



ST. HELENS

**INDOOR AND BUILT SPORTS FACILITIES NEEDS
ASSESSMENT**

GOLF COURSE ADDENDUM

JUNE 2016

Integrity, Innovation, Inspiration

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CONTENTS

Introduction	2
Strategy context	3
Supply of golf courses	5
Demand for golf	13
Supply and demand analysis	18
Summary	21

APPENDICES

Appendix 1: Consultee List	24
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INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

ADDENDUM: GOLF

1 Introduction

This addendum covers the supply and demand analysis for golf in St. Helens with the methodology adhering to Sport England's Needs Assessment Opportunity Guide (ANOG). It provides the detail as to what exists in the Borough, its condition, distribution and overall quality. It also considers demand for facilities based on population distribution, planned growth and also takes account of other factors such as health and economic deprivation (which can be found in the St. Helens Indoor and Built Sports Facility Needs Assessment Report June 2016). The report makes reference to all golf courses in St. Helens including private members, commercial and the one municipal course (Sherdley Park Golf Course) which St. Helens Council has ownership, interest and a financial commitment to. Consequently, more information has been made available regarding Sherdley Park than other golf courses within the ambit of this study.

Where possible, assessments have been undertaken in the presence of facility staff. Even if only partially achievable it is of considerable value. It not only enables access to be gained to all aspects of facilities, but also allows more detailed *in-situ* discussion of issues such as customer perspectives, quality, maintenance etc. This is essential as the audit is a 'snapshot' visit in time and there is a risk, dependent upon the time of day/year, that it may not wholly reflect general user experience.

Through the audit and via informal interviews with golf professionals and club secretaries, we build a 'relevance' and 'condition' register which describes (e.g.):

- ◀ Facility and scale.
- ◀ Usage/local market.
- ◀ Ownership, management and access arrangements (plus, where available, facility owner aspirations).
- ◀ Management, programming, catchments, user groups, gaps.
- ◀ Location (urban/rural), access and accessibility.
- ◀ Condition, maintenance, existing improvement plans, facility 'investment status' (lifespan in the short, medium and long term).
- ◀ Community value (now and in the future).
- ◀ Existing/ planned adjacent facilities.

This enables us to identify the potential of each facility and will inform roles to be developed for each; or, as applicable, provide justification for rationalisation.

Catchment areas

It is recognised that catchment areas vary from person to person, day to day, hour to hour. KKP's experience of working with leisure facilities and having completed such assessments for similar local authorities has enabled the identification of catchment areas for golf courses as 20 minute drive time for residents, which is in line with other specialist facilities. It is noted that some golf courses attract golfers from further afield, especially with the change in usage patterns being experienced by golf clubs generally. Consultation with club secretaries and golf professionals indicates that mapping of 20 minute drive time catchments indicates will encapsulate over 90% of the current membership. Further mapping work has been undertaken including 10 minute drive times which takes account of more local needs.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

Catchment is therefore predicated on conservative estimates. We have developed this study to provide a detailed:

- ◀ Audit of all golf facilities by type.
- ◀ Assessment of demand for golf in St. Helens based on population projections through to 2027, 2032 and 2037 as per ONS projections.
- ◀ Supply and demand analysis to determine potential surpluses and deficiencies of golf facilities in terms of quantity, quality and accessibility.
- ◀ Identification of the main challenges from the assessment and options on how future needs should be addressed.

2. Strategy context

The key strategic themes emanating from the main strategies as summarised in the Needs Assessment Report 2015 are considered to be:

- ◀ Improving the quality of life by enabling people to be more active, more often.
- ◀ The need for high quality sports facilities that are accessible, provide key services and help to improve the lives of people living in the Borough.
- ◀ Facilities located in the right location to be accessible to the whole community.
- ◀ Facilities and programmes of activity which will contribute to reducing health inequalities, reducing ill health and creating a healthy St. Helens. This is in the context of an ageing population within the Borough and the need for appropriate activities for the local population.
- ◀ The provision of local sports facilities at a neighbourhood level.
- ◀ The development and refurbishment of new attractive facilities for local people.

The golf club market in England

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

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

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

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

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

In addition to the key themes identified above, England Golf (EG) has, along with other national governing bodies of sport (NGBs) developed its Whole Sport Plan 2014-2017. Its vision is “*England Golf at the heart of a network of partners, empowering and supporting a thriving community of golf facilities and golfers and widely recognised as being a forward thinking and successful organisation*”.

Its ambitions for 2017 are:

- ◀ To increase the number of people who play golf at least once a week from the baseline of 750,000 in 2014 to 910,000* by March 2017.
- ◀ To reverse the decline in club membership (which has been occurring annually since 2005) and stabilise club membership at the July 2014 level of 675,000 members.
- ◀ To strengthen the talent development pathway from club to national level, leading to even more international success for English players.
- ◀ To improve communications, governance and partnerships at all levels within EG.

The Golf Club Membership Questionnaire 2014 (England Golf) indicates the following:

- ◀ Golf club memberships are in a precarious position, with a combination of fewer players taking up the game and a greater number of golfers reverting to independent, unaffiliated, play.
- ◀ This appears to be in response to constrictions in financial circumstances and to the amount of time available for recreation, leading to a general decline in numbers participating across all sections of men, women and juniors.
- ◀ Those clubs which are surviving better (attracting visitors and retaining membership) appear to be the ones which have a programme of continual investment in facilities, particularly in weatherproofing courses, making golf possible all year round.
- ◀ There is also a recognition that whilst the main demographic playing is older men (and these golfers must be accommodated and enticed by clubs), it is essential that Secretaries/Managers be careful to ensure that they are also offering competitive packages and appropriate offers for younger men, women and juniors.
- ◀ Offering members the chance to play other courses through reciprocal memberships has been influential for a number of clubs but also has the potential of enticing members away as they compare facilities and the social element of the game.
- ◀ Consultation with members indicates that value for money is an important part of the golfing offer; as are flexible memberships, or at the very least, flexibility with payment as a key method of retaining members who could otherwise drift from the club as a result of playing less frequently.

Potential impact on golf facilities

As noted in the main body of the Needs Assessment Report, St. Helens has a relatively stable population which is expected to grow by 5.6% by 2027 to 185,954, 6.7% by 2032 to 187,893 and 7.5% by 2037 to 189,409^[1]. Fluctuations are seen within this time frame, for example the number of 16-24 year olds falls by 15.7% between 2012 and 2023 and remains lower throughout the period.

