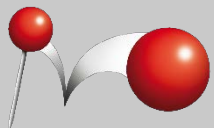


SANDWELL METROPOLITAN BOROUGH COUNCIL

GOLF NEEDS ANALYSIS

FINAL REPORT

APRIL 2019



SANDWELL METROPOLITAN BOROUGH COUNCIL
GOLF NEEDS ANALYSIS

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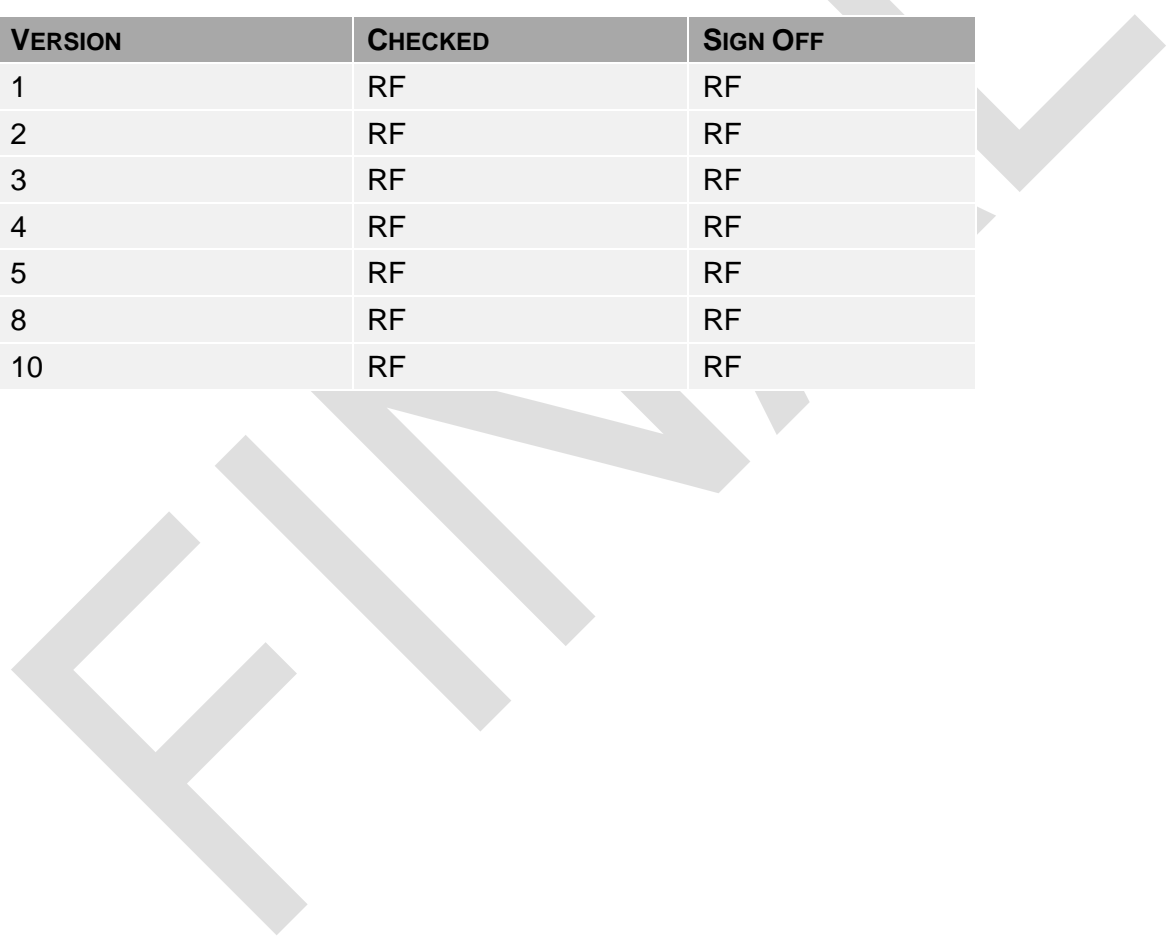


