



HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

DECEMBER 2022

QUALITY, INTEGRITY, PROFESSIONALISM

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PART 1: INTRODUCTION AND METHODOLOGY

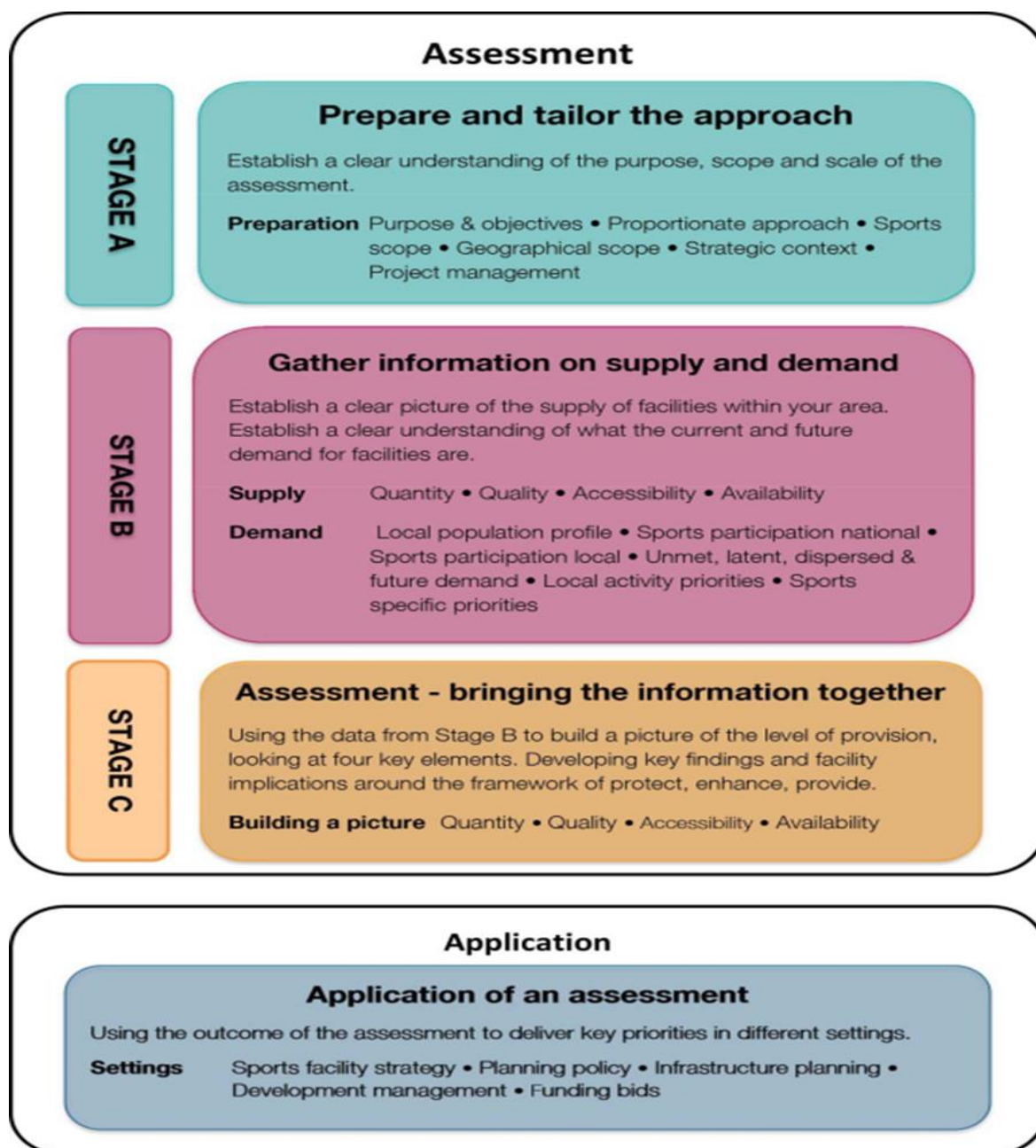
1.0 Introduction

- 1.1 Horsham District Council commissioned Knight Kavanagh & Page Ltd (KKP) to undertake a standalone supply and demand assessment for golf. This was completed in February 2021, but now needs to be updated to account for changes in the Council's development strategy and to recognise the impact of the Covid-19 pandemic. This report therefore provides this.

1.1 Methodology

- 1.2 In order to produce this assessment, Sport England's 'Assessing Needs and Opportunities Guide' (ANOG) has been followed. This is separated into three stages, followed by the application of the assessment findings, as detailed below.

Figure 1.1: Summary of ANOG



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1.2 Stage A: Prepare and tailor the approach

Purpose, objectives and strategic context

- 1.3 The purpose of this study is to provide a robust, comprehensive assessment of the supply of, and demand for, golf provision within Horsham District. This will enable the Council to make informed strategic decisions linked to its Local Plan Review and comply with the National Planning Policy Framework (NPPF).

Local Plan Review

- 1.4 In December 2015, Horsham District Council adopted the Horsham District Planning Framework (HDPF). This document is part of the Council's adopted Development Plan, and it sets out the Council's planning strategy to 2031. The aim of the plan is to help bring forward the social, economic and environmental needs for the land in Horsham District that is outside the South Downs National Park.
- 1.5 It is a legal requirement that local plans are monitored and reviewed regularly to ensure that they are kept up-to-date. As such, the Council began its Local Plan Review process in 2018 when it published the 'Issues and Options – Employment, Tourism and Sustainable Rural Development'.
- 1.6 A Regulation 18 Draft Local Plan was subject to consultation between February and March 2020. However, the meeting of full Council to approve the Regulation 19, Pre-Submission Horsham District Local Plan document was postponed due to amendments to the National Planning Policy Framework (NPPF) and then Natural England's Water Neutrality Position Statement (September 2021). This delayed the completion/publication of the Local Plan, although it is now being prepared for Regulation 19 consultation in early 2023 (subject to confirmation of dates).
- 1.7 The new Local Plan will cover the period from 2022 to 2039. Like the HDPF, it aims to deliver the social, economic and environmental needs of Horsham District, as well as looking beyond its boundaries. The new Local Plan will also set the strategic framework helping local communities seeking to prepare and/or update neighbourhood development plans.

National Planning Policy Framework (2021)

- 1.8 The National Planning Policy Framework (NPPF), updated in 2021, sets out the reformed planning policies for England. It details how these changes are expected to be applied to the planning system and provides a framework for local people and their councils when they produce distinct neighbourhood and local plans respectively, that reflect the needs and priorities of local communities.
- 1.9 Meeting the needs of local communities through provision of accessible, high-quality facilities which provide opportunities to participate in sport is therefore a critical part of good planning. The efficient and effective delivery of sports facilities depends on understanding the nature of current provision and assessing what will be required in the future by taking account of demographic and sports participation changes and trends.

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- 1.10 The NPPF states that planning policies should be based on robust, up-to-date assessments of need for open space, sports and recreation facilities and opportunities for new provision. Specific needs and quantitative and qualitative deficiencies and surpluses in local areas should also be identified and used to inform what provision is required in an area.
- 1.11 As a pre-requisite, Paragraph 99 of the NPPF states that existing open space, sports and recreation sites should not be built on unless:
- ◀ An assessment has been undertaken, which has clearly shown the site to be surplus to requirements.
 - ◀ The loss resulting from the proposed development would be replaced by equivalent or better provision in terms of quantity and quality in a suitable location.
 - ◀ The development is for alternative sports and recreational provision, the needs for which clearly outweigh the loss.

Scope

- 1.12 The study area for the assessment is the Horsham District boundary area, with all golf facilities within the District included. The sites covered are therefore as follows:
- ◀ Horsham Golf & Fitness Club
 - ◀ Ifield Golf & Country Club
 - ◀ Mannings Heath Golf Club
 - ◀ Rookwood Golf Course
 - ◀ Slinfold Park Golf & Country Club
 - ◀ West Sussex Golf Club
 - ◀ Horton Golf Club
 - ◀ Cottesmore Golf & Country Club
- 1.13 In addition, whilst the focus of the project is on the above sites, consideration has also been given to supply and demand in close proximity to the Horsham District border from neighbouring authorities due to the location of some venues and the propensity of golfers to travel cross-boundary to access preferred facilities. This has been achieved via use of a 20-minute drive time catchment area, which is recommended as best practice by both Sport England and England Golf when undertaking such studies.

Project management

- 1.14 A project team from Horsham District Council has worked with KKP to ensure that all relevant information is readily available so that project stages and milestones are delivered on time. Together, the group has been responsible for the direction of the assessment from a strategic perspective and for supporting and checking and challenging its findings.

1.3 Stage B: Gather information on supply and demand

- 1.15 A clear picture of the supply and demand for golf facilities in Horsham District is provided to enable an accurate assessment of quantity, quality and usage. This is achieved through a variety of elements.

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Supply

Quantity

- 1.16 Where known, all golf facilities within Horsham District are included within the assessment, irrespective of ownership, management and use, with reference also made to facilities within a 20-minute drive time catchment area. Sites were identified using Sport England's Active Places web-based database, with Horsham District Council, England Golf and operators supporting this process by checking and challenging the data to ensure accuracy.
- 1.17 Three different types of golf facilities are recognised by Sport England and governed by England Golf. They are standard hole courses, par 3 courses and driving ranges. Any provision meeting this criteria is, therefore, included within the study.

Accessibility and availability

- 1.18 Not all golf facilities offer the same level of access to the community and the ownership and operating model in place can also influence their actual availability. To better understand this, the assessment identifies whether sites are members clubs, proprietary facilities or private sites and considers both membership and pay and play aspects.
- 1.19 Whilst sites may theoretically be available to the community, capacity may be limited due to current membership and/or usage levels, whilst pricing and other factors may also deter some users. The fees associated with each site are therefore also included within the study and operators have been asked whether they are accepting additional members/users (or if a waiting list is in place).
- 1.20 In addition, some golf facilities may no longer be in use and are therefore categorised as being disused or lapsed. Disused sites are not being used at all by any users and are not available for community hire either; once such sites have been disused for five or more years they are categorised as lapsed.

Quality

- 1.21 The capacity of provision to adequately provide for competitive play, tournaments and practice is most often determined by quality. As a minimum, the quality of a site can impact on the playing experience and people's enjoyment of golf, whilst in extreme circumstances it can result in a facility being unable to cater for all or certain types of play during peak and off-peak times.
- 1.22 Notwithstanding the importance of quality, it can be difficult to measure for golf as it is often linked to the price of access, with better quality provision generally having higher membership costs and green fees. This income can then be invested into more sophisticated maintenance regimes and site improvements. Quality is therefore considered relative to other aspects of a site, meaning it is not always reasonable to draw site-to-site comparisons as some golfers are happy to accept poorer quality facilities for lower cost access. Furthermore, quality can be subjective, with certain golfers preferring conditions that would not always be considered best practice and with difficulty also needing to be factored in.

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- 1.23 In addition, even sites generally considered as providing the best quality can have particular issues that the operators wish to resolve, such as drainage in specific areas or problematic greens and tee beds. Some will also have clubhouse, car parking and and/or practice facility aspirations, with such provision often key to income generation and site sustainability.
- 1.24 Based on the above, the quality of all provision identified in the assessment and the ancillary facilities supporting them have been assessed, regardless of ownership, management and availability, along with capturing any detail specific to the individual facilities and sites. This information has primarily been acquired from operators and through consultation with England Golf as it is accepted that these stakeholders are best placed to provide an overview.

Demand

Current demand

- 1.25 Each site included within the scope of the assessment in Horsham District has been contacted to inform the study with a view to ascertaining their current position in respect of supply (including quantity, quality, accessibility and availability) and demand, plus any potential key issues and development plans. For demand, this includes an interrogation of current membership and pay and play levels, which has helped build the local participation profile and has enabled comparisons to be drawn to regional (South East area) and national rates. Historical data has also been acquired to allow for an analysis of participation trends.
- 1.26 Consideration has also been given to unmet, latent, exported and imported demand. Unmet demand is existing demand that is not getting access to provision, usually expressed in golf when a waiting list is in place due to a lack of existing capacity at a site, whilst latent demand is defined as the number of additional members (or users) that could be accommodated if certain barriers to participation or access were removed. For some examples, this could be linked to quality, pricing being a deterrent, or people having insufficient time to play.
- 1.27 Exported and imported demand refers to those that play outside of their home local authority area e.g., Horsham residents travelling outside of the District (exported demand) or non-Horsham residents travelling into the District (imported demand). This can be attributed to a variety of factors, such as users travelling to access better-suited sites, or because of perceived quality. More simply, it may also be because some sites are close to the boundary line and are therefore nearer and better situated for cross-border users.
- 1.28 Where operators have not responded to consultation, the required information has been acquired via desk-based research and consultation with England Golf, which has been able to provide relevant data and commentary. England Golf, which is the respective National Governing Body (NGB), has also provided data relating to national and regional golf participation, enabling participation in Horsham to be adjudged against this.
- 1.29 Linked to the above, England Golf has compiled a facilities report, specific to Horsham, to inform the assessment (this is provided in Appendix 1). This includes detail relating to all sites, local and national context, a further analysis relating to potential demand, and a conclusion summarising its current view of supply and demand in the area and its local and golf-specific priorities.

