



HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

FEBRUARY 2021

QUALITY, INTEGRITY, PROFESSIONALISM

Knight, Kavanagh & Page Ltd

Company No: 9145032 (England)

MANAGEMENT CONSULTANTS

Registered Office: 1 -2 Frecheville Court, off Knowsley Street, Bury BL9 0UF

T: 0161 764 7040 E: mail@kkp.co.uk www.kkp.co.uk



HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

1.1: Introduction

- 1.1 Horsham District Council (HDC) commissioned Knight Kavanagh & Page Ltd (KKP) to undertake a standalone supply and demand assessment for golf.
- 1.2 Golf is the fifth largest participation sport in England, with around 650,000 members belonging to one of 1,900 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.
- 1.3 Nationally, the sport is governed by England Golf. The role of the National Governing Body (NGB) 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'.

Scope

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

Table 1.1: 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.
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.

1.2: Supply

- 1.5 There are eight golf venues within Horsham District, as identified in Figure 1.1 and Table 1.2 below. All of the sites 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).

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

Figure 1.1: Location of golf facilities in Horsham District

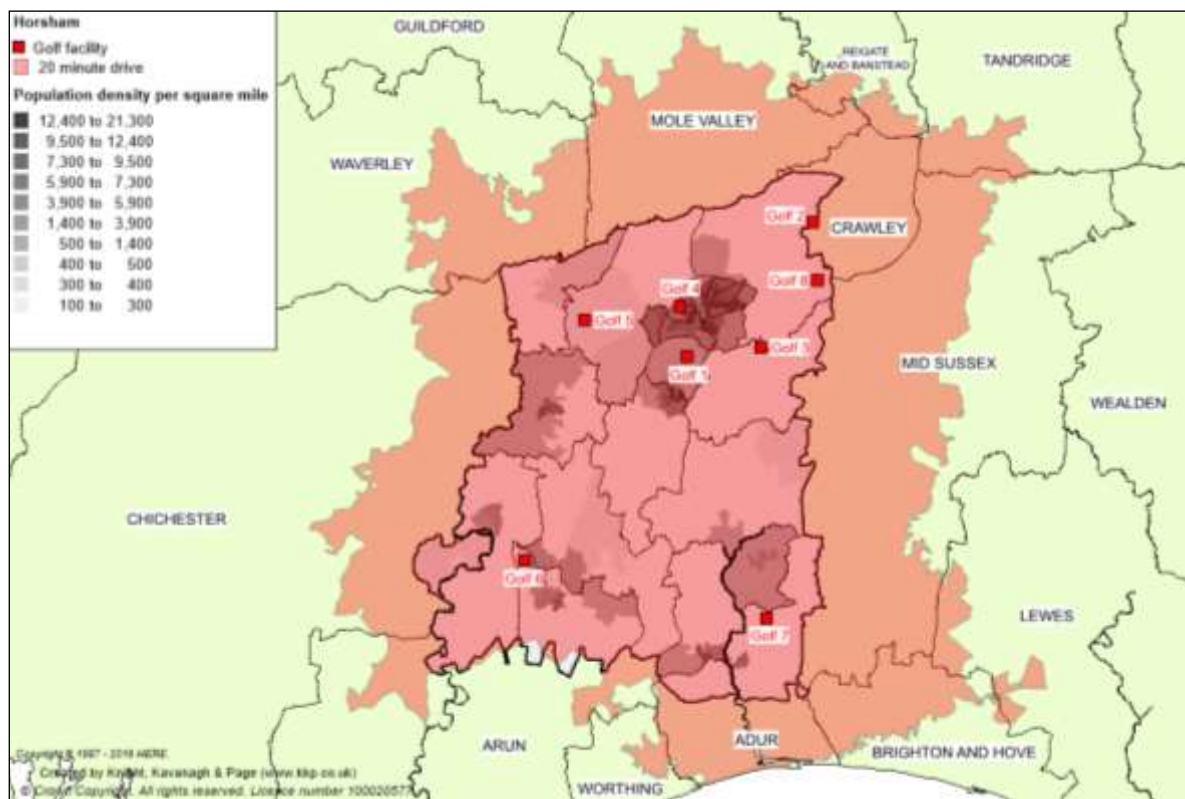


Table 1.2: Summary of golf facilities within Horsham District

Site ID	Course name	Holes		Drive range bays
		Standard	Par 3	
Golf 1	Horsham Golf & Fitness Club	18	9	18
Golf 2	Ifield Golf & Country Club	18	-	-
Golf 3	Mannings Heath Golf Club	27	-	-
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	Cottesmore Golf & Country Club	27	-	-
Totals		153	18	32

Lapsed/disused provision

- 1.6 An additional golfing venue was previously in place in Horsham District, known as West Chiltington Golf Club. This provided an 18-hole standard course before closing in 2016. This was a business decision due to the site no longer being financially viable, with the land now operated by a local vineyard.

HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

Standard hole golf courses

- 1.7 As mentioned, all eight golf sites in Horsham District provide standard hole provision. Seven provide an 18-hole course whilst three provide 9-hole courses, with Horton Golf Club supplying a standalone 9-hole course and Cottesmore Golf & Country Club and Mannings Heath Golf Club hosting 9-hole courses in addition to their 18-hole offerings.
- 1.8 All of the 18-hole courses are relatively similar in length and all are in the range of what you would expect from traditional provision. The additional 9-hole course at Mannings Heath Golf Club is also aligned to this, with it actually representing the longest course if it was played through twice to make up an 18-hole round.
- 1.9 In contrast, the 9-hole courses supplied at Cottesmore Golf & Country Club and particularly at Horton Golf Club are considerably shorter, with neither containing any Par 5 holes. However, this is not a criticism. Nationally, there are many shorter standard hole courses, with such sites often appealing more so to beginner and/or casual golfers, rather than more regular, experienced players. As such, they offer varied provision that can appeal to a defined market. In addition, two sets of tees are provided, allowing the courses to be played as an 18-hole setup.

Table 1.3: Summary of standard hole golf courses in Horsham District

Site ID	Course name	Holes	Par	Yardage*		
Golf 1	Horsham Golf & Fitness Club	18	70	6,111	5,300	4,755
Golf 2	Ifield Golf & Country Club	18	70	6,319	5,986	5,590
Golf 3	Mannings Heath Golf Club	18	72	6,510	6,056	5,439
		9	36	3,314	3,190	2,986
Golf 4	Rookwood Golf Course	18	72	6,261	6,008	5,465
Golf 5	Slinfold Park Golf & Country Club	18	72	6,424	6,025	5,623
Golf 6	West Sussex Golf Club	18	68	6,264	5,961	5,596
Golf 7	Horton Golf Club	9	31	-	1,437	1,206
Golf 8	Cottesmore Golf & Country Club	18	72	6,484	6,076	5,597
		9	33	2,240	2,169	1,918

- 1.10 Four of the standard hole courses are subject to proposals for development which have been promoted to the Strategic Planning team at Horsham District Council. This could result in the allocation of provision at Rookwood Golf Course and Ifield Golf & Country Club, as well as the loss of facilities at Cottesmore Golf & Country Club and Horsham Golf & Fitness Club. These proposals and their potential impact are touched upon later within this section of the report.
- 1.11 Previously, both Mannings Heath Golf Club and Cottesmore Golf & Country Club hosted 36 holes, meaning both now provide nine holes less than they formerly did. It is thought that the reduction at both sites was due to dwindling demand.

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

HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

Par 3 golf holes

- 1.12 Two of the sites in Horsham District provide Par 3 courses in addition to their standard holes, with them both encompassing nine holes which is common. Both are known by their providers as “academy courses” and are most commonly used by beginners, casual players and some older users, although they can also be frequented by more traditional golfers wanting to practice their short game.
- 1.13 Slinfold Park Golf & Country Club provides the longest course, at 1,315 yards, whilst Horsham Golf & Fitness Club provides the smallest course, albeit at 959 yards it still averages over 100 yards per hole.

Table 1.4: Summary of Par 3 golf courses in Horsham District

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

- 1.14 Par 3 courses in addition to standard hole courses can be beneficial to golf venues as they can create a pathway for users who might not be ready or confident enough to play on a longer course. They can also provide added income through attracting players that would not necessarily be 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 wanting sole access to such provision may need to pay a premium to do so, or travel outside of the District, as pricing will generally account for the standard hole course also being provided.
- 1.15 The closest standalone Par 3 courses to Horsham District are at Ashdown Park Hotel in Wealden, Burgess Hill Golf Centre in Mid Sussex, and Cranleigh School in Waverley. That being said, the short nature of the standard hole course at Horton Golf Club does provide a close alternative within Horsham District (it is only 122 yards longer than the Par 3 course at Horsham Golf & Fitness Club).
- 1.16 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 on the wane.

Driving range bays

- 1.17 There are 32 driving range bays provided in Horsham District across two locations, with Horsham Golf & Fitness Club providing 18 bays and Slinfold Park Golf & Country Club providing 14 bays. All of the bays at the two venues are covered and floodlit, 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.

HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

Table 1.5: Summary of driving range bays within Horsham District

Site ID	Course name	No. of bays	Floodlit?	Pay and play?
Golf 1	Horsham Golf & Fitness Club	18	Yes	Yes
Golf 5	Slinfold Park Golf & Country Club	14	Yes	Yes

- 1.18 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 with the site installing 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.
- 1.19 Three 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 a classified as driving range bays. This is because they are generally reserved for members, with visitors having to register and book at the site rather than being allowed casual access.
- 1.20 Similarly, Mannings Heath Golf Club advertises itself as having a driving range, but in reality its provision is more aligned to a practice area. No defined bays are provided and there are no hitting mats, with users instead playing off grass.

Management and ownership

- 1.21 There are three main types of ownership and management models of golf facilities in England; members clubs, proprietary clubs and municipal facilities. Each of these is summarised in the table below.

Table 1.6: Types of ownership and management of golf facilities

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

- 1.22 It is recognised that members clubs and visitors to such clubs are normally expected to dress appropriately, have a registered handicap certificate (a certificate issued by the Council of National Golf Unions (CONGU)) and be familiar with the rules and etiquette of the game. This is not uncommon at some proprietary clubs, but municipal courses tend to be more relaxed with regard to dress codes and do not require people to have handicaps, making golf much more accessible.