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1 EXECUTIVE SUMMARY

- 1.1. There are currently seven golf facilities in Sandwell including one pitch and putt facility. Two of these facilities Brandhall Golf Course and Sandwell Valley Pitch and putt/Crazy Golf, are operated by third party operators on behalf of Sandwell Council.
- 1.2. Sandwell Council (SC) adopted its Built Facilities Strategy (BFS) – Sport and Leisure in 2018; the BFS highlights that the oldest facilities in Sandwell, are in a poor condition and do not meet the needs of residents. The Sandwell Revised Playing Pitch Strategy and the Sandwell Sport and Leisure Built Facilities Strategy both highlight that there is spare capacity within the Borough's golf facilities to accommodate current and future demand.
- 1.3. Sandwell Council have recently carried out a refresh of their Playing Pitch Strategy (PPS) (October 2018) which identified the following recommendation for Golf. 'A further detailed options appraisal is required to identify the potential management and investment options for Brandhall Golf Course. The facility is currently not financially sustainable, and membership is in decline, however the facility does provide a low-cost option for non-member golfers, which is key to the future of the sport although not necessarily through an 18-hole golf course.' It must be noted that whilst this version of the PPS has been signed off by all steering group members, including England Golf, it has not yet been formally adopted by the Council.
- 1.4. The golf market in the UK has changed in recent years from a sport operating through club membership to one where pay and play is now more desirable. Due to this all golf facilities in Sandwell offer pay and play options for use.
- 1.5. There is a high-level supply of golf courses in Sandwell and a low latent demand, leaving each facility competing for the same golfers and increasing the risk of golf courses becoming unsustainable. This risk of unsustainability is further exacerbated by the availability of 32 further golf facilities being within 20 minutes' drive from the borough boundary.
- 1.6. Brandhall Golf Course is in poor condition, requires an annual operational subsidy of circa £170,000 per annum, and would need significant capital investment to bring it up to the required standard.
- 1.7. Golf England's suggested golf development pathway is for golfers to use a driving range, then learn to play on a municipal course prior to becoming a member at a private club. However, now that all private clubs in Sandwell offer pay and play options at their courses, the need for municipal courses has become less important. Therefore, even without the provision of a traditional municipal golf course, a full golf development pathway could be developed in Sandwell.
- 1.8. From this report it can be concluded that, due to the high-level supply of golf courses in Sandwell and the low latent demand for participating in golf, there is an over-supply of golf facilities in Sandwell. The golf development pathway also demonstrates that there is significant opportunity for Sandwell residents to participate in golf at all stages.
- 1.9. Given the over-supply of facilities, the revenue subsidy required for the operation of Brandhall Golf Course, and the capital that would be required to bring this facility up to standard, it is recommended that the Council explore further the long-term sustainability of Council-owned golf facilities as well how best to deliver the golf development pathway.

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- 1.10. Based upon this, it is considered that a full options appraisal is undertaken on all Sandwell Council golf facilities. Therefore, there is an opportunity for Sandwell Council to consider the facilities that it currently supplies and the impact these have on the sustainability of golf in the Borough.

FINAL

2 INTRODUCTION

- 2.1. Following the adoption of the revised Playing Pitch Strategy in 2015 and the Sandwell Sport & Leisure Built Facility Strategy 2018, Sandwell Council identified the need to undertake a Golf Needs Assessment for the Borough to identify the future level and nature of golf provision needed to meet residents' demands.
- 2.2. Strategic Leisure Limited (SLL) was appointed to undertake this needs assessment on behalf of Sandwell Council in October 2018.

BACKGROUND CONTEXT

- 2.3. There are currently seven golf facilities in Sandwell including one pitch and putt facility. Two of these facilities Brandhall Golf Course and Sandwell Valley Pitch and putt/Crazy Golf, are operated by third party operators on behalf of Sandwell Council.
- 2.4. The Sandwell Revised Playing Pitch Strategy, approved at the meeting of Cabinet on 16 September 2015 (156/15), highlights that there is spare capacity at all golf courses in Sandwell to accommodate current and future demand.
- 2.5. Sandwell Council adopted the Sandwell Sport & Leisure Built Facilities Strategy (BFS) at the meeting of Cabinet on 31 January 2018. The BFS identifies the current position of sport and leisure facilities in Sandwell and its ability to deal with residents demands / needs now and forecast in the future. In the Black Country only 1.94% of residents play golf, a figure lower than the national average which is 2.54%. Membership and usage numbers at Brandhall Golf Course have dropped significantly over the past 3 years and the facility requires a substantial subsidy for it to remain open. With demand being catered for by other golf courses in Sandwell and the declining membership numbers at Brandhall Golf Course, the strategy recommends that the future use of the facility is reviewed, and potential alternative uses are identified.
- 2.6. The BFS also highlights that the oldest facilities in Sandwell, including Brandhall Golf Course are in a poor condition and do not meet the needs of residents and sets out a number of opportunities to ensure that demand is met in the future.
- 2.7. At the meeting of Cabinet on 31 January 2018, it was approved that Opportunity 8 within the BFS would be investigated, namely to ***'Secure the long-term sustainability of golf in Sandwell by supporting independent clubs, creating a golf development pathway, and identifying potential alternative uses for Brandhall Golf Course.'***