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Future demand

- 1.30 Alongside current demand, it is important for the assessment to assess future demand for provision in order to understand and to see if it can be met. Using Office of National Statistics (ONS) population projections, an estimate can be made of the likely future demand for golf facilities. Assumptions can then be made about whether existing provision can cater for such growth.
- 1.31 Membership generation rates are used to provide an indication as to how many people may play golf within the District in the future. They are calculated by determining what percentage of the population are currently members at sites. This ratio is then applied to predicted population growth to help estimate future levels of demand for the sport. This is run to 2039, in line with Horsham's Local Plan Review.
- 1.32 Other information sources used to help identify future demand include club targets, with operators asked during consultation whether they have plans to attract additional members/users and what this might mean in quantitative terms. In addition, various modelling tools have been used, including those provided by England Golf and Sport England, whilst wider England Golf participation targets and priorities have also been considered.
- 1.33 Within the modelling undertaken, consideration has also been given to the Local Plan Review and potential site allocations to provide a better understanding of what impact the draft development proposals would have if they came to fruition. This is necessary to provide context as to whether the potential future level of provision can accommodate demand and, thus, provides an indication as to whether plans can be supported (or not).

1.4 Stage C: Assessment – Bringing the information together

- 1.34 The supply and demand information gathered is used to assess the adequacy of golf provision in Horsham District, with key issues, challenges and aspirations identified and an overall supply and demand analysis undertaken. This forms the basis of this report.

PART 2: SUPPLY AND DEMAND ASSESSMENT

2.0 Introduction

- 2.1 Golf is the fifth largest participation sport in England, with around 730,000 members belonging to one of 1,800 affiliated clubs and a further two million people playing independently outside of club membership. There are an estimated 3,000 golf courses across the Country, with approximately 90 designated as sites of special scientific interest because apart from the intensively managed trees and greens they have other habitats with high wildlife value. Many other courses also exist within designated heritage coast sites, areas of outstanding natural beauty, or listed historic parklands.
- 2.2 Nationally, the sport is governed by England Golf. Its role includes providing competitions for players of all ages and abilities, identifying and developing the most talented golfers, maintaining a uniform system of handicapping, administering and applying the rules, and introducing new golfers via its initiatives such as 'Get into Golf'.

Consultation

- 2.3 To inform this study, all golfing sites and operators in Horsham District have been contacted to provide information relating to their facilities and associated demand. The following responded to consultation requests:
- ❖ Horsham Golf & Fitness Club
 - ❖ Ifield Golf & Country Club
 - ❖ Mannings Heath Golf Club
 - ❖ West Sussex Golf Club
 - ❖ Horton Golf Club
 - ❖ Cottesmore Golf & Country Club
- 2.4 Slinfold Park Golf & Country Club and Rookwood Golf Course have been unresponsive. Where operators have not taken part, England Golf has provided the relevant information and data for the sites as part of the wider consultation with the NGB.

2.1 Supply

- 2.5 The three different types of golf facilities recognised by Sport England and governed by England Golf are further defined in the table below. Facilities such as pitch and putt courses and miniature/crazy/adventure golf courses are not included as these are not considered to be traditional formats of the game and are not comparable offerings.

Table 2.1: Definitions of golf facilities

Facility type	Description
Standard	A standard par course, with a minimum of 9 holes but normally associated with 18-hole courses; many 9-hole courses have different tee boxes which allow the provision to be played as an 18-hole course. Some courses provide 27 holes, with any two loops of 9-holes played to make up an 18-hole round.
Par 3	Shorter length of holes than a standard course, with no hole longer than par 3. Most likely to be a 9-hole course although 18-hole offerings do exist. Does not include pitch and putt courses, which are even shorter offerings and are not considered to be a traditional version of the sport.

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Facility type	Description
Driving Range	Includes covered and uncovered driving range bays but not practice areas within golf courses; ranges are based on the hiring of balls, with users not required to retrieve, whereas practice areas are generally for members to use with their own balls (although a growing number have dispensers). Does not include 'entertainment' ranges or virtual offerings, although some driving ranges have expanded to also provide these features.

- 2.6 There are eight golf venues within Horsham District that conform to the above definitions, as identified in Figure 2.1 and Table 2.2 below. All provide at least one standard hole course (both Cottessmore Golf & Country Club and Mannings Heath Golf Club have two), whilst two also host accompanying par 3 courses and driving range bays (Horsham Golf & Fitness Club and Slinfold Park Golf & Country Club).

Figure 2.1: Location of golf facilities in Horsham District

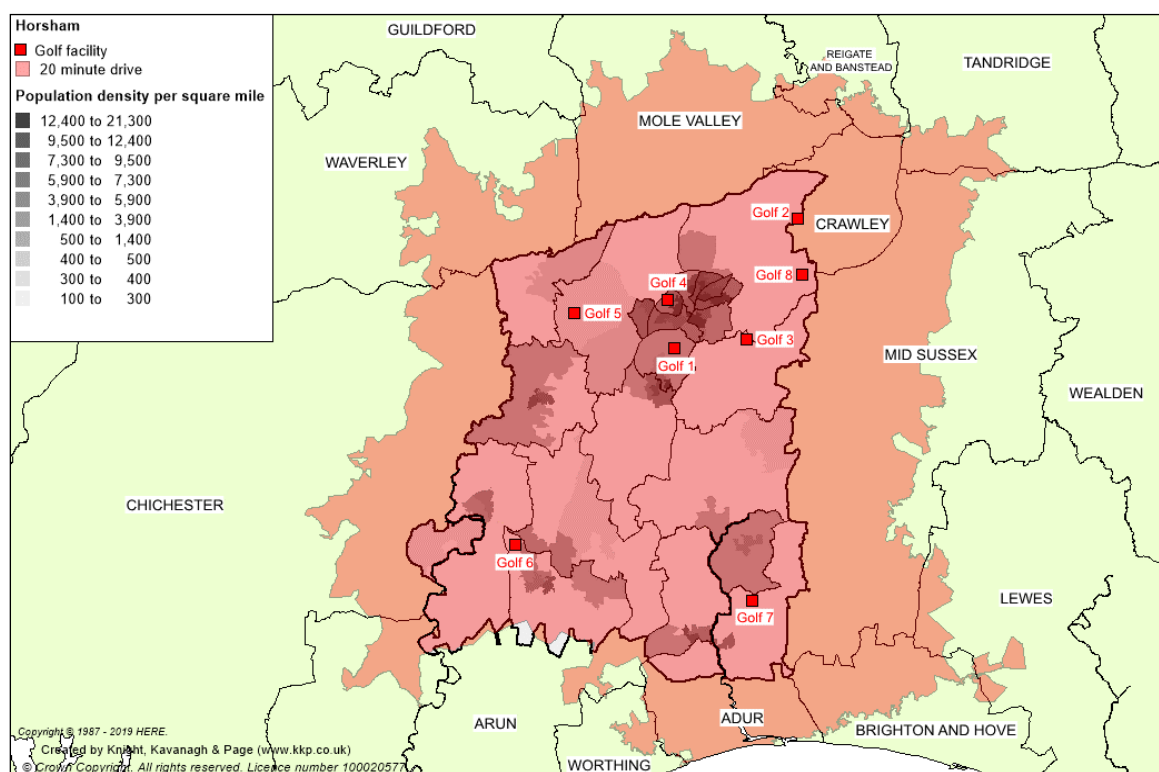


Table 2.2: Summary of golf facilities within Horsham District

Site ID	Site name	Holes		Driving range bays
		Standard	Par 3	
Golf 1	Horsham Golf & Fitness Club	18	9	16
Golf 2	Ifield Golf & Country Club	18	-	-
Golf 3	Mannings Heath Golf Club	27	-	15
Golf 4	Rookwood Golf Course	18	-	-
Golf 5	Slinfold Park Golf & Country Club	18	9	14
Golf 6	West Sussex Golf Club	18	-	-
Golf 7	Horton Golf Club	9	-	-
Golf 8	Cottessmore Golf & Country Club	27	-	-
Total		153	18	45

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- 2.7 As seen, across all sites, there are a total of 153 standard holes, 18 Par 3 holes and 45 driving range bays. Additionally, it is clear that most of the golf facilities are located to the north of the District, with two sites in the south and a gap centrally. The sites are further explored below.

Standard hole golf courses

- 2.8 As mentioned, all eight golf sites in Horsham District provide standard hole provision, with seven providing an 18-hole course and three providing 9-hole courses. As part of this, Horton Golf Club supplies a standalone 9-hole course, whilst Cottesmore Golf & Country Club and Mannings Heath Golf Club host 9-hole courses in addition to their 18-hole offerings.

Table 2.3: Summary of standard hole golf courses in Horsham District

Site ID	Site name	Holes	Par	Yardage ¹			Slope rating ²
Golf 1	Horsham Golf & Fitness Club	18	70	6,111	5,300	4,755	116-135
Golf 2	Ifield Golf & Country Club	18	70	6,319	5,986	5,590	108-119
Golf 3	Mannings Heath Golf Club	18	72	6,483	6,021	5,439	115-134
		9	36	3,082	2,945	2,742	123-130
Golf 4	Rookwood Golf Course	18	72	6,261	6,008	5,465	-
Golf 5	Slinfold Park Golf & Country Club	18	72	6,409	6,216	5,547	114-136
Golf 6	West Sussex Golf Club	18	68	6,264	5,961	5,596	113-129
Golf 7	Horton Golf Club	9	31	-	1,498	-	-
Golf 8	Cottesmore Golf & Country Club	18	72	6,444	6,033	5,572	111-132
		9	33	2,240	2,169	1,918	83-97

- 2.9 All of the 18-hole courses are relatively similar in length and in the range of what would be expected from traditional provision. The additional 9-hole course at Mannings Heath Golf Club is also aligned to this, in that it would be a similar sized course if was played through twice to make up an 18-hole round.
- 2.10 In contrast, the 9-hole courses at Cottesmore Golf & Country Club and particularly at Horton Golf Club are considerably shorter, with neither containing any Par 5 holes (a mix of Par 3, Par 4 and Par 5 holes is generally required to represent a 'traditional' course). This, however, is not a criticism. Nationally, there are many shorter standard hole courses. Such sites often appeal more to beginner and/or casual golfers, rather than catering for more regular, experienced players. As such, they offer varied provision that can appeal to a defined market.
- 2.11 Both Mannings Heath Golf Club and Cottesmore Golf & Country Club previously hosted 36 holes, meaning both now provide nine fewer holes than they have. The former reduced its provision in 2018, whilst the latter reduced its provision in around 2012.

¹ White denotes Championship tees, yellow denotes men's tees and red denotes ladies' tees.

² Sourced from randa.org/en/course-handicap-calculator

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Slope ratings

- 2.12 Slope ratings are new to golf across the world. The intention is for them to allow the handicap system to reflect course difficulty and the difference in difficulty for players compared to scratch golfers. In effect, this enables people to have a handicap that varies from course-to-course depending on difficulty, as well as a general handicap.
- 2.13 The maximum slope rating that can be achieved is 155, whereas the minimum is 55. The standard difficulty is considered to be 113, which means that the large majority of golf courses in Horsham are considered to be more difficult than the average. The clear exception to this is the 9-hole course at Cottessmore Golf & Country Club (83-97).
- 2.14 Neither Horton Golf Club nor Rookwood Golf Course have assigned slope ratings as they are not affiliated to England Golf (see management and ownership section).

Par 3 golf holes

- 2.15 Two of the sites in Horsham District provide Par 3 courses in addition to their standard hole provision and both encompass nine holes, which is common. Both are known by their providers as “academy courses” and are most frequently used by beginners, casual players and some older users, although they are also played by more traditional golfers wishing to practice their short game.
- 2.16 Slinfold Park Golf & Country Club provides the longest Par 3 course, at 1,315 yards, while Horsham Golf & Fitness Club’s Par 3 is the shortest, albeit at 959 yards it still averages over 100 yards per hole.

Table 2.4: Summary of par 3 golf courses in Horsham District

Site ID	Site name	Holes	Par	Yardage
Golf 1	Horsham Golf & Fitness Club	9	27	959
Golf 5	Slinfold Park Golf & Country Club	9	27	1,315

- 2.17 Par 3 courses in addition to standard hole courses can be beneficial to golf venues as they can contribute to the creation of a pathway for users who may not be ready or sufficiently confident to play on a longer course. They can also provide added income through attracting players who are not necessarily interested in playing the more traditional form of the sport. Nevertheless, the lack of a standalone Par 3 course in the District means that any users only looking to access such provision may need to pay a premium to do so, or travel outside of the District, as membership pricing will generally account for the standard hole course also being provided, as is the case in Horsham District.
- 2.18 The closest standalone Par 3 courses to Horsham District are at Ashdown Park Hotel in Wealden and Burgess Hill Golf Centre in Mid Sussex. That said, the relatively short length of the standard hole course at Horton Golf Club does provide a local alternative (it is only 183 yards longer than the Par 3 course at Horsham Golf & Fitness Club). However, the site is unique in that it can only be accessed via a membership (rather than pay and play), with membership also linked to the upkeep of the provision. As such, it is not overly accessible to the general public.

