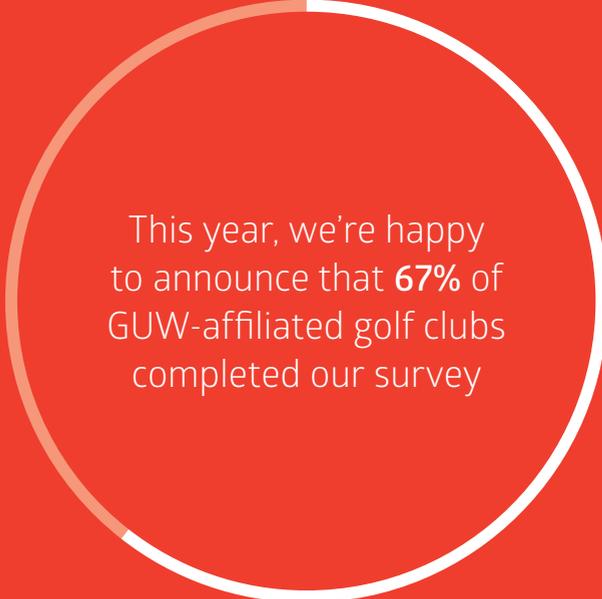


Welsh Golf Club

Survey 2013/14



www.golfunionwales.org



This year, we're happy to announce that **67%** of G UW-affiliated golf clubs completed our survey

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Executive Summary

The Welsh Golf Club Survey 2013/14 was completed by 103 clubs, a 67% response rate which compares favourably with the 61% response rate for the 2008/09 survey. We are grateful to all these clubs for the time and effort they have put into completing the survey. 87% of clubs used the online completion option.

Section 1

Course Management



No. of temporary course closures

The number of temporary course closures showed a more positive picture than in 2008/09.

2008/09

2013/14

About the same



Increasing



Decreasing



55% of clubs had a written Course Management Policy.



64% of clubs were aware of the R&A's CourseTracker, but only **16%** of clubs had signed up to use it.



57% of clubs were aware of the R&A publication 'A Modification of the Rules of Golf for Golfers with Disabilities'.

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Section 2

Defibrillators

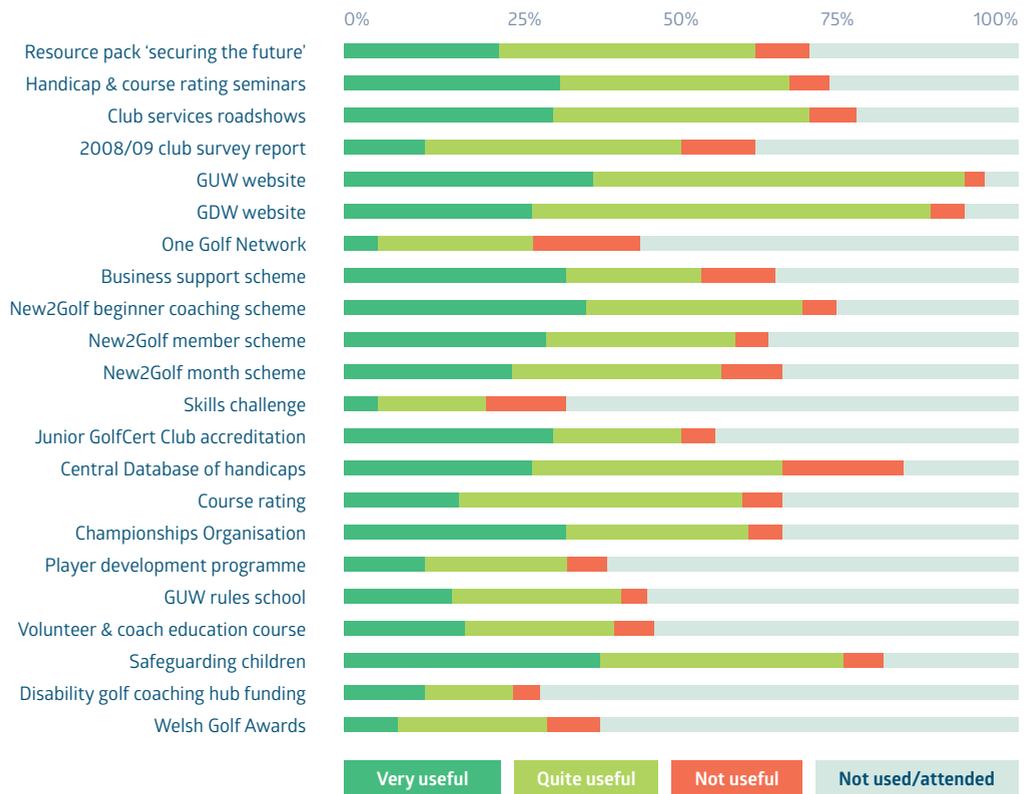


23% of clubs had a defibrillator on the premises; one club had occasion to use the defibrillator during the past year. But in clubs without defibrillators, **47%** of respondents did not know where the nearest defibrillator was.