2.8. The rationale for undertaking the golf needs assessment is therefore to:



Assess the current and future demand for golf in Sandwell;



Identify the nature and level of existing golf provision in the Borough, and other golf provision accessible to Borough residents;



Analyse whether supply meets current and future demand;



Identify any gaps in provision, and/or key issues with existing golf provision; and



Identify the options available to address these gaps/issues.

2.9. The golf market in the UK has changed significantly in recent years from a sport operating predominantly through club membership, to one where pay and play opportunities have increased and become more accessible largely to counteract declining numbers of club membership. Anecdotally, as it is very hard to evidence, given the reluctance of private clubs to share membership trends, many regular golfers are not club members, but instead choose to play at a variety of courses, where they know they can play good quality facilities for a reasonable cost, and enjoy good social facilities. Day package golf for non-members is growing in popularity.

2.10. It is important to consider this shift in traditional golf participation patterns in considering the level and nature of golf provision in the future in Sandwell, to ensure sustainability, and that available facilities address changing needs.

APPROACH TO NEEDS ASSESSMENT

2.11. The approach to undertaking the needs assessment comprised:



Audit (quantitative and qualitative) of all existing golf provision in Sandwell;



Audit of golf provision within 20 minutes of each of the towns in Sandwell;



Consultation with identified stakeholders;



Review of participation trends for golf in the UK;



Assessment of supply and demand for golf in Sandwell;



Identification of any gaps in provision, and/or key issues with existing golf provision; and



Identification of the options available to address these gaps/issues.

3 GOLF PROVISION IN SANDWELL

FACILITY SUPPLY

- 3.1 There are seven golf courses within the Borough of Sandwell including one pitch and putt facility. One of these courses, Brandhall Golf Course is run by Sandwell Leisure Trust (SLT) on behalf of SC. All other golf courses within Sandwell are privately operated facilities. SC also owns the Sandwell Valley Pitch and Putt which also incorporates an 18 hole Footgolf Course; these facilities are operated by Valley Cycles.
- 3.2 Existing golf provision in Sandwell is detailed in Table 3.1 and Map 3.1, which also shows the courses in Sandwell, and those immediately outside the Borough.

Table 3.1: Golf Courses in Sandwell

COURSE	OWNERSHIP	HOLES	DRIVING RANGE	ACCESS	AFFILIATED TO ENGLAND GOLF	OPERATIONAL MANAGEMENT
BRANDHALL GOLF COURSE	Local Authority	18	No	Pay & play Membership	Yes	Sandwell Leisure Trust
DARTMOUTH GOLF COURSE	Club	9	No	Pay & play Membership	Yes	Private
DUDLEY GOLF CLUB	Club	18	No	Pay & play Membership	Yes	Private
ROWLEY GOLF CENTRE	Club	18	Yes	Pay & play Membership	No	Private
SANDWELL VALLEY PITCH & PUTT	Local Authority	18 Plus 18 Footgolf	No	Pay & play	No	Sandwell Council
SANDWELL PARK GOLF CLUB	Club	18	No	Pay & play Membership	Yes	Private
WARLEY WOODS GOLF COURSE	Trust	9	No	Pay & play Membership	Yes	Trust