There are pockets of significant deprivation in the Borough and a range of economic and poor health issues. With over one quarter of the population projected to be over 65 in 2037,

^[1] Source: ONS 2012 Based Projections

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

it will be necessary to ensure that golf and golf clubs are appealing, accessible, have the requisite amenities and programming and are of sufficient quality to meet the needs for this ageing population. This needs to be considered by all golf providers as they compete to retain and increase golfers in St. Helens within the face of a declining market.

3. Supply

Quantity

The assessment identifies eight, 18 hole courses within St. Helens Borough. One of which is commercial, one municipal with the six remaining courses being private members clubs. In addition, there are two courses (Haydock Park and Alder Root golf courses) which are situated on the border of the Borough (with Wigan and Warrington respectively). There are a further 12 courses within a 20 minute drive time of St. Helens (see Figure 1 and Table 1). The Borough is also serviced by two driving ranges - Sherdley Park, which has 12 bays and The North West National Driving Range, which has 27 bays. This assessment considers all types of clubs as they are increasingly reaching out to a wider demographic through of flexible membership types and fees and increasing openness to new members.

Figure 1: 20 minute drive time of Sherdley Park with neighbouring golf clubs

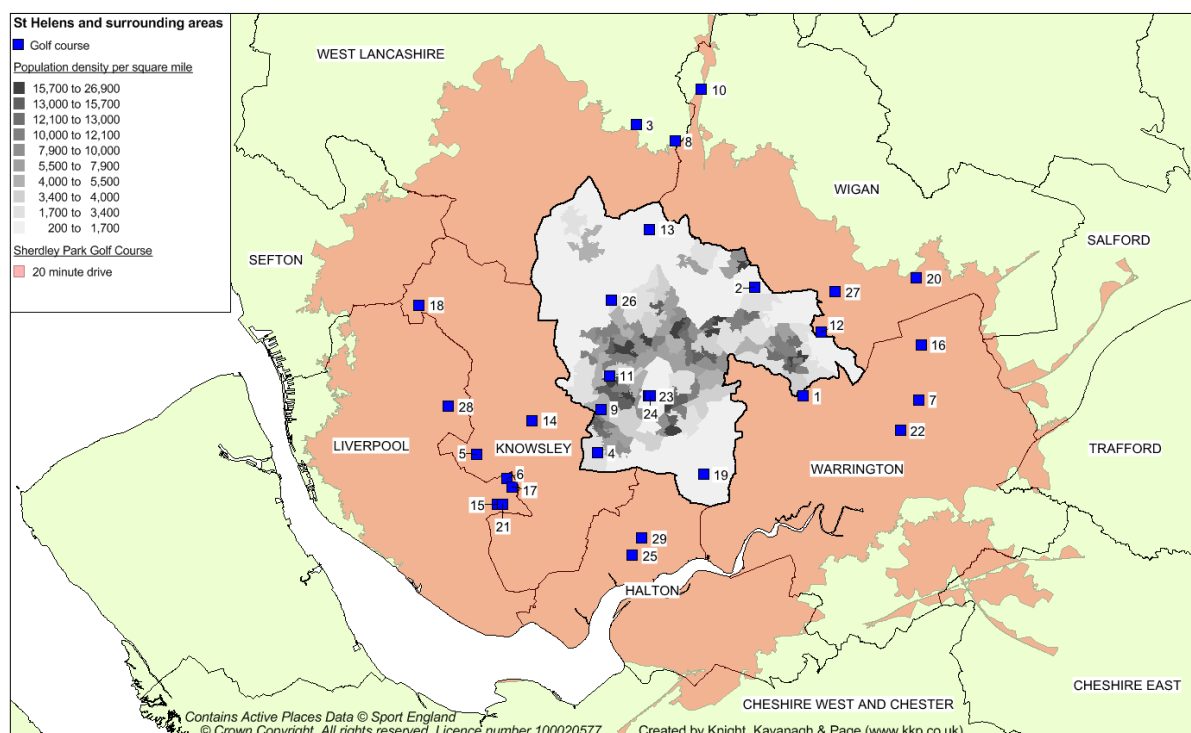


Table 1: Types of golf facilities in St. Helens and surrounding authorities

Map ID	Course	Driving Range (bays)	Standard 9 hole	Standard 18 hole	Local Authority	Membership type
1	Alder Root Golf Club		10		Warrington	Members
2	Ashton-In-Makerfield Golf Club			18	St. Helens	Members

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Map ID	Course	Driving Range (bays)	Standard 9 hole	Standard 18 hole	Local Authority	Membership type
3	Beacon Park Golf Centre	22		18	West Lancashire	Community Leisure
4	Blundells Hill Golf Club			18	St. Helens	Members
5	Bowring Park Golf Course			18	Knowsley	Municipal
6	Childwall Golf Club			18	Liverpool	Members
7	Croft Golf Centre	20			Warrington	Commercial
8	Dean Wood Golf Club			18	West Lancashire	Members
9	Eccleston Park Golf Club			18	St. Helens	Members
10	Gathurst Golf Club Ltd			18	Wigan	Members
11	Grange Park Golf Club			18	St. Helens	Members
12	Haydock Park Golf Club			18	Wigan	Members
13	Houghwood Hall Golf Club			18	St. Helens	Commercial
14	Huyton and Prescott Golf Club Ltd			18	Knowsley	Members
15	Lee Park Golf Club Ltd			18	Liverpool	Members
16	Leigh Golf Club			18	Warrington	Members
17	Liverpool Golf Centre and Driving Range	26			Liverpool	Commercial
18	Liverpool Municipal North Golf Course (Kirkby)			18	Liverpool	Municipal
19	Mersey Valley Golf Club & Country Club			18	St. Helens	Members
20	Pennington Golf Course		9		Wigan	Members
21	Play The World		9		Liverpool	Commercial
22	Poulton Park Golf Club		9		Warrington	Members
23	Sherdley Park Golf Course			18	St. Helens	Municipal
24	Sherdley Park Golf Driving Range	12			St. Helens	Municipal
25	St Michaels Jubilee Golf Course			18	Halton	
26	The North West National Golf and Country Club	28	9	18	St. Helens	Members
27	The Sycamores Golf Centre	20			Wigan	Commercial
28	West Derby Golf Club			18	Liverpool	Members
29	Widnes Golf Club			18	Halton	Members

Contains Active Places Data © Sport England'

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Table 2: Number of courses available in comparison with St. Helens 'nearest statistical neighbours'.

Location	Adult population	18 Holes	9 Holes	Municipals	Adult Population per course	Adult Population per hole
Rotherham	213,070	8	1	0	23,674	1,393
Barnsley	196,802	5	1	2	32,800	1,988
Wigan	264,555	4	2	2	44,093	2,940
Darlington	86,557	4	1	0	17,311	1,069

Table 3: Number of courses available in other Merseyside local authority areas.