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.23 Consequently, municipal courses are, in many instances, seen as entry level facilities, with players using them before having the confidence to move on to a members' or high-end proprietary club (although many people can and do stay attached to a particular course). They also tend to offer a more affordable golfing experience.
- 1.24 The business model for members clubs tends to rely heavily on income through membership subscriptions and use of ancillary facilities, rather than from pay and play usage, although attention has somewhat switched at many sites in recent years due to demand falling. The same can be said for some proprietary clubs, although, in general, more emphasis is placed on supplementing regular activity with green fee sales. Conversely, municipal sites have always been heavily reliant on visitors even though membership packages are normally available (often in the shape of season tickets). On occasion, these can be linked to access to other local authority operated sports facilities, such as leisure centres and swimming pools.
- 1.25 Despite the above generalisations, each golf facility, regardless of management type, 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. In contrast, a site that depends on visitors can struggle to be viable if there are spells of inclement weather during summer months and can discourage people that want 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 part of a membership scheme.
- 1.26 In Horsham District, there are no municipal courses, although the land at Rookwood Golf Course is owned by the Council and operated in partnership. It is considered a proprietary club due to its current management arrangement; to be considered a true municipal course, management must be undertaken by the Council itself. Cottessmore Golf & Country Club, Horsham Golf & Fitness Club, Slinfold Park & Country Club and Ifield Golf Club and also considered to be proprietary courses, with the latter now owned by Homes England having previously been a members' facility.
- 1.27 As shown in the table below, all remaining sites are members clubs.

Table 1.7: Summary of ownership/management in Horsham District

Site ID	Course name	Management type
Golf 1	Horsham Golf & Fitness Club	Proprietary
Golf 2	Ifield Golf & Country Club	Proprietary
Golf 3	Mannings Heath Golf Club	Members
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	Cottessmore Golf & Country Club	Proprietary

HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.28 At present, neither Rookwood Golf Course nor Horton Golf Club are affiliated to England Golf. This means that competitions are not governed by the NGB and 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, costing £9.50 in 2020). Non-affiliation is most commonly the case at venues that have a focus on informal activity.

Pricing

- 1.29 A key issue for the wider golf population is whether golf courses are available to the general population at a price point which is 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.
- 1.30 Nationally, over the past few years, many facilities have altered their pricing structure to allow for discounts following a decline in golf membership. England Golf has positively encouraged this as its view is that clubs are more likely to experience growth when flexible packages are available. For instance, some offer five and/or six day memberships (whereby members can access the course on specific days but not on one or both weekend days), whilst others provide discounts that are no longer limited solely to junior players (e.g. discounts for those aged 18-21 and 21-30 or for those aged 65 and over). It was not uncommon for many clubs to have waiting lists for membership in the past, but this has become increasingly rare in the present day.
- 1.31 Declining membership also means that there is a growing number of facilities openly encouraging pay and play visitors, with the number of nomadic golfers on the rise. Whilst this has always been the case at some venues, other, more membership orientated venues were previously reluctant to promote green fee usage as capacity simply did not exist. Now, green fee pricing has generally reduced and discounts are being offered to drive demand, especially outside of peak time hours and to accommodate larger groups. However, this situation is more acute at lower grade clubs than at higher grade clubs, where high quality can enable a provider to maintain a premium price.
- 1.32 England Golf reports that the average cost of a full adult membership across the Country is currently £901.00. In Horsham District, all sites offer some form of membership scheme and, where known, all but two charge more than the national average, with membership to Ifield Golf & Country Club amounting to the most expensive at £1,375.75 per year. This suggests that most of the sites are high-end and that, subsequently, the cost of playing golf in the District is generally high.
- 1.33 Notwithstanding the above, it must be noted that some of the golf facilities within Horsham District are part of wider complexes, with membership therefore including access to additional provision that would not be available at dedicated golfing sites. For example, both Horsham Golf & Fitness Club and Slinfold Park Golf & Country Club supply onsite gyms, Cottessmore Golf & Country Club is accompanied by a hotel and spa and Mannings Heath Golf Club forms part a wine estate. This may somewhat explain the high pricing.

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.34 Membership costs in relation to West Sussex Golf Club were not made available to inform this study; however, it is anticipated that the cost would be the highest in the area. The site is considered to be a premier golfing facility and has an exclusive operation, with potential members needing to be put forward by an existing member in order to be eligible, or via a personal application letter supported by suitable referees. It is also known that a substantial joining fee exists, amounting to a multiple of the annual subscription.
- 1.35 At the other end of the scale, membership to Rookwood Golf Course equates to £98.00 a year via a season ticket, whereas the cost at Horton Golf Club is £155.00 a year. Both sites are considerably below the national average to the point of being remarkably cheap, although a joining fee of £50.00 is applicable at Horton Golf Club.
- 1.36 The cheap price at Rookwood Golf Club is reflective of many sites that offer an annual scheme despite having a focus on pay and play usage. Conversely, the offer at Horton Golf Club is particularly unique, with the Club solely reserving access for members and not offering pay and play, despite the low membership cost. This is linked 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.
- 1.37 Where known, membership fees across the sites can be paid both in full each year or via monthly instalments. However, in some instances, particularly at membership clubs, monthly payments are charged at a higher rate than the advertised membership price, whilst some venues also outsource the finance, which can add interest charges for those that choose to pay this way. This is not the case at Rookwood Golf Course, where season ticket holders enter into a 12-month contract as standard.
- 1.38 With the exception of Horton Golf Club, green fees are available at the remaining sites, with pricing quite varied. The cheapest price for access of a standard hole course is at Rookwood Golf Course, with weekday access costing £18.00 per round and weekend use costing £22.00. Horsham Golf & Fitness Club, Ifield Golf & Country Club and Slinfold Park Golf & Country Club have similar price points to each other, ranging from £29.50 to £40.00, whilst costs at Mannings Heath Golf Club (£65.00 on weekdays and £75.00 at weekends) and particularly West Sussex Golf Club (£100.00 on weekdays and £110.00 at weekends) are significantly higher.