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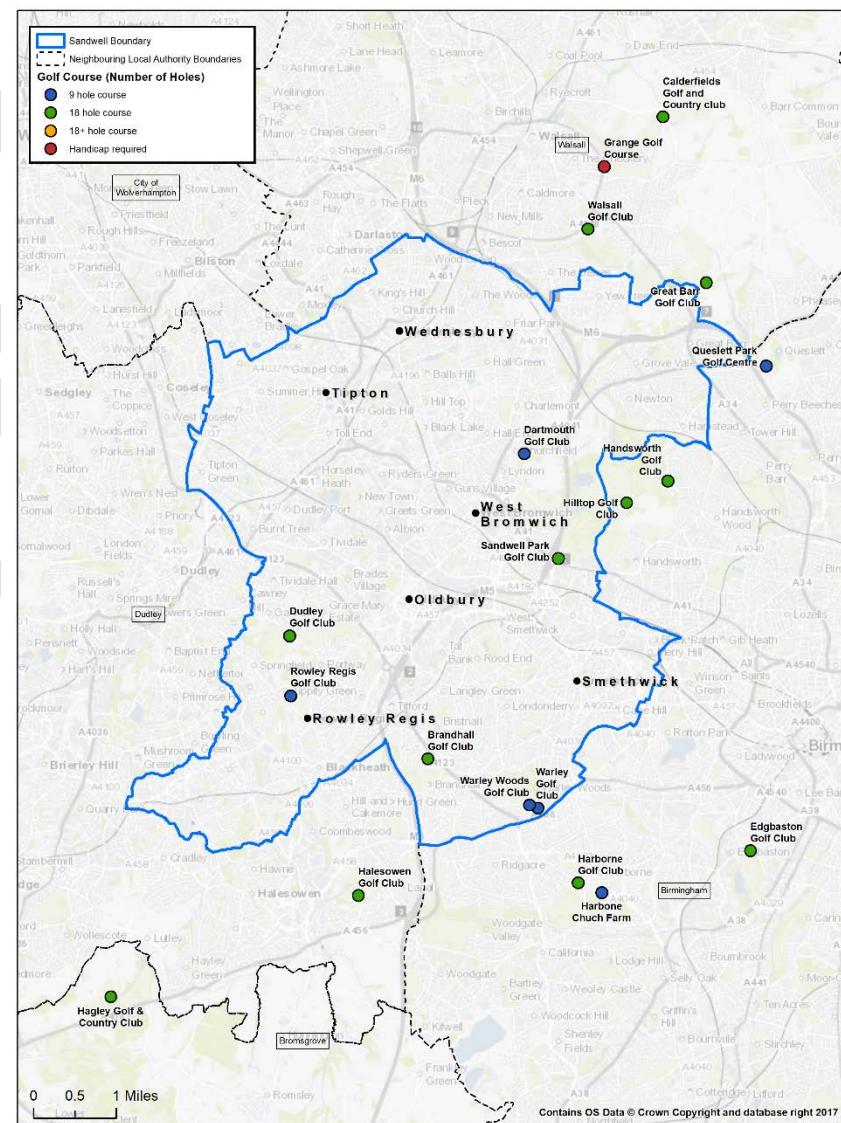
- 3.3 There are 7 golf facilities in Sandwell. Brandhall Golf Course is the only full municipal golf course in Sandwell.
- 3.4 Sandwell Valley is an 18 hole pitch and putt, plus 18 hole Footgolf Course.
- 3.5 Existing golf courses in Sandwell offer 90 holes of golf for the general public to use six days a week (Some clubs have limited public access on Saturdays due to competitions; this is a common operational approach for golf clubs).
- 3.6 A visual quality audit was undertaken on all golf facilities in the Borough. The assessment was made on the basis of the visual appearance and condition of the golf facilities, changing provision, and as available, pro shop, catering, social facilities. The audit did not include on site consultation.
- 3.7 The quality scoring is based on the following rationale:

Table 3.2: Audit Scoring System

KEY	RATING
>80%	Excellent
60% - 79%	Good
40% - 59%	Average
20% - 39%	Poor
<20%	Very Poor

- 3.8 A facility scoring highly in terms of visual quality and condition (good – excellent) is likely to require less investment than one which is in a poorer visual condition (average – very poor). The summary of the quality audit is set out in Table 3.3

Map 3.1: Golf Courses in Sandwell, and those immediately adjacent



Golf courses in and around Sandwell



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Table 3.3: Quality audit of golf facilities in the Borough

GOLF FACILITY	QUALITY OF OVERALL FACILITIES%	COMMENTARY ON QUALITY SCORE, CAPACITY FOR INCREASED MEMBERSHIP, AND PLAYING FEES
BRANDHALL GOLF COURSE	54%	Poor-quality built infrastructure, golf playing facilities are average so the overall score reflects both aspects; capacity for additional members;
DARTMOUTH GOLF CLUB	59%	Average quality; capacity for additional members; affordable membership and pay and play cost,
DUDLEY GOLF CLUB	70%	Good quality; capacity for additional members; affordable membership and pay and play cost; good quality lesson offer, Pro shop and practice area
ROWLEY REGIS GOLF CLUB	71%	Good quality; capacity for additional members; affordable membership and pay and play cost; includes a driving range
SANDWELL PARK GOLF CLUB	81%	Excellent quality; capacity for additional members; affordable pay play cost; good quality clubhouse
SANDWELL VALLEY PITCH AND PUTT (INCORPORATING 18 HOLE FOOTGOLF COURSE)	64%	Good quality; not open in winter; different golf offer
WARLEY WOODS	61%	Good – average quality; capacity for additional members; affordable membership and pay and play cost,