Location	Adult population ¹	18 Holes	9 Holes	Municipals	Population per course	Population per hole
Sefton	229,815	10	3	1	17,678	1,110
Wirral	265,067	12	1	3	20,389	1,178
Liverpool	398,265	5	2	1	56,895	3,688
Knowsley	119,884	3	0	1	39,961	2,220
St. Helens	147,154	8	1	1	16,350	962

Tables 2 and 3 show that St. Helens has fewer residents per golf course and per hole in comparison with its nearest statistical neighbours and other local authorities on Merseyside indicating a relatively high level of availability (an equivalent of 1 course per 16,350 adults or 1 hole per 962 adults).

In the event of an 18 hole course closing due to the current pressures facing clubs (as discussed in this report), the St. Helens population would be served on the basis of 1 course per 18,394 adults or 1 hole per 1,090 adults.

Comparator local authorities to St. Helens (as detailed in Table 2) are served in the region of 1 course per 17,311 to 44,093 adults or 1 hole per 1,069 to 2,940 adults.

Quality

Site assessments

As part of the study KKP visited Sherdley Park Golf Course, Houghwood Hall, Huyton and Prescott and Ashton in Makerfield golf clubs as well as the golf ranges at Sherdley Park and the Sycamores Golf Centre. Contact was made with all golf clubs in St. Helens but access and consultation was denied for a number of reasons with commercial sensitivity cited as the main concern. A non-technical visual inspection of the ancillary facilities at all available sites was completed. In addition, KKP undertook consultation with club members, the club professional, club secretary and/or owners on site.






¹ Adult population consists of ages 15+

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM






There are no official national or county golf course rankings. Generally the better the quality, the higher the joining / membership and green fees are likely to be. Some courses gain status through hosting county, national and international golf events and some tend to feature in ranking articles put together by golf magazines. Better quality courses tend to have higher quality and more extensive ancillary practice, catering and changing provision. 18 hole provision generally carries a higher status than 9 hole provision.

It is to be expected that all clubs, regardless of management arrangements work hard at maintaining high quality facilities in order to satisfy and retain club members. The standard of courses, at all sites visited, was found to be good.

Table 4: Brief summary of golf courses within 20 minutes' drive time of St. Helens

Name of course	Summary
<p>Ashton in Makerfield (St. Helens)</p> 	<ul style="list-style-type: none"> • Private members club. • 18 hole golf course in excellent condition. • Practice area with putting and chipping greens. • Investment in ancillary facilities is ongoing. • Considers its nearest competitors to be Houghwood Hall and Haydock Park.
<p>Alder Root Golf Club (Warrington)</p> 	<ul style="list-style-type: none"> • Private members club • 10 holes with 18 tees • Putting green, practice ground and 2 bay driving range
<p>Blundells Hill Golf Club (St. Helens)</p> 	<ul style="list-style-type: none"> • Private members club • 18 hole course • Opened in 1994
<p>Eccleston Park Golf Club (St. Helens)</p> 	<ul style="list-style-type: none"> • Commercially operated club • 18 hole course • Constrained in developing its practice facilities as it is surrounded by housing • On site pro shop
<p>Grange Park Golf Club (St. Helens)</p> 	<ul style="list-style-type: none"> • Private members club • 18 hole course • Course is 6,496 yards • Has an onsite Pro Shop • Opened in 1891

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Name of course	Summary
<p>Houghwood Hall (St. Helens)</p> 	<ul style="list-style-type: none"> • Commercial golf club with an on-site public restaurant, which is open Wednesdays to Sundays. • 18 hole course • Built in 1991 this is a high quality facility whose main competitors are considered to be Formby Hall, Grange Park and Ashton in Makerfield. • Greens are open all year round due to their composition (which is the same as Sherdley Park). • The management understands the need for continued investment
<p>Huyton and Prescot (Knowsley)</p> 	<ul style="list-style-type: none"> • Private members club. • 18 hole golf course in excellent condition. • Practice area with putting green and chipping green. • The club understands the need for continued investment in facilities and has currently improved its drainage and is undergoing a new programme for its greens. • The ancillary facilities are excellent.
<p>Mersey Valley Golf and Country Club (St. Helens)</p> 	<ul style="list-style-type: none"> • Private Members Club. • 18 hole golf course. • Has a function room in the club house.
<p>Sherdley Park (St. Helens)</p> 	<ul style="list-style-type: none"> • Municipal course • 18 hole golf course • Generally in good condition (Agronomy report 2015) • Poor changing conditions in comparison with private members and commercial clubs. • Available for use all year round (frost notwithstanding) • Several clubs based at the course
<p>The North West National (St. Helens)</p> 	<ul style="list-style-type: none"> • 18 hole golf course open all year. • Well laid out and picturesque. • There is also a 9 hole golf course open all year and a 27 bay driving range

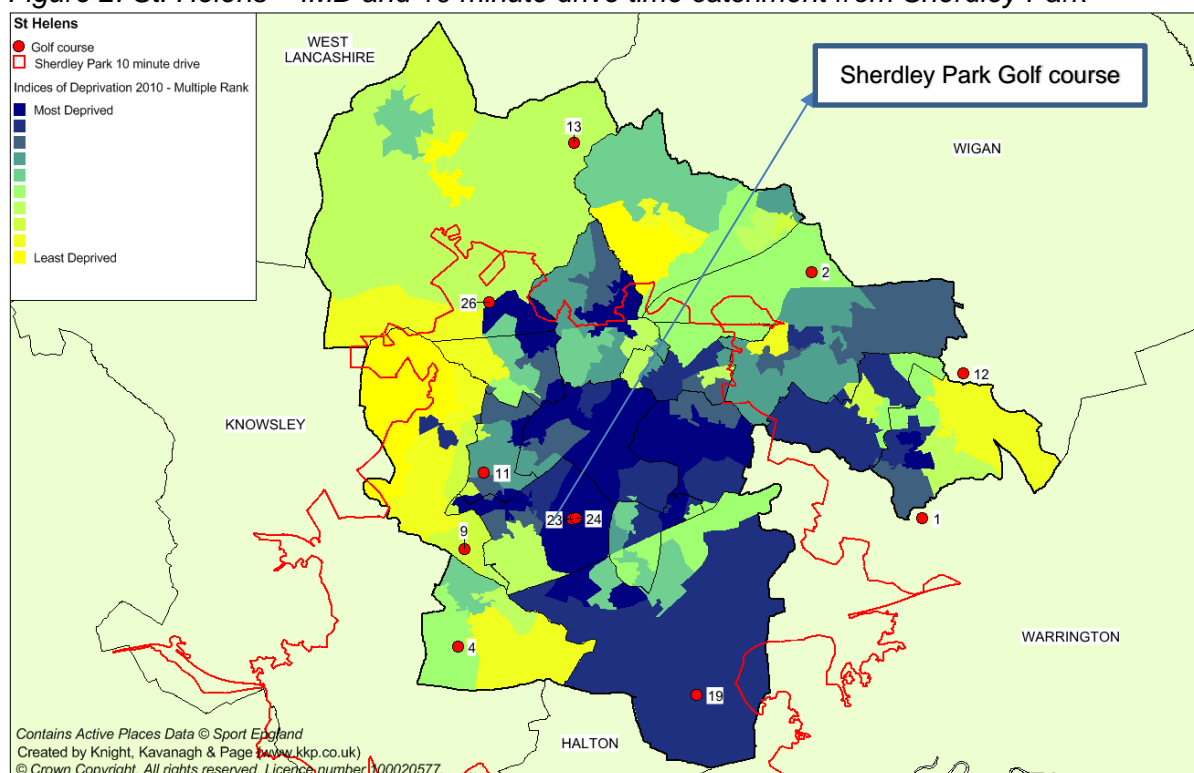
INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