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- 2.19 Elsewhere in Horsham District, Rookwood Golf Course also provides a 9-hole facility in addition to its standard hole course; however, this is considered to be a pitch and putt course and is considerably shorter than the Par 3 courses referenced above. Furthermore, it is now more commonly used for Footgolf, which is a relatively new concept combining the sports of golf and football. Whilst the activity has only recently come to the fore, its popularity seemingly peaked around 2016 when it proved to be a fashionable social and party activity for users. Since then, participation has been steadily on the wane, with no increases noted following the Covid-19 pandemic despite a rise in traditional golf activity over the same time frame.

Driving range bays

- 2.20 There are 45 driving range bays provided in Horsham District across three locations. Horsham Golf & Fitness Club has 16 bays, Mannings Heath Golf Club 15 and Slinfold Park Golf & Country Club 14.
- 2.21 The bays at Horsham Golf & Fitness, and Slinfold Park Golf & Country Club are covered and floodlit, thus allowing for all-year round and late-evening usage. The range at Horsham Golf & Fitness Club also provides heated bays to allow for added comfort during winter months.
- 2.22 The range at Mannings Heath Golf Club is not floodlit but it has recently been refurbished to enhance the quality of the provision.

Table 2.5: Summary of driving range bays within Horsham District

Site ID	Site name	No. of bays	Floodlit?	Pay and play?
Golf 1	Horsham Golf & Fitness Club	16	Yes	Yes
Golf 3	Mannings Heath Golf Club	15	No	Yes
Golf 5	Slinfold Park Golf & Country Club	14	Yes	Yes

- 2.23 Nationally, many driving range operators are updating their facilities with modern technology in a bid to increase demand. This is the case in Horsham District at Horsham Golf & Fitness Club. It has installed FlightScope, an entertainment system that allows for ball tracking, instant shot replays and statistical feedback. It also enables users to simulate playing on courses across the world.
- 2.24 Neither Mannings Heath Golf Club nor Slinfold Park Golf & Country Club offer this technology at their driving range bays, although the former does have an aspiration to install such a product.
- 2.25 Covered bays are also in place at West Sussex Golf Club; however, these are considered to form part of its practice ground rather than being classified as driving range bays. This is because they are generally reserved for members; visitors have to register and book in at the site rather than being allowed casual access.

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Future provision

- 2.26 Three golf sites in Horsham District are being promoted for development and have been put forward to the Strategic Planning team at Horsham District Council for consideration as potential development allocations in the emerging Local Plan. This could result in the allocation of the provision at Ifield Golf & Country Club in the Council's emerging Local Plan, as well as the loss of some provision at both Cottesmore Golf & Country Club and Horsham Golf & Fitness Club.
- 2.27 In order to minimise confusion, taking into account the Council officer's recommendations in the July 2021 Cabinet report, it should be noted that it is unlikely that Horsham District Council will propose the loss (in whole or part) of either Cottesmore Golf & Country Club or Horsham Golf & Fitness for development. However, it is more likely that Ifield Golf & Country Club will be supported if the West of Ifield strategic site, promoted by Homes England, progresses to allocation in the Local Plan. This was recommended by officers in the Cabinet report.
- 2.28 In relation to Ifield Golf & Country Club specifically, the site is now owned by Homes England, although the members club continues to operate out of it. Its present tenure has been secured via a five-year lease agreement, although a six-month break clause is included in this arrangement.
- 2.29 At Cottesmore Golf & Country Club, the operators report that they would only look to sell some of the land, meaning that some form of golf provision would remain in the event of any development proposals being approved. It is suggested that this would take the form of a shorter 9-hole offering as the operators report greater demand for such provision compared to its 18-hole alternative.
- 2.30 Similarly, Horsham Golf & Fitness Centre wishes to reduce its current 18-hole course to a 9-hole course, stating that there is now more demand for this type of provision and that maintaining the current offering is unsustainable. As part of this, it wishes to invest in improving its practice facilities and creating an adventure (mini) golf course, believing that this would help attract younger people to the venue.
- 2.31 The proposals and their potential impact are touched upon later in this section of the report.
- 2.32 Away from the potential loss of provision, West Sussex Golf Club previously applied for planning permission to establish a 6-hole academy course. This was, however, refused.

Lapsed/disused provision

- 2.33 An additional golfing venue was previously in place in Horsham District, known as West Chiltington Golf Club. This provided two 18-hole standard courses before closing in 2016. This was a business decision due to the site reportedly no longer being financially viable. The land is now part of a local vineyard.

Neighbouring provision

- 2.34 Due to the nature of golf, consideration of supply and demand should also consider provision within neighbouring authorities as it is recognised that golfers do not necessarily adhere to local authority boundaries. Aspects such as travel distance, quality and pricing are also likely to be considered when users choose a site to play at or be a member of.

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- 2.35 Both Sport England and England Golf recommend that a 20-minute drivetime catchment area should be considered when assessing golf facilities. Using this metric, there are 31 other golfing sites identified within proximity of Horsham District, with these collectively providing 495 standard holes, 200 driving range bays and 18 Par 3 holes. These are all within a distance whereby they could be catering for Horsham District-based demand, whilst residents that live near to these facilities could be accessing provision within Horsham District despite coming from outside of the authority.
- 2.36 The location of the sites can be seen in Figure 2.2 and Table 2.6. They are split across Arun, Brighton & Hove, Chichester, Crawley, Mid Sussex, Mole Valley, Tandridge, Waverley, Lewes and Worthing.

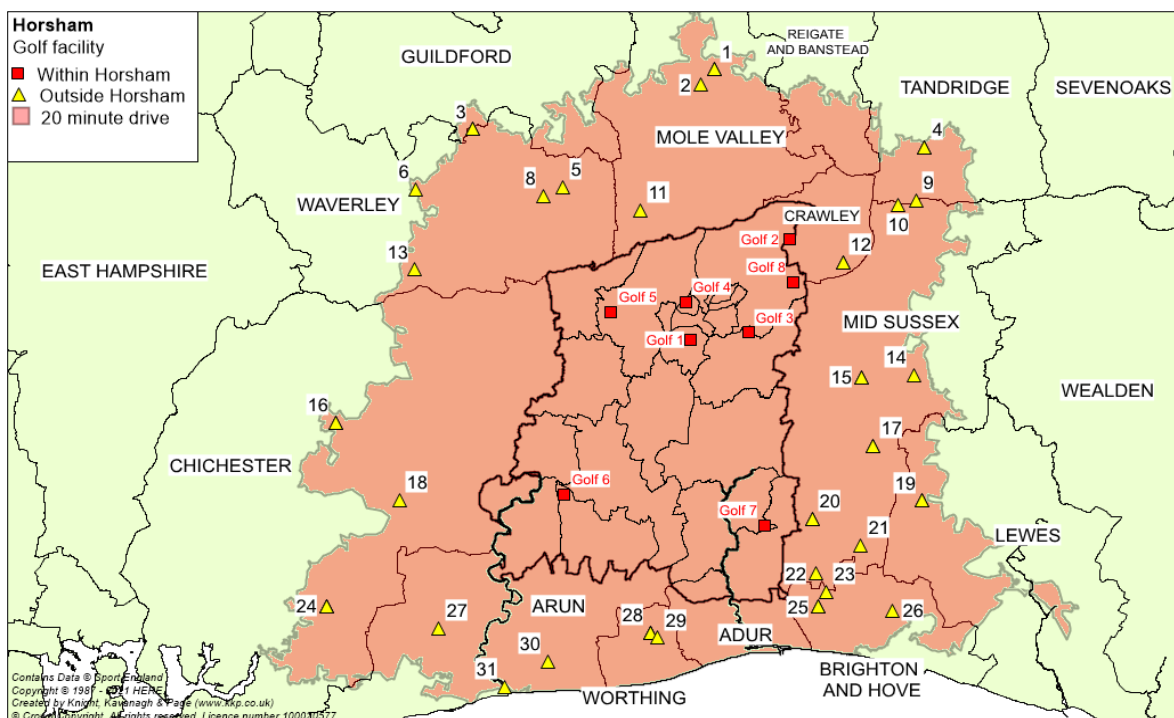
Table 2.6: Golf facilities within a 20-minute drive time catchment of Horsham District

Site ID	Site name	Local authority	Holes		Driving range bays
			Standard	Par 3	
1	Betchworth Park Golf Club	Mole Valley	18	-	20
2	Dorking Golf Club	Mole Valley	9	-	-
3	Bramley Golf Club	Waverley	18	-	10
4	Horne Park Golf Club	Tandridge	9	-	23
5	Cranleigh Golf & Country Club	Waverley	18	-	-
6	West Surrey Golf Club	Waverley	18	-	-
8	Cranleigh School Sports Centre	Waverley	-	9	-
9	Le Club Effingham Park	Tandridge	9	-	-
10	Copthorne Golf Club	Mid Sussex	18	-	-
11	Gatton Manor Hotel	Mole Valley	18	-	-
12	Tilgate Forest Golf Centre	Crawley	18	-	27
13	Chiddingfold Golf Club	Waverley	18	-	-
14	Haywards Heath Golf Club	Mid Sussex	18	-	-
15	Cuckfield Golf Centre	Mid Sussex	9	-	14
16	Cowdray Park Golf Club	Chichester	18	-	8
17	The Burgess Hill Golf Centre	Mid Sussex	-	9	28
18	Seaford College	Chichester	9	-	-
19	Mid Sussex Golf Club	Lewes	18	-	10
20	Singing Hills Golf Centre	Mid Sussex	27	-	15
21	Pyecombe Golf Club	Mid Sussex	18	-	-
22	The Dyke Golf Club	Mid Sussex	18	-	-
23	Brighton & Hove Golf Club	Brighton & Hove	9	-	-
24	The Goodwood Health Club	Chichester	36	-	15
25	West Hove Golf Club	Brighton & Hove	18	-	20
26	Hollingbury Park Golf Course	Brighton & Hove	18	-	-
27	Avisford Park Golf Club	Arun	18	-	-
28	Worthing Golf Club	Worthing	36	-	10
29	Hillbarn Golf Course	Worthing	18	-	-
30	Ham Manor Golf Club	Arun	18	-	-
31	Littlehampton Golf Club	Arun	18	-	-
Total			495	18	200

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Figure 2.2: Location of golf facilities within a 20-minute catchment area of Horsham District



- 2.37 Note that the above does not include sites such as Rusper Golf Club, Brooklands Golf Centre and Waterhall Golf Course, all of which also fall within the catchment area. They have all closed in recent years and are no longer operational. It is assumed that the demand for which they catered for has been absorbed by the remaining facilities.

Supply of golf provision set against population

- 2.38 To assist with analysing the level of supply of golf facilities within Horsham, provision within the District has been assessed and compared to national and regional rates as well as to rates in authorities that fall within the 20-minute drive time catchment area. This helps gauge 'standards' and considers the number of golf holes (both standard and par 3) and the number of driving range bays per head of population.
- 2.39 Table 2.7 below shows that there are 1.04 standard golf holes per one thousand people within Horsham District. This is substantially higher than the figures for both the South East (0.71 holes) and for the whole of England (0.54 holes). It is also higher than nine of the 13 other authorities, with only Tandridge (2.56 holes), Guildford (1.25 holes), Mole Valley (1.20 holes) and Waverley (1.12 holes) having more provision per resident.

Table 2.7: Standard golf course holes per head of population

Area	Standard holes ³	Population ⁴	Holes per 1000 people
Horsham	153	146,800	1.04
Adur	-	64,500	-
Arun	72	164,800	0.44

³ Information acquired from Sport England's Active Places

⁴ Based on Office for National Statistics Census data 2021 (produced 28.06.22)

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Area	Standard holes ³	Population ⁴	Holes per 1000 people
Brighton & Hove	63	277,200	0.23
Chichester	126	124,100	1.02
Crawley	18	118,500	0.15
Guildford	180	143,600	1.25
Lewes	81	99,900	0.81
Mid Sussex	126	152,600	0.83
Mole Valley	105	87,400	1.20
Reigate & Banstead	117	150,900	0.78
Tandridge	225	87,900	2.56
Waverley	144	128,200	1.12
Worthing	54	111,400	0.48
<i>South East</i>	<i>6,597</i>	<i>9,278,100</i>	<i>0.71</i>
<i>England</i>	<i>30,448</i>	<i>56,489,800</i>	<i>0.54</i>

- 2.40 For Par 3 holes, there is a similar picture. At 0.12 holes per one thousand people, the rate in Horsham District is more than double the regional rate (0.06 holes) and triple the national rate (0.04 holes). Moreover, the District is also better provided for than all but one of its nearby authorities (Chichester), with no Par 3 provision identified in 10 of the authorities.

