VISION

EVERYONE’S GAME, ANYWHERE.

OUR PURPOSE STATEMENT

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

STRATEGIC PILLARS

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

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

CLUBS

TYPE OF GOLF CLUB

- 76% Private Members
- 18% Proprietary
- 6% Other

76%
Over three quarters of responding clubs were Private Members clubs.

70%
70% of all affiliated clubs are Private Members clubs.

80%
of clubs now have a written Course Management Policy, up from 63% in 2016.
Golfers in Wales are estimated to have spent £258 million on the game in 2014 and more than half of this was channelled through golf clubs. As such, golf clubs are small to medium enterprises, with significant assets, and so many clubs are choosing to incorporate as it limits the liability faced by those running the club in the case of insolvency. Wales Golf Development Officers are able to advise any clubs who are concerned about the risks of being unincorporated.

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

### Club Facilities

**Which of these additional facilities does your club have?**

<table>
<thead>
<tr>
<th>Facility</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar</td>
<td></td>
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<td></td>
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<tr>
<td>Changing Rooms</td>
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<td></td>
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<tr>
<td>Practice Area</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Wifi</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Pro Shop</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Function Room</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TV (without Sky)</td>
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<td></td>
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<tr>
<td>TV (with Sky)</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Driving Range</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coffee Shop</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dedicated Reception</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Spa</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Gym/Health Club</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Creche</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Children’s Play Area</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
MEMBERSHIP

KEY NUMBERS

Average number of club members: **429**

Over the last 2 years:

- **30%** of clubs had increased membership, with an average net gain of 45 members.
- **In 36% of clubs,** membership had decreased, with an average net loss of 19 members.
- **In 34% of clubs,** membership had remained stable.

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

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

### RELATIONSHIPS BETWEEN CLUB OFFERS/SCHEMES AND MEMBERSHIP LEVELS

<table>
<thead>
<tr>
<th>Offer family membership</th>
<th>Offer New2Golf</th>
<th>Have a Junior Academy</th>
<th>Have an Adult Academy</th>
<th>Have a full junior calendar</th>
<th>Have engaged with Business Support Scheme/Strong Club Matrix</th>
<th>Run community outreach events</th>
<th>Have promotional materials</th>
<th>Hold a new member induction</th>
</tr>
</thead>
<tbody>
<tr>
<td>% increasing membership</td>
<td>% decreasing/stable membership</td>
<td>% increasing membership</td>
<td>% decreasing/stable membership</td>
<td>% increasing membership</td>
<td>% decreasing/stable membership</td>
<td>% increasing membership</td>
<td>% decreasing/stable membership</td>
<td>% increasing membership</td>
</tr>
</tbody>
</table>
HOW MANY OF YOUR MEMBERS ARE IN EACH OF THE FOLLOWING AGE CATEGORIES?

<table>
<thead>
<tr>
<th>Age Category</th>
<th>Average Number per Club</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-15 years</td>
<td></td>
</tr>
<tr>
<td>16-19 years</td>
<td></td>
</tr>
<tr>
<td>20-29 years</td>
<td></td>
</tr>
<tr>
<td>30-44 years</td>
<td></td>
</tr>
<tr>
<td>45-64 years</td>
<td></td>
</tr>
<tr>
<td>65 years +</td>
<td></td>
</tr>
</tbody>
</table>

**RETAINING JUNIOR GOLFERS**

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

**RETAINING TEENAGE GOLFERS**

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

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

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

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

CATEGORY OF MEMBERSHIP OFFERED BY CLUBS

0% 20% 40% 60% 80% 100%

- Full Adult Male
- Full Adult Female
- Junior Male
- Junior Female
- Intermediate (between Junior and Adult)
- Student
- Social Membership
- Senior Male
- Senior Female
- Country/Overseas
- Corporate Membership
- Trial Membership
- Joint Membership
- Adult Male (restricted playing times)
- Adult Female (restricted playing times)
- Family Membership
- Junior Academy
- Adult Academy
- Other Flexible/Lifestyle Membership
- Points Membership
- Any Other Categories
BUILDING FAMILY FRIENDLY PACKAGES:

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

- **ENSURING THE CLUB ENVIRONMENT SUPPORTS FAMILY PARTICIPATION**
- **THE NEEDS OF THE WHOLE FAMILY**
- **GOOD VALUE FOR MONEY**
- **GIVING OPPORTUNITIES TO LEARN**
- **ESTABLISHING A REGULAR AND REPEATED CALENDAR OF FAMILY EVENTS FOR PARTICIPATION TO BECOME ROUTINE**

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

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

ARE YOU TARGETING ANY OF THE FOLLOWING GROUPS?