3.9 The SC golf facility in the Borough is rated as being poor quality and would benefit from improvement. Sandwell Valley is a seasonal pitch and putt and footgolf facility, and is not the main municipal golf offer in the Borough. The quality audit highlights that there is significant need and opportunity for improvement and investment at Brandhall Golf Course.

SUPPLY AND DEMAND ANALYSIS

3.10 Demand for golf in Sandwell comprises membership, 'Learn to Play', casual, corporate and competitive participation.

3.11 England Golf indicates the number of golf members at courses within Sandwell reduced by 16.27% between 2014 to 2016. This has led to all golf courses in and around Sandwell offering tee times for non-members in an attempt to generate additional income. Subsequently, this has led to financial stresses on both municipal and private courses, as customers who would have previously played municipal golf are now able to play at a private course for a similar price. Subsidised local authority facilities work to the detriment of private facilities in the area; the latter are better quality and are not subsidised by a council but are having to compete on price to mitigate the support enjoyed by subsidised municipal facilities.

3.12 The 2015 PPS indicates that 6.8% of the Sandwell public suggested that they would like to play golf. This was the lowest response level of all recorded in relation to participation in a range of sports.

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- 3.13 Importantly, all types of golf demand, except crazy golf, pitch and putt and footgolf in Sandwell can be addressed through the private sector, because it now offers what has previously, and traditionally, been the preserve of municipal courses, and critically, with higher quality playing and ancillary facilities, at the same, or a similar cost.
- 3.14 Nationally, 2.54% of people participate in golf. This figure is lower in the Black Country at 1.94%. The national latent demand for golf is 1.34% (PS9, 2015). Although no equivalent data exists at a Sandwell or a Black Country level, if this figure is assumed to be the same in Sandwell, this would mean 2,966 people (16+) would like to participate in golf who do not already do so.
- 3.15 From Sport England market segmentation data, 'Philip' has the highest participation and latent demand for golf, with 'Tim' being the second highest. 'Leanne' and 'Paula' have the lowest latent demand for golf within the market segments (Sport England, 2015). Sandwell has a lower proportion of 'Philip' and 'Tim' than the national average (11.4% against 17.4%), and a higher proportion of 'Leanne' and 'Paula' (12.9% vs 8.0%). Therefore, Sandwell is likely to have a lower latent demand for golf than the national average, and it is likely that less than 2,966 people in Sandwell would like to participate in golf.
- 3.16 There is a significant level of golf provision in Sandwell (5 private courses as well as two SC facilities (Brandhall Golf Course and the Valley Cycling operated pitch and putt) and close to the Borough. The main municipal facility in Sandwell, Brandhall Golf Course, is of a poorer quality (playing and practice facilities, and ancillary provision) than comparable private golf courses. However, the cost of pay and play golf at Brandhall Golf Course is higher than at similar private golf courses. Membership at Brandhall Golf Course decreased by 53.2% 2014-2016. Annual usage at Brandhall Golf Course has reduced from 30,767 in 2013/14 to 22,887 by 2017/18.
- 3.17 There is high level of 9 and 18 hole provision, one driving range (at Rowley Regis Golf Club, privately operated) although there is no Par 3, entry level course in the Borough. Membership numbers overall are relatively low compared with the national average, but it is worth noting that each club will have a different financial model in terms of income generation from membership vs green fees etc. Given the level of demand across both club-based and independent profiles, there is clearly scope for clubs to offer additional non-traditional and flexible playing opportunities wherever appropriate. High demand, but lower, and reducing membership levels reflects the trend in golf participation, away from club membership to pay and play day use. Club membership has become less relevant as a handicap can now also be calculated using on-line tools.
- 3.18 All 6 golf courses in Sandwell have capacity for additional members.
- 3.19 Due to the number of golf facilities in Sandwell and the low latent demand to participate in golf, there is an over-supply of golf provision leaving all facilities in the Borough at risk of becoming unsustainable. The continued offer of Brandhall Golf Course by Sandwell Council is further diluting the golfing market and adding to this risk.