Table 1.8: Pricing structures at golf facilities within Horsham District

Golf facility	Joining fee	Full membership (per year)	Green fee (per round)	
			Weekday	Weekend
Horsham Golf & Fitness Club	-	£1,095.00	£30.00	£30.00
Ifield Golf & Country Club	-	£1,375.75	£30.00	£40.00
Mannings Heath Golf Club	-	£1,300.00	£65.00	£75.00
Rookwood Golf Course	-	£98.00	£18.00	£22.00
Slinfold Park Golf & Country Club	-	£1,372.00	£29.50	N/A
West Sussex Golf Club	Unknown	Unknown	£100.00	£110.00
Horton Golf Club	£50	£155.00	N/A	N/A
Cottesmore Golf & Country Club	-	£1,254	£36.00	£40.00

HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.39 Nationally, pay and play access to standard hole golf courses can be achieved at some sites for less than £15.00, representing a more affordable offer than at any of the sites in Horsham District. However, the 9-hole provision at Cottessmore Golf & Country Club, Horsham Golf & Fitness Club and at Slinfold Park Golf & Country Club is more aligned to this, with costs ranging from £7.00 to £14.00.

Quality

- 1.40 There are no official national or county golf facility rankings. Generally, the better course quality and supporting infrastructure is, the higher the 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.
- 1.41 In terms of quality of the golf courses in Horsham District, whilst no assessments have taken place to inform this study, it is assumed to be good across the District as reflected by the high price point at the majority of the facilities. No significant issues have been identified, with nearly all sites having dedicated green keeping staff which provide maintenance regimes that operate all-year round. These programmes are for the most part likely to be frequent and sophisticated, especially at sites such as West Sussex Golf Club.
- 1.42 Conversely, maintenance at sites such as Rookwood Golf Course is, whilst adequate, perceived to be fairly basic. This, however, is not uncommon across the more affordable golfing venues, with providers commonly needing to undergo cost-cutting exercises to deliver a golfing offer at a relatively low price point. The same could also be said at Horton Golf Club, which relies solely on volunteers for general upkeep, rather than paid staff.
- 1.43 Ancillary facilities are also for the most part good across Horsham District, with most sites accompanied by all-encompassing clubhouses and with, as mentioned, many providers also supplying other amenities such as gyms and hotels. One of two exceptions to this is at Horton Golf Club, which has a small, very limited clubhouse that offers little opportunity to accommodate external hirers and no space for anything more than a minimal catering offer.
- 1.44 The other exception is at Ifield Golf Club, where the clubhouse is a building that is over 100 years old and therefore extremely dated. Plans were in place to develop this; however, it is unclear whether these aspirations still exist given the recent change in ownership and long-term uncertainty over the site.
- 1.45 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 members e.g. by providing gender specific changing facilities.

Supply of golf provision set against population

- 1.46 To analyse the level of supply of golf facilities within Horsham, provision within the District has been analysed and compared to national and regional rates as well as to neighbouring authorities. 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.

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.47 Table 1.9 below shows that there are 1.08 standard golf holes per one thousand people within Horsham District, which is substantially higher than the figures for both the South East (0.74 holes) and for the whole of England (0.55 holes). It is also higher than all but one of its neighbouring authorities, with only Mole Valley (1.41 holes) having more provision. The number of holes is considerably above the rates in the likes of Adur (no holes), Crawley (0.16 holes), Brighton & Hove (0.28 holes) and Arun (0.45 holes).

Table 1.9: Standard golf course holes per head of population

Area	Standard holes	Population MYE 2018	Holes per 1000 pop
Horsham	153	142,217	1.08
Adur	0	62,869	-
Arun	72	159,827	0.45
Brighton & Hove	81	290,395	0.28
Chichester	126	120,750	1.04
Crawley	18	112,448	0.16
Mid Sussex	160	149,716	1.07
Mole Valley	123	87,253	1.41
Waverley	135	125,610	1.07
South East	6,774	9,133,625	0.74
England	30,932	55,977,178	0.55

- 1.48 For Par 3 holes, there is a similar picture. At 0.13 holes per one thousand people, the rate in Horsham District is more than double the regional rate (0.06 holes) and more than triple the national rate (0.04 holes). It is also better provided for than all of its neighbouring authorities, with no Par 3 provision identified in Adur, Arun, Brighton & Hove, Mole Valley or Waverley and only one 9-hole course supplied in each of Chichester, Crawley and Mid Sussex.