Section 3

GUW/GDW Activities & Initiatives

The chart below shows how many of the responding clubs had engaged with the various GUW/GDW activities and initiatives, and how useful they found them.



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Over **90%** of clubs now engage with both GUW and GDW websites, up from below **70%** in 2008/09, and almost all of these find the websites “very” or “fairly” useful.



A high level of engagement with most of the resources developed following the 2008/09 survey. The vast majority of clubs engaging with these resources had found them either useful or very useful.

Section 4

Club Membership



Subscriptions

The table below shows the ranges and averages of membership fees for the main membership categories, with 2008/09 figures for comparison.

| Category | Current Survey 2013/14 | | 2008/09 Survey | | % Increase in Average |
|----------------|------------------------|---------|----------------|---------|-----------------------|
| | Range of Fees | Average | Range of Fees | Average | |
| Adult Male | £300 - £1,386 | £573 | £105 - £1,025 | £494 | 16% |
| Adult Female | £200 - £1,386 | £560 | £105 - £1,025 | £462 | 21% |
| Junior Male* | £0 - £385 | £97 | £5 - £247 | £89 | 9% |
| Junior Female* | £0 - £385 | £95 | £5 - £247 | £76 | 25% |
| Student** | £60 - £728 | £248 | £55 - £535 | £176 | 41% |
| Husband & Wife | £500 - £2,380 | £1,046 | £195 - £1,550 | £853 | 23% |
| Family | £200 - £1,152 | £884 | £435 - £1,200 | £834 | 6% |

*Where there is more than one junior fee depending on age, the maximum fee has been used in calculations.

**Where there is more than one student fee, the one applicable to a student between 19 and 21 has been used.

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80%

80% of clubs charged the same for adult males and females. Only **58%** in 2008/09; at junior level **98%** charged same for male and females.

69%

Over two thirds (**69%**) of clubs operated one or more intermediate categories of membership between Junior and Full Adult.

<10%

Less than **10%** of clubs charged a joining fee.

9%

9% of clubs gave details of a Family Membership, similar to **11%** of clubs in 2008/09. Cost usually very slightly less than that of two full adult memberships.

Cause for Concern

Junior males are showing the largest drop in average numbers, echoing the concerns raised by several clubs about recruitment of juniors.



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Clubs are encouraged to work toward Junior Golf Cert, an accreditation system that rewards outstanding junior sections. The process looks at Junior Club Structure, Recruitment and Coaching, Playing and Competition, Coach and Volunteer Recruitment and Education, and Child Welfare. Contact GDW for more information.

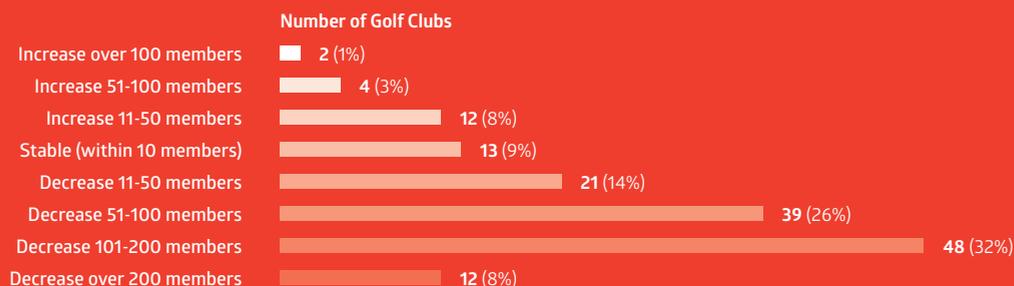
Coaching Centres – a new junior development programme written by the G UW. The programme will bridge the gap between the fantastic work currently being done through our participation schemes and elite squad structure. The G UW coaching team have produced a five year programme focusing on developing the young

athlete as a person as well as a performer. The programme will ensure a consistent and quality approach to junior coaching throughout Wales engaging the young athletes and encouraging lifelong golfers.

