The average split of course income had not changed significantly since last year, with over three quarters coming from membership subscriptions. However 25% of clubs stated that they had increased visitor income as a percentage of course income.

EQUALITY ON THE COURSE?

In **62% of clubs**, both male and female members had access to the course at all times.

33% of clubs had times when female members could not play on the course, due to male competitions taking place; most often these were during the weekend.

36% of clubs had times when male members could not play on the course, due to female competitions taking place; most often these were on Tuesdays or Thursdays.

Only **2 clubs** had weekend tee times (30 min and 40 min) reserved for female members.

GOLFERS WITH A DISABILITY

83% of clubs are now aware of the Modified Rules for Golfers with Disabilities (now part of the Rulebook). This is an excellent improvement on the 53% aware at the time of the last survey. But still only a quarter of these were implementing the modified rules in Competition.

Being inclusive is not only a legal responsibility of a club, it is also great for business.

With on average **22% of members having a disability** and **80% of disabilities being acquired with age**, are you maximising your club's potential? i.e. course set-up, club house access, modified rules, etc. If you need support, please contact Wales Golf.

GOVERNANCE

The Governance Guide for Golf Clubs is a booklet of practical advice on structuring and running a golf club effectively, created in collaboration by the British/Irish golf governing bodies, GCMA, PGA and NGCAA. It aims to give golf clubs advice and support which will help them achieve their potential and is easily accessible online. The survey found that almost two thirds of clubs had read at least some of The Governance Guide for Golf Clubs.

HAVE YOU READ A COPY OF 'THE GOVERNANCE GUIDE FOR GOLF CLUBS'?

23%

Yes, all or most of it

40%

Yes, some sections of it

28%

No

10%

Don't know

THE
GOVERNANCE
GUIDE FOR
GOLF CLUBS

Many clubs are still requesting help in various aspects of governance (see below) so Wales Golf are continuing to offer support; governance is one of the areas of the Strong Club Matrix and all Development Officers have been trained to give advice in this area.