Table 1.10: Par 3 golf course holes per head of population

Area	Par 3 holes	Population MYE 2018	Holes per 1000 pop
Horsham	18	142,217	0.13
Adur	0	62,869	-
Arun	0	159,827	-
Brighton & Hove	0	290,395	-
Chichester	9	120,750	0.07
Crawley	9	112,448	0.08
Mid Sussex	9	149,716	0.06
Mole Valley	0	87,253	-
Waverley	0	125,610	-
South East	567	9,133,625	0.06
England	2,338	55,977,178	0.04

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.49 For driving ranges, there are 0.23 bays in Horsham District per one thousand people. In contrast to standard and Par 3 holes, this is below the regional rate (0.30 bays) although it remains slightly above the national rate (0.21 bays). It is higher than the figures in Adur and Arun (neither of which have any bays) as well as Brighton & Hove (0.07 bays) and Waverley (0.21 bays). However, it is below the rates in the remaining authorities and quite considerably so when compared to Mole Valley (0.78 bays) and Mid Sussex (0.54 bays).

Table 1.11: Driving range bays per head of population

Area	Driving range bays	Population MYE 2018	Bays per 1000 pop
Horsham	32	142,217	0.23
Adur	0	62,869	-
Arun	0	159,827	-
Brighton & Hove	20	290,395	0.07
Chichester	47	120,750	0.39
Crawley	27	112,448	0.24
Mid Sussex	81	149,716	0.54
Mole Valley	68	87,253	0.78
Waverley	26	125,610	0.21
South East	2,726	9,133,625	0.30
England	11,533	55,977,178	0.21

Future developments

- 1.50 Both Rookwood Golf Course and Ifield Golf & Country Club are both being promoted to the Council as potential strategic housing sites as part of its Local Plan review. As both sites supply standard hole courses, the calculations for this type of provision have been re-run in the table below to show what the reduced rates would be per head of population if the sites were to be lost (Par 3 holes and driving range bays would be unaltered).
- 1.51 As seen, the overall rate in Horsham District would remain above the regional and national rates if one or both sites were lost; however, the District would have less provision per head of population than Mid Sussex, Waverley and Chichester whereas it currently has more. It would remain above Arun, Adur, Brighton & Hove and Crawley.

Table 1.12: Standard holes per head of population subject to Local Plan developments

Area	Standard holes	Population MYE 2018	Holes per 1000 pop
Horsham without Ifield Golf & Country Club	137	142,217	0.96
Horsham without Rookwood Golf Course	137	142,217	0.96
Horsham without both	119	142,217	0.84
Adur	0	62,869	-
Arun	72	159,827	0.45
Brighton & Hove	81	290,395	0.28
Chichester	126	120,750	1.04
Crawley	18	112,448	0.16
Mid Sussex	160	149,716	1.07

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

Area	Standard holes	Population MYE 2018	Holes per 1000 pop
<i>Mole Valley</i>	123	87,253	1.41
<i>Waverley</i>	135	125,610	1.07
South East	6,774	9,133,625	0.74
England	30,932	55,977,178	0.55

- 1.52 If one or more of the existing golf courses were to be lost to development, it is considered that additional evidence is likely to be required to show that the site(s) is (or are) surplus to requirements from a golfing perspective. Such assessments should apply a relevant catchment area around the respective site (a 20-minute drive time is recommended by Sport England). If any of these courses are allocated for development, it is expected that such assessments would be submitted and considered through the Local Plan consultation and examination process.
- 1.53 In addition to Rookwood Golf Course and Ifield Golf & Country Club, aspirations are also in place at Cottesmore Golf & Country Club, with the owners looking to develop the site around the existing hotel and leisure centre and to safeguard and improve the facilities that are retained. To enable this, it is thought that the future of the golf provision is in serious doubt due to a significant downturn in demand over recent years. However, any proposals will have to go through the planning process and meet relevant policy requirements.
- 1.54 Similarly, plans are proposed at Horsham Golf & Fitness Club to reduce the 18-hole course to a 9-hole course. The intention is for this to enable the owners to regenerate the wider site, albeit, again, the aspiration will need to go through the planning process and meet planning policy.
- 1.55 The table below shows the rates in the District should the proposals go ahead (in addition to proposals at Rookwood Golf Course and Ifield Golf & Country Club), on the assumption that the entire standard hole course at Cottesmore Golf & Country Club is lost in addition to nine of the standard holes at Horsham Golf & Fitness Club.

Table 1.13: Standard holes per head of population subject to all developments

Area	Standard holes	Population MYE 2018	Holes per 1000 pop
Horsham without all sites subject to all development plans	110	142,217	0.77
<i>Adur</i>	0	62,869	-
<i>Arun</i>	72	159,827	0.45
<i>Brighton & Hove</i>	81	290,395	0.28
<i>Chichester</i>	126	120,750	1.04
<i>Crawley</i>	18	112,448	0.16
<i>Mid Sussex</i>	160	149,716	1.07
<i>Mole Valley</i>	123	87,253	1.41
<i>Waverley</i>	135	125,610	1.07
South East	6,774	9,133,625	0.74
England	30,932	55,977,178	0.55

HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.56 The number of holes per one thousand people reduces to 0.77, which is still above national and regional rates albeit much more closely aligned to the latter. In terms of neighbouring authorities, Horsham District would remain better provided for than Arun, Adur, Brighton & Hove and Crawley but worse off than the rest.
- 1.57 As with the promotion of Rookwood Golf Course and Ifield Golf & Country Club, the aspirations at Horsham Golf & Fitness Centre and Cottesmore Golf & Country Club may need to demonstrate, via additional evidence, that the provision is surplus to requirements as part of the planning application (or any allocation) process.