BRANDHALL GOLF COURSE

3.20 Brandhall is the only municipal golf course in Sandwell. Located in Oldbury Brandhall Golf Course is a par 71, 18-hole municipal course, built in 1903. It offers a small practice area, professional's shop and clubhouse. The woodland course is open to the public on both a pay and play and membership basis.

3.21 Brandhall Golf Course is in need of improved maintenance to the greens and fairways, plus the practice area. One issue is that the allocated ground maintenance team are not golf specialists.

3.22 The Golf Club based at the Course operates a small clubhouse and bar; the clubhouse is in need of significant refurbishment. In 2016 there were 89 members of the golf club reducing by 53% from 190 in 2014.

3.23 The course is used by local and regular participants, although membership levels have fallen. The course is also popular for those learning to play golf, but once competent, these individuals do not always remain as members.

The decrease in membership at Brandhall Golf Club is due to an expansion of the private sector pay and play offer, as well as the poorer quality of Brandhall Golf Course; this includes both the course itself and the ancillary facilities.

3.24 There has been limited investment in the course or ancillary facilities by Sandwell Council. SLT's remit is to operate the course and offer lessons through the Golf Professional.

3.25 The 2015 PPS evidences:

'Multimillion-pound investment would be needed at Brandhall Golf Course to allow the course to compete with other golf provision in the Borough. This would include significant irrigation, drainage improvements and a clubhouse redevelopment.'

3.26 The 2018 refreshed PPS evidences:

A further detailed options appraisal is required to identify the potential management and investment options for Brandhall Golf Course. The facility is currently not financially sustainable, and membership is in decline, however the facility does provide a low-cost option for non-member golfers, which is key to the future of the sport although not necessarily through an 18-hole golf course.' It must be noted that whilst this version of the PPS has been signed off by all steering group members, including England Golf, it has not yet been formally adopted by the Council.

3.27 The 2018 BFS states:

Multi-million-pound investment would be required to allow the course to become sustainable and maintained to a required standard. This would include the relocation of the club house facilities to be directly off the Wolverhampton Road, a major upgrade to the irrigation / drainage of the course as during wet months the course becomes unplayable due to it being water logged, and the overall quality of the greens and fairways. However, this would still not ensure the sustainable future of the site or an overall increase in the number of residents participating in golf. With the declining numbers of golf club members in Sandwell, and with the low latent demand for residents who wish to play golf, it is likely that any upgrade to Brandhall Golf Course would further dilute the market and dislocate participants from other golf clubs / courses in the area.

Therefore, due to the small latent demand to participate in golf, the fact that other Sandwell golf courses are struggling to remain open, the decline in golf club membership numbers, and the condition and cost of making the required improvements to Brandhall Golf Course, it is recommended that an alternative future use is determined for the Brandhall site and that the Council support the sustainability of golf in Sandwell by supporting the independent golf clubs and courses in the borough through the creation of a development pathway for golf.

3.28 The current Brandhall Golf Course operates at a loss of circa £170,000 per annum. The course is unsustainable and will continue to be so unless there is significant capital investment, which would mean the quality of the playing and social facilities improves.

GOLF PROVISION IN NEIGHBOURING LOCAL AUTHORITIES

3.29 There are six main towns in Sandwell. Within a 20-minute drive time of each town, there are a total of 39 golf courses inside and outside the Borough boundary (See Appendices 1 and 2) managed privately, by local authorities or trusts. Across all of these courses there is a significant difference in relation to quality, accessibility and pricing structures.

3.30 As shown in the Appendix 1 maps, and the lists in Appendix 2 there is a very significant number of golf courses and facilities in close proximity to the Borough. Golfers will travel to access good quality courses and facilities; it is ensuring access to provision for those learning to play, or for those who cannot afford to travel that is the challenge.

CONSULTATION WITH PRIVATE COURSES IN AND AROUND SANDWELL

3.31 To identify demand for golf in the Borough, consultation was undertaken with England Golf, private golf courses both those in Sandwell, and those surrounding the Borough, SLT, and SC officers (leisure, grounds maintenance). Feedback from stakeholders is reflected in the supply information above, as well as below.