59%

Reviewing your club's committee and management structure

38%

Identifying/recruiting skilled committee/council members

44%

Setting out the vision and mission for your club

46%

Reviewing your club's operating and control systems

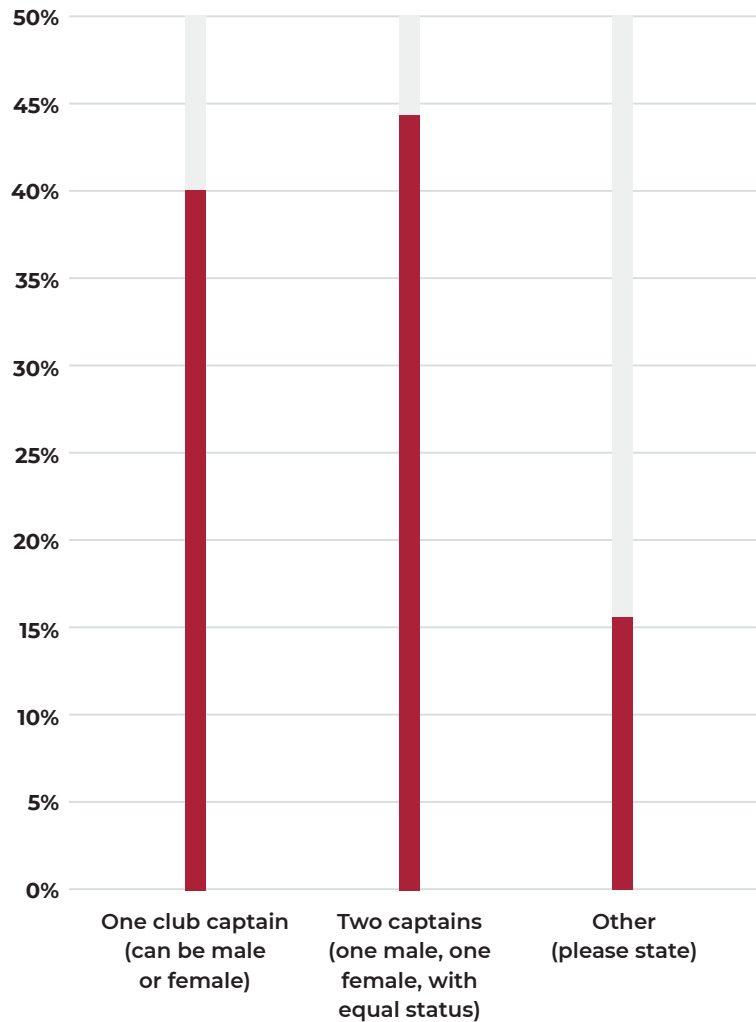
9%

Ensuring GDPR compliance



The average Board or Committee of a Club is made up of 8 men and 2 women

HOW MANY CAPTAINS DOES YOUR CLUB HAVE?



Slightly more clubs opted for two captains than one. Some clubs stated that they had additional captains for Seniors, Juniors, and other specific sections of the club.

Research shows that more diversity on boards leads to better decision making. Wales Golf offer support and guidance in this area.

Why not pledge your club's support to the Women in Golf Charter (driven by the R&A) to show your club's commitment to increasing female participation and creating more opportunities for women to work in the industry? Wales Golf also offer a mini equality committee workshop where required.

STAFF

The average club provides jobs for 7 full-time staff, 5 part-time staff, one self-employed person and 3 volunteers. Staffing levels have decreased very slightly since the last survey.



5

Greenkeepers



1

Cleaner



1

PGA Professional



5

Bar and Catering



2

Management and Admin

Over a third of Secretaries and Managers (**37.5%**) were participating in a recognised education pathway.

COMMON FRANCHISED/CONTRACTED AREAS

16%
Cleaning

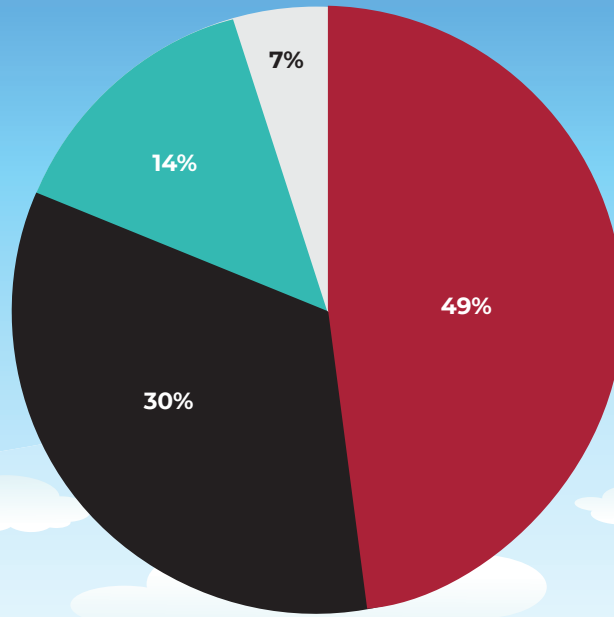


27%
Catering



GREENKEEPER QUALIFICATIONS

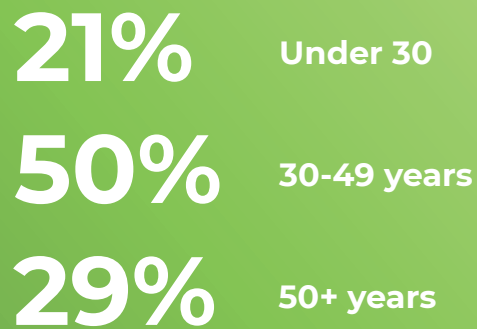
- Sports Turf Management Level 2
- Sports Turf Management Level 3
- No qualification
- Other qualification



The average number of Greenkeepers per club has increased slightly from **3 to 4 full-time posts**; the majority are qualified and in the **age range 30-49**.