1.3: Demand

- 1.58 Since 2004, participation in golf has generally been in decline, with only recent signs showing that the reduction may be levelling off. The landscape of demand has also changed over this time, with less users taking up membership packages and more golfers becoming nomadic and using a range of courses on a pay and play basis. This is a pattern likely to be seen in Horsham District as it has been shown to be the case nationwide.
- 1.59 Notwithstanding the above, early indications from across the Country suggest that golf participation considerably increased following the lifting of the initial Covid-19 restrictions. As one of the first sports to be allowed, 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).
- 1.60 As a result, golf facilities were able to open when many other sports venues could not, with some courses reporting a near doubling of usual demand. This highlights that a significant opportunity now exists to increase participation in the long-term, although to what level is unclear as retention may be challenging when users return to normal working/living conditions.
- 1.61 The following section examines current demand for golf in Horsham District as well as recent trends and potential future demand.

Modelled travel patterns

- 1.62 Data identifies that 142,217 people live within Horsham District. Using this, it is possible to identify the golf facility within the District to which its people are most likely to travel to, based on distance only. This is shown in Figure 1.2 and Table 1.14 below.

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

Figure 1.2: Closest golf facilities in Horsham for the population of the District

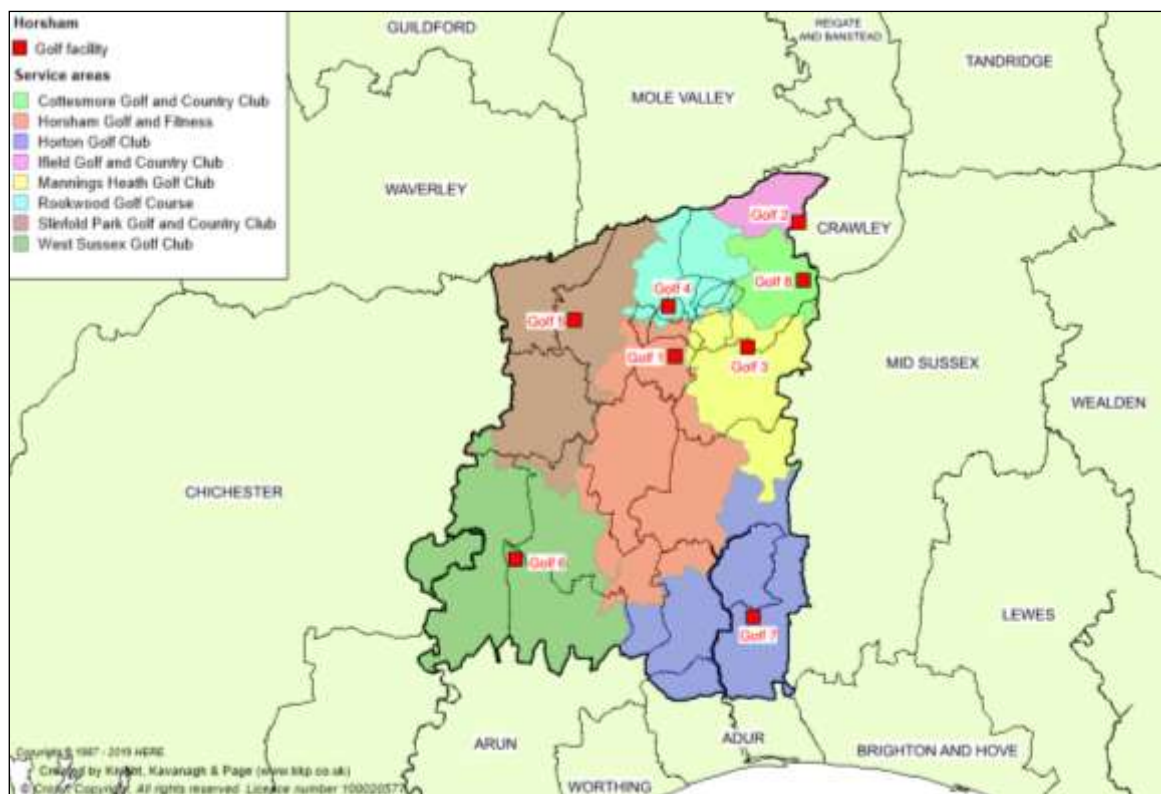


Table 1.14: Estimated populations for each golf facility within Horsham District

Site ID	Site	Catchment population	
		#	%
Golf 1	Horsham Golf & Fitness Club	33,340	23.4%
Golf 2	Ifield Golf & Country Club	1,294	0.9%
Golf 3	Mannings Heath Golf Club	15,414	10.8%
Golf 4	Rookwood Golf Course	35,814	25.2%
Golf 5	Slinfold Park Golf & Country Club	14,573	10.2%
Golf 6	West Sussex Golf Club	21,077	14.8%
Golf 7	Horton Golf Club	18,335	12.9%
Golf 8	Cottesmore Golf & Country Club	2,370	1.7%

- 1.63 Rookwood Golf Course has the highest number of people considered most likely to travel to it from within Horsham District (based on travel distance only) when compared to the other facilities (25.2%), followed by Horsham Golf & Fitness Club (23.4%).
- 1.64 At the other end of the scale, only 0.9% of the District's population are likely to travel to Ifield Golf & Country Club, whilst only 1.7% are most likely to travel to Cottesmore Golf & Country Club (based on travel distance only). However, this does not account for users accessing the sites from outside of Horsham District, with both located close to local authority boundaries (in particular, Crawley and Mid Sussex).