Table 2.8: Par 3 golf course holes per head of population

Area	Par 3 holes ⁵	Population ⁶	Holes per 1000 people
Horsham	18	146,800	0.12
Adur	-	64,500	-
Arun	-	164,800	-
Brighton & Hove	-	277,200	-
Chichester	18	124,100	0.15
Crawley	-	118,500	-
Guildford	-	143,600	0.06
Lewes	-	99,900	-
Mid Sussex	9	152,600	-
Mole Valley	-	87,400	-
Reigate & Banstead	-	150,900	-
Tandridge	-	87,900	-
Waverley	18	128,200	-
Worthing	-	111,400	-
<i>South East</i>	<i>552</i>	<i>9,278,100</i>	<i>0.06</i>
<i>England</i>	<i>2,295</i>	<i>56,489,800</i>	<i>0.04</i>

⁵ Information acquired from Sport England's Active Places

⁶ Based on Office for National Statistics Census data 2021 (produced 28.06.22)

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- 2.41 For driving ranges, there are 0.31 bays in Horsham District per one thousand people. In correlation with standard and Par 3 holes, this is above the regional rate (0.29 bays), albeit only marginally, and the national rate (0.20 bays). It is also higher than the figures in eight of the 13 nearby authorities, but below provision levels in Tandridge (0.94 bays), Mole Valley (0.55 bays), Mid Sussex (0.53 bays), Guildford (0.49 bays) and Chichester (0.38 bays).

Table 2.9: Driving range bays per head of population

Area	Driving range bays ⁷	Population ⁸	Bays per 1000 people
Horsham	45	146,800	0.31
Adur	-	64,187	-
Arun	-	161,123	-
Brighton & Hove	20	291,738	0.07
Chichester	47	121,508	0.38
Crawley	27	112,474	0.23
Guildford	71	152,142	0.49
Lewes	10	87,547	0.10
Mid Sussex	81	126,556	0.53
Mole Valley	48	87,400	0.55
Reigate & Banstead	27	150,900	0.18
Tandridge	83	87,900	0.94
Waverley	10	128,200	0.08
Worthing	10	111,400	0.09
<i>South East</i>	<i>2,671</i>	<i>9,278,100</i>	<i>0.29</i>
<i>England</i>	<i>11,385</i>	<i>56,489,800</i>	<i>0.20</i>

Future developments

- 2.42 As referenced previously, Ifield Golf & Country Club is subject to development aspirations that could result in its allocation in the Council's emerging Local Plan and the loss of the site. As such, the calculations for standard hole provision have been re-run in the table below to show what the reduced rates would be per head of population should the development aspiration go ahead (Par 3 holes and driving range bays would be unaltered).

Table 2.10: Standard holes subject to proposal at Ifield Golf & Country Club

Area	Standard holes ⁹	Population ¹⁰	Holes per 1000 people
Horsham (without Ifield Golf & Country Club)	135	146,800	0.92
Adur	-	64,500	-
Arun	72	164,800	0.44
Brighton & Hove	63	277,200	0.23
Chichester	126	124,100	1.02
Crawley	18	118,500	0.15

⁷ Information acquired from Sport England's Active Places

⁸ Based on Office for National Statistics Census data 2021 (produced 28.06.22)

⁹ Information acquired from Sport England's Active Places

¹⁰ Based on Office for National Statistics Census data 2021 (produced 28.06.22)

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Area	Standard holes ⁹	Population ¹⁰	Holes per 1000 people
Guildford	180	143,600	1.25
Lewes	81	99,900	0.81
Mid Sussex	126	152,600	0.83
Mole Valley	105	87,400	1.20
Reigate & Banstead	117	150,900	0.78
Tandridge	225	87,900	2.56
Waverley	144	128,200	1.12
Worthing	54	111,400	0.48
<i>South East</i>	<i>6,579</i>	<i>9,278,100</i>	<i>0.71</i>
<i>England</i>	<i>30,430</i>	<i>56,489,800</i>	<i>0.54</i>

- 2.43 As shown, the overall rate in Horsham District would remain above regional and national rates if provision was lost; however, the level would fall below that in Chichester (in addition to Tandridge, Guildford, Waverley and Mole Valley). It would remain above the remaining authorities.
- 2.44 Moreover, it must be reiterated that there are also development aspirations at both Cottesmore Golf & Country Club and Horsham Golf & Fitness that would result in the loss of further golf holes if they came to fruition, although neither were recommended as development allocations in the Cabinet documentation in July 2021. The table below evidences what impact these proposals would have on standard holes, in addition to the potential loss of provision at Ifield Golf & Country Club (again, Par 3 holes and driving range bays would be unaltered). It is based on both sites being reduced to 9-hole offerings only as this is what is currently intended at the sites.

Table 2.11: Standard holes subject to all development proposals

Area	Standard holes ¹¹	Population ¹²	Holes per 1000 people
Horsham (without Ifield Golf & Country Club and with only 9 holes provided at both Cottesmore Golf & Country Club and Horsham Golf & Fitness)	108	146,800	0.74
Adur	-	64,500	-
Arun	72	164,800	0.44
Brighton & Hove	63	277,200	0.23
Chichester	126	124,100	1.02
Crawley	18	118,500	0.15
Guildford	180	143,600	1.25
Lewes	81	99,900	0.81
Mid Sussex	126	152,600	0.83
Mole Valley	105	87,400	1.20
Reigate & Banstead	117	150,900	0.78
Tandridge	225	87,900	2.56
Waverley	144	128,200	1.12

¹¹ Information acquired from Sport England's Active Places

¹² Based on Office for National Statistics Census data 2021 (produced 28.06.22)

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Area	Standard holes ¹¹	Population ¹²	Holes per 1000 people
Worthing	54	111,400	0.48
South East	6,552	9,278,100	0.71
England	30,403	56,489,800	0.54

- 2.45 The overall rate in Horsham District would still be above regional and national rates if provision was lost; however, the level would be below that in nine of the 13 nearby authorities. It would remain above what is identified in Arun, Brighton & Hove, Crawley and Worthing.

Summary

- 2.46 Golf facility levels in Horsham District are evidently high when compared to national and regional rates and will remain that way even if existing development proposals come to fruition, which should be seen as a positive. However, this does not necessarily equate to an oversupply of provision and the above findings should not be used in isolation to justify any future loss. **The calculations are intended for use as a guide and are part of the suite of tools used to inform this supply and demand assessment.**
- 2.47 In reality, using 'standards' to gauge provision can be somewhat inaccurate as rates can continually reduce as and when developments take place and golf provision is lost, which then in turn reduces the level of provision required for an authority to be above average levels. As an example of this, there are currently 484 fewer standard holes identified nationally and 222 fewer identified regionally when compared to previous findings (in 2021), despite demand levels seemingly rising over this timespan. This has created more pressure on remaining golf supply yet calculating averages with no further analysis would suggest less need for facilities.
- 2.48 In addition, the approach does not take account of local nuances and the propensity of a population base to participate in golf. Furthermore, due to the nature of the sport, local authorities with high supply levels are more likely to have provision that meets demand from neighbouring authorities with low supply levels, especially where facilities are situated close to the border. In Horsham District, this is the case particularly at Ifield Golf & Country Club, which reports accommodating considerable demand from Crawley due to its location (see imported demand). Horsham has one of the higher rates of provision in the South East region, whereas Crawley has one of the lowest rates (although nationally there are authorities without any golf facilities, including Adur), which is likely to be a consequence of it being an urban centre (with Horsham District much more rural).

Management and ownership

- 2.49 The three main types of ownership and management models for golf facilities in England are members clubs, proprietary sites and municipal facilities, as summarised below.

Table 2.12: Types of ownership and management of golf facilities

Management type	Description
Members	Traditionally owned by members and run by committees. Most members' clubs offer some level of pay and play and encourage golf societies but are mostly focused on membership numbers.

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Management type	Description
Proprietary	Owned or managed by businesses or individuals, these can include country club type facilities at the high end of the golfing market alongside more localised facilities. Many have clubs operating within them but can also take a much more relaxed attitude to dress and traditions of golf. Pay and play opportunities tend to be a key feature of the business plan.
Municipal	These are generally owned by a local authority, although in a growing number of instances, management has been contracted and externalised to private companies. Due to a lack of financial viability, many have closed across the Country in recent years and many that remain are under threat.

- 2.50 It is recognised that members clubs and visitors to such clubs are normally expected to dress appropriately, have a registered handicap (a certificate issued by the Council of National Golf Unions) and be familiar with the sport's rules and etiquette. This is not uncommon at proprietary sites, but municipal facilities tend to be more relaxed with regard to a dress code and do not require people to have handicaps, making golf much more accessible.
- 2.51 Consequently, municipal courses are, in many instances, seen as entry level facilities, with players using them before having the confidence and ability to move on to a members' clubs or high-end proprietary sites (although many people can and do stay attached to a particular course). They also tend to offer a more affordable golfing experience.
- 2.52 The business model for members clubs tends to rely heavily on income via membership subscriptions and use of ancillary facilities, rather than pay and play usage, although the balance has altered at many sites in recent years. The same can be said for some proprietary sites, although, in general, more emphasis is placed on supplementing regular activity with green fee sales. That being said, some proprietary sites have large membership clubs operating out of them that means they have more of a focus on members than what would otherwise be expected.
- 2.53 Conversely, municipal sites have always been heavily reliant on visitors even though membership packages are normally available (often in the shape of season tickets). In some instances, these are linked to access to local authority operated sports facilities, such as leisure centres and swimming pools.
- 2.54 Despite the above generalisations, each golf facility, regardless of management, will have its own processes in terms of how much focus is placed on membership and pay and play usage, or whether it equally encourages both. There is no correct way to run a site. A club that focuses on members has guaranteed income, but this can often deter more casual players or nomadic golfers through, for example, a lack of peak time availability.
- 2.55 In contrast, a site that depends on visitors can struggle to be viable if there are spells of inclement weather and can discourage people who wish to be part of a club environment. On the other hand, more income can be brought in through regular users compared to what would be the case had they been members
- 2.56 Cottessmore Golf & Country Club, Horsham Golf & Fitness Club, Mannings Heath Golf Club, Rookwood Golf Course and Slinfold Park & Country Club are classified as proprietary courses, whilst the remainder are members clubs. There are thus no municipal courses, although Rookwood Golf Course does advertise that it works in partnership with Horsham District Council.

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Table 2.13: Summary of ownership/management in Horsham District¹³

Site ID	Site name	Management type
Golf 1	Horsham Golf & Fitness Club	Proprietary
Golf 2	Ifield Golf & Country Club	Members
Golf 3	Mannings Heath Golf Club	Proprietary
Golf 4	Rookwood Golf Course	Proprietary
Golf 5	Slinfold Park Golf & Country Club	Proprietary
Golf 6	West Sussex Golf Club	Members
Golf 7	Horton Golf Club	Members
Golf 8	Cottesmore Golf & Country Club	Proprietary

- 2.57 At present neither Rookwood Golf Course nor Horton Golf Club affiliate to England Golf or the Sussex County Golf Union. This means that competitions are not governed by the organisations and that participants do not qualify for handicap certifications or changes; however, it also means that members save on yearly subscription fees (annual affiliation to England Golf is compulsory for members of affiliated clubs at a cost of £9.50 in 2022). Non-affiliation is most commonly the case at venues that focus on informal activity or those that are very private.

Pricing

- 2.58 A key issue for the wider golf population is whether golf courses are available to the general population at a price point accessible to the majority of residents. Better quality courses tend to cost more to use, whilst 18-hole provision is generally more expensive to access than 9-hole provision.
- 2.59 Nationally, over the past decade, many facilities have altered their pricing structure to allow for discounts following a previous decline in golf membership. England Golf encouraged this and continues to do so as its view is that clubs are more likely to experience growth when flexible packages are available. For instance, five and/or six-day memberships are now common (whereby members can access a site on specific days but not on one or both weekend days), whilst discounts are regularly in place that are no longer limited solely to juniors (e.g. discounts for those aged 18-21 and 21-30 or for those aged 65 and over).
- 2.60 A prior reduction in membership also resulted in a growing number of facilities openly encouraging visitors, with nomadic golf participation increasing. Whilst this has always been the case at some venues, other, more membership orientated sites were previously reluctant to promote green fee usage as capacity did not exist. Now, most venues actively promote non-member access, especially outside peak times and to accommodate larger groups and societies. However, this situation is more acute at lower grade sites than at higher grade sites, where high quality can enable a provider to maintain exclusive usage and a premium price.
- 2.61 England Golf reports that the average cost of a full adult membership across the Country is currently £901. In Horsham District, all sites offer some form of membership scheme and all but two charge more than the national average, suggesting that most are high-end and that the cost of playing golf is generally high. Membership at West Sussex Golf Club is the most expensive at £2,500 per year, followed by Mannings Heath Golf Club at £1,815 per year and Slinfold Park Golf & Country Club at £1,376.75 per year.

¹³ Information sourced from England Golf and checked and challenged with operators.