Accessibility

All of St. Helens residents have access to a golf course within 20 minute drive time, as identified in Figure 1. It is estimated that 25.7% of the total population of St. Helens does not have access to a car; which is low compared to the rest of Merseyside but above the national average. Further mapping (see Figure 2) has been undertaken to assess the accessibility of Sherdley Park (as the only municipal course in St. Helens) to residents within a 10 minute drive time. (There is no Sport England guidance as to the importance of municipal courses to the accessibility of golf).

Figure 2: St. Helens – IMD and 10 minute drive time catchment from Sherdley Park



Map ID	Course	Local Authority	Membership type
2	Ashton-In-Makerfield Golf Club	St. Helens	Members
4	Blundells Hill Golf Club	St. Helens	Members
9	Eccleston Park Golf Club	St. Helens	Members
11	Grange Park Golf Club	St. Helens	Members
13	Houghwood Hall Golf Club	St. Helens	Commercial
19	Mersey Valley Golf Club & Country Club	St. Helens	Members
23	Sherdley Park Golf Course	St. Helens	Municipal
24	Sherdley Park Golf Driving Range	St. Helens	Municipal
26	The North West National Golf and Country Club	St. Helens	Members

Contains Active Places Data © Sport England

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Table 5: IMD 2010 populations in St. Helens within a 10 minute drive time catchments from Sherdley Park

Indices of Multiple Deprivation 2010 10% bands	St. Helens			Sherdley Park 10 minute drive		
	Population mid-2010	% Population	Cumulative %	Population mid-2010	% Population	Cumulative %
00 - 10%	33,851	19.1%	19.1%	29,463	25.2%	25.2%
10 - 20%	29,542	16.7%	35.7%	16,949	14.5%	39.6%
20 - 30%	19,524	11.0%	46.7%	13,799	11.8%	51.4%
30 - 40%	17,497	9.9%	56.6%	9,991	8.5%	60.0%
40 - 50%	16,226	9.1%	65.8%	11,610	9.9%	69.9%
50 - 60%	12,990	7.3%	73.1%	8,299	7.1%	77.0%
60 - 70%	17,658	10.0%	83.0%	10,648	9.1%	86.1%
70 - 80%	7,712	4.3%	87.4%	2,856	2.4%	88.5%
80 - 90%	17,061	9.6%	97.0%	10,787	9.2%	97.7%
90 - 100%	5,302	3.0%	100.0%	2,670	2.3%	100.0%
Total	177,363	100.0%		117,072	100.0%	

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Figure 3: St. Helens – IMD with % of population within an 10 minute drive time catchment from Sherdley Park

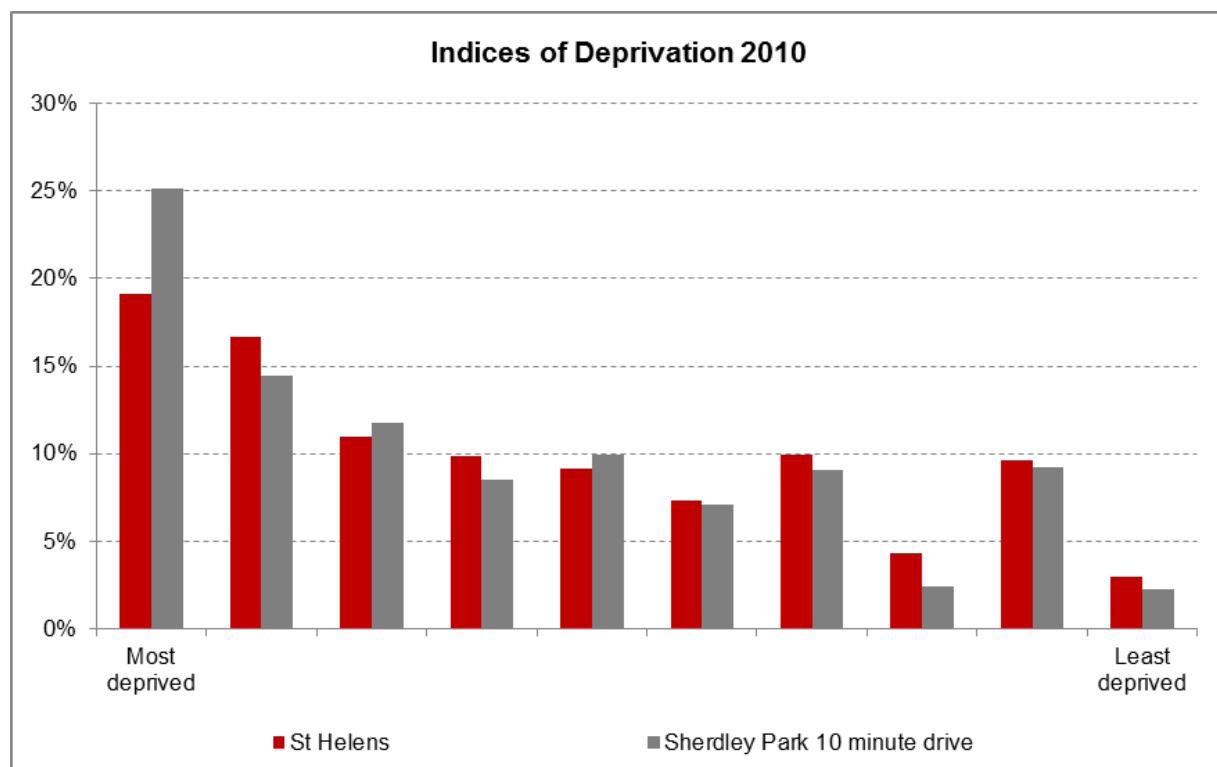


Table 5 and Figure 3 indicate that two thirds of residents (circa 66%) live within 10 minute drive time of Sherdley Park. Of that, nearly 40% live within the most deprived areas using the 20% percentile as identified by IMD.