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.65 It is also important to understand that many golfers choose a facility for a whole range of reasons other than travel distance, with factors including quality, availability, cost and where friends/family play. For example, a golfer wanting a high-end experience would be unlikely to access Rookwood Golf Course, regardless of their proximity to the site, and would be more prone to travelling a considerable distance to access provision such as that at West Sussex Golf Club. Similarly, an individual may live close to a really good quality golfing site but may not be able to afford access, meaning they would be likely to travel further afield to utilise a more affordable offering.
- 1.66 Given the above, a better way to assess current demand is to look at current membership figures and pay and play numbers.

Membership

- 1.67 England Golf's bi-annual Golf Club Questionnaire, last issued in 2018, suggests that the average number of members per golf club is 484. This is higher than the 2016 figure, when the average was 460, although this was a slight decline from an average of 466 in 2014. The growth between 2016 and 2018 represents a bucking of a trend of year-on-year decline since 2004.
- 1.68 When broken down, the average membership of a golf club nationally now consists of 381 adult men, 70 adult women, 27 junior boys and six junior girls. For adult men and junior girls, this is an increase compared to both 2016 and 2014, with the biggest increase seen in those aged over 65 (13%). The number of women attached to clubs has remained static, whereas there has been an overall decrease in the number of junior boys members.
- 1.69 In Horsham, Table 1.15 below provides the most recent membership numbers at the golf facilities within the District, based on latest England Golf affiliation data. As such, figures for Rookwood Golf Course and Horton Golf Club are unavailable on account of them not affiliating to the NGB.

Table 1.15: Summary of membership within Horsham District

Site ID	Site name	No. of members
Golf 1	Horsham Golf & Fitness Club	492
Golf 2	Ifield Golf & Country Club	403
Golf 3	Mannings Heath Golf Club	424
Golf 4	Rookwood Golf Course	Unknown
Golf 5	Slinfold Park Golf & Country Club	707
Golf 6	West Sussex Golf Club	699
Golf 7	Horton Golf Club	Unknown
Golf 8	Cottesmore Golf & Country Club	620

- 1.70 Where known, overall demand across Horsham District is seemingly high, with the average membership amounting to 558 members per club. This is 70 members above the national average.

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.71 When analysing membership by site, it is above the national average at four venues and considerably so at Slinfold Park Golf & Country Club (707 members), West Sussex Golf Club (699 members) and Cottesmore Golf & Country Club (620 members). However, it must be reiterated that both Cottesmore Golf & Country Club and Slinfold Park Golf & Country Club provide other amenities alongside the golf provision, with membership also covering access to these. As such, further exploration is required to understand whether there are any non-playing members and, if this is the case, how many it applies to.
- 1.72 Only West Sussex Golf Club has any reported capacity issues, with a waiting list in place for membership that reflects the high-end and exclusive nature of the site. All remaining venues are openly looking and advertising for new members and have an easier joining process (references are required at West Sussex Golf Club).
- 1.73 At the other end of the scale, membership at Mannings Heath Golf Club (424 members) and Ifield Golf & Country Club (403 members) is below the national average. Whilst many clubs nationally are functional with a lower membership base, it is somewhat concerning at these sites given that both are setup as members clubs with a reliance on annual subscriptions.

Membership trends

- 1.74 Membership across the sites in Horsham District has increased by 9.24% since 2015, with Mannings Heath Golf Club, Slinfold Park Golf & Country Club, West Sussex Golf Club and Cottesmore Golf & Country Club all experiencing a growth in demand. This was only partially offset by a decline at Horsham Golf & Fitness Club and Ifield Golf & Country Club.

Table 1.16: Changes in demand since 2015

Site ID	Site name	2015 members	Current members	Change in membership
Golf 1	Horsham Golf & Fitness Club	501	492	-1.80
Golf 2	Ifield Golf and Country Club	444	403	-9.23
Golf 3	Mannings Heath Golf Club	384	424	+10.41
Golf 4	Rookwood Golf Course	Unknown	Unknown	-
Golf 5	Slinfold Park Golf & Country Club	552	707	+28.07
Golf 6	West Sussex Golf Club	695	699	+0.58
Golf 7	Horton Golf Club	Unknown	Unknown	-
Golf 8	Cottesmore Golf & Country Club	486	620	+27.57

Pay and play

- 1.75 Whilst pay and play usage has generally increased across England in recent years, usage figures for the sites within Horsham District are not known as it is not something that is tracked by England Golf. It would be expected that demand would be higher at propriety courses such as Rookwood Golf Course and Horsham Golf & Fitness Club given how they are setup and the relatively low price points, whereas it will be lower at sites such as West Sussex Golf Club and Horton Golf Club given that they are predominately focused on members.

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.76 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.

Unmet demand

- 1.77 Unmet demand is existing demand that is not getting access to golf facilities. This could be reflected in Horsham District via the waiting list in place at West Sussex Golf Club, although it is likely that people on the waiting list are still playing golf elsewhere either via membership of another club or through pay and play access. As such, unmet demand is considered to be very minimal, with no other sites having any capacity concerns.