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- 2.62 The average cost of annual membership across all sites is £1,321; considerably above the national average, albeit more comparable regionally. Furthermore, four sites (West Sussex Golf Club, Mannings Heath Golf Club, Slinfold Park Golf & Country Club and Horton Golf Club) also charge joining fees which adds (initially) to the overall cost package. This charge is particularly high at West Sussex Golf Club (£4,000) and, in addition to its annual fee, makes the site inaccessible to a substantial proportion of the population.
- 2.63 Some of the more expensive sites provide more than one golf facility, such as Slinfold Park Golf & Country Club, which has a standard hole course, a Par 3 course and a driving range. Sites with more facilities are likely to charge higher fees than a site with, for example, just one standard hole course, if all other aspects are equal (e.g., quality).
- 2.64 Furthermore, some of the golf facilities are part of wider complexes. In these cases membership can include access to provision not available at dedicated golfing sites. For example, both Horsham Golf & Fitness Club and Slinfold Park Golf & Country Club offer onsite gyms, Cottesmore Golf & Country Club is accompanied by a hotel, swimming pool and spa, and Mannings Heath Golf Club forms part a wine estate. This may, in part, explain the relatively high cost point of membership at these sites.
- 2.65 In addition, membership of some venues enables access to other golfing sites nationwide; known as “reciprocal courses”. This is the case at Slinfold Park Golf & Country Club, which allows one time access to 15 other affiliated golf courses and preferential rates at a further 28. Similarly, membership at Mannings Heath Golf Club facilitates entry to five other golf sites once per month.
- 2.66 Cottesmore Golf & Country Club operates below the national average for membership costs, although it must be noted that the package on offer only includes off-peak access to the golf provision. For access at peak time, ‘golf credits’ must be purchased and used, with these starting from £2.00 per round, thus adding to the cost of using the site. As referenced above, this is linked to it being multi-use rather than solely golf-specific.
- 2.67 The remaining site with a low membership cost is Horton Golf Club; its membership equates to £155.00 a year. This is considerably below the national average to the point of being remarkably cheap, although a joining fee of £50.00 is also applicable. This low price is linked to the offer at the site being unusual as the Club predominantly reserves access for members, who in turn are expected to contribute to the maintenance of the site, with no pay and play access offered. This is connected to the history of the site, with its members designing and building the course following the closure of a facility within the Shoreham Cement Works Estate in 1991.
- 2.68 Away from membership costs, with the exception of Horton Golf Club, green fees are available at the remaining sites, although pricing is varied. The cheapest price for access of a standard hole course is at Rookwood Golf Course, with weekday access costing £29.00 per round and weekend use costing £31.00. Conversely, West Sussex Golf Club is the most expensive at £125.00 on weekdays and £140.00 at weekends.

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Table 2.14: Pricing structures at golf facilities within Horsham District¹⁴

Site ID	Course name	Joining fee	Full annual membership	Green fee (per round) ¹⁵	
				Weekday	Weekend
Golf 1	Horsham Golf & Fitness Club	-	£1,200.00	£30.00	£45.00
Golf 2	Ifield Golf & Country Club	-	£1,376.75	£35.00	£35.00
Golf 3	Mannings Heath Golf Club	£350.00	£1,815.00	£70.00	£80.00
Golf 4	Rookwood Golf Course	-	£1,248.00	£29.00	£31.00
Golf 5	Slinfold Park Golf & Country Club	£10.00	£1,512.00	£37.00	£37.00
Golf 6	West Sussex Golf Club	£4,000.00	£2,500.00	£125.00	£140.00
Golf 7	Horton Golf Club	£50.00	£155.00	N/A	N/A
Golf 8	Cottesmore Golf & Country Club	-	£768.00	£45.00	£35.00

- 2.69 Nationally, pay and play access to standard hole golf courses can be achieved at some sites for less than £15.00. This is more affordable than any of the sites in Horsham District. However, the 9-hole provision at Cottesmore Golf & Country Club, Horsham Golf & Fitness Club and at Slinfold Park Golf & Country Club is more aligned to this, with green fee costs ranging from £7.00 to £19.00.

Quality

- 2.70 There are no official national or county golf facility rankings. Generally, the better course quality and supporting infrastructure is, the higher joining/membership and green fees are likely to be. Some sites gain status through hosting county, national and international golf events and some tend to feature in ranking articles put together by golf magazines. However, quality can also be subjective and can be dependent on, amongst other aspects, golfer preference and ability.
- 2.71 In terms of quality of the golf courses in Horsham District, whilst no assessments have taken place to inform this study (due to the aforementioned subjectivity), it is reported to be good across the District as reflected by the high price point at the majority of facilities. Few issues have been identified, with nearly all sites having dedicated green keeping staff which provide maintenance regimes that operate all-year round. It is also assumed that these programmes are for the most part frequent and sophisticated, especially at sites such as West Sussex Golf Club, Mannings Heath Golf Club and Ifield Golf & Country Club.
- 2.72 West Sussex Golf Club is considered to be the premier golfing offer in the District and is ranked as one of the best courses in the Country. This links to its particularly high fees. It also implemented full course irrigation works in 2020 which has reportedly led to further improvement.
- 2.73 Mannings Heath Golf Club and Ifield Golf & Country Club are also considered to be top tier facilities. Both, in addition to West Sussex Golf Club, have previously hosted the Sussex Amateur County Championship (as organised by the Sussex County Golf Union) and Ifield Golf & Country Club will again be holding the competition in 2023. Only the best quality facilities are considered appropriate for such events.

¹⁴ Information sourced from England Golf and checked and challenged with operators.

¹⁵ Where more than one course is provided, the price displayed is for the larger course and relates to summer fees (winter fees can be cheaper).

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- 2.74 With specific reference to Ifield Golf & Country Club, despite its status, it reports that it can suffer from drainage issues in the winter due to the clay-based soil upon which it is built. This is a common problem across Sussex. As a result, it often chooses to close the site when others stay open to protect the course from excessive damage and to ensure that high quality is sustained. This means that its members will not have golf course access during this time (unless they have additional memberships or choose to access an alternative site via pay and play), despite still paying their fees, although this is completely normal and industry standard.
- 2.75 Conversely, maintenance at Rookwood Golf Course is, whilst adequate, comparatively perceived to be fairly basic. This is common across many sites nationally, with some providers commonly needing to undergo cost-cutting exercises to deliver a golfing offer at a lower price point. The same could also be said at Horton Golf Club, which relies solely on volunteers for general upkeep, rather than paid staff.
- 2.76 The operator of Horsham Golf & Fitness Centre reports that it is becoming increasingly difficult to maintain its course due to rising costs and a scarcity of water supply. This is linked to its current development aspirations as it is believed that it will help reduce expenditure and increase income.
- 2.77 Ancillary facilities are also for the most part good across Horsham District, with most sites offering all-encompassing clubhouses and several, as noted, also supplying other amenities such as gyms and hotels. The clubhouse at West Sussex Golf Club was refurbished and extended recently, whilst the clubhouse at Ifield Golf & Country Club was refurbished in 2017. Both are considered to be of particularly good quality.
- 2.78 Mannings Heath Golf Club reports that it wants to develop staying accommodation via extending its existing clubhouse, which is of good quality. This is part of its effort to attract more visitors to the site and to increase income.
- 2.79 Away from the good quality facilities, Horton Golf Club is only serviced by a small, very limited clubhouse that offers little opportunity to accommodate external hirers and no space for anything more than a minimal catering offer. Similarly, the golf provision at Horsham Golf & Fitness Century is only serviced by a modest building with basic changing rooms and a small bar with an accompanying club room. There is no space to accommodate functions, meaning the facilities are not currently hired out externally.
- 2.80 Golf clubs generally need multiple revenue sources to operate effectively and the provision of a good quality, well equipped clubhouse is a key opportunity to provide a secondary income stream. This emanates from a variety of sources including bar and catering income from members and visitors as well as venue hire for special occasions including weddings, christenings and funerals. From a golfing perspective, given the current emphasis on increasing levels of female and junior golf membership across the Country, it is also imperative that ancillary provision can adequately cater for all types of member e.g., by providing gender specific changing facilities.

2.3 Demand

- 2.81 Golf participation considerably increased across the Country following the lifting of Covid-19 restrictions, both initially in 2020 and again following the later lockdown period in 2021. As one of the first sports to be allowed on both occasions, people were able to play whilst maintaining social distancing and England Golf provided very clear guidance as to how this should manifest itself (e.g., by not allowing the flag to be taken out or rakes to be used).

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- 2.82 Nationally, some courses reported a near doubling of demand, highlighting that a significant opportunity now exists to increase participation in the long-term. However, to what level this may apply remains unclear as retention may be challenging as more users return to normal working/ living conditions and with ongoing economic issues.
- 2.83 Prior to the recent growth in demand, participation in golf had generally been in decline, with only recent signs showing that the reduction may have been levelling off. The landscape of demand has also changed, with fewer users taking up membership packages and more golfers becoming nomadic and using a range of courses on a pay and play basis.
- 2.84 The following section examines current demand for golf in Horsham District as well as recent trends and potential future demand.

Membership

- 2.85 England Golf reports that the average membership of a golf club nationally is 386 (based on its central national handicap platform). In Horsham District, the current average membership across the sites, as reported by England Golf, is 606. This suggests that demand in the area is significantly higher than national rates.
- 2.86 Previously, using England Golf's bi-annual Golf Club Questionnaire (last produced in 2018), it was suggested that the average number of members per site was 484. However, this was solely based on clubs that responded to the associated survey, whereas the average identified now accounts for all affiliated providers. It is now acknowledged that the more viable clubs with a larger membership base were the most likely to respond to the survey, which distorted the national picture.
- 2.87 Table 2.15 below provides current membership numbers at golf facilities in the District, as reported by operators during the consultation. Exact figures for Rookwood Golf Course and Slinfold Park Golf & Country Club are therefore unknown because they did not respond to requests for information.
- 2.88 Please note that the figures displayed relate to golf playing members only. Sites such as Cottessmore Golf & Country Club (which reportedly has 2,000 members), West Sussex Golf Club (743 members) and Horsham Golf & Fitness Club (492 members) have considerably more members overall; however, many of these cannot utilise the golf provision as part of their joining package.

Table 2.15: Summary of membership within Horsham District

Site ID	Site name	No. of members
Golf 1	Horsham Golf & Fitness Club	375
Golf 2	Ifield Golf & Country Club	515
Golf 3	Mannings Heath Golf Club	700
Golf 4	Rookwood Golf Course	Unknown
Golf 5	Slinfold Park Golf & Country Club	Unknown
Golf 6	West Sussex Golf Club	540
Golf 7	Horton Golf Club	177
Golf 8	Cottessmore Golf & Country Club	600
-	National Average	386

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- 2.89 When analysing membership by site, where known, it is considerably above the national average at Mannings Heath Golf Club (700), Cottesmore Golf & Country Club (600), West Sussex Golf Club (540) and Ifield Golf & Country Club (515). This correlates with the average membership level, again evidencing overall high demand for golf in the District.
- 2.90 In contrast, membership is marginally below the average at Horsham Golf & Fitness (375) and significantly below the average at Horton Golf Club (177), although this can be attributed to it only providing a 9-hole course in addition to its unique operational setup.

Membership breakdown

- 2.91 Where membership is known, there are 2,163 senior male, 464 senior female and 280 junior members across the golfing sites, which broadly reflects the national picture in terms of the breakdown of demand. Via a 2018 England Golf questionnaire, it calculated that the average membership nationally consisted of roughly 79% senior males, 14% senior females and 7% juniors, whereas in Horsham District membership equates to 74% senior males, 16% senior females and 10% juniors. As such, proportionately, there are more senior female and junior members and fewer senior male members, although this may be a reflection of England Golf and clubs focusing on female and junior participation since 2018.
- 2.92 The table below summarises the data supplied by the responding operators.

Table 2.16: Membership breakdown within Horsham District

Site ID	Site name	No. of members (%)		
		Senior male	Senior female	Junior
Golf 1	Horsham Golf & Fitness Club	271 (72%)	95 (25.5%)	9 (2.5%)
Golf 2	Ifield Golf & Country Club	423 (82%)	76 (15%)	16 (3%)
Golf 3	Mannings Heath Golf Club	594 (85%)	50 (7%)	56 (8%)
Golf 4	Rookwood Golf Course	Unknown	Unknown	Unknown
Golf 5	Slinfold Park Golf & Country Club	Unknown	Unknown	Unknown
Golf 6	West Sussex Golf Club	385 (71.3%)	115 (21.3%)	40 (7.4%)
Golf 7	Horton Golf Club	140 (79%)	28 (16%)	9 (5%)
Golf 8	Cottesmore Golf & Country Club	350 (58%)	100 (17%)	150 (25%)

- 2.93 In addition, there is a significant mix of membership packages utilised at the sites, with a growing number of options available at most, away from the traditional “full” membership offer. As an example, only 154 of the 515 members at Ifield Golf & Country Club have a full membership, with the others receiving discounts based on their age (available for over 80s and under 35s) and/or having a flexible membership that limits course access. This helped the Club keep demand levels relatively static at a time when participation nationally was declining, and has also contributed to recent increases.

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- 2.94 Notwithstanding the above, whilst a variety of membership options can help increase overall demand levels at a site, it can also create issues with income and create a false sense of demand and site sustainability. This is because a club with a high number of non-full members will be receiving less money from users than a club with a similar level of demand, but with demand derived predominantly from full members.