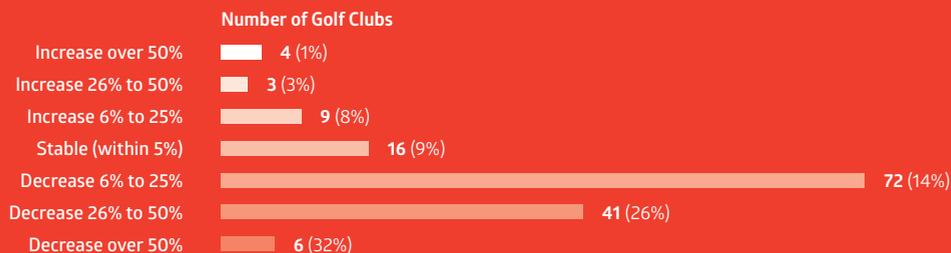
Numbers

The subscription records were used to build a picture of changes in membership numbers since the last survey. Over the 5-year period 2008-2013, overall membership numbers declined by 19%. 80% of clubs suffered a decline in membership over that period.

Changes to Memberships from 2008 to 2013



Relative Changes to Memberships from 2008 to 2013 (%)



Membership Comparisons from 2008 to 2013

The average number of members of each type per club, and the range of membership numbers, are shown below, with those from the 2008/09 survey for comparison.

| Category | Average 2013 | Average 2008 | Range 2013 | Range 2008 |
|---------------|--------------|--------------|------------|------------|
| Adult Male | 266 | 271 | 25 - 693 | 27 - 723 |
| Adult Female | 42 | 45 | 0 - 124 | 1 - 162 |
| Junior Male | 29 | 39 | 0 - 81 | 2 - 123 |
| Junior Female | 4 | 5 | 0 - 25 | 1 - 32 |



Clubs in the counties of Dyfed and Denbighshire/Flintshire were the most likely to show increased or stable membership numbers.

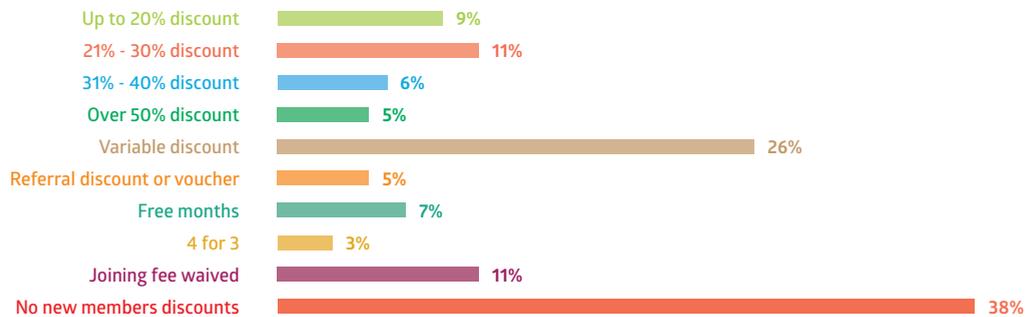
Dyfed findings may be related to the fact that South West Wales attracts most inward migration from other regions of Wales and also from England, particularly the 45-64 age group, who are more likely to be regular golfers.

Discounts

Incentives for new members to join varied considerably; offered by over 60% of clubs.

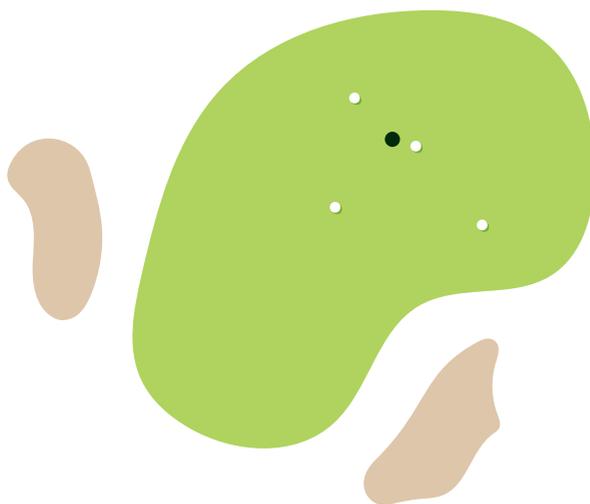
Discounts offered to new members

Percentage of clubs that offer:



74% of clubs offered a direct debit facility. Over 50% of clubs accepted payment of subscriptions by instalment over 10, 11 or 12 months. This is good practice as it makes club membership seem more affordable.