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- 3.32 Appendix 1 mapping shows which golf courses are within 20 minutes of each of the 6 Sandwell towns. Clearly some courses are within 20 minutes of more than one of the 6 towns. Appendix 2 identifies these golf courses in list format. Appendix 3 details the consultation responses from the golf clubs (via the Pro) that responded to the club survey; responses were received from clubs in and outside the Borough.
- 3.33 In total, 22 golf courses responded to the consultation survey. The responses came from both golf courses in the Borough and those outside the Borough. All feedback can be found in Appendix 3 (green shaded responses are those from golf clubs in the Borough).
- 3.34 All 22 private golf courses responding to the consultation offer a pay and play option for non-members. All 22 golf course professionals confirmed there is capacity to take on new members i.e. both adult and junior members. Six golf courses have increased their membership figures over the last three years, four golf courses have fewer members than in 2015 and ten have memberships which have remained the same.
- 3.35 The cost of membership at these 22 courses ranges from £600 per year to £1,500 per year. Each course offers a monthly direct debit scheme. All golf courses offer a day rate to play ranging between £4.50 (Sedgley Golf Club, 9 holes) to £70 for 18 holes with a considerable variance across the courses. The average price of a green fee is £31. A significant number of these golf courses also provide discounted green fees for juniors, females and older adults.

ENGLAND GOLF

- 3.36 Consultation with England Golf highlights that whilst there is a good number of golf facilities in Sandwell including one driving range (Rowley Regis Golf Club), membership numbers across these facilities have generally decreased since 2014.
- 3.37 Golf is the 5th highest sport in relation to national participation figures. Nationally, 2.54% of people participate in golf. This figure is slightly lower in the Black Country at 1.94%. The national latent demand for golf is 1.34% (PS9, 2015). Although no equivalent data exists at a Sandwell or a Black Country level, if this figure is assumed to be the same in Sandwell, this would mean 2,966 people (16+) who do not currently participate in golf would like to do so. England Golf research identifies that 24% of adults in England are potential players. This is made up of 9% current players, 8% lapsed players and 7% latent players. Within these groups England Golf identify nine defined profiles and clearly identified behaviours, motivations and barriers.
- 3.38 All formats of golf are a priority for England Golf including informal types of the game which have become very popular over the last few years such as Adventure golf and Top golf. However, the suggested pathway to engage committed golfers includes using a driving range, then playing on municipal golf courses before becoming a full course member at a private club.
- 3.39 Due to the change in accessibility at private clubs i.e. very affordable pay and play day access, the need for municipal golf has become less important. The key priority, however, is that there is still a pathway for beginners leading to them playing the full format of the game.
- 3.40 England Golf is running schemes such as 'Get into golf', 'Girls' Golf Rocks, 'Ladies into par' and 'Golf Sixes' to increase participation across the country. Golf Courses across Sandwell are not currently developing and implementing these initiatives; this could be a means of increasing participation, particularly amongst females.

GOLF DEVELOPMENT PATHWAY

3.41 It is important to ensure that there are opportunities to participate in golf from the 'learn to' to recreational and competitive participation levels; this is the only way to facilitate participation growth and retention. The existing golf provision in Sandwell Borough provides opportunities at all stages of the Golf Development Pathway, as follows:

Table 3.3: Summary of Golf Pathway in Sandwell

PARTICIPATION LEVEL	EXPLANATION	EXISTING FACILITY PROVISION	SANDWELL VENUES:	PRICE RANGE
LEARN TO PLAY GOLF	Learn to Play relates to both facilities and instruction services; these facilities provide opportunities to learn to play golf, practise and or take lessons.	Driving range	<ul style="list-style-type: none"> • Rowley Regis Golf Club 	£3 - £6
		9 hole course/18 hole course	<ul style="list-style-type: none"> • Brandhall Golf Course • Dartmouth Golf Course • Dudley Golf Course • Rowley Golf Centre • Sandwell Park Golf Club • Warley Woods Golf Course 	£5 - £20
RECREATIONAL /SOCIAL GOLFER	Social golfers do not play regularly necessarily, but may participate in one-off golf days/events, or play infrequently with friends etc. Need access to good quality facilities, which provide value for money.	Driving Range, 9 hole course, 18 hole course (5 day member of private or municipal course)	<ul style="list-style-type: none"> • Brandhall Golf Course • Dartmouth Golf Course • Dudley Golf Course • Rowley Golf Centre • Sandwell Valley Pitch and Putt • Sandwell Park Golf Club • Warley Woods Golf Course 