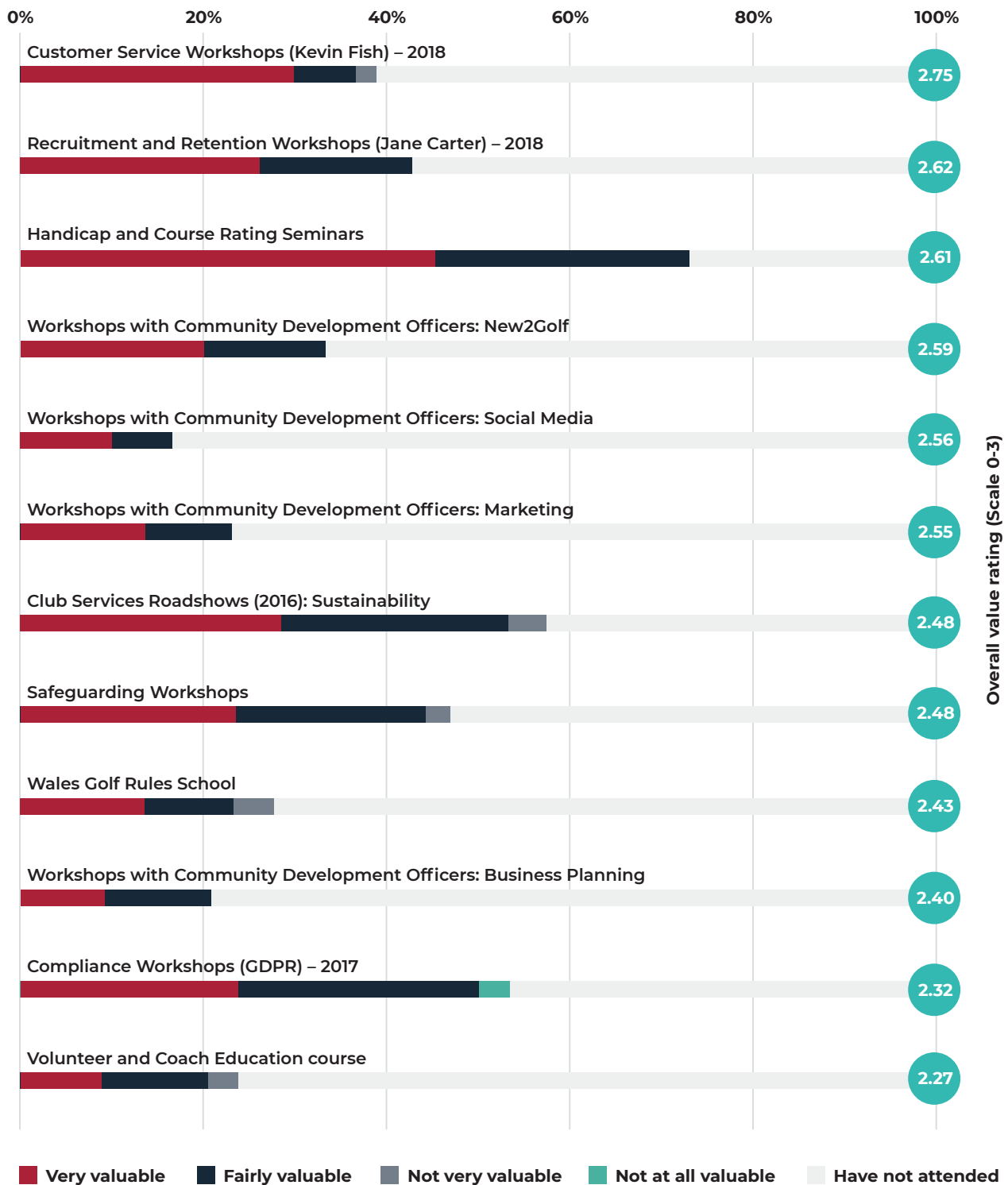
Only 3 clubs had an Apprentice Greenkeeper.

