

Wales Golf

Club Survey 2022



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.

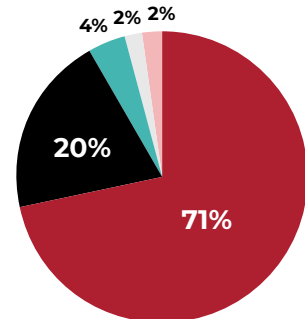
STRATEGIC PILLARS

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 2022, 85 golf clubs (almost 60% 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 1102) and income (from under £100,000 to over £700,000 per annum). Thank you to all clubs who took the time to complete the 2022 survey, and for the valuable information you have provided, which helps Wales Golf to help you!

CLUBS

TYPE OF GOLF CLUB*



- Private Members
- Proprietary
- Members' Club (not private)
- Community Club
- Other

77%

of responding clubs were
Members clubs

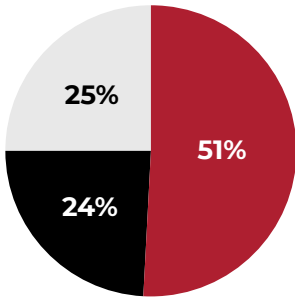
71%

of all affiliated clubs are
Members clubs

Clubs of all income levels (from under £100,000 to over £700,000 per annum) were represented in the survey.

*All percentages throughout report are rounded to nearest whole number, so may not sum to exactly 100%

WHAT IS THE CURRENT LEGAL STATUS OF YOUR CLUB?



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

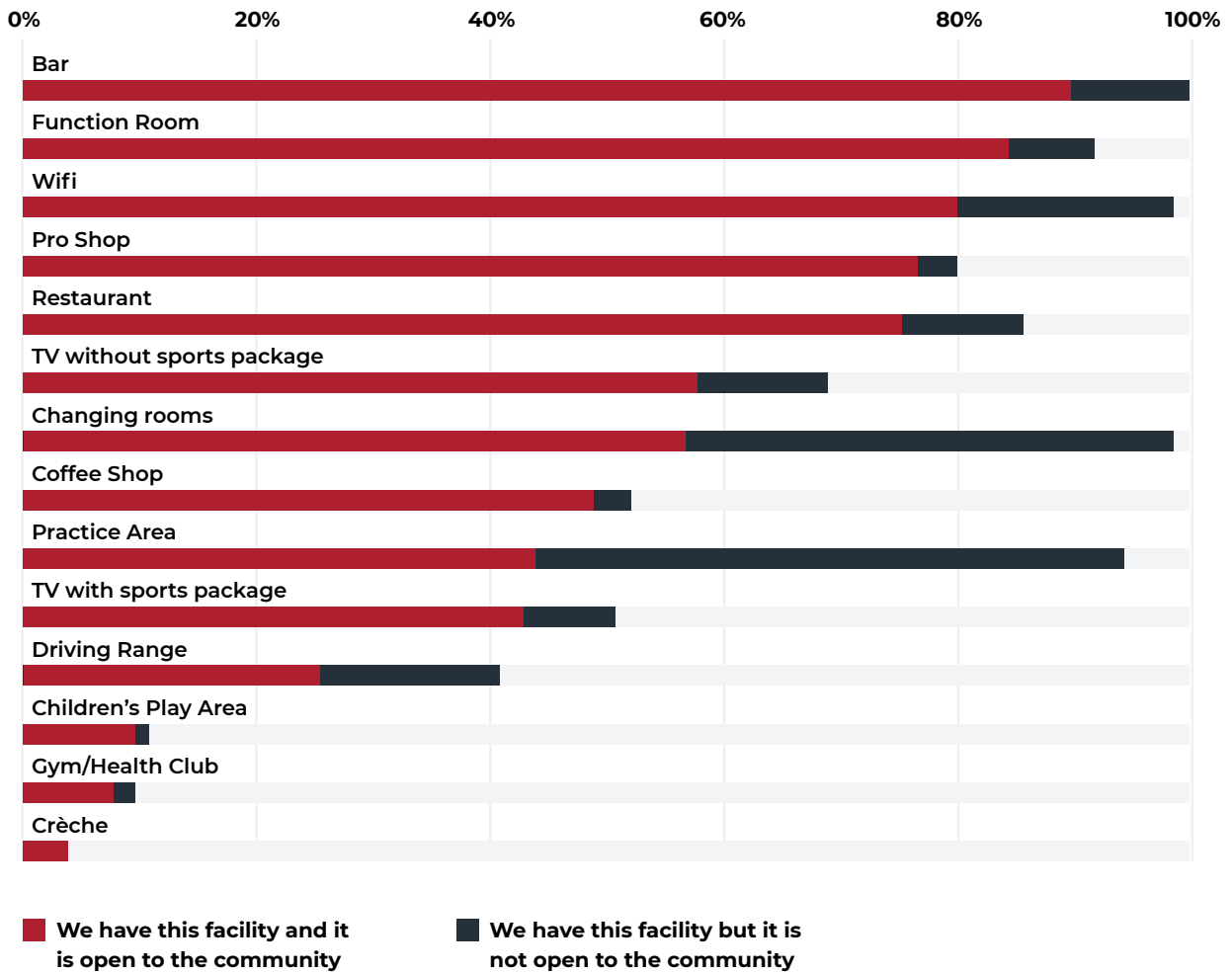
Many sports clubs set up and continue to run as an unincorporated association, bound together by common rules. Becoming incorporated makes the club a separate legal entity which means club members are not personally responsible for its debts.

29% of clubs gave their tax status as CASC (Community Amateur Sports Club).

10 clubs, 5 of which were unincorporated associations, were planning on reviewing their legal status.

CLUB FACILITIES

WHICH OF THESE ADDITIONAL FACILITIES DOES YOUR CLUB HAVE, AND ARE THEY OPEN TO THE COMMUNITY?



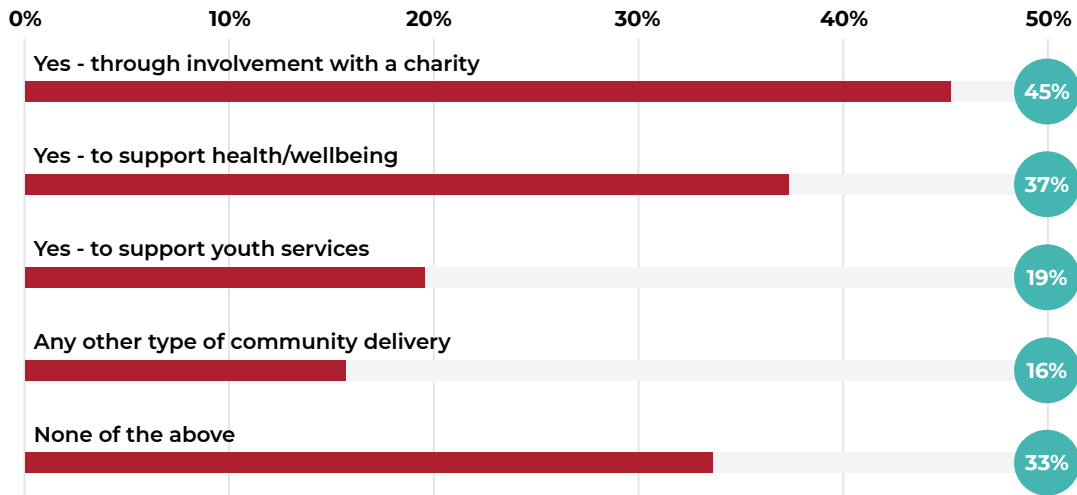
Clubs are generally doing well in opening their facilities to their community. Changing rooms and practice areas are the facilities least likely to be available to the community.

COMMUNITY ENGAGEMENT

Two thirds of clubs engaged in community delivery in one or more of the ways shown. Just over half (51%) engaged in schools delivery.