Availability

A key issue for the wider St. Helens population is whether golf courses are considered available for the general population at a price which is accessible to the majority of residents. The general downturn in numbers of golfers playing has resulted in many clubs offering a whole variety of different packages including pay and play opportunities with costs varying considerably at clubs across the Borough. The situation is further complicated as pricing strategies of clubs become more flexible with many clubs currently offering five day memberships, six day memberships, concessions to specific market segments and a flexible approach to golf societies and visitors.

This trend is increasing the opportunities for nomadic golfers. Costs vary from as little as £9.00 per round as a guest of a member at Alder Root Golf Club (Warrington) to over £1,000 membership at Blundells Hill Golf Club (St. Helens). Most clubs offer much reduced rates for junior membership (which can be as little as £40 per annum).

This is having the effect of further squeezing the market. Consultation suggests that the increase in nomadic golfers is leading to a reduction in the actual number of club members and that this phenomenon is being felt across many golf clubs. This is leading to:

- ◀ A reduction in regular income levels for many golf clubs.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

- ◀ More clubs are open to market fluctuations
- ◀ The impact of the weather is greater as more reliance is placed on nomadic golfers rather than club members.

Capacity

Based on the assumption that an 18 hole golf course can support 550 adult members and a 9 hole golf course can support 250 adult members, the current supply of golf courses in St. Helens has the capacity to accommodate 4,650 adult members (see below).

Table 6: Course types and capacity within St. Helens

Course type	Maximum no. of members	No. of courses in St. Helens	Golf club membership capacity in St. Helens
Eighteen Holes	550	8	4,400
Nine Holes	250	1	250
Total	-	9	4,650

Consultation suggests that all but one of the courses have capacity to increase membership and Blundells Hill Golf Club is the only club with a waiting list and a joining fee. Further, only one course indicated that it had increased its membership in the past year (and that was as a direct result of targeted marketing for a specific age group). This increase was a direct result of attracting people who already play golf and was not necessarily about increasing new players to the game *per se*.

Driving ranges

St. Helens has two standalone driving ranges within the Borough (Sherdley Park and the National Golf Centre with Sycamores Golf Centre being located just outside the local authority border). Sherdley Park has 12 bays whilst National Golf Centre has 27. Many golf clubs also have their own practice facilities which will affect demand for driving ranges.

Local consultation indicates that people are willing to travel approximately up to five miles to use driving ranges. There has been a gradual decline in use at the centres over the past 10 years or so; however, 2014 has seen numbers increasing marginally. Usage is affected by a number of factors including, for example, the weather and the incidence of major sporting events (as people tend to stay away when major events take place).

4. Demand

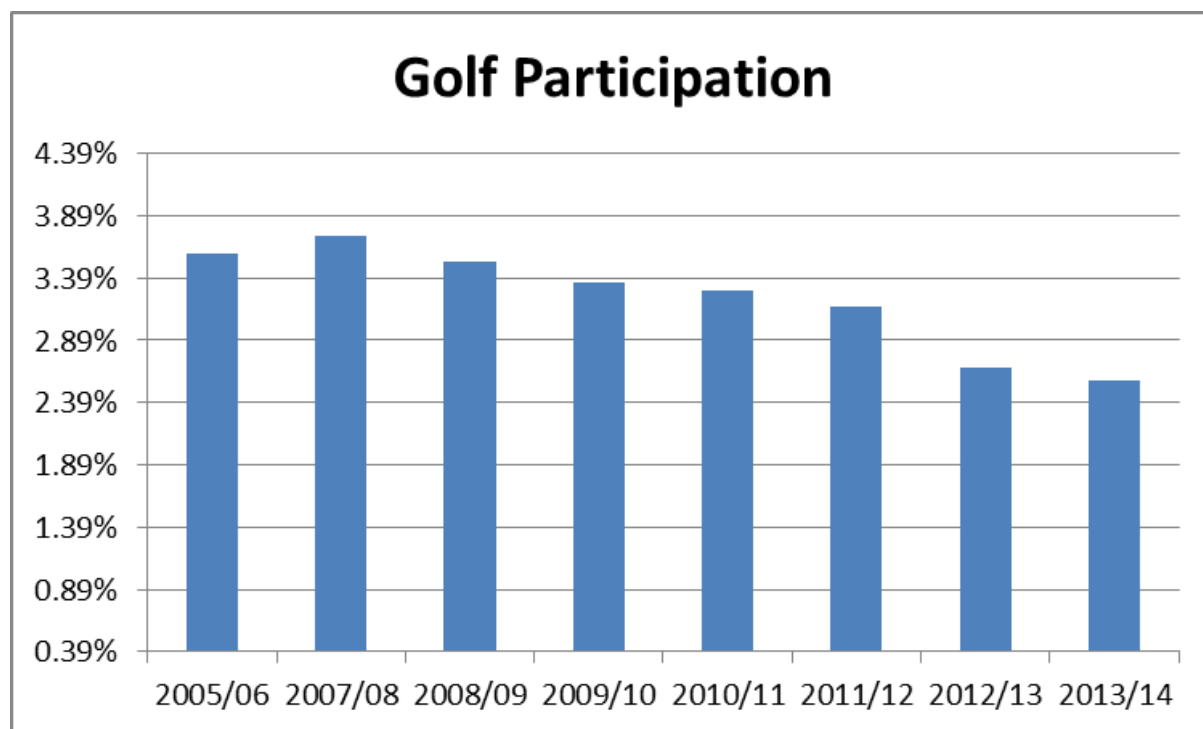
Participation in golf has seen a general decline since 2007/8 as illustrated by Sport England's Active People Survey findings (see Figure 3 below). This is acknowledged by England Golf, which has identified one of its aims to reverse the decline in club membership and stabilise it at the July 2014 level of 675,000 members. The reasons for that decline vary with research indicating that golfers:

- ◀ Have reduced leisure time and the average round of golf can take up to four hours.
- ◀ Reduced income due to the economic down turn.
- ◀ Changing leisure choices with a rise, for example, in cycling.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Furthermore, a recent Sport England survey found that golf participation numbers have dropped by 21,600 over the last year (using APS data). It also found that the number of people playing once per week in the year up until October 2014 had dropped from 751,900 to 730,300. This is a loss of 158,800 regular golfers in the last eight years.