Membership trends

- 2.95 Where known, membership across sites in Horsham District has increased by 9.29% since 2015, with Mannings Heath Golf Club, Horton Golf Club, Cottesmore Golf & Country Club and Ifield Golf & Country Club all experiencing a growth in demand. The largest increase has been experienced by Mannings Heath Golf Club, which has grown from 384 members in 2015 to 700 currently.
- 2.96 Increases at the aforementioned sites are only partially offset by an apparent decline at both Horsham Golf & Fitness Club and West Sussex Golf Club. However, it must be noted that this is unlikely to represent a true decrease as prior membership numbers included overall site membership levels, whereas the current membership, as supplied by the operators themselves, only accounts for golf playing members. Using West Sussex Golf Club as an example, site demand has actually increased as there are currently 743 overall members compared to 699 in 2018 and 695 in 2015.
- 2.97 For Horsham Golf & Fitness Club, the operators report that golf demand increased following Covid-19 lockdown periods, but that it has since returned to pre-pandemic levels.

Table 2.17: Changes in demand since 2015¹⁶

Site ID	Site name	2015 members	2018 members	Current members	Change
Golf 1	Horsham Golf & Fitness Club	501	492	375	-25.15%
Golf 2	Ifield Golf & Country Club	444	403	515	+15.91%
Golf 3	Mannings Heath Golf Club	384	424	700	+82.29%
Golf 4	Rookwood Golf Course	Unknown	Unknown	Unknown	-
Golf 5	Slinfold Park Golf & Country Club	Unknown	Unknown	Unknown	-
Golf 6	West Sussex Golf Club	695	699	540	-22.30%
Golf 7	Horton Golf Club	150	151	177	+18.00%
Golf 8	Cottesmore Golf & Country Club	486	620	600	+23.46%

- 2.98 Horton Golf Club attributes its membership increase to the closure of other sites in the area, naming Brooklands Golf Centre (in Worthing) and Waterhall Golf Course (in Brighton & Hove). These municipal courses closed in 2017 and 2020, respectively.
- 2.99 Mannings Heath Golf Club also mentions that the closure of other sites in its locality has helped drive demand, but in addition states that site improvements and increased marketing has led to increased membership.
- 2.100 Cottesmore Golf & Country Club reports experiencing a significant increase following the lifting of Covid-19 restrictions, although it notes that this growth has now stagnated.

¹⁶ Historic membership data has been supplied by England Golf based on its affiliation figures

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- 2.101 Similarly, Ifield Golf & Country Club states that its demand increased following Covid-19 before the rise came to a halt. Anecdotally, it also reports that potential growth is now being impacted upon by the development aspirations at the venue, identifying that this puts off potential users as long-term access is not guaranteed. The Club says that this has also led to some existing members leaving although to relatively minimal levels.

Pay and play

- 2.102 Whilst it is acknowledged that pay and play usage has generally increased across England in recent years, usage figures for the sites within Horsham District are generally not known as it is not something that is tracked by England Golf. Furthermore, most operators are unwilling to disclose details as part of this study due to commercial sensitivity.
- 2.103 An exception to the above is provided via Ifield Golf & Country Club, which has supplied its green fee income figures to evidence a recent and considerable growth in its pay and play demand. Between the 2006/2007 and 2015/2016 playing seasons¹⁷, it averaged income of £26,500 per year in green fees, before this increased to an average of £41,000 across 2016/2017 and 2017/2018 and to an average of £62,159 across 2018/2019 and 2019/2020. It then brought in £142,617 in 2020/2021 and £98,448 in 2021/2022, which whilst representing a reduction compared to the previous year is still above prior levels.
- 2.104 The Club states that its initial growth post 2016 can be attributed to not previously encouraging or allowing many visitors, whilst its more recent growth can be put down to several factors. Primarily, a significant increase in demand was experienced following the lifting of Covid-19 restrictions; however, it is thought that good quality and affordable (non-increasing) pricing is also attributable. Moreover, the Club believes that more users now want to access the course on a pay and play basis rather than via a membership due to the uncertainty around the sites long-term future.
- 2.105 Away from Ifield Golf & Country Club, pay and play demand would be expected to be highest at proprietary courses such as Rookwood Golf Course and Horsham Golf & Fitness Club given how they are setup and the relatively low price points, especially at the latter. Conversely, it is probably lowest at sites such as West Sussex Golf Club and Horton Golf Club given their primary focus on members.
- 2.106 At many sites that are focused on membership, pay and play can be restricted to ensure sufficient capacity exists for members, especially at weekends when competitions are being played. An example of this in Horsham District is at Cottessmore Golf & Country Club, which does not accept green fees until after 13:00 on same days during summer months. Despite being a proprietary site, it has more of an emphasis on members at peak time periods due to a relatively high membership base.
- 2.107 If facilities with low membership numbers do not have high green fee demand, long-term viability is questionable. Attracting pay and play usage is key to the business model and sustainability of such sites.

Exported/imported demand

- 2.108 Cross-boundary demand for golf is common nationally due to the nature of the sport. As referenced previously, golfers do not necessarily recognise local authority borders, and many will choose a facility for a whole range of reasons other than where it is located, with factors including quality, availability, cost and where friends/family play.

¹⁷ The Club's year runs from May-April.

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- 2.109 Imported demand is especially pronounced at some venues in Horsham District due to their location in relation to neighbouring authorities and a comparative lack of provision within those authorities, especially to the north. In particular, high levels are reported by Ifield Golf & Country Club due to its close proximity to Crawley. In total, only 68 of its 515 current members (13%) live definitively within Horsham District, with a further 146 members living close to the Crawley boundary (the Club could not calculate how many of these are within Horsham District and how many are within Crawley). The remaining members all live conclusively outside of Horsham District, including 44 that even reside outside of neighbouring authorities.
- 2.110 Cottesmore Golf & Country Club is similarly located in close proximity to Crawley, as well as Mid Sussex. Because of this, it also reports that many of its members reside outside of Horsham District and travel into the authority for access, although it has not quantified to what degree.
- 2.111 Mannings Heath Golf Club and Horton Golf Club report that a considerable proportion of their members travel from Mid Sussex, whilst the latter also has many members travelling from Brighton & Hove.
- 2.112 West Sussex Golf Club also reports levels of imported demand, which it links to the high-end status of the site. In addition to catering for some residents of neighbouring authorities, it states that some users travel from even further to access the provision, including some from overseas. As a result, it has a “country members” package to ensure that as much of this demand can be accommodated as possible.
- 2.113 Levels of exported demand from Horsham District to other areas cannot be determined without speaking to the providers of golf facilities within neighbouring authorities. Whilst it can be assumed that there will be some, especially given that 31 golf facilities are situated within a 20-minute drive time catchment, the level is expected to be, on average, lower than what is imported. This is because golf provision in Horsham District is higher than most authorities in the region. As an example, a high degree of imported demand from Crawley is identified, but the same level of exported demand to the Borough is unlikely given that it only provides one standard hole course and no other forms of provision (as evidenced in tables 2.7, 2.8 and 2.9).
- 2.114 Where exported demand is occurring, it is expected to be highest from the south of the District. This is because only two facilities are provided in the area, with both being relatively exclusive offerings (West Sussex Golf Club and Horton Golf Club). This is likely to lead to nearby residents travelling to the likes of Arun, Brighton & Hove and Worthing, although some will stay within Horsham District and commute to the northern sites.

Unmet demand

- 2.115 Unmet demand is existing demand that is not getting access to facilities. This is most commonly reflected in golf via site waiting lists, although it is likely that people on a waiting list are still playing elsewhere due to the quantity of facilities in the area and the nature of the sport. This could be via membership of another club or pay and play access.
- 2.116 In Horsham District, West Sussex Golf Club has a long waiting list, with 45 people currently on this. It reports reviewing the list every six months to determine whether additional members can be accepted, but notes that it has grown in recent years, particularly following the Covid-19 pandemic. There is clear unmet demand for access to this particular site.

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- 2.117 In addition, Cottesmore Golf & Country Club also reports that it has a waiting list in place due to currently being at capacity. This, however, is a waiting list for membership to the whole site, rather than just for access to the golf provision.
- 2.118 No other operators report having a waiting list in place, meaning that they are in a position to accept new members. Horton Golf Club, for example, reports having capacity for 190 members, 17 more than it currently accommodates, whilst Mannings Heath Golf Club reports having capacity for 800 members. This is 100 more than its current level.
- 2.119 Unmet demand is also expressed where there is a lack of provision to meet a particular golfing market. In Horsham District, this is most likely to be experienced by golfers looking for a more affordable offer, given that most sites are relatively high end in terms of associated fees. Only Horton Golf Club and arguably Cottesmore Golf & Country Club are currently able to meet demand for cheaper access, and the former is not appropriate for any golfer who wishes to gain access to an England Golf affiliated facility.
- 2.120 There is little evidence to suggest that other elements of the golfing market are not being met. This due to the mixture of operating models in place and the variety of 18-hole and 9-hole courses on offer, as well as driving ranges.

Latent demand

- 2.121 Latent demand is demand for golf that is not currently being realised. There are numerous reasons for this including time constraints, financial reasons and a lack of suitable, available provision. To that end, Sport England's Market Segmentation enables an analysis of people that would like to play golf in Horsham District but that do not currently do so. This currently amounts to 1,756 people, which equates to 1.2% of the population compared to a national rate of 1.1%.
- 2.122 Whilst the reasoning for the latent demand is unknown and is likely to be varied, the data does show relatively high demand which would significantly increase membership and/or pay and play usage across facilities if realised. England Golf is supportive of clubs that proactively target new audiences and that attempt to tap into this demand i.e., through developing a variety of golfing offers, coaching and a range of membership options.
- 2.123 England Golf also has a mapping tool that enables assessment of potential demand within a 20-minute drive time of each golf facility (as noted earlier, this is considered to be a reasonable travel distance). This is based on research undertaken that identifies that 24% of adults in England are potential players, amounting to circa 9.6 million people and equating to 9% current players, 8% lapsed (former) players and 7% latent players. It can be used by providers to identify what demand may exist for their facilities, thus helping inform marketing, development and investment decisions.
- 2.124 Using the tool across Horsham District, Cottesmore Golf & Country Club is identified as having the largest potential demand, with 57,414 potential players within its catchment area. This is followed by Rookwood Golf Course, which has 52,992 people, and Ifield Golf & Country Club, which has 52,919 people.

Table 2.18: Potential demand by site as identified by England Golf

Site ID	Site name	Potential players within catchment area
Golf 1	Horsham Golf & Fitness Club	35,780
Golf 2	Ifield Golf & Country Club	52,919

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Site ID	Site name	Potential players within catchment area
Golf 3	Mannings Heath Golf Club	27,026
Golf 4	Rookwood Golf Course	53,992
Golf 5	Slinfold Park Golf & Country Club	25,478
Golf 6	West Sussex Golf Club	20,274
Golf 7	Horton Golf Club	40,342
Golf 8	Cottesmore Golf & Country Club	57,414

2.125 West Sussex Golf Club is identified as having the smallest potential demand, equating to 20,274 people.

2.126 The tool also breaks the potential playing population down into nine golfing segments, with these defined to help provide an indication as to what type of golfing offer each would be most likely to access. They are:

- ◀ Relaxed members
- ◀ Older traditionalists
- ◀ Younger traditionalists
- ◀ Younger fanatics
- ◀ Younger actives
- ◀ Late enthusiasts
- ◀ Occasional time pressed
- ◀ Social couples
- ◀ Casual fun

2.127 In Horsham District, the demand for each of the sites is relatively evenly split across the segments, suggesting that a variety of provision is required. The highest demand is from “younger fanatics” (36,825 people), whilst the lowest is from “older traditionalists” (33,774 people). The former would most commonly be attracted to affordable, pay and play options, whilst the latter would be most likely to be long-standing members at clubs of high quality.

2.128 For more information, as well as a site-by-site breakdown of potential demand from each segment, please see England Golf’s Facility Report in Appendix 1.

Modelled travel patterns

2.129 Data identifies that 146,800 people live within Horsham District, whilst 1,000,943 people live within a 20-minute drive time catchment area. Using this, similar to the England Golf mapping tool, it is possible to identify the golf facility within the District to which people are most likely to travel to, based on distance only and including all golf facilities within the catchment. This is shown in Table 2.19 and Figure 2.3 below.