Latent demand

- 1.78 Latent demand is demand for golf that is not currently being realised. This could be for numerous reasons, such as time constraints, financial reasons and a lack of suitable, available provision. To that end, Sport England's Market Segmentation allows for an analysis of people that would like to play golf in Horsham District but that do not currently do so. This currently equates to 1,756 people (1.2% of the population).
- 1.79 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 in an attempt to tap into such demand i.e. through developing a variety of golfing offers, coaching programmes and a range of membership options.

Future demand

- 1.80 England Golf has an aim to increase membership of clubs nationally from 650,000 to 675,000, representing an increase of 1.07%. If this was extrapolated to all clubs offering a membership scheme within Horsham District, total membership, where known, would increase from 3,062 to approximately 3,095. This represents an increase of 33 members, which is relatively minimal and could easily be accommodated outside of West Sussex Golf Club.
- 1.81 In reality, each facility within the catchment area will have different aspirations in terms of future growth. Most of the sites will be open to growing by significantly more than 1.07% and will actively try to do so, whereas some of the more established venues will be happy to retain current demand levels.

1.4: Supply and demand analysis

- 1.82 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 across both high-end and more affordable sites. With some venues focusing on membership schemes and others on pay and play usage, this means that it is likely that all current and potential users can be catered for. As such, despite demand also being above average, supply is deemed sufficient, especially given that only one site has any known capacity issues.

HORSHAM DISTRICT COUNCIL

GOLF SUPPLY AND DEMAND ASSESSMENT

- 1.83 It is also clear that supply would remain relatively adequate even if various development proposals were to go ahead; however, this does not necessarily constitute an oversupply of provision. In principle, there is likely to be 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 in the locality. Certain sites have more of a unique appeal when compared to others, potentially making it difficult for demand to relocate to an equivalent offer. This could be based on numerous factors, such as cost, travel distance and difficulty.
- 1.84 Based on the existing provision across Horsham District, it is considered that affordability should be taken into account when considering a loss in provision as there is a greater need for more affordable facilities with a focus on pay and play. This is because there are fewer of these provided when compared to courses focused on membership, making it less likely for the users of the cheaper facilities to relocate. That being said, golfers do not necessarily abide by local authority boundaries, so there is also a need to consider provision within neighbouring authorities as appropriate alternative provision may be (or may not be) closer outside of Horsham District than it is within. As such, separate needs assessment studies may be beneficial if and when proposals come forward for the loss of golf provision, with the focus specifically on the site in question and a more relevant catchment area (a 20-minute drive time is recommended by Sport England).

Summary of golf provision

- ◀ 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 due to the site no longer being financially viable.
- ◀ All eight existing sites provide standard hole courses, whilst both Slinfold Park Golf & Country Club and Horsham Golf & Fitness Club also provide Par 3 courses and driving range bays.
- ◀ Development proposals at Rookwood Golf Course, Ifield Golf & Country Club, Cottessmore 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 agreed this could lead to the loss of some provision.
- ◀ Four of the current sites are propriety courses whilst the remaining four are members clubs (there are no municipal courses, meaning none are directly operated by the Council).
- ◀ 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; however, membership packages to both Rookwood Golf Course and Horton Golf Club are considerably below the national average.
- ◀ There are more golf facilities in Horsham District when compared to average national and regional rates as well as compared to the majority of neighbouring local authorities.
- ◀ The District would remain relatively well provided for even if various development plans were to go ahead.
- ◀ In terms of demand, Rookwood Golf Course has the highest number of people considered likely to travel to it from within Horsham District when compared to the other facilities (25.2%), followed by Horsham Golf & Fitness Club (23.4%), based solely on distance.
- ◀ Membership demand across Horsham District is seemingly high, with the average membership amounting to 558 members per club; 70 members above the national average.
- ◀ Membership is above the national average at Slinfold Park Golf & Country Club, West Sussex Golf Club, Cottessmore Golf & Country Club and Horsham Golf & Fitness Club, although it is below the average at Mannings Heath Golf Club and Ifield Golf & Country Club.
- ◀ Membership figures at Rookwood Golf Course and Horton Golf Club are not known as they are not affiliated to England Golf, meaning commentary cannot be made on whether membership levels are increasing or falling at these sites.
- ◀ Only West Sussex Golf Club reports any capacity issues, with a waiting list in place; all other sites are openly looking and advertising for new members.

HORSHAM DISTRICT COUNCIL GOLF SUPPLY AND DEMAND ASSESSMENT

- ◀ Membership across the sites has increased by 9.24% since 2015, with Mannings Heath Golf Club, Slinfold Park Golf & Country Club, West Sussex Golf Club and Cottesmore Golf & Country Club all experiencing a growth in demand.
- ◀ Sport England's Market Segmentation allows for an analysis of people that would like to play golf in Horsham District but that do not currently do so and this currently equates to 1,756 people (1.2% of the population).
- ◀ England Golf has an aim to increase membership of clubs nationally by 1.07%, which would, where known, represent an increase of 33 members in Horsham District and could easily be accommodated.
- ◀ Based on supply and demand, it is considered that Horsham District currently has sufficient golfing provision; however, this does not necessarily constitute an oversupply of provision.
- ◀ It is likely that there will be a greater need to retain the more affordable courses with a focus on pay and play as there are fewer of these provided, making it less likely for users to be able to relocate.
- ◀ For golf facilities to be lost, proposals will need to demonstrate that the provision is not required, or that appropriate provision will be retained and/or re-provided within a suitable catchment area; this should take into account affordability and justify why the existing user base will still be provided for.