<table>
<thead>
<tr>
<th>%</th>
<th>0%</th>
<th>20%</th>
<th>40%</th>
<th>60%</th>
<th>80%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Females</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Junior Girls</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Junior Boys</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adult Males</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>People who have played golf previously</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members’ friends</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>People who have never played golf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular visitors to the area</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Members’ families</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Families</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No groups in particular</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

CASE STUDY – INCREASING FEMALE MEMBERSHIP
LLANISHEN GOLF CLUB

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

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

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

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

The New2Golf group was kept engaged by:

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

Of 33 ladies who signed up for New2Golf in 2017, 16 took up membership, and of the 17 who signed up in 2018, 10 are now full club members. 26 new female members in two years!
The club noticeboard is closely followed by email newsletters and social media. As in the last survey, the club website and social media are by far the most commonly used promotional methods.

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

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

**CLUB NOTICEBOARD**

The most popular means of communicating with members

**HOW DOES THE CLUB PROMOTE ITS FACILITIES AND MEMBERSHIP OPPORTUNITIES?**

<table>
<thead>
<tr>
<th>Promotion Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club Website</td>
<td>100%</td>
</tr>
<tr>
<td>Social Media (Facebook, Twitter, etc.)</td>
<td>80%</td>
</tr>
<tr>
<td>Promotional materials</td>
<td>70%</td>
</tr>
<tr>
<td>Publications</td>
<td>50%</td>
</tr>
<tr>
<td>Links with schools</td>
<td>30%</td>
</tr>
<tr>
<td>Other websites</td>
<td>20%</td>
</tr>
<tr>
<td>Collaboration with tour operators</td>
<td>20%</td>
</tr>
<tr>
<td>Links with local businesses/facilities/community groups</td>
<td>10%</td>
</tr>
<tr>
<td>Joint promotions/discounts with other Clubs in your area</td>
<td>10%</td>
</tr>
<tr>
<td>Links with driving ranges</td>
<td>5%</td>
</tr>
<tr>
<td>Links with further/higher education providers</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

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

HOW ARE NEW MEMBERS WELCOMED TO YOUR CLUB?

- Welcome Pack
- Induction
- Welcome Evening
- Mini Lesson
- Personal Introductions
- Other

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

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

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

- Paper based at the club
- Email
- Online form
- Touch screen at the club
- Paper based through the post
30 clubs stated that they conducted surveys; out of these:

- **26** conducted member surveys
- **13** conducted exit surveys
- **8** conducted visitor surveys
- **4** conducted new member surveys

**Survey methods used**

- **2** conducted over the phone
- **7** conducted face-to-face
- **8** Wales Golf Customer Feedback Tracker
- **11** other online survey
- **16** by email

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

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

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

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

<table>
<thead>
<tr>
<th>Percentages</th>
<th>Increased</th>
<th>Decreased</th>
<th>Stayed about the same</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20%</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>30%</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>40%</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>50%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Playing Options</th>
<th>Percentages</th>
<th>9 hole</th>
<th>18 hole</th>
<th>Day</th>
<th>Twilight</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0%</td>
<td>20%</td>
<td>40%</td>
<td>60%</td>
<td>80%</td>
<td>100%</td>
</tr>
</tbody>
</table>

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

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

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

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

<table>
<thead>
<tr>
<th>RANGE</th>
<th>MAXIMUM GREEN FEE</th>
<th>MINIMUM GREEN FEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highest</td>
<td>£161</td>
<td>£60</td>
</tr>
<tr>
<td>Lowest</td>
<td>£10</td>
<td>£6</td>
</tr>
<tr>
<td>Average</td>
<td>£35.96</td>
<td>£20.52</td>
</tr>
<tr>
<td>Average (2015/2016 survey)</td>
<td>£33.91</td>
<td>£21.56</td>
</tr>
<tr>
<td>Average (2013/2014 survey)</td>
<td>£34</td>
<td>£14</td>
</tr>
</tbody>
</table>

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

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

Wales Golf can help. Ask your Development Officer!

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

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

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

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

EQUALITY ON THE COURSE?

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

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

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

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

GOVERNANCE

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

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

23% 40% 28% 10%

Yes, all or most of it Yes, some sections of it No Don’t know

THE GOVERNANCE GUIDE FOR GOLF CLUBS

Wales Golf_Club Survey 2018.PR.indd   14
17/04/2019   08:59
Many clubs are still requesting help in various aspects of governance (see below) so Wales Golf are continuing to offer support; governance is one of the areas of the Strong Club Matrix and all Development Officers have been trained to give advice in this area.