Figure 4: Sport England's APS data regarding golf participation from 2005/6-2013/14



Golf by Gender

There is a clear disparity between the number of men and women participating regularly in golf which is shown in Table 7 below.

Table 7: Sport England APS data by gender

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

The difference in national participation in gender is confirmed locally via consultation with commercial, private members clubs and municipal courses all indicating much higher male membership/usage of males to females and, in some instances, more juniors than female members. Using the figures in Table 7, it can be seen that there is a drop of 12.2% in male members and a 30.8 % reduction in female members during the same period. This suggests the importance placed on golf clubs not just to attract female members but to also retain current ones.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Table 8: Attendance of Sherdley Park Golf Course and Driving Range April 2015

Attendances	2010-11	2011-12	2012-13	2013-14	2014-15
Golf Course	32,268	35,015	28,966	32,666	25,020
Driving Range	24,588	30,789	27,150	23,180	18,921

The usage figures above for Sherdley Park Golf Course are typically broken down into Adults (88%) 60+ and concessions (10%) and juniors (2%).


Quite clearly there has been less use in the last year than there was five years ago. This does not indicate a steady decline as both the golf course and driving range had an upsurge in 2011-12. Sherdley Park Golf Course currently has 112 people who pay advanced annual payments (32 of whom are adult, 79 of whom are either 60 plus or 16-19 and there is one junior). Figure 5, below, indicates the number of Access Card Holders (from 1/4/10- 31/3/15) from Sherdley Park who reside in the different postal areas (data supplied by St. Helens Council).

The data also suggests that many of the Access Card Holders must have access to transport as they travel relatively significant distances to utilise the facilities at Sherdley Park. In doing so, many of them either drive past or near to other golf courses.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

Figure 5: Distribution of Access Card holders of Sherdley Park Golf Course by postal district 1/4/10- 31/3/15

 Indicates clubs which are considered to be direct competitors with Sherdley Park Municipal Golf Course

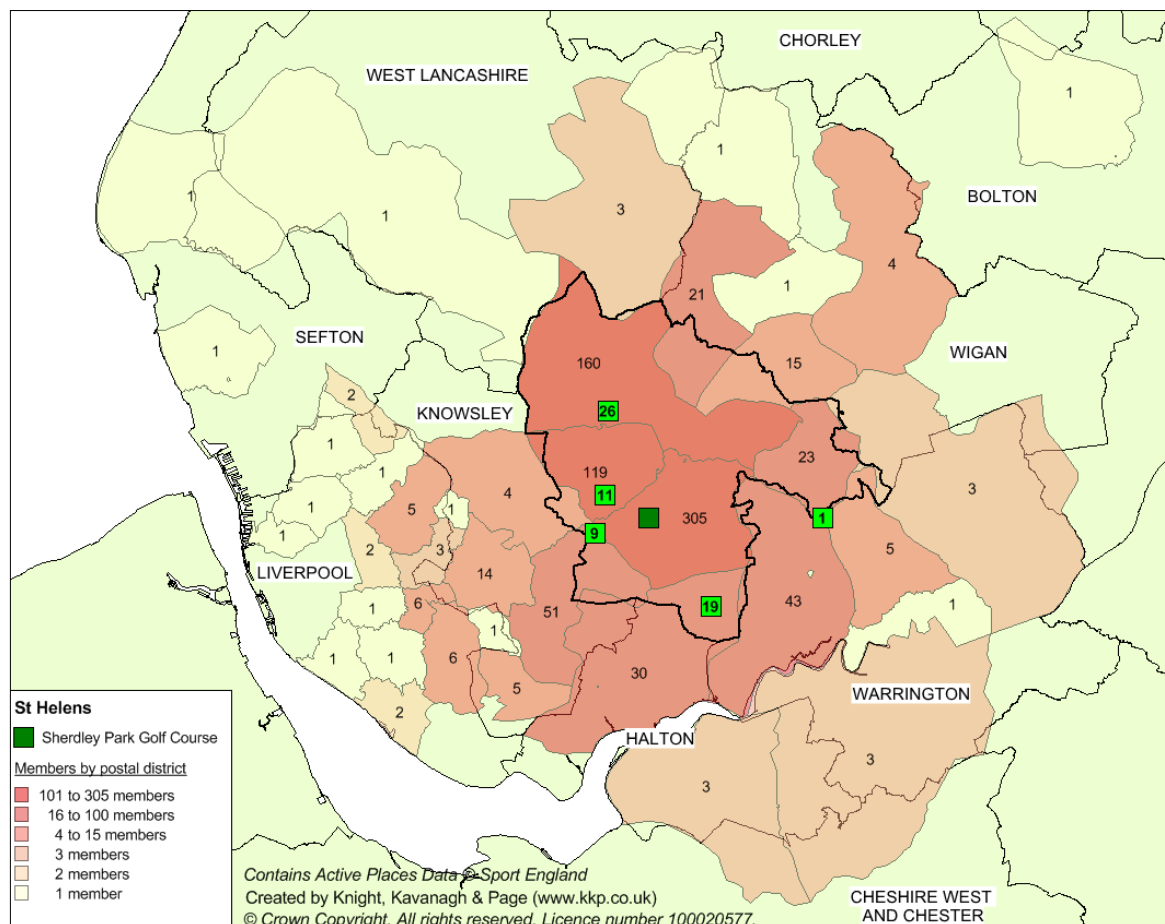


Figure 5 indicates that approximately three quarters (640 out of 858) Access Card Holders reside in St. Helens, making the facility an important local amenity. These numbers are, however, based on a five year period so the numbers compared with other leisure facilities (such as sports hall, health and fitness suites and swimming pools) are considered small in comparison. It is not known how many of the Access Card Holders are currently active.

Figure 5 also identifies the golf courses which are considered to be direct competitors to Sherdley Park either because of proximity or competitive pricing. They are:

Map ID	Name of course	Rationale for competitiveness
1	Alder Root GC	Cheaper prices and proximity
9	Ecceleston Park Golf Club	This club identified that Sherdley Park is a competitor and it has some very cheap flexible memberships.
11	Grange Park Golf Club	Proximity. Membership price not known but thought to be significantly more than Sherdley Park
19	Mersey Valley Golf Club & Country Club	Visitors and five day memberships combined with close proximity suggest this is a local competitor
26	The North West National	Located in St. Helens Borough, this facility has a 9 hole and 18 hole facility with competitive and flexible pricing

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

General club consultation

Consultation undertaken with other clubs in the area indicates that they all have spare capacity for all types of members. Several clubs indicate that this is being addressed by improved marketing to specific market segments (e.g. Huyton and Prescot increased its 22-29 year old members by nearly 100 in 2014 due to targeted marketing of this segment). Only Ashton in Makerfield indicated that it is near to capacity and that its main focus is on retention of current members and maintaining and improving existing facilities.