GREENKEEPER AGES

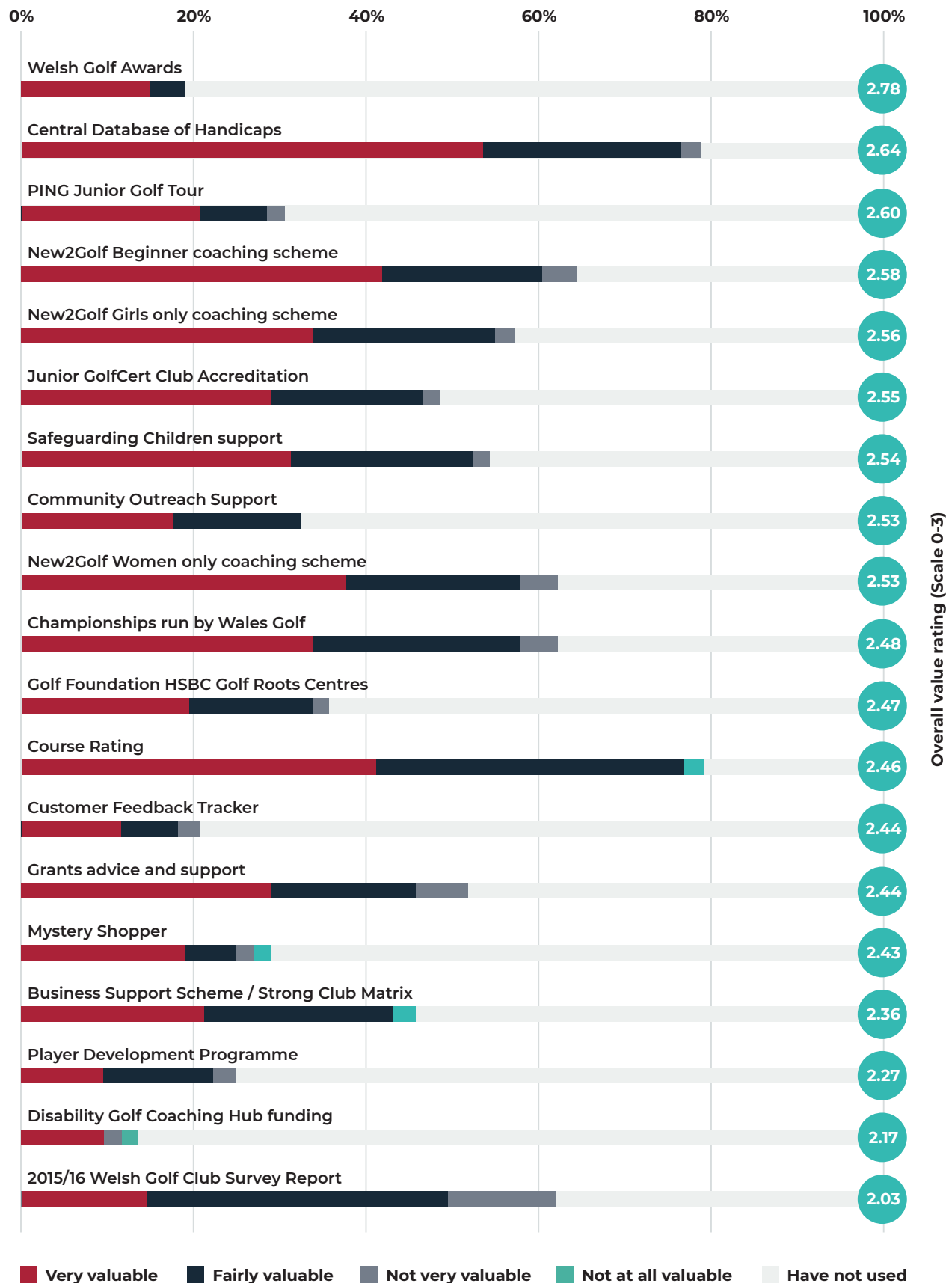


WALES GOLF ACTIVITIES AND INITIATIVES

The chart below shows how valuable clubs have found Wales Golf's Courses and Workshops. We listened and provided. The 2 highest scoring workshops were areas requiring support through insight - customer service and membership recruitment and retention - and it is good to see that overall value ratings have increased slightly since the last survey. If there are any specific areas your club requires support on in a workshop format, please let us know.