59%
Reviewing your club’s committee and management structure

38%
Identifying/recruiting skilled committee/council members

44%
Setting out the vision and mission for your club

46%
Reviewing your club’s operating and control systems

9%
Ensuring GDPR compliance

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

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

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

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

- **5** Greenkeepers
- **1** Cleaner
- **1** PGA Professional
- **5** Bar and Catering
- **2** Management and Admin

**COMMON FRANCHISED/CONTRACTED AREAS**

- **16%** Cleaning
- **27%** Catering

Over a third of Secretaries and Managers (37.5%) were participating in a recognised education pathway.
The average number of Greenkeepers per club has increased slightly from 3 to 4 full-time posts; the majority are qualified and in the age range 30-49.

Only 3 clubs had an Apprentice Greenkeeper.

**Greenkeeper Qualifications**
- Sports Turf Management Level 2: 49%
- Sports Turf Management Level 3: 30%
- No qualification: 14%
- Other qualification: 7%

**Greenkeeper Ages**
- Under 30: 21%
- 30-49 years: 50%
- 50+ years: 29%
WALES GOLF ACTIVITIES AND INITIATIVES

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

![Value Rating Chart]

- **Customer Service Workshops (Kevin Fish) – 2018**: 2.75
- **Recruitment and Retention Workshops (Jane Carter) – 2018**: 2.62
- **Handicap and Course Rating Seminars**: 2.61
- **Workshops with Community Development Officers: New2Golf**: 2.59
- **Workshops with Community Development Officers: Social Media**: 2.56
- **Workshops with Community Development Officers: Marketing**: 2.55
- **Club Services Roadshows (2016): Sustainability**: 2.48
- **Safeguarding Workshops**: 2.48
- **Wales Golf Rules School**: 2.43
- **Workshops with Community Development Officers: Business Planning**: 2.40
- **Compliance Workshops (GDPR) – 2017**: 2.32
- **Volunteer and Coach Education course**: 2.27
The chart below shows how valuable clubs have found the other resources provided by Wales Golf. Average scores have again improved. Since the last survey WG have added support on gaining feedback from your customers which is vital to ensure you are meeting their needs and that you continue to grow your club. Consultation is also an important element of the business planning process. Wales Golf have several tools & services to help you such as Customer Feedback Tracker, Mystery Shopper & support & advice in running membership forums.
Responding clubs covered the full range of income levels.

WHAT IS THE TOTAL CLUB INCOME PER ANNUM?

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<th>0%</th>
<th>2%</th>
<th>4%</th>
<th>6%</th>
<th>8%</th>
<th>10%</th>
<th>12%</th>
<th>14%</th>
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24 clubs were able to provide a breakdown of income. On average, these clubs derived 69% of income from the course, 24% from club activities at the clubhouse, and 7% from non-club use of the clubhouse.

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

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

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

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

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<th>18%</th>
<th>35%</th>
<th>45%</th>
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<tr>
<td>MORE</td>
<td>SIMILAR</td>
<td>LESS</td>
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Wales Golf Buying Group
– save money for your club!

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

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

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

SUMMARY OF KEY ISSUES FOR CLUBS

- **Membership (recruitment/retention)**: 27%
- **Membership (juniors)**: 5%
- **Sustainability**: 8%
- **Staff/Volunteers**: 5%
- **Membership (ageing)**: 6%
- **Financial issues**: 22%
- **Attracting visitors**: 6%
- **Competition with other clubs**: 4%
- **Membership (females)**: 3%
- **Governance**: 9%
- **Balancing member/visitor demand**: 2%
- **Legislation/compliance**: 3%

Concerned about your environmental management and sustainability practices? Check out our Greener Golf pages at [www.walesgolf.org/greener-golf](http://www.walesgolf.org/greener-golf)
Clubs were also asked in what areas they would like assistance from Wales Golf – unsurprisingly membership and finance issues were at the top of the list.

### WHERE CLUBS WOULD LIKE ASSISTANCE

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Accessing Funding</th>
<th>Recruitment of New Members</th>
<th>Retention of Existing Members</th>
<th>Cost savings</th>
<th>Facility development</th>
<th>Governance</th>
<th>Marketing and Communications</th>
<th>Business Planning</th>
<th>Develop school/community links</th>
<th>Legislation</th>
<th>Customer Service</th>
<th>Club Operations</th>
<th>Recruiting Volunteers</th>
<th>Staff and Volunteer Training</th>
<th>Partnership with PGA Pros</th>
<th>Safeguarding (Child Protection)</th>
<th>Clubhouse/Facility Accessibility</th>
<th>Coach Development/Education</th>
<th>Equality and Diversity</th>
<th>Food and Beverage</th>
<th>Regional club manager meetings</th>
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WALES GOLF

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

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

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