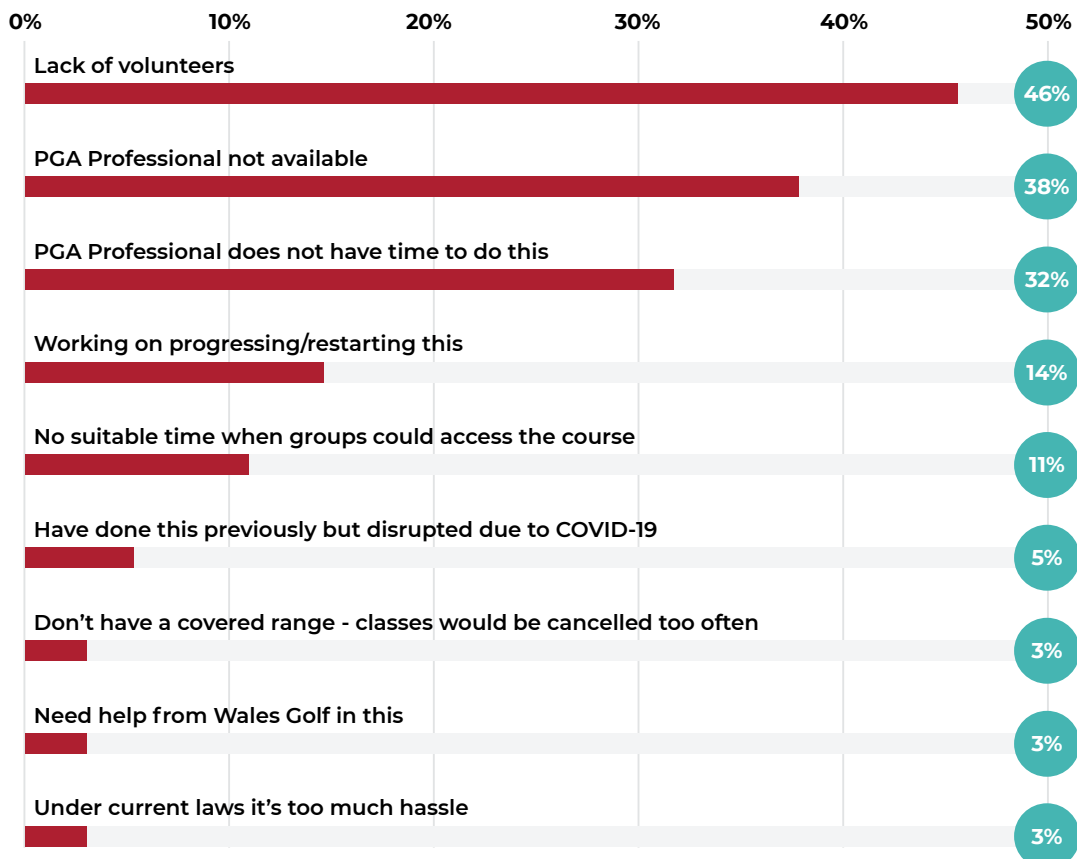
19% of responding clubs did not engage in either community or schools delivery.

DO YOU ENGAGE IN LOCAL COMMUNITY DELIVERY?



Where clubs did not engage in community and/or schools delivery, the most frequent barriers were lack of volunteers, and lack of a PGA Professional with the time available to do this.

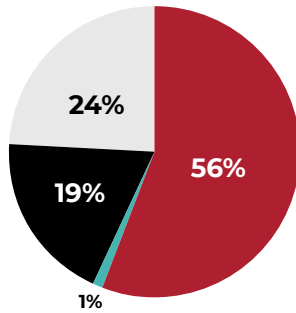
REASONS FOR NOT ENGAGING IN COMMUNITY/SCHOOLS DELIVERY?



JUNIOR GOLF

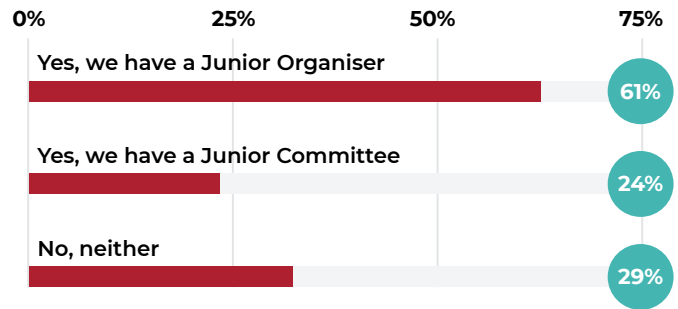
75% of responding clubs offer structured coaching for juniors throughout the year, while 71% have a Junior Organiser and/or Junior Committee. 42% offer a full calendar of junior golf activity throughout the year.

DO YOU HAVE STRUCTURED COACHING THROUGHOUT THE YEAR?



- Yes, for adults and juniors
- Yes, for adults only
- Yes, for juniors only
- No

DOES YOUR CLUB HAVE A JUNIOR ORGANISER AND/OR JUNIOR COMMITTEE?



The future of this great game rests with the young golfers of today and the **VITAL** role the golf clubs of Wales play in nurturing those young people both as individuals and as golfers.



BY DEVELOPING AND SUPPORTING JUNIOR GOLF, CLUBS ARE ABLE TO:

- **INVEST** in their future and the game as a whole.
- **CREATE** healthy and sustainable junior structures which will support the recruitment and retention of young people (players and members).
- **THRIVE** on a healthy mix of members of all ages to keep the golf club dynamic and forward thinking.
- **ENCOURAGE** the family use of their facility.
- **DEVELOP** not only better golfers, but also better people

Please use this resource and make it available to the members of your clubs, and let's make Wales an even stronger golfing nation!

MEMBERSHIP

KEY NUMBERS

Average number of members (all clubs, August 2021): **378**

Average number of members (clubs responding to the survey): **488**

Over the last 2 years, of the 71 clubs responding to this question:



57 clubs had increased membership

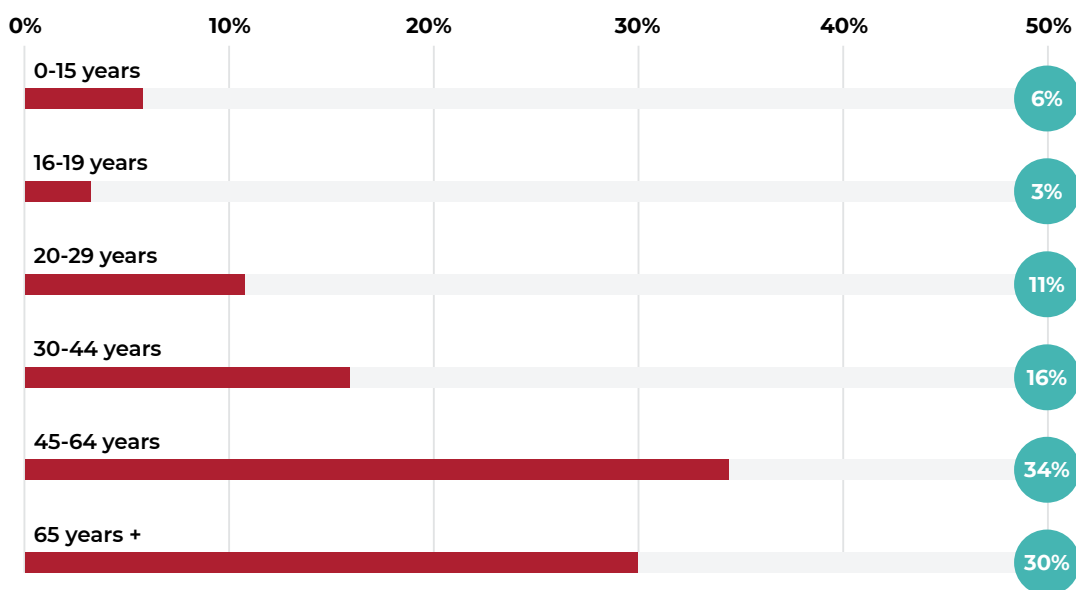


Only 2 clubs' membership had decreased



In 12 clubs, membership had remained stable

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



Since 2020, the proportion of members aged 16-19 has risen by 1% and those aged 20-29 by 3%; the proportion of over 65s has decreased by 3%. But almost two thirds of our club members are still aged 45+.