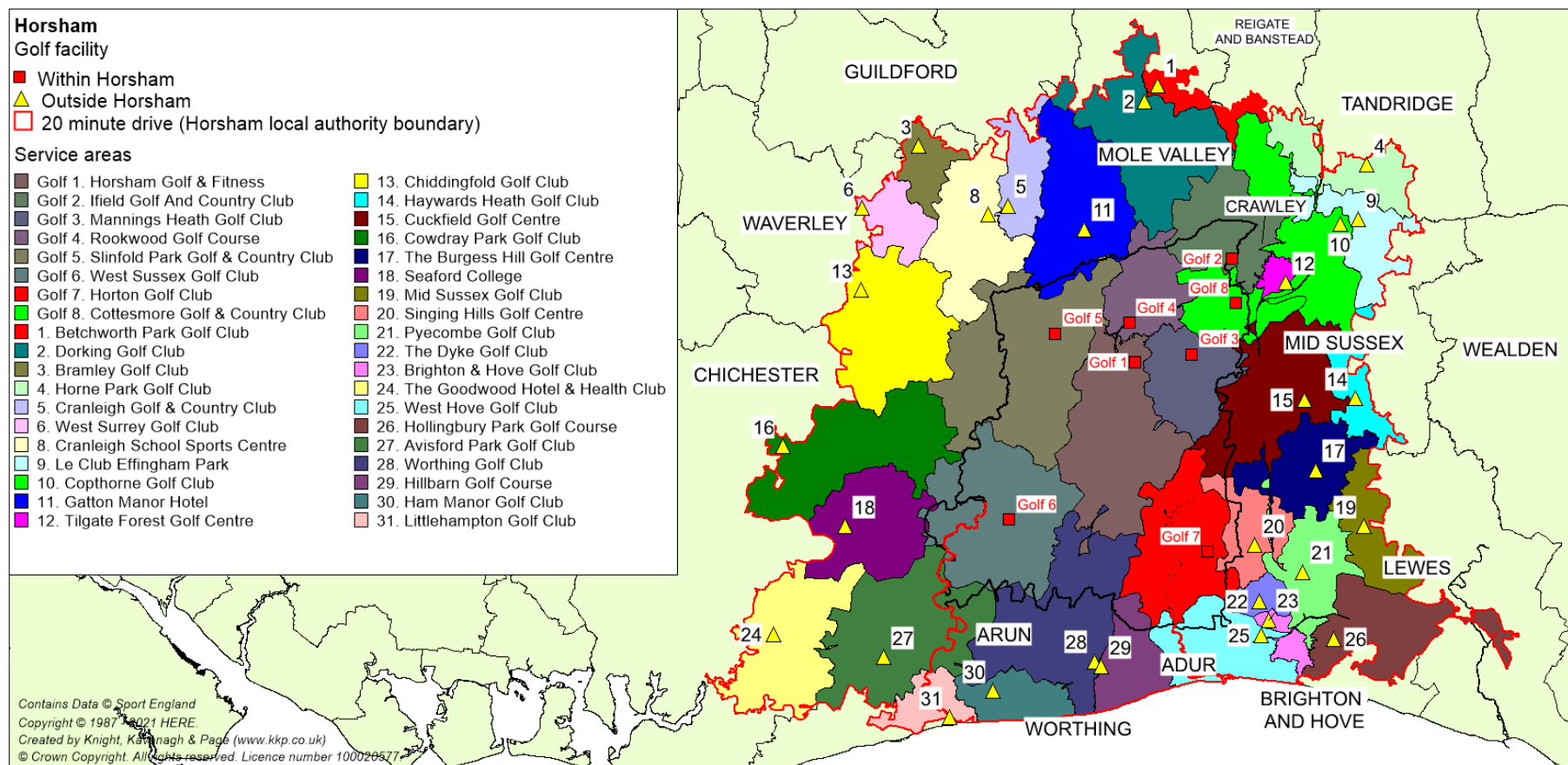
Table 2.19: Estimated populations for each golf facility within catchment area

Site ID	Site	Catchment population ¹⁸	
		Number	Percentage
Golf 1	Horsham Golf & Fitness Club	29,354	2.9%
Golf 2	Ifield Golf & Country Club	48,731	4.9%
Golf 3	Mannings Heath Golf Club	15,011	1.5%
Golf 4	Rookwood Golf Course	38,721	3.9%
Golf 5	Slinfold Park Golf & Country Club	19,777	2.0%
Golf 6	West Sussex Golf Club	20,801	2.1%
Golf 7	Horton Golf Club	16,902	1.7%
Golf 8	Cottesmore Golf & Country Club	14,012	1.4%

¹⁸ Based on Office for National Statistics Census data 2021 (produced 28.06.22)

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Figure 2.3: Potential demand within Horsham District and a 20-minute drive time catchment area



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- 2.130 Ifield Golf & Country Club (48,731 people) has the highest number of people considered most likely to travel to it (based on travel distance only) when compared to the other facilities followed by Rookwood Golf Course (38,721 people). For Ifield Golf & Country Club, it actually has a minimal catchment within Horsham District, with the majority of its area covering Crawley.
- 2.131 At the other end of the scale, Cottesmore Golf & Country Club has the fewest people considered likely to travel to it (14,012 people), followed by Mannings Heath Golf Club (15,011 people). However, it is important to understand, as previously mentioned, that most golfers choose a facility for a range of reasons of which travel distance may be just one. For example, a golfer looking for a high-end experience would be unlikely to access a lower quality site, regardless of residential proximity, and would be more prone to travelling further to access provision such as that at Mannings Heath Golf Club. Similarly, an individual living close to a really good quality golfing site may not be able to afford access, meaning that they would be likely to travel further afield to utilise a more affordable offering.
- 2.132 Furthermore, the lower level of demand identified for Cottesmore Golf & Country Club is a direct consequence of its close proximity to Ifield Golf & Country Club, where demand is highest. This is because the modelling identifies that most people travelling from Crawley, which is an urban area, will get to Ifield Golf & Country Club before Cottesmore Golf & Country Club, resulting in it being left with a smaller catchment area covering a much more rural area. However, in reality, people travelling from Crawley will be just as likely to use the site as they would be to use Ifield Golf & Country Club as the difference in distance is negligible.

Future demand

- 2.133 England Golf has an aim to increase membership of clubs nationally; however, after reaching its previous target, it no longer has a fixed goal in terms of growth. Nationally, many clubs, especially the most established, will be happy to retain current demand levels, whilst others are open to growing further and some considerably so. In that regard, England Golf reports that many providers are proactively targeting new audiences, which it encourages.

Club demand

- 2.134 In Horsham District, neither West Sussex Golf Club nor Cottesmore Golf & Country Club express future demand to grow usage given the current capacity issues at the sites. Nevertheless, both appreciate the ongoing need to attract new members to replace those who leave the venues or become unable to play. West Sussex Golf Club in particular stresses this need as it notes that the average age of its userbase is likely to be higher than what would be considered average.
- 2.135 Horsham Golf & Fitness Centre also reports serving a relatively old demographic and notes that this may result in demand levels dwindling in the near future. This is linked to its development aspirations, noting that it will be able to attract a younger participation base if it can provide a shorter course with enhanced practice facilities and other golfing offers (i.e., adventure golf). The operator suggests that this will help increase overall demand levels, although it recognises that some current, more traditional users may leave as a result.
- 2.136 All other responding operators report actively trying to grow membership as capacity exists to enable this. However, as previously referenced, Ifield Golf & Country Club identifies that potential growth is being impacted by uncertainty over the future of the site.

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Population growth

- 2.137 Using ONS-based population projections¹⁹, the population of Horsham District is predicted to increase from 146,800 to 166,330 by 2039. This will likely result in increased golf demand, exclusive of current growth aspirations, and consequently increased capacity pressures on the supply of provision.
- 2.138 To evidence the above, using data from tables 2.7 through to 2.11, the provision per 1,000 residents would decrease following the projected population increase, unless additional provision was supplied. This is shown in the table below based on the current facility stock.

Table 2.20: Impact of golf provision per head of population based on population projections

Provision type	Current population	Current provision per 1000 people	Future population	Projected provision per 1000 people
Standard holes	146,800	1.04	166,330	0.93
Par 3 holes	146,800	0.12	166,330	0.11
Driving range bays	146,800	0.31	166,330	0.27

- 2.139 Whilst the supply of each facility type would remain comfortably above existing national levels, the driving range bay supply would fall below the current average rate in the South East. Furthermore, it must be noted that the calculations do not take into account similar population growth in neighbouring authorities that export demand into Horsham District, which could further increase demand.
- 2.140 Alternatively, to keep rates close to what they currently are, an additional 18-hole standard course would be required in addition to a 9-hole Par 3 course and eight driving range bays. This would likely ensure that the growth could be accommodated if it could not be absorbed by the existing sites.

Development proposals

- 2.141 The table below provides the calculations for standard hole provision based on the population projections whilst taking into account the current development aspirations at Ifield Golf & Country Club, Cottesmore Golf & Country Club and Horsham Golf & Fitness, should they come to fruition (Par 3 and driving range bay supply would be unaltered).

Table 2.21: Potential future standard all provision subject to development proposals

Area	Current holes per 1000 people	Projected holes per 1000 people
Horsham	1.04	0.93
Horsham without Ifield Golf & Country Club	0.92	0.81
Horsham (without Ifield Golf & Country Club and with only 9 holes provided at both Cottesmore Golf & Country Club and Horsham Golf & Fitness)	0.74	0.65

¹⁹ Based on 2020 mid-year ONS population projections (the latest available).

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- 2.142 The level of provision would fall from 1.04 holes per 1,000 people currently to 0.81 holes without Ifield Golf & Country Club and to 0.65 holes if all proposals went ahead. The latter would drop the rate to below the current level across the South East.

2.3: Supply and demand analysis

- 2.143 Horsham District is currently well provided for in relation to golf provision, with it having considerably more facilities than both national and regional rates. Furthermore, a variety of provision is offered with standard hole courses, Par 3 courses and driving range bays supplied and with some venues focusing on membership schemes (i.e., West Sussex Golf Club, Ifield Golf & Country Club, Horton Golf Club, Mannings Heath Golf Club and Cottestmore Golf & Country Club), and others on pay and play usage (i.e., Rookwood Golf Course and Slinfold Park Golf & Country Club). This means that it is likely that most current and potential users can be catered for and that supply is generally sufficient to meet demand, although it should be noted that most sites are relatively expensive to access and that there are no municipal courses.
- 2.144 Notwithstanding the above, it is also clear that each facility is meeting a need due to overall high demand as well as current membership and usage levels at most sites, and when factoring in potential future growth, **meaning that there is not an oversupply of provision. Due to this, despite the current development aspirations in place, it is unlikely that any loss of provision could be supported without appropriate mitigation being secured, unless it can be evidenced that a proposal can help meet a gap in the golfing market. As things stand, existing usage levels could not be absorbed by the remaining sites without significant capacity pressures being created, meaning that replacement to an equivalent or better quantity and quality in a suitable location will be required where any loss is occurred. This is as per the NPPF.**
- 2.145 If the existing development proposals and the potential loss of golf provision are to be pursued, separate needs assessment studies will be required to fully determine requirements, with the focus specifically on the site/s in question and a bespoke, site-specific catchment area. Provision and demand from within neighbouring authorities can be more thoroughly considered as part of this. Any assessment should follow Sport England's ANOG and, for a proposal to go ahead, will need to evidence that the provision is surplus to requirements or set out a mitigation proposal that replaces the supply to an equivalent or better quantity and quality in a suitable location. **This is also as per the NPPF.**
- 2.146 More generally, there is likely to be more of a need for specific facilities to be retained depending on what type of demand and market is being catered for and whether or not similar provision exists elsewhere within the locality. Certain sites have a more distinctive appeal when compared to others, such as West Sussex Golf Club due to its premium offer, or Horton Golf Club due to its lower price point, potentially making it more difficult for demand to relocate to access an equivalent offer. This can be based on numerous factors, such as quality, cost, travel distance and difficulty.

PART 3: SUMMARY AND CONCLUSION

3.0 Summary

3.1 The supply and demand assessment of golf provision in Horsham District is summarised as follows:

- ✦ There are currently eight golf sites in Horsham District.
- ✦ An additional golfing venue was previously provided (known as West Chiltington Golf Club); however, this closed in 2016.
- ✦ All eight sites offer standard hole provision, seven provide an 18-hole course and three a 9-hole course (Cottesmore Golf & Country Club and Mannings Heath Golf Club supply both).
- ✦ Horsham Golf & Fitness Club and Slinfold Park Golf & Country Club offer 9-hole par 3 courses in addition to their standard hole courses.
- ✦ There are driving ranges at Horsham Golf & Fitness Club, Mannings Heath Golf Club and Slinfold Park Golf & Country Club.
- ✦ Development proposals at three sites (Ifield Golf & Country Club, Cottesmore Golf & Country Club and Horsham Golf & Fitness Club) have been submitted to the Strategic Planning Team at Horsham District Council and are being considered through the Local Plan process.
- ✦ If these aspirations were to go ahead, then the whole site at Ifield Golf & Country Club would be lost, whereas the courses at Cottesmore Golf & Country Club and Horsham Golf & Fitness Club would be reduced (based on the Council's July 2021 Cabinet documentation, it is noted that only the Ifield Golf & Country Club proposal formed a potential development allocation; however, at the time of writing, no formal decision has been made in relation to any of the three sites).
- ✦ There are 31 additional golfing facilities outside of Horsham District that sit within a 20-minute drive time catchment area; these are all within a distance whereby they could be catering for Horsham District-based demand, whilst residents that live near to these facilities could be accessing provision within Horsham District.
- ✦ Horsham District has more golf facilities than average national and regional rates and when compared to the majority of its neighbouring local authorities.
- ✦ Of the eight sites in Horsham District, five are proprietary facilities and three are members clubs (none are municipal).
- ✦ The average membership cost across the sites is £1,321 and all but two of the venues charge more than England Golf's national average for membership, suggesting that the cost of playing golf in the District is generally high.
- ✦ Quality is reported to be good especially at sites such as West Sussex Golf Club, Mannings Heath Golf Club and Ifield Golf & Country Club.
- ✦ Current average site membership is 606, which is significantly higher than the national average (386 members) and with only Horsham Golf & Fitness (375 members) and Horton Golf Club (170 members) operating below this level.
- ✦ Golf participation considerably increased nationally following the lifting of Covid-19 restrictions and this is reflected in Horsham District, with membership across the sites increasing.
- ✦ A significant opportunity now exists to increase participation in the long-term, although to what level this may apply remains unclear as retention may be challenging and with some clubs reporting that growth has recently levelled off.
- ✦ Whilst the level of pay and play usage is not generally known, it is expected that demand is higher at proprietary venues such as Rookwood Golf Course and Horsham Golf & Fitness Club given how they are setup.