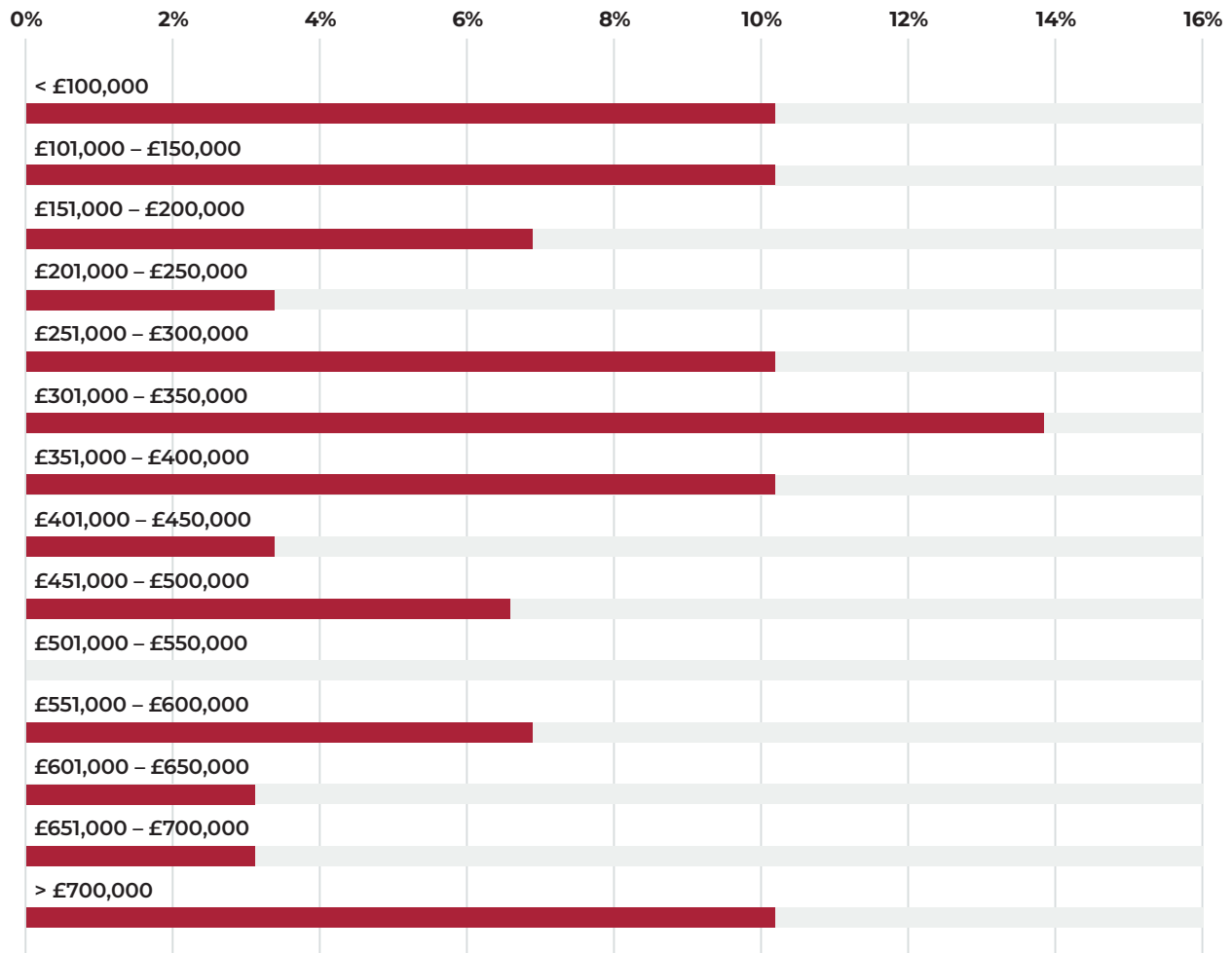
The chart below shows how valuable clubs have found the other resources provided by Wales Golf. Average scores have again improved. Since the last survey WG have added support on gaining feedback from your customers which is vital to ensure you are meeting their needs and that you continue to grow your club. Consultation is also an important element of the business planning process. Wales Golf have several tools & services to help you such as Customer Feedback Tracker, Mystery Shopper & support & advice in running membership forums.



CLUB INCOME

Responding clubs covered the full range of income levels.

WHAT IS THE TOTAL CLUB INCOME PER ANNUM?