EFFECTS OF THE PANDEMIC

Golf enjoyed a significant boom during the pandemic due to its ability to be played safely, and proven benefits in boosting mental and physical health. Research carried out by Sports Marketing Surveys for The R&A found that 53% of lapsed players re-engaging with golf stated they did so due to having more free time to play, whilst new members were motivated by spending time in the outdoors. This helped to attract a younger demographic of golfer.

98% of new members surveyed identified that they were very likely to continue playing golf after the coronavirus pandemic is controlled.

The main factors identified that would affect their future play frequency were:



Injury

58%



Health

51%



Changes to their financial situation

43%



If it was too expensive to play

41%



Family commitments

41%

THE RESEARCH ALSO OUTLINED RECOMMENDATIONS THAT CLUBS CAN TAKE TO RETAIN NEW PLAYERS, INCLUDING:

- feeling welcome and valued;
- a friendly culture and relaxed atmosphere;
- participation options based on ability and experience;
- good customer service;
- having an efficient booking system;
- and the quality and maintenance of the course.

(POST COVID OPPORTUNITY FOR GOLF, Sports Marketing Surveys (2021))

MEMBERSHIP FEES

Individuals	% of clubs offering this membership	Maximum (£)	Minimum (£)	Average (£)	% change in average since 2018 survey
Full adult male	100%	1620	86	697	+10%
Full adult female	100%	1620	86	690	+10%
Junior age 17	100%	456	0	89	+11%
Country/overseas	69%	1032	39	355	not asked in 2018
5-day member	34%	1272	61	562	

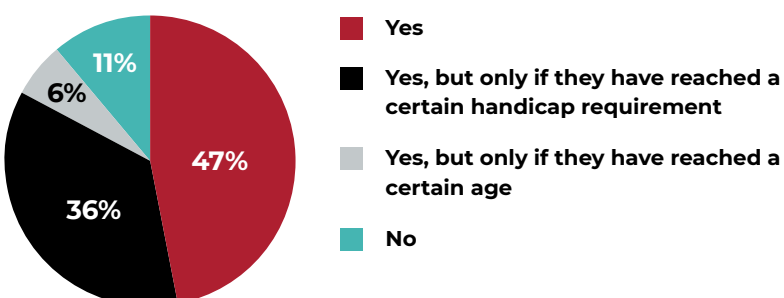
	% of clubs offering this membership	Maximum discount on fees for 2 adults	Minimum discount on fees for 2 adults	Average discount on fees for 2 adults
Joint membership	34%	32%	0%	11%

	% of clubs offering this membership	Maximum discount on fees for 2 adults + 2 juniors	Minimum discount on fees for 2 adults + 2 juniors	Average discount on fees for 2 adults + 2 juniors
Family membership (2 adults, 2 children under 16)	14%	43%	6%*	11%

*in one club, savings would only be made with a larger family or older children

Only 2 clubs (compared to 11 clubs in 2018 survey) had a lower fee for women, one offering an 11% reduction and one a 60% reduction.

CAN JUNIORS ENTER ADULT/MAIN COMPETITIONS?



It appears that the trend seen in previous surveys of decreasing junior fees has reversed, with junior fees rising at around the same rate as adult fees.

In almost 90% of clubs Juniors are entitled to enter main club competitions, with less than half of clubs imposing an age or handicap requirement for them to do so.

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. Here are some practical suggestions for making your club more family-friendly:

**OUTSIDE
CHILDREN'S PLAY
AREAS/TOYS**

**CRÈCHE
FACILITY**

**CHILDREN'S
MENUS,
COLOURING-IN
PENCILS**

**JUNIOR
ROOMS**

**OFFER FACILITY
FOR PARENTS
AND TODDLERS
SESSIONS**

**PROMOTE
FAMILY TIMES
ON THE
COURSE**

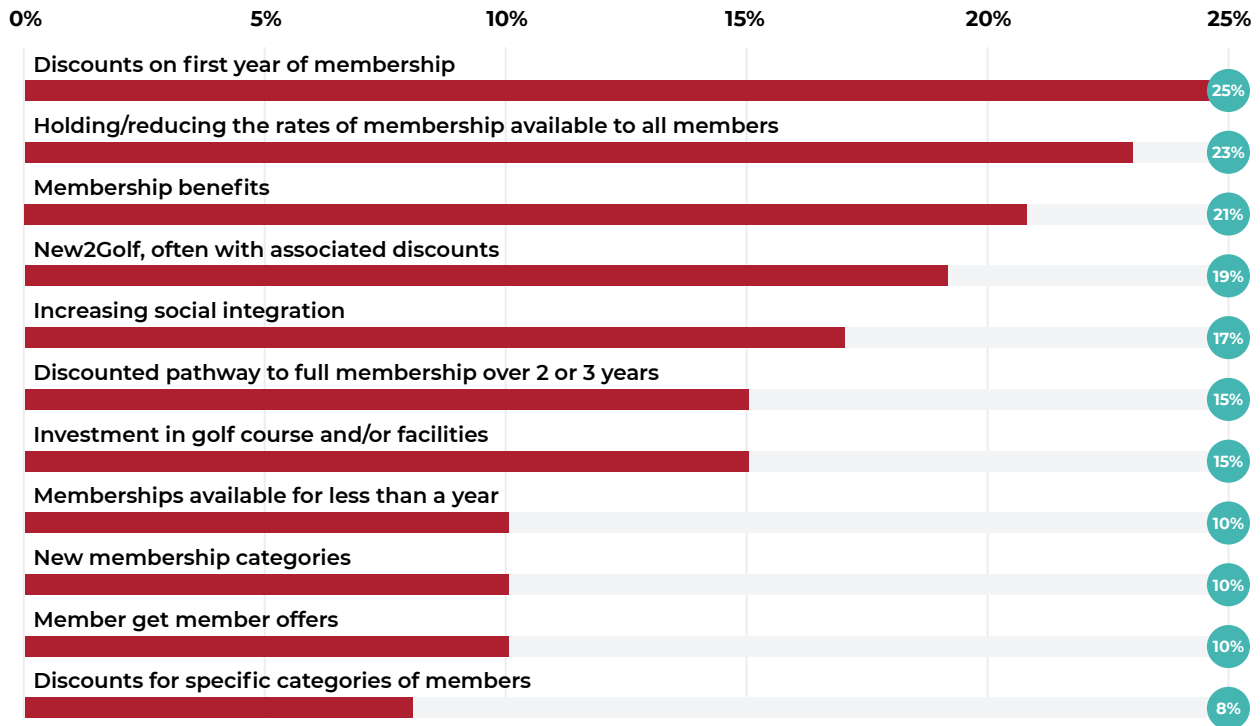
**BABY
CHANGE
FACILITIES**



RECRUITING AND RETAINING MEMBERS

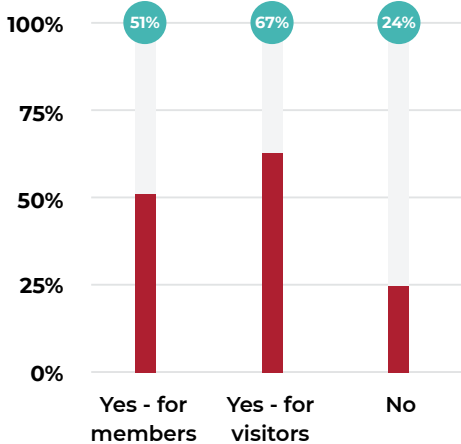
Clubs were undertaking multiple initiatives to attract new members and retain those they had gained. While many of these centred on discounted fees, several clubs are also focusing on increasing the value of their offer through investment in their course and/or facilities and improving the member experience.

RECRUITMENT AND RETENTION INITIATIVES

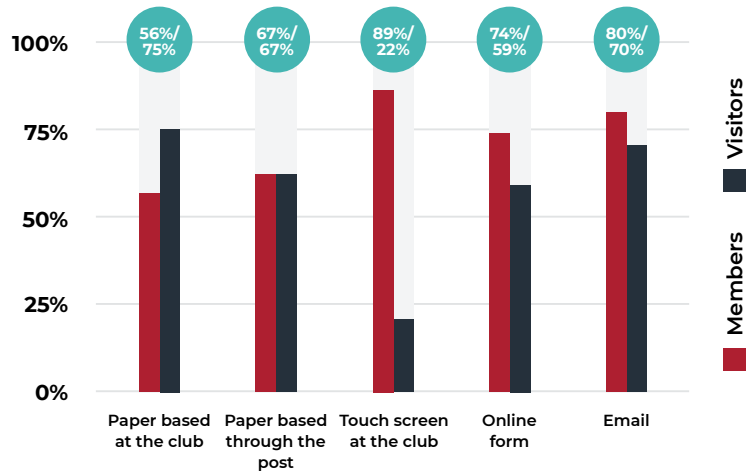


Most clubs planned to continue collecting and storing member and/or visitor details as they have been required to do during the pandemic. For members, touchscreen and electronic methods are generally preferred over paper-based methods, while paper-based methods or email are preferred for visitors.

THROUGHOUT THE PANDEMIC, CLUBS HAVE HAD TO COLLECT AND STORE CONTACT DETAILS FOR MEMBERS AND VISITORS. DO YOU PLAN TO CONTINUE DOING THIS IF/WHEN IT IS NO LONGER A LEGAL REQUIREMENT?



IF YES, HOW DO YOU PREFER TO COLLECT THESE DETAILS?

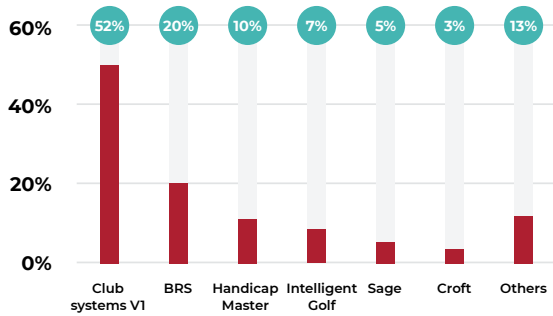


Most clubs (92%) now carry out member surveys – this figure is an increase of 57% on the 2018 survey figure. Relatively few clubs carry out any other type of survey, although the numbers carrying out new member and visitor surveys has increased slightly since 2018, to 14% and 25% respectively. 25% of clubs carry out exit surveys.'

INFORMATION SYSTEMS

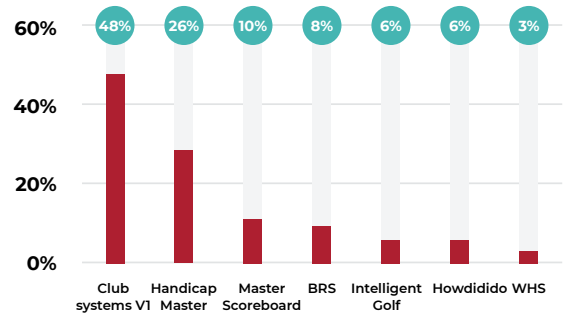
For Club Management, over half of clubs use Club Systems V1. 10% of clubs use more than one system.

CLUB MANAGEMENT SOFTWARE USED

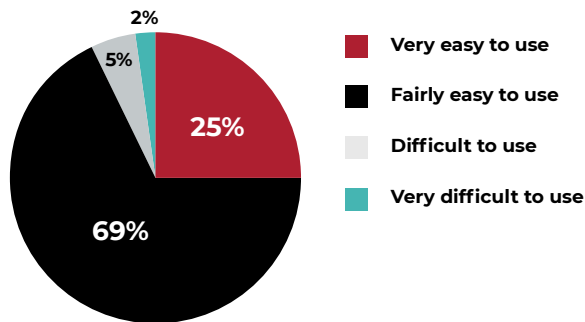


For Club Competition, Club Systems V1 is again the most popular; 8% of clubs use more than one system.

CLUB COMPETITION SOFTWARE USED



HOW EASY HAVE YOU FOUND IT TO USE YOUR WHS CLUBHOUSE SYSTEM?



Over **93%**

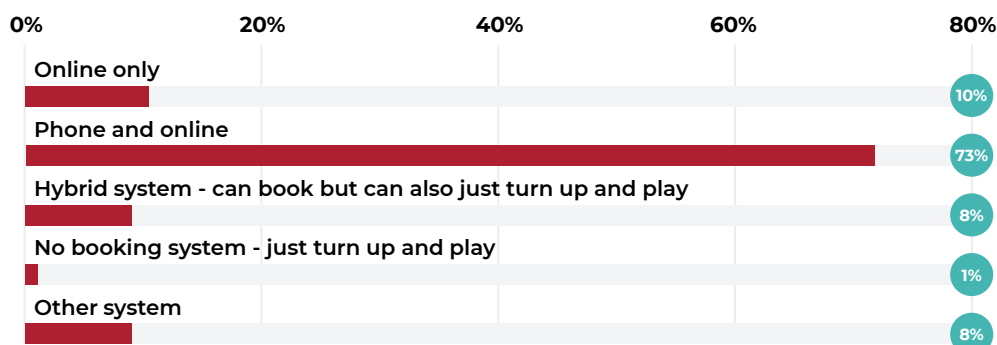
of clubs had found their WHS Clubhouse System 'very easy' or 'fairly easy' to use.

Individual training on the WHS Clubhouse System can be offered to any club at any time - just contact Wales Golf to book in a session!

TEE BOOKING

The number of clubs using an online tee booking system has increased again, with most clubs combining this with phone booking; very few clubs now allow golfers to turn up and play, which may in part be a consequence of COVID regulations.

WHICH FORM OF TEE BOOKING SYSTEM DO YOU USE?

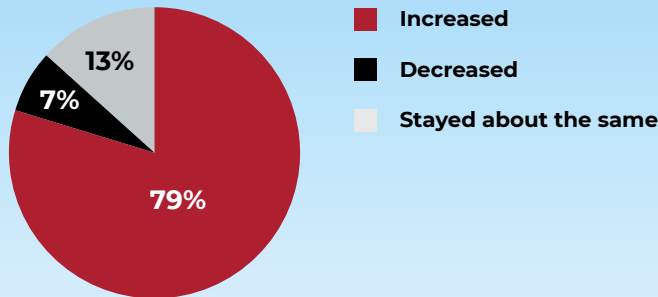


81% of those who had introduced an online system during the pandemic were going to keep it, with a further 15% using it alongside other options.

VISITORS

Almost 80% of clubs had seen an increase in visitor numbers over the last two years, in parallel with the increase in membership.

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



SUMMER GREEN FEES

RANGE	MAXIMUM GREEN FEE	MINIMUM GREEN FEE
Highest	£105	£60
Lowest	£13.50	£10
Average	£35.11	£23.94
Average (2018 survey)	£35.96	£20.52
Average (2015/2016 survey)	£33.91	£21.56

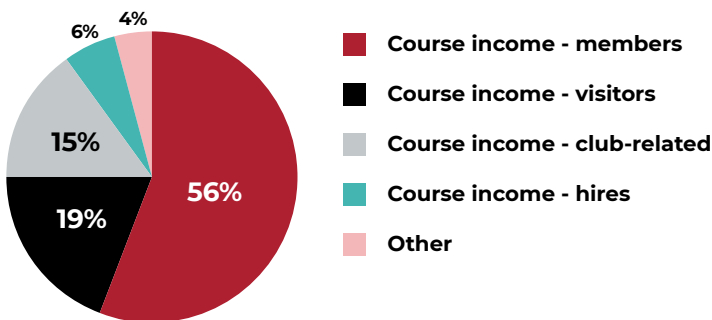
Although these fees are not significantly different to those seen in the last survey, it seems that minimum fees may be increasing slightly with fewer clubs offering very cheap rounds. Golf may have benefited from the downward trend in overall costs of goods and services in UK between 2018 and 2021, but with the cost of living now rising sharply, clubs may face challenges in maintaining visitor numbers.



CLUB INCOME

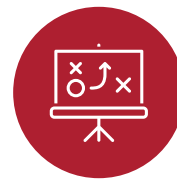
50 clubs were able to give a breakdown of their income sources; the chart shows the average income split. Clubs are deriving a greater percentage of income from the course, and a lesser percentage from club-related clubhouse income, than in 2018 – which could well be due to restrictions imposed on social activity throughout the pandemic. However the split of course income between members and visitors remained steady at around 3:1.

AVERAGE SPLIT OF CLUB INCOME



45%

No club raised more than 45% of its income from club-related clubhouse activities.



62%

of clubs raised some income from clubhouse hires, and 38% were diversifying into other income-generating activities.



52%

of clubs had received between £50,001 and £100,000 in COVID-specific grants/rebates.



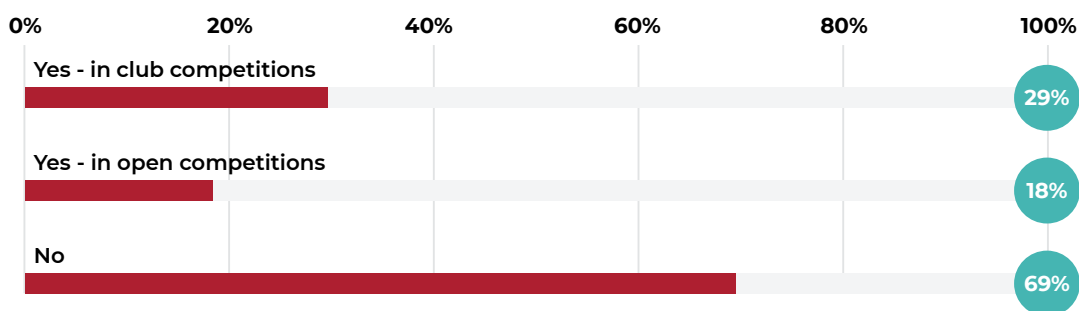
38%

of clubs had received between £10,001 and £50,000 in COVID-specific grants/rebates.

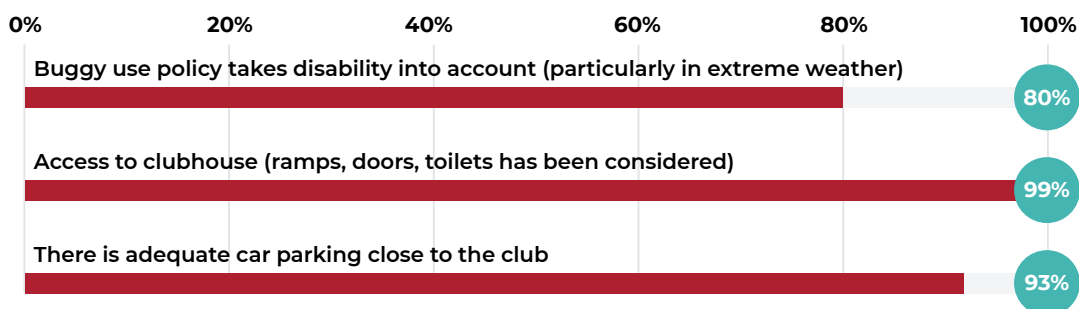
GOLFERS WITH A DISABILITY

75% of responding clubs were aware of the Modified Rules for Golfers with Disabilities. The proportion implementing the Modified Rules in competitions has increased from 25% in 2018 to 31%; they were more frequently implemented in club competitions than in open competitions.

HAVE YOU IMPLEMENTED THE MODIFIED RULES FOR GOLFERS WITH DISABILITIES WITHIN CLUB OR OPEN COMPETITIONS AT YOUR CLUB?



WHAT MEASURES HAVE YOU TAKEN TO ENSURE YOUR CLUB AND COURSE ARE ACCESSIBLE TO GOLFERS/VISITORS WITH A DISABILITY?



Clubs are doing well in catering for golfers/visitors with a disability, with 80% taking all three suggested measures.

The Modified Rules for Golfers with Disabilities have been integrated into the Rules of Golf from 2019 and can be found in the Official Guide to the Rules of Golf. These modified rules only apply if adopted by the committee in charge of a competition, and it is up to each committee whether they adopt any of the modified rules for its competitions.

Wales Golf currently adopts these rules for all of its championships and would encourage clubs to do the same.



SUSTAINABILITY

While it was encouraging to see that 88% of responding clubs were talking about sustainability, only a third of clubs appear to have gone further with a sustainability agenda. Most of those who were engaged in other sustainability practices ticked at least two of the options.

WHEN IT COMES TO SUSTAINABILITY IN YOUR CLUB, ARE YOU:



The GEO Foundation for Sustainable Golf is an international not-for-profit organisation, founded sixteen years ago to help inspire, support and reward credible sustainability action and to strengthen and promote golf's social and environmental value. The organisation remains the only one in the world entirely dedicated to this mission.

In partnership with GEO, Wales Golf was successful in securing funding from the Welsh Government to help develop a sustainability strategy, club grant fund, club accreditation scheme, schools' educational resource, and agronomy project.

Wales Golf Buying Group – save money for your club!



The Wales Golf Buying Group, in partnership with Golf Management Group (GMG) harness the collective purchasing power of clubs to leverage significant discounts on goods and services. The benefits of joining the Buying Group include 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.



EQUALITY AND DIVERSITY

DID YOU KNOW?

In 2021, Wales Golf became the first Welsh sport governing body to achieve the Advanced Level of the Equality Standard for Sport!

See <https://equalityinsport.org/equality-standard-for-sport/how-to-achieve/advanced-level/> to find out more about what this involved!



But there's still a lot to do, particularly in terms of gender equality!

Although female membership is increasing, male membership is increasing at a faster rate, so the proportion of female golfers in Wales decreased from 13% in 2018 to 11% in 2021!

There are 5 national golf associations in which female golfers account for over 30% of the golfing population. Wales Golf is striving to improve the attractiveness of golf to women and girls so that we can get closer to that figure.



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

The average gender split in Club Committees/Boards has not changed since the 2018 survey.

Only one responding club, with a small committee of 4, had equal representation.

In 86% of responding clubs, females either had no representation or were outnumbered by more than 2:1.

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

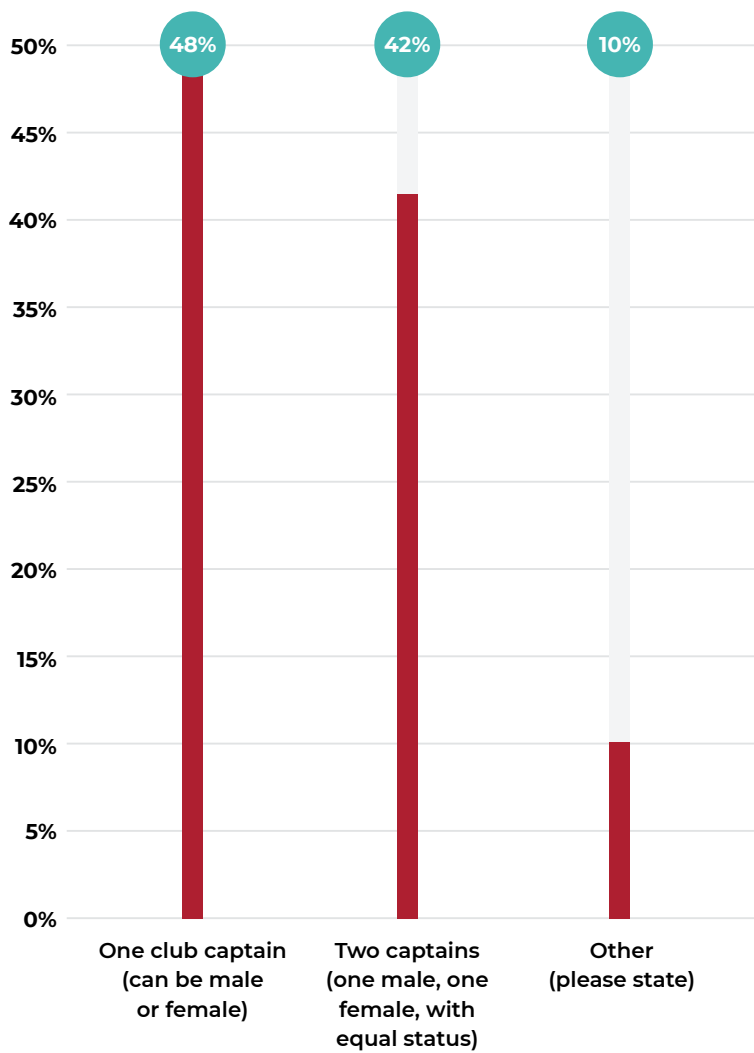
Why not pledge your club's support to the Women in Golf Charter (driven by the R&A) to show your club's commitment to increasing female participation and creating more opportunities for women to work in the industry? Wales Golf also offer a mini equality committee workshop where required.

Wales have led the way in being the first R&A Women in Golf Charter signatory.

Wales Golf are encouraging clubs to move to an ability-based set of tees rather than the traditional 'reds' for ladies, 'yellow and white' for men. Rating all tees for all genders gives both members and visitors the option of what length of course they want to play, based purely on their ability level.

Clubs are also encouraged to run mixed gender competitions to get their membership competing and enjoying their golf together.

HOW MANY CAPTAINS DOES YOUR CLUB HAVE?



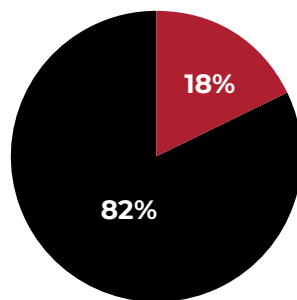
More clubs are now opting for one captain (48% in 2022 compared to 40% in 2018). The most frequent 'other' arrangement is to have a Seniors or Senior Men's Captain as well as Men's and Ladies' Captains.

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.



DOES YOUR CLUB HAVE A WELSH LANGUAGE POLICY?

18% of clubs have a Welsh Language Policy. The majority of these are in West Wales.



■ Yes
■ No

DID YOU KNOW?

The Governance Guide for Golf Clubs was updated in 2019 to version 2.0. You can download a copy of the updated Guide from <https://www.walesgolf.org/club-governance-resource/>

STAFF

The average club provides jobs for 7 full-time staff, 5 part-time staff, one self-employed person and 2 volunteers. Staffing levels are similar to the 2018 survey although volunteer numbers have decreased slightly.



4

Greenkeepers



1

Cleaner



1

PGA Professional



1

Other coaching staff



4

Bar and Catering



3

Management
and Admin



Over a third of Secretaries and Managers (39%) were participating in a recognised education pathway.

COMMON FRANCHISED/CONTRACTED AREAS

More clubs are franchising/contracting out their catering – for many clubs, improving their catering facilities was a key strategy to attract more members. Fewer clubs than in 2018 are contracting out their cleaning.



36%
Catering



18%
Bar



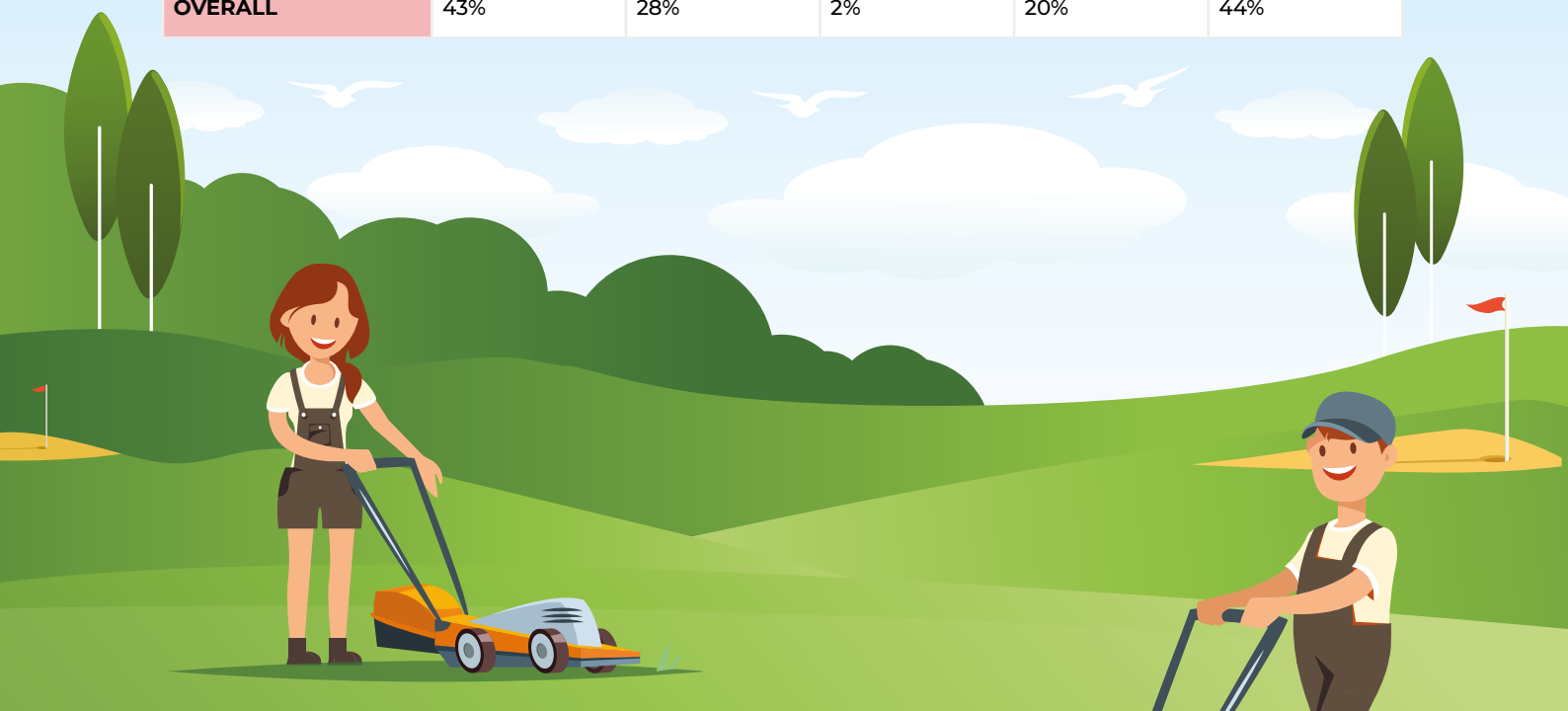
6%
Cleaning

GREENKEEPERS

A higher percentage of Greenkeepers (20%) have no qualifications than when we surveyed in 2018 (14%). This is partially due to a reduction in the number of greenkeepers, with many leaving the industry. Also, the greenkeepers replacing them are younger and unqualified, as evidenced below. There has also been an increase in the use of agency staff and seasonal staff.

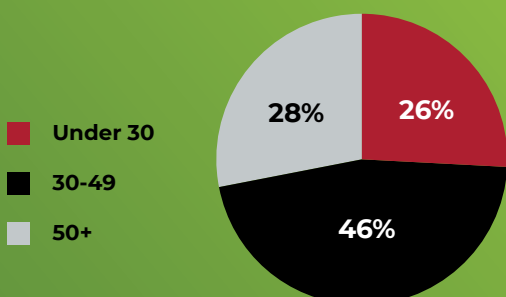
Greenkeepers in private members clubs were more likely to be qualified and to hold BIGGA membership.

Percentage of Greenkeepers holding:					
Type of club	Sports Turf Management Level 2	Sports Turf Management Level 3	Other qualification	No qualifications	BIGGA membership
Private members	45%	29%	2%	18%	48%
Proprietary/other	34%	22%	4%	30%	26%
OVERALL	43%	28%	2%	20%	44%



GREENKEEPER AGES

The majority of Greenkeepers were in the age range 30-49, while there has been a rise in the proportion of younger Greenkeepers from 19% in 2018 to 26% in 2022.

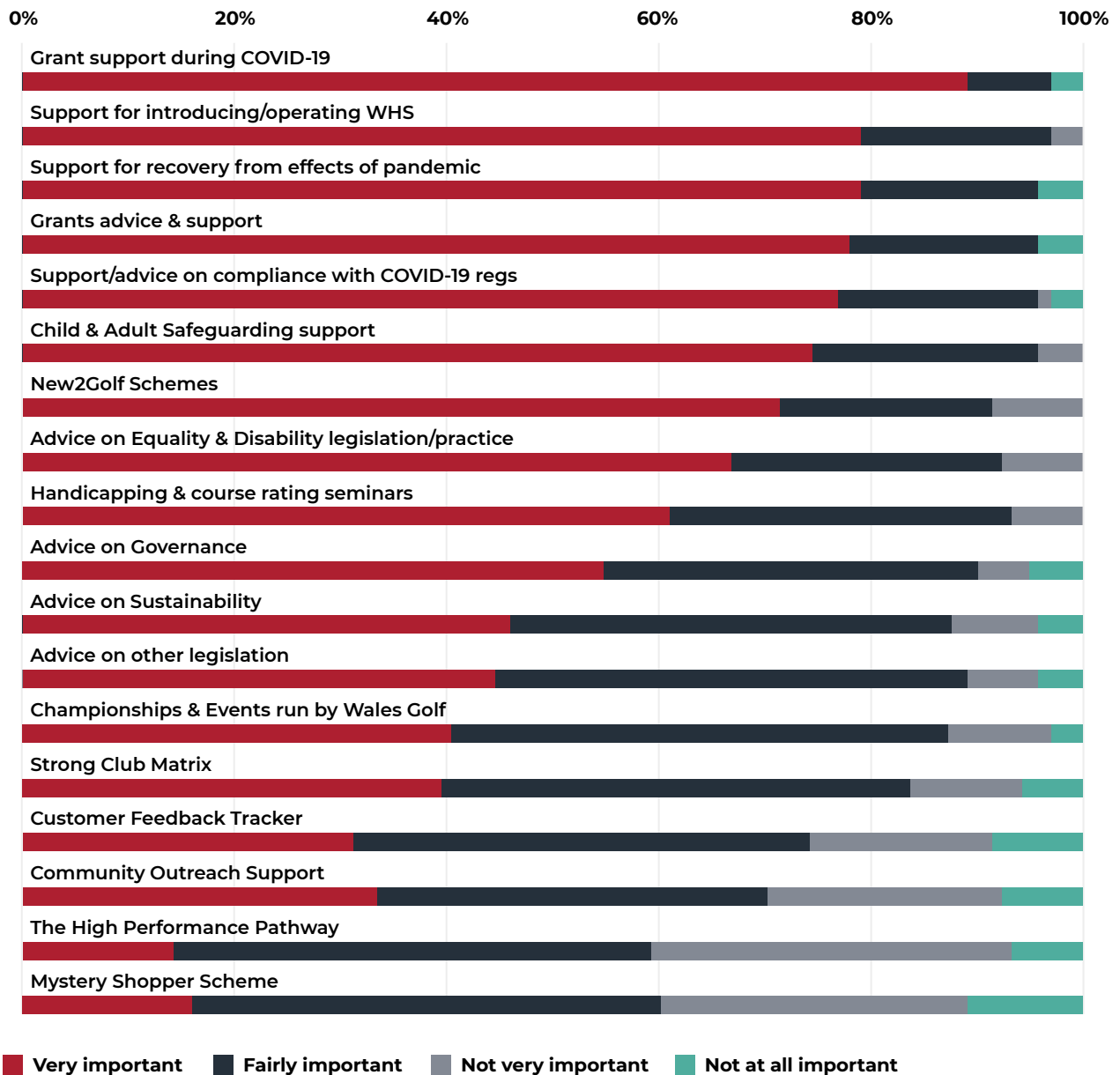


Only 8 responding clubs had taken on an apprentice greenkeeper. If your club would like to know more about greenkeeper apprenticeships, please contact Wales Golf via your regional development officer.

SUPPORT FROM WALES GOLF

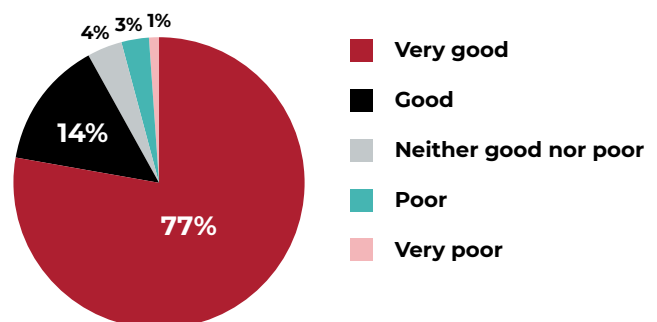
Clubs generally valued the activities, resources and support offered by Wales Golf, particularly support during COVID-19 and for the introduction of the World Handicapping System, and general grants advice.

HOW IMPORTANT IS IT TO YOUR CLUB THAT WALES GOLF OFFERS (OR HAS OFFERED) THE FOLLOWING ACTIVITIES/RESOURCES/SUPPORT?



HOW WOULD YOU RATE YOUR EXPERIENCES OF DEALING WITH WALES GOLF?

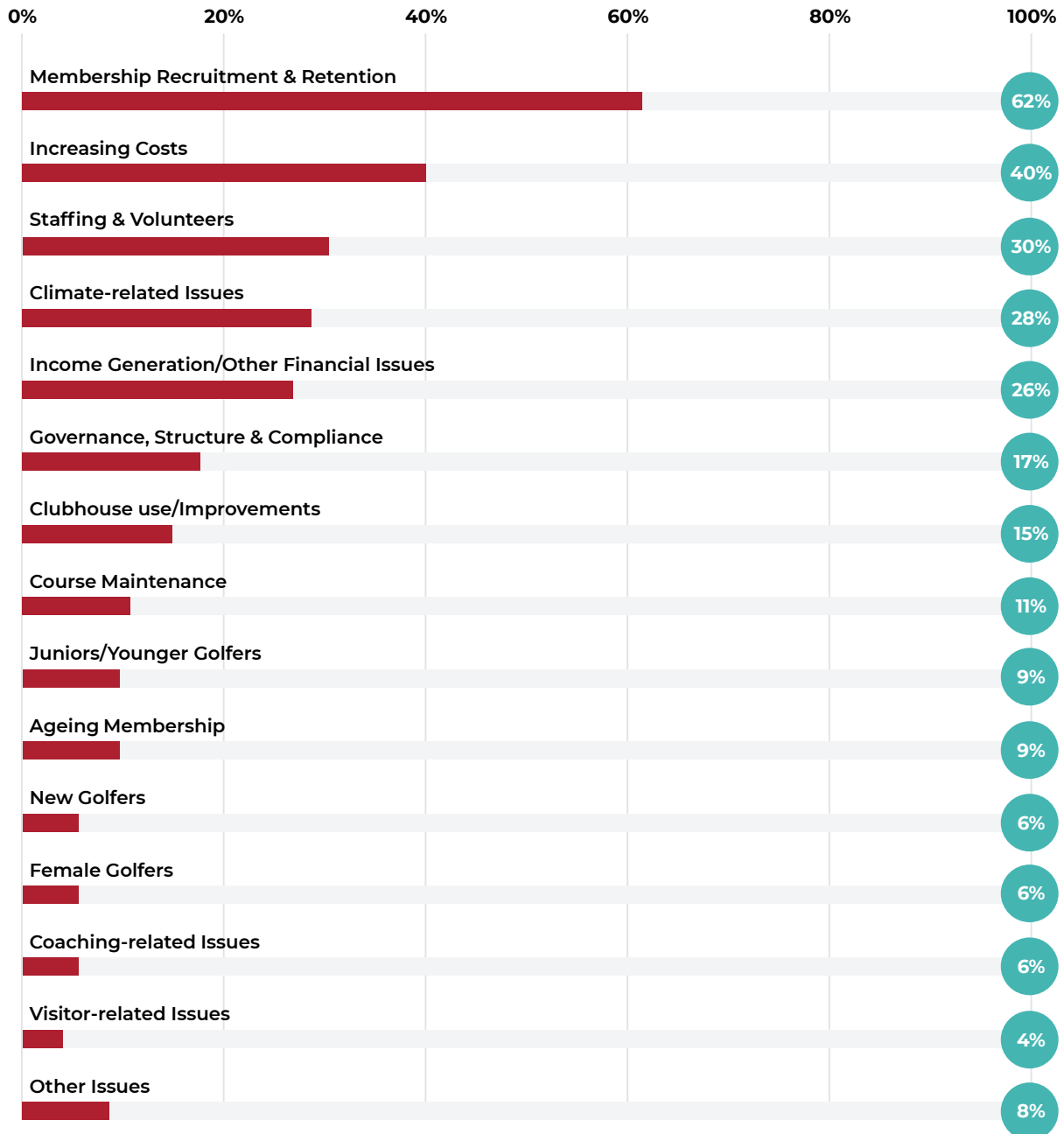
Over 90% of responding clubs rated their experience of dealing with Wales Golf as 'very good' or 'good'.



CLUB CONCERNS

Clubs were asked to state their 3 main concerns: membership recruitment and retention was the overriding issue, mentioned specifically by 62% of clubs, with an additional 15% of clubs referring to associated membership issues such as an ageing membership or the need to recruit/develop younger golfers or female golfers.

CLUB CONCERNS



Financial issues came a close second in terms of clubs' concerns, with 40% of clubs mentioning increasing costs, particularly of fuel/energy, and an additional 19% referring to income generation and other financial issues.

Climate-related issues and sustainability have become a greater concern than in any previous survey, with course flooding/drainage the most frequently mentioned.



CLUB BUSINESS SUPPORT SCHEME

PROCESS OF SUPPORT



NEEDS ASSESSMENT AND CLUB SUPPORT TOOLS

Club Healthcheck (Via Strong Club Matrix)
Mystery Shopper Scheme

Customer Satisfaction Survey Tool
Cost Cutting Free Audit by GMG

CLUB SUPPORT - NEEDS BASED

CONSULTANCY

WALES GOLF PART FUNDED

(Upto 50% - terms apply)

- Governance
- Marketing

CLUB FUNDED PACKAGES

WALES GOLF PREFERRED SUPPLIERS DISCOUNTED RATES

- Health & Safety + Human Resources
- Governance
- Marketing
- Social Media
- Data Capture
- Customer Service
- Food & Beverage

DEVELOPMENT OFFICER SUPPORT

- Governance
- Marketing
- Customer Service
- Visitors
- Participation
- Membership Recruitment and Retention
- Course Management
- Handicap and Course Rating
- Plus More eg. Grant Applications

CLUB EDUCATION

a) WALES GOLF FUNDED NEEDS BASED WORKSHOPS

- Roadshows
- Planning for Future
- Role of Board etc.

b) WALES GOLF PARTNERS WORKSHOPS (CLUB/GRANT FUNDED)

- CMAE - Management development programme
- GCMA - Management programme
- PGA, Golf Foundation, BIGGA WSA, NGCAA etc.

c) WALES GOLF COMMITTEE WORKSHOPS

- Business Planning, Marketing Social Media etc.

ADDITIONAL - SUPPORTING RESOURCES

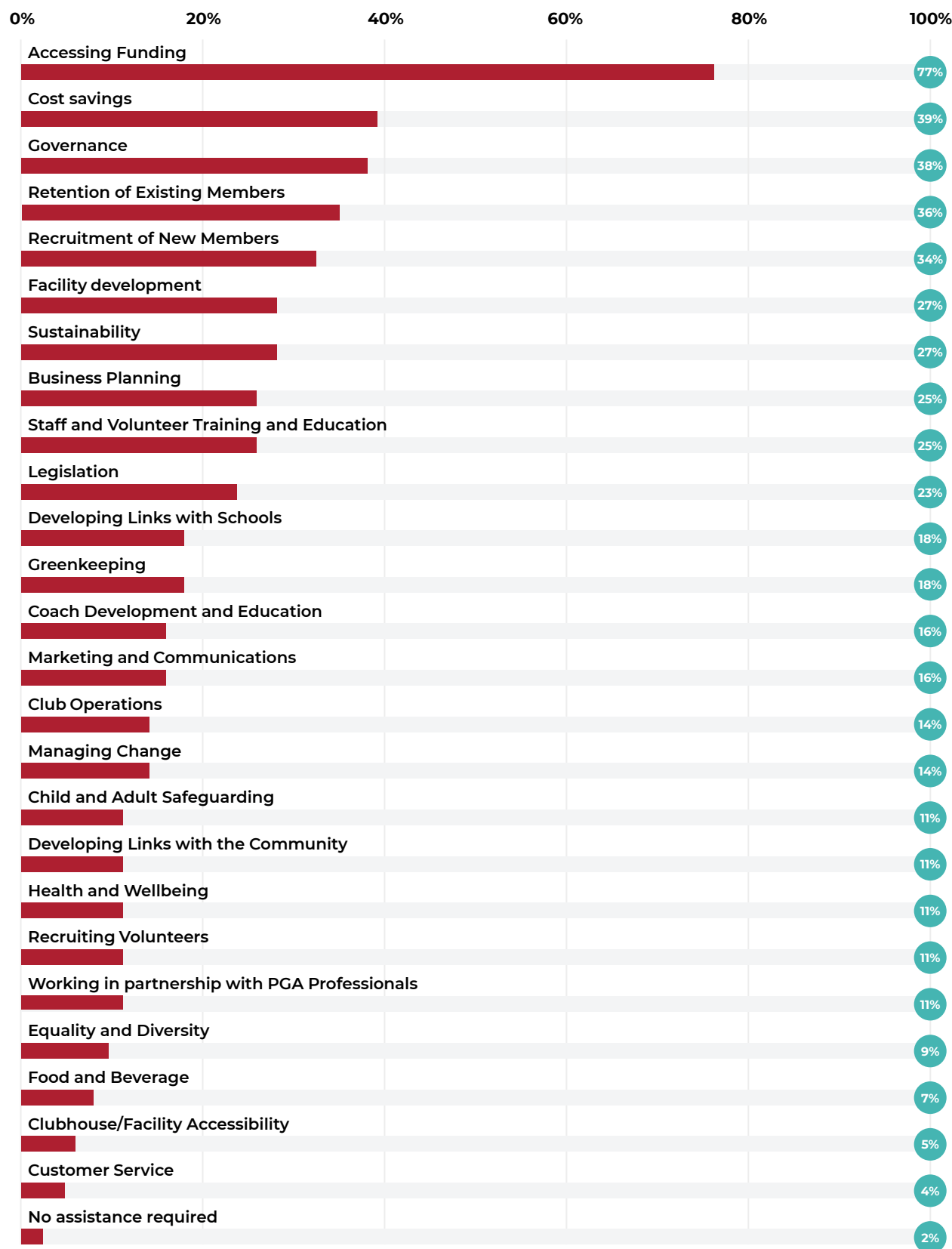
Club Governance Resource
Role Descriptors
Terms of Reference
Strategic Plans etc.

Marketing Templates
Junior Golf Guide
Securing The Future Tool Kit
Template Policies

Green Keeper Training Grants
NGCAA Documents
XACT Templates
Plus More

Clubs sought assistance most from Wales Golf in relation to financial issues, followed by membership and governance.

WHERE CLUBS WOULD MOST LIKE ASSISTANCE FROM WALES GOLF



Over 80% of clubs were aware of the current Wales Golf Strategic Plan; 85% would like to be involved in development of the next Strategic Plan (2023-2027).

Thank you to all the clubs who made suggestions as to what should be included in our future strategy; if any other clubs wish to contribute their ideas, please contact Wales Golf via your regional development officer.

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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The Wales Golf Club Survey 2022 was completed online by 85 affiliated clubs. Thank you to all these clubs for the time and effort put into completing the survey, and for the valuable information provided.