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- High levels of imported demand are reported, in particular by Ifield Golf & Country Club, Cottesmore Golf & Country Club, Mannings Heath Golf Club, Horton Golf Club and West Sussex Golf Club.
- Exported demand is also likely, especially from the south of the District given the lower and more exclusive supply, although it is presumed to be on average lower than the level imported because there is more golf provision in the District than in most other neighbouring authorities.
- West Sussex Golf Club and Cottesmore Golf & Country Club have waiting lists in place, whilst unmet demand could also exist with regard to access at cheaper golfing sites given that the majority are currently expensive facilities to access.
- Sport England's Market Segmentation analysis suggests that the number of people who would like to play golf in Horsham District but that do not currently do so (latent demand) equates to 1,756 people.
- England Golf's mapping tool identifies high levels of potential demand for each site, with this highest for Cottesmore Golf & Country Club.
- Using modelled travel patterns and a 20-minute drive time catchment area, Ifield Golf & Country Club has the highest number of people considered most likely to travel to it (based on distance only).
- With the exception of West Sussex Golf Club and Cottesmore Golf & Country Club, which do not express future demand due to existing capacity issues, all other sites report having capacity to accommodate growth.
- Using ONS-based population projections, the population of Horsham District is predicted to increase from 146,800 to 166,330 by 2039, which will likely result in increased golf demand and consequently increased capacity pressures on the supply of provision.
- Whilst the supply of each facility type would remain comfortably above existing national levels, the driving range bay supply would fall below the current average rate in the South East

3.1: Conclusion

3.2 To conclude the supply and demand assessment, it is considered that:

- Horsham District is currently well provided for in relation to golf supply, with it having considerably more facilities than both national and regional rates as well as a good variety of provision, although most sites are expensive to access.
- Supply is currently deemed to be sufficient to meet demand; however, it is also clear that each facility is meeting a need due to current membership and usage levels.
- Potential future demand provides further evidence that each existing facility is required.
- It is unlikely that any loss of provision could be supported without appropriate mitigation being secured due to capacity pressures that would be created, despite the development aspirations that are in place.
- If existing development proposals and/or the potential loss of any golf provision are to be pursued, separate site-specific needs assessment studies are needed to fully determine requirements, with a full and specific focus on the site/s in question and concentration on a more closely defined and more relevant catchment area (a 20-minute drive time from the site/s).
- For a proposal to go ahead, any needs assessment will need to evidence that the provision is surplus to requirements or set out a mitigation proposal that replaces the supply to an equivalent or better quantity and quality in a suitable location, as per the NPPF's requirements.

APPENDIX 1: ENGLAND GOLF FACILITY REPORT



ENGLAND
GOLF

Playing Pitch Strategy Report

Horsham Local Authority





Horsham Local Authority, Sussex, South East.

BACKGROUND

Golf is the fifth largest participation sport in the Country, with around 730,000 members belonging to one of 1800 affiliated clubs and a further 2 million people playing golf independently outside of club membership.

More than more than 4 million people have played golf on a full-length course in the last 12 months – this is an increase on previous years and highlights a growing golf participation market. Other notable figures regarding golf club participation in the last 12 months suggest a large and growing market of new and existing golfers:

- 2.6 million have used driving ranges
- 2.1 million played a short course
- 3.7 million played pitch & putt
- 6.8 million have been to Adventure Golf facility

(Source: Sport MR)

Facility Strategy

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

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

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



Methodology

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

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

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

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

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



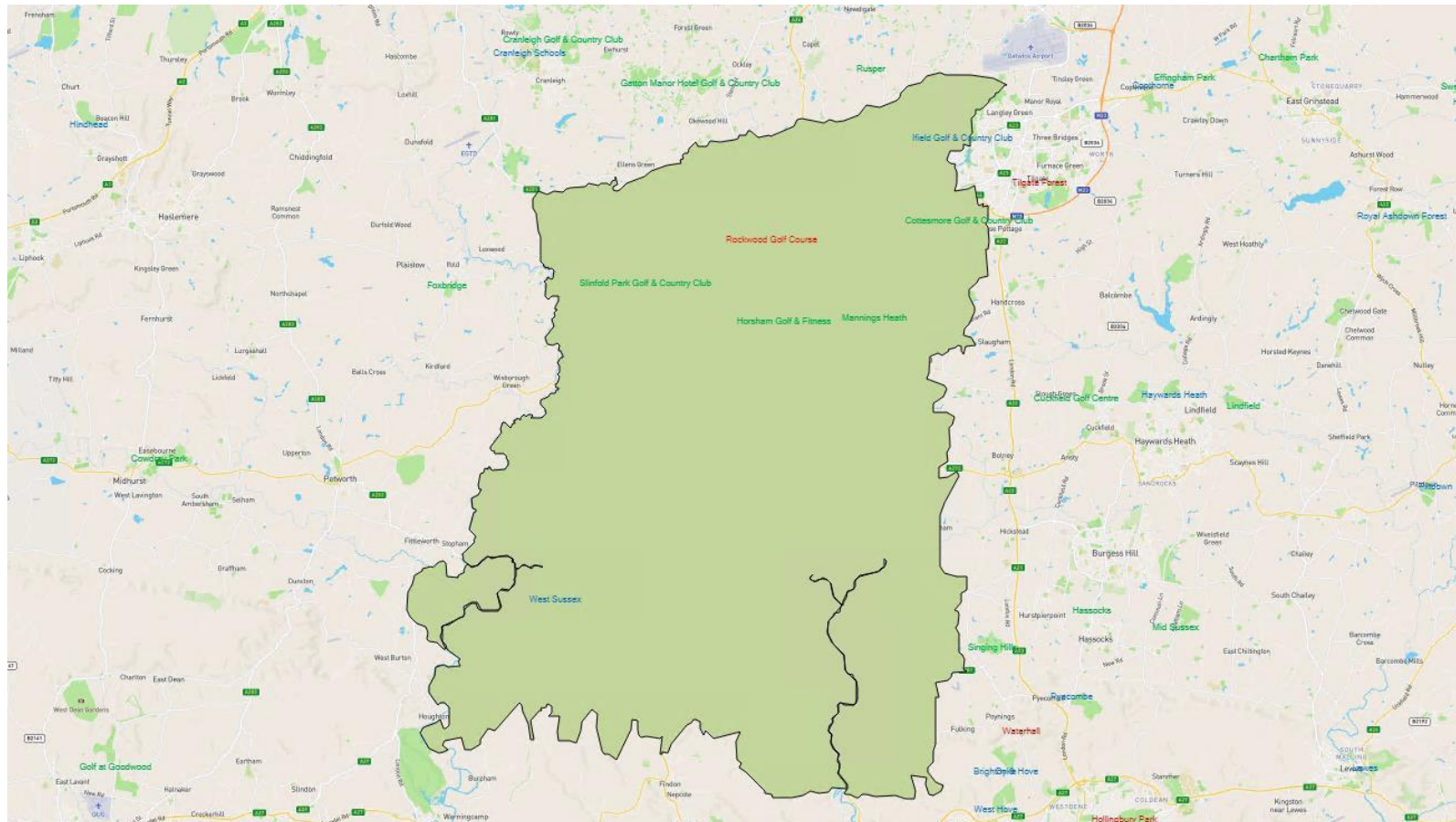
Analysis

The demand for golf within the borough, county and the region by profile is as follows:

Profile Name	Average number of people per club/facility/local authority (within 20-minute drive time*)		
	<u>Local Authority</u>	<u>County</u>	<u>Region</u>
	Horsham	Sussex	South East
1: Relaxed Members	4,189	4,690	6,149
2: Older Traditionalists	3,893	4,282	5,662
3: Younger Traditionalists	4,011	4,466	5,836
4: Younger Fanatics	4,251	4,665	6,193
5: Younger Actives	4,076	4,537	5,960
6: Late Enthusiasts	4,073	4,491	5,943
7: Occasional Time Pressed	4,074	4,530	5,941
8: Social Couples	3,945	4,398	5,781
9: Casual Fun	4,444	4,866	6,494

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

Within Horsham there are 6 affiliated clubs playing from 6 affiliated courses and two non-affiliated facilities.





In addition, the following tables outline the demand for each of the clubs and facilities.

			Average number of people per club/facility/local authority (within 20 minute drive time*)								
Facility Name	Affiliated?	Local Authority	Relaxed Members	Older Traditionalists	Younger Traditionalists	Younger Fanatics	Younger Actives	Late Enthusiasts	Occasional Time Pressed	Social Couples	Casual Fun
COTTESMORE GOLF & COUNTRY CLUB	Y	Horsham	7411	6842	7187	7442	7212	7137	7244	6939	7701
MANNINGS HEATH GOLF CLUB	Y	Horsham	2998	2868	2830	3198	2937	3020	2918	2839	3418
IFIELD GOLF & COUNTRY CLUB	Y	Horsham	6089	5532	5950	5966	5904	5756	5952	5671	6099
HORTON GOLF CLUB	N	Horsham	4754	4184	4505	4439	4547	4373	4533	4459	4548
WEST SUSSEX GOLF CLUB	Y	Horsham	2235	2176	2031	2411	2189	2297	2138	2170	2627
HORSHAM GOLF & FITNESS	Y	Horsham	4028	3775	3886	4147	3934	3948	3943	3782	4337
SLINFOLD PARK GOLF & COUNTRY CLUB	Y	Horsham	2754	2745	2514	3101	2719	2907	2662	2666	3410
ROOKWOOD GOLF COURSE	N	Horsham	6183	5652	6060	6121	6009	5881	6064	5754	6268



THE LOCAL PICTURE

Membership Figures (clubs within local authority boundary)

Affiliated Club Name	2015 Average	2016 Average	2017 Average	2018 Average	2022 Average (08/22)
COTTESMORE GOLF & COUNTRY CLUB	427	430	462	531	606 (14% Growth)
WEST SUSSEX GOLF CLUB					
MANNINGS HEATH GOLF CLUB					
IFIELD GOLF & COUNTRY CLUB					
HORSHAM GOLF & FITNESS (No Membership Data until 2018)					
SLINFOLD PARK GOLF & COUNTRY CLUB					
No. of Affiliated Clubs	5	5	5	6	6



Facility Provision & Prices:

Facility Name	Number of Holes	Club Type	Course Type	Driving Range? Y/N	Clubhouse? Y/N	Green fees weekday	Green fees weekend	7 Day membership fees
COTTESMORE GOLF & COUNTRY CLUB	18	Private Members	Parkland	N	Y	£19	£19	£768
WEST SUSSEX GOLF CLUB	18	Proprietary	Moorland	N	Y	£22.50	£27.50	£862
MANNINGS HEATH GOLF CLUB	27	Proprietary	Parkland	Y	Y	£70	£80	POA
IFIELD GOLF & COUNTRY CLUB	18	Members	Parkland	N	Y	£35	£40	£1376.75
HORSHAM GOLF AND FITNESS	27	Proprietary	Parkland	Y	Y	£45	£45	£1200
SLINFOLD PARK GOLF & COUNTRY CLUB	18	Proprietary	Parkland	Y	Y	£30	£35	POA
HORTON GOLF CLUB	18	Private Members	Parkland	Y	Y	POA	POA	£155
ROOKWOOD GOLF COURSE	18	Municipal	Parkland	N	Y	£29	£31	£104



CONCLUSION

Our work around mapping demand and supply, and the need for improved market understanding is all about supporting clubs to ensure they retain their existing members and players as well as capitalise on untapped demand.

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

Within the local authority there is a fairly strong demand for golf when compared to the average for the county, which is also close to the average for the region. The demand is split evenly over the 9 golfing profiles, both club-based and independent.

There is a low level of golf provision within the area, especially given the geographical size of the local authority. It is also worth noting, as per the map, that all but one of the facilities are situated in the far north of the Horsham Local Authority; leaving West Sussex Golf Club to cater for the vast majority of the area alone. Considering the low level of provision the local authority does offer four driving ranges, and also has two 27 hole golf complexes. It is also positive to see a good mixture of price points on offer. Based on our initial analysis, most clubs are proactively targeting new audiences through coaching programmes and a wider range of membership and introductory options, which we will continue to support and encourage.

Membership numbers are currently very strong in the area. The national average of 484 members was not met between 2015 and 2017 but surpassed in 2018. The numbers have kept on growing with an encouraging 14% growth in members between 2018 and 2022. It is worth noting that each club will have a different financial model in terms of income generation from membership vs green fees etc.

Participation and membership in golf has seen a large resurgence over the last few years and particularly as a consequence of the COVID-19 pandemic, as it was considered to be a much safer and more accessible sport when we emerged from the various periods of restrictions.



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

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