24 clubs were able to provide a breakdown of income. On average, these clubs derived 69% of income from the course, 24% from club activities at the clubhouse, and 7% from non-club use of the clubhouse.

An average of 76% of course income came from members and 24% from visitors. 60% of clubs said this split had been similar over the last 2 years, but for 25% of clubs, visitor income had increased as a percentage of course income.

Almost half of the clubs responding were generating less of a surplus than 2 years previously.

Two thirds (66%) of clubs stated that their expenditure had increased since 2016, with the most frequent reasons being given as the increasing costs of course maintenance, utilities, and staff. But only 37.5% of clubs had managed to increase their income – most by attracting more visitors and thus increasing green fee income, and/or increasing membership subscriptions.

IN TERMS OF BUSINESS ACTIVITY, IS THE CLUB TENDING TO GENERATE MORE OR LESS OF A SURPLUS OVER THE LAST TWO YEARS THAN PREVIOUSLY?



Wales Golf Buying Group – save money for your club!

Wales Golf is delighted to announce an exciting new partnership with Golf Management Group (GMG), providing all affiliated golf clubs with free access to a dedicated buying group.

The Wales Golf Buying Group, in partnership with GMG, will harness the collective purchasing power of clubs to leverage significant discounts across a range of goods and service categories used by golf clubs. The service will be opt-in, but we are encouraging all clubs to consider the many benefits of the Buying Group, including access to GMG's experts who will benchmark your core areas of expenditure against national price files and give you insight into best practice and current trends; access to Contracts Manager, an easy to use online management tool designed to manage all your service and utility contracts; and free GMG membership for a year – usually £149.



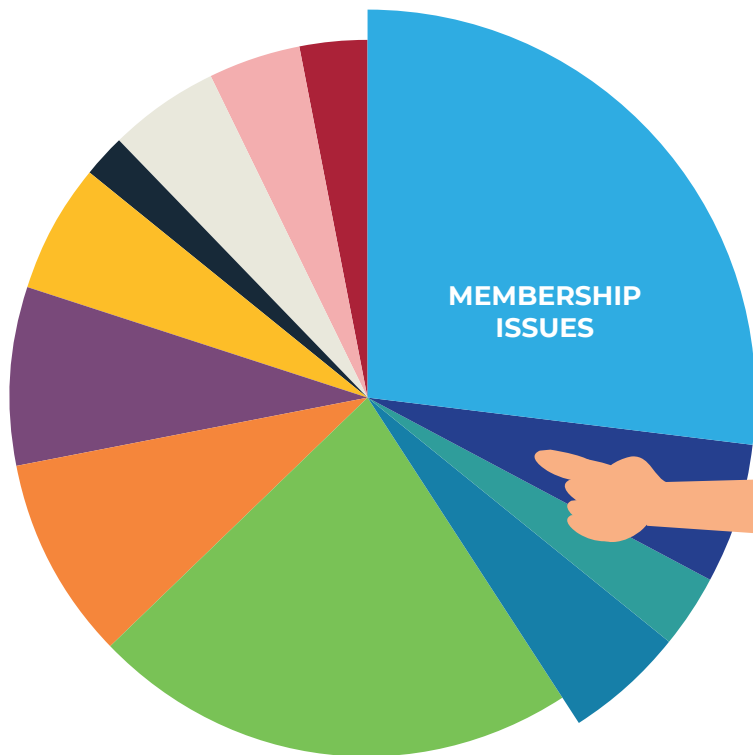
**DISCOUNTS
ACROSS A
RANGE OF
GOODS AND
SERVICES**



CLUB CONCERNS

Clubs were asked to state their three main concerns: once again membership issues (indicated below in different shades of blue) were predominant, followed by financial issues. A growing number of clubs were concerned about their sustainability.

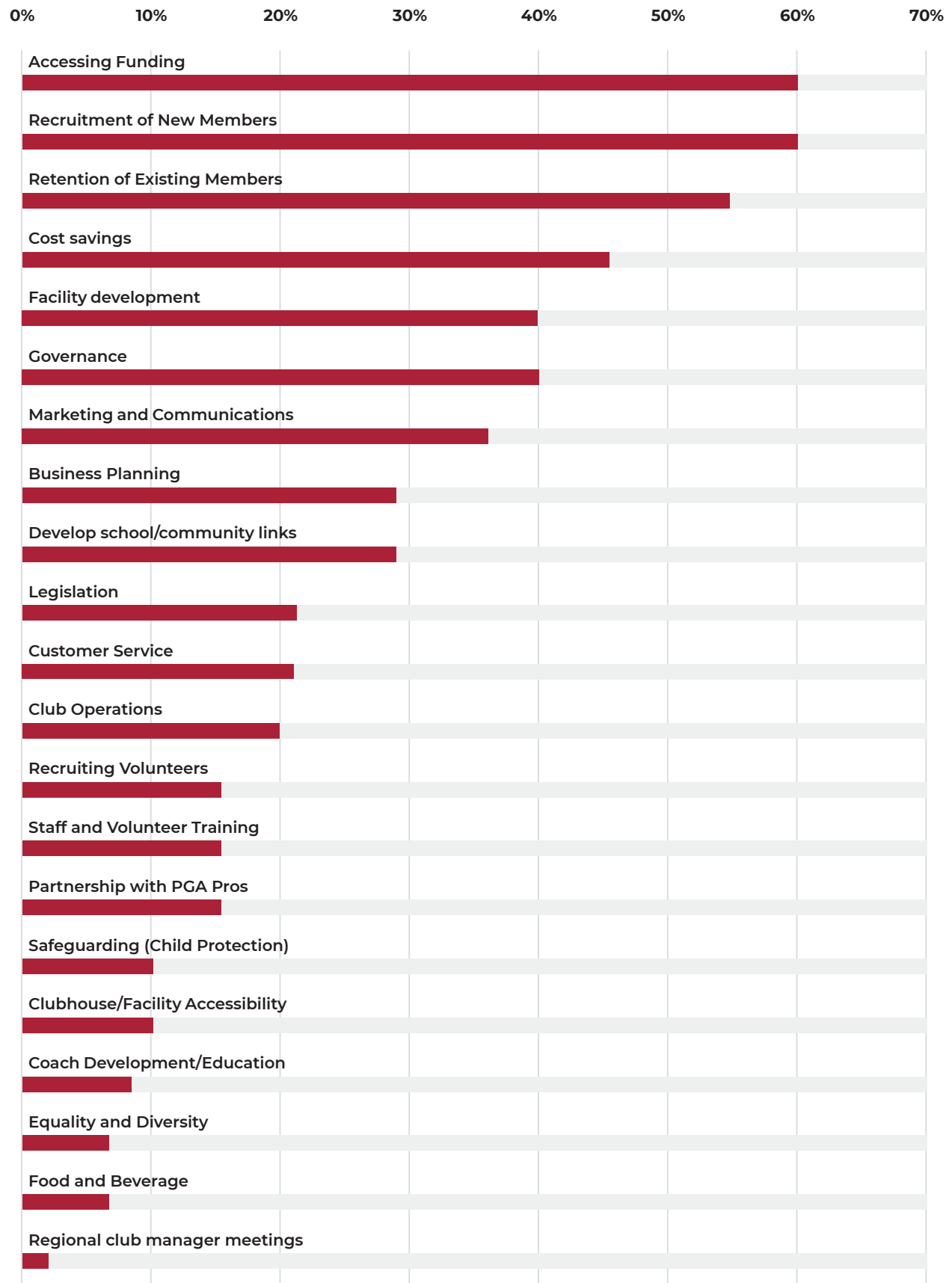
SUMMARY OF KEY ISSUES FOR CLUBS



Concerned about your environmental management and sustainability practices? Check out our Greener Golf pages at www.walesgolf.org/greener-golf

Clubs were also asked in what areas they would like assistance from Wales Golf – unsurprisingly membership and finance issues were at the top of the list

WHERE CLUBS WOULD LIKE ASSISTANCE



WALES GOLF

Creating and supporting an environment in Wales where golf is safe and accessible for everyone to participate, enjoy and progress.

We hope you have found our latest club survey report interesting and insightful. A downloadable copy is available from the Wales Golf website.

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