Section 5 Visitors



The Range of Green Fees

| Maximum Green Fees | |
|--------------------|------|
| Highest | £178 |
| Lowest | £10 |
| Average | £34 |

| Minimum Green Fees | |
|--------------------|-----|
| Highest | £35 |
| Lowest | £5 |
| Average | £14 |



From the small number of clubs who gave details of monthly visitor numbers, it appeared that these had improved considerably compared to the low figures recorded in the poor weather of summer 2012.

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Golf Union of Wales (GUW) Golfer Registration Scheme has been developed to create a universal and unique ID for all golfers, member and non-member, so that golfers will be easily recognised across all golf clubs in Wales. Golfers won't have to fill out forms each time they visit a different club as their unique ID ensures a smooth and quick check-in, giving more time to enjoy their round.

For more info, go to www.golfregistrationwales.co.uk



Section 6

Marketing & Communications

56% of clubs had a specific Board or Committee member responsible for marketing, similar to the **52%** reported in 2008/09. Only **53%** had a marketing budget, down from **63%** in 2008/09. Apparent that clubs with one/both of these engaged in more marketing activity.



Comparisons of advertising and promotional methods used

| Marketing item | Clubs with marketing budget & someone responsible | Clubs without marketing budget & no-one responsible | Average |
|---------------------------------------------|---------------------------------------------------|-----------------------------------------------------|------------|
| Club website | 100% | 95% | 97% |
| Other websites | 71% | 38% | 54% |
| Club Newsletter | 89% | 19% | 63% |
| Member Referral scheme | 46% | 24% | 30% |
| Local newspaper | 75% | 38% | 62% |
| Golfing publications (within Wales) | 71% | 48% | 58% |
| Golfing publications (outside Wales) | 54% | 19% | 37% |
| Collaboration with Visit Wales | 36% | 0% | 24% |
| Joint promotions/discounts with other clubs | 50% | 19% | 39% |
| Groupon discounts | 18% | 10% | 15% |
| Open Days | 57% | 43% | 53% |
| New2Golf scheme | 68% | 29% | 44% |

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Most clubs use multiple communication methods to their members, with well over half using social media.



45% of clubs wished to have all GUW communications sent to the main club contact, while the others would prefer more targeted communications.



Section 7

Information Technology



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79%

of clubs were able to accept credit card payments, a substantial increase since 2008/09.

62%

of clubs were using some form of online system for tee bookings, either for members, visitors or both; also a substantial increase.



Section 8 Staff Numbers



Jobs provided to people in Wales by clubs affiliated to G UW directly.

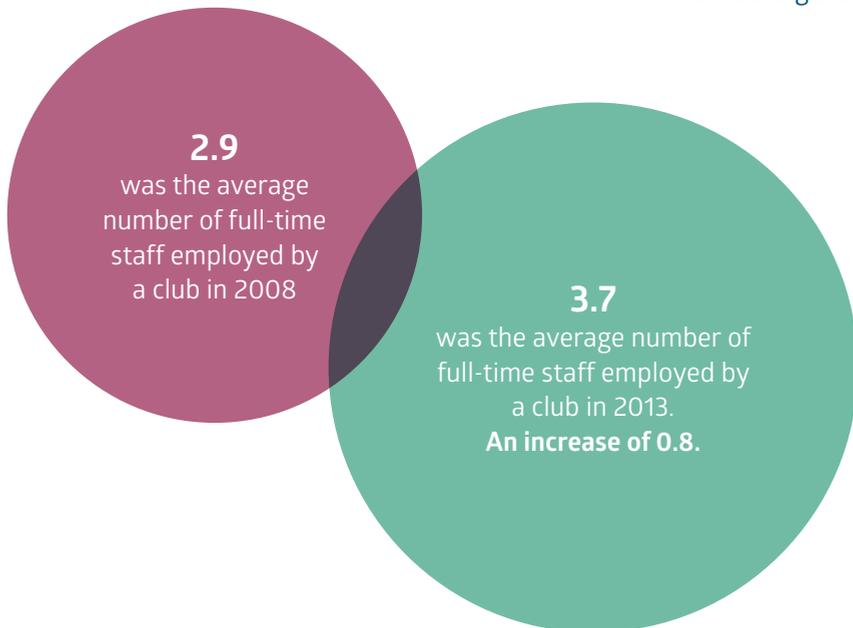


Volunteering opportunities to people in Wales by clubs affiliated to G UW directly.