Several clubs declined to be consulted citing a number of reasons. Only one club, Eccleston Park, indicated that it considered Sherdley Park Golf Club as a direct competitor. Consultation at the remaining clubs indicates that municipal golf courses are an important local amenity, which gives opportunity to beginners, in particular, as part of the broader pathway of golf opportunity. It is acknowledged that many of these golfers move on to private members clubs when they have either attained a handicap or just feel more confident.

Sherdley Park Club consultation

Face to face consultation with the two clubs based at Sherdley Park indicates:

- ◀ That membership at both clubs is steadily declining with the age demographic increasing.
- ◀ Private members golf clubs locally are becoming increasingly aggressive in trying to attract members by offering financially advantageous rates (and are able to combine this with better ancillary facilities provision).
- ◀ Both clubs are failing to attract younger members.
- ◀ The clubs accept that some members will move to private clubs once they have developed the confidence to do so, which in many cases coincides with getting their first handicap.
- ◀ Membership reflects national trends with older men being the predominant playing group, women making up approximately 15% of the total membership and no juniors at either of the clubs.
- ◀ The reduction in club members exacerbates the reduction in the social side of golf at Sherdley Park.
- ◀ The course is generally as good as those found at private members clubs (although this has reduced slightly in the past year). The comment was made that until last year, Sherdley Park was considered to be the best municipal golf course in the North West of England.

In addition, consultation with staff at Sherdley Park indicated that they are working with the English Golf Union to try and increase participation by offering a range of products including the 'Get into Golf' scheme. Staff have used the popular tee off times websites, to help drive participation, which was proving relatively popular but it has experienced a decline of internet booking since reducing the availability of tee times via this medium. This has reduced the ability to respond to a changing market via new technology.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

5. Supply and demand analysis





Future demand

This section considers who is currently playing golf, who is likely to play golf and the demographic changes in St. Helens which are projected to occur via ONS predictions.

Market segmentation

Sport England has produced segmentation profiles for each local authority area, which provide insight into the sporting behaviours and the barriers/motivations to taking part amongst existing participants and those who might be encouraged to engage in a more active lifestyle. In addition, Sport England has identified segmentation types most likely to play golf. Table 6 below indicates the market segments most likely to play golf with the numbers estimated to play in the different market segments identified in Table 7.

Table 9: Market segments most likely to play golf

Segment	Motivations	Barriers
 <p>Tim Age 26-35 Settling down male</p>	<p>Motivations</p> <ul style="list-style-type: none"> • Improve performance • Keep fit & healthy • Meet friends • Individual, team, water & technical sports 	<ul style="list-style-type: none"> • Busy Lifestyle
 <p>Philip Age 46-55 Comfortable midlife male</p>	<p>Motivations</p> <ul style="list-style-type: none"> • Enjoys team sports • Keeping fit • Social aspect to sport • To meet friends 	<ul style="list-style-type: none"> • Better facilities • Childcare issues • Lack of time
 <p>Roger & Joy Age 56-65 Early retirement couples</p>	<p>Motivations</p> <ul style="list-style-type: none"> • Keep fit & healthy • Aid injury • Taking grandchildren 	<ul style="list-style-type: none"> • Transport • Limited facilities
 <p>Elaine Age 46-55 Empty nest career ladies</p>	<p>Motivations</p> <ul style="list-style-type: none"> • Keep fit & healthy • Lose weight • Aid an injury 	<ul style="list-style-type: none"> • People to go with • Free time

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Table 10: Estimation of people likely to play golf compared with national and regional pictures

Segment	National Percentage	Regional percentage	Catchment percentage	Population in St. Helens estimated to play golf in main market segments
Tim	17.9	15.1	12.7	582
Philip	20.8	21.5	22.3	1021
Elaine	3.3	3.4	3.4	156
Roger & Joy	11.6	11.6	12.5	570
Total				2,329

Utilising this information further, Sport England identifies that 4.7% of the population in St. Helens are currently or would like to play golf. This gives a total of 2,329 people or 291 people per 18 hole course in the Borough (based on eight 18 hole courses). This equates to 6,596 people aged 16 and above. These people are serviced by eight golf clubs within in the Borough, which equates to just under 825 members per course (if these members were to be distributed equally on the golf courses within the Borough). Experience suggests that private members clubs require a critical mass of approximately 550 members to make them viable and financially sustainable. Taking into account the current level of play there is significant capacity available at all courses, indicating a significant level of latent demand for the sport (latent demand is identified as players who are perceived to want to play but choose not to for a variety of reasons which may include accessibility, availability, quality, cost etc).

Many courses, including Sherdley Park are, therefore, under increasing financial pressure and despite flexible memberships and targeted marketing, clubs have not been able to halt the decline in memberships. As mentioned above though, there is increasing opportunity at increasing the use by nomadic golfers.

Key issues

The key issues for golf in St. Helens and Sherdley Park, in particular, are:

- ◀ The numbers of golfers participating has declined over the past eight years (nationally) and data suggests less usage at Sherdley Park from five years ago, although there has been fluctuations in participation in that time.
- ◀ This reduction is considered to be a result of changing leisure patterns, the time commitment required to play 18 holes of golf and the economic downturn.
- ◀ The percentage reduction in the numbers of women playing is greater than that of men.
- ◀ There are a wide variety of golf courses in the area which are high quality and have flexible and competitive prices.
- ◀ There is a change in pattern to consumers of golf with more nomadic players able to access golf clubs which have higher quality ancillary facilities. All courses, therefore, need to be able to be financially flexible and use technology to maximise participation and income.
- ◀ England Golf is aware of the changing environment, has a clear vision and is working with clubs locally to help stem the tide of declining members *per se*.
- ◀ The location of Sherdley Park suggests that people in areas of higher deprivation have access to golf facilities (using 10 minute drive time), although the data provided suggests

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

that they drive past or near other golf facilities to use it (suggesting that they are price sensitive).

- ◀ Changing weather patterns are affecting use of courses which require increased investment as they need to be playable all year round.
- ◀ It is likely that the renewed round of austerity measures from Central Government will put increased pressure on local authorities financially and reduce the ability of St. Helens to continue to support Sherdley Park operations.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

Summary

The above consultation and analysis indicate that St. Helens is in the following position:

Supply

- ◀ The audit identifies eight 18 hole and one 9 hole golf course in St. Helens These can theoretically accommodate 4,650 adult 7 day / full members.
- ◀ Management of these courses is varied and includes commercial, municipal and private members' clubs.
- ◀ The Sport England segmentation data identifies circa 6,596 potential and existing golfers in St. Helens which would indicate an under supply of golf courses in St. Helens (based on assumption all current potential golfers actually took part in the sport).
- ◀ Only one course identified that it had a waiting list within the Borough; other consulted clubs identified that they had existing capacity (but were not able to quantify this) and one club indicated that it is struggling to survive financially.
- ◀ Courses in St. Helens are considered good or very good although the ancillary facilities can vary. Sherdley Park is considered to have the weakest of the ancillary facilities.
- ◀ Based on the adult population figure, St. Helens has the highest holes per capita ratio when compared with both its statistical neighbours and other Merseyside local authorities (equating to 962 adult residents per hole).
- ◀ There are seven municipal golf courses on Merseyside, although only Bowring in Knowsley and Liverpool Municipal in Kirkby are within a 20 minute drive time of Sherdley Park
- ◀ The facilities at Sherdley Park Municipal Golf Course provide a good opportunity for people wishing to learn to play golf. Consultation at other clubs indicates that it is not unusual for golfers to have started playing at Sherdley Park and then move to other courses, as it provides a pathway to build confidence.
- ◀ St. Helens has a variety of provision (courses at different price and quality) to meet the development requirement of new and established golfers. This variation and associated pricing accommodates all types of golfer.

Demand

- ◀ Demand for golf and, in particular, membership of a golf club has fallen significantly over the past decade according to Sport England and England Golf. Consultation undertaken in St. Helens confirms that most clubs in the Borough are following this trend.
- ◀ There are a couple of exceptions in the wider locality with Prescott and Huyton indicating an improvement in a specific market segment and Blundells Hill Golf Club still able to charge a joining fee as well as an annual membership (indicating a strong membership).
- ◀ At the same time as the fall in general membership, there has been a rise in 'Nomads', i.e. golfers who like to play golf but are not interested in affiliating to the NGB, obtaining a CONGU handicap or joining a golf club preferring instead to play a variety of courses, mostly in good weather with friends and family, taking advantage of offers and discounts to play off-peak.
- ◀ The population in St. Helens is projected to rise by 7.5% by 2037. Given the current spare capacity on golf courses in St. Helens, this rise is unlikely to lead to a rise in the demand for more courses, but rather current courses will be able to accommodate it.
- ◀ England Golf is leading a number of national golf development initiatives e.g., Get into Golf and National Golf Week to encourage young people aged 25 – 44 to take up the sport. Clubs that are engaging with the YCGP and changing to accommodate new Members are growing
- ◀ Given the precarious financial stability of some clubs, it may be that they no longer become

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT

GOLF COURSE ADDENDUM

financially viable and close to the public. It is not known absolutely if this was the case, whether all golfers at a particular site will transfer to other sites. It is likely that some will, whilst others may revert to a more nomadic style of play. Consultation indicates that management at Sherdley Park is focused on providing the best product possible within available resources. Management at the site is limited by its ability to vary the product price on a short term basis and Council Standing Orders do present a challenge to act quickly to respond to changes in demand, competitor's actions or market conditions.

7: Brief summary of key findings and options

There does not appear to be any unmet demand for golf participation across the Borough. With capacity available at nearly all of the golf courses within the ambit of this study, the projected increase in population is unlikely to have a significant impact on this. The management of golf courses is, however, diverse so community access by price is not always available (despite the increasing number of clubs offering flexible membership and finance arrangements).

There is a case for getting all clubs in the area to work more closely together via the Merseyside Golf partnership, as many of the clubs are facing similar issues of dwindling memberships and lack of participation from women and juniors. It is acknowledged that this form of coordination takes time and effort and will need to be undertaken by a lead organisation.

Sherdley Park Golf Course

This addendum has paid particular attention to Sherdley Park Golf Course and driving range as St. Helens Council has ownership, interest and a financial commitment to it. Whilst the course is considered to be of good quality, the ancillary facilities are considered below average (particularly in comparison with private members clubs). The table below identifies options for St. Helens to consider.

Category	Priority
Retain Sherdley Park Golf course	<p>Sherdley Park, as with all other golf courses, requires investment to ensure that it continues to offer a quality golf experience. In addition, it needs to drive up participation and, therefore, income, via a range of measures which may include, for example:</p> <ul style="list-style-type: none"> ◀ Working with the clubs on site to help them drive increases in their membership. ◀ Seek/explore opportunities to improve ancillary facilities to ensure competitiveness. ◀ Improved marketing to specific market segments which are likely to be attracted to golf. ◀ Developing school links and working through health partners to attract new members ◀ Being flexible in its approach to attracting new and nomadic golfers (utilising modern technology). ◀ Continuing to work with England Golf by considering different initiatives in working with the wider golf partnership in the area.
Community	Consider whether there is a local organisation or club that can take on the

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Asset transfer	management of the facility. This is likely to reduce the costs of running the facility to the Council (and lead to an increase in the number of volunteers required to do so), but finding an appropriate club with the volunteers with requisite skills to do so may prove problematic.
Outsource management	Several local authorities, who have found it difficult to keep their current golf courses open have taken the decision to outsource the management of them to a social enterprise. An example of this is Mytime Active which has taken over 19 municipal golf courses in the Midlands and South of England. The Company looks to re-invest back into properties with a view to using its expertise to make the facilities affordable and accessible.

INDOOR AND BUILT SPORTS FACILITIES NEEDS ASSESSMENT GOLF COURSE ADDENDUM

Appendix 1: List of Consultees

Club/Organisation	Name	Designation	Who	Type	Date
Local Authority					
St Helens Council	Dave Bloor	Grounds Maintenance	Clare MacLeod		
St Helens Council	Gerrard Woods	Planning Policy Team Leader	Clare MacLeod		
St Helens Council	Dave Boocock	Head of Youth and Sports Development	Clare MacLeod		
St Helens Council	Dave Pugh	Leisure Investment Manager	Clare MacLeod		
St Helens Council	Helen Williams	Head of Public Health Programme	Clare MacLeod		
St Helens Council	Steve Littler	Estates & Assets Manager	Clare MacLeod		
Other Stakeholders					
Lancashire County Golf Partnership	Beverly Dodds	Development Officer	Clare McCleod		
Ashton-in-Makerfield Golf Club	Garry Lacy	Manager	Paul Ashton		
Houghwood Hall Golf Course	Pete Turner & Patricia Valentine	Managing Director/Club Secretary	Clare MacLeod		
Huyton and Prescot Golf Club Ltd	Les Griffin	Club Secretary	Clare MacLeod		
Sherdley Park Golf Course	Francis Gill/Robert Molyneux	Captain/Club Secretary	Clare MacLeod		