Additional employment is provided through franchising companies, used by a number of clubs to provide bar, catering and cleaning staff.

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Management & Administration

Just over a quarter of clubs with full-time and/or part-time staff also had volunteer assistance. GUV's Vision 2020 target is to double our number of active volunteers.



Greenkeepers

Most clubs had between 1 and 5 full-time greenkeepers; a few larger clubs had more.

*Sport Wales
chwaraeoncyfmsu*

Resources for volunteers
Sport Wales are creating a 'one-stop shop' for sport volunteer resources, due to be up and running in 2015.



If you have no professionals, we can help.

Golf Development Wales' Roaming Professional project is designed to help clubs who don't have their own professional: there are now 5 clubs engaged in the Roaming Professional project. If your club doesn't have its own professional and would like to be included in the scheme please get in touch.

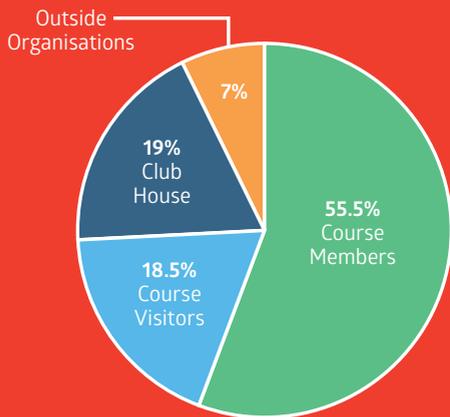
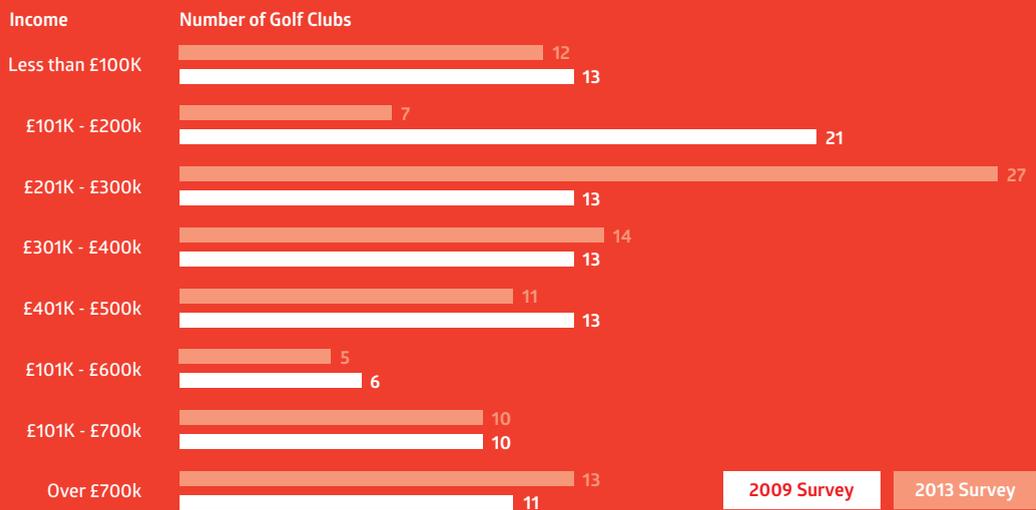
Section 9

Club Finances

63 clubs either answered questions on their finances or sent their accounts, and the chart below compares the percentages in each income band with the 2008/09 survey. It appears that clubs with incomes between £100,000 and £300,000 have suffered most during the economic downturn, with a large shift downwards from the £201-£300K category to the £101-£200K category.

53%
of clubs had made a surplus in the last financial year.

Income comparisons: 2009 and 2013



Where the income came from

On average, clubs received **73%** of their income from the course, **19%** from the clubhouse, and **7%** from outside organisations (e.g. hire of clubhouse). The average split of course income was **76%** from members and **24%** from visitors.

What concerns you?

The main concerns expressed by clubs are shown below – the bigger the text, the more clubs mentioned it.





Thank you for your time

We hope that this gave you an interesting insight into the different aspects of golf clubs in Wales. We would encourage you to take part in our next survey.

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For more information, please visit our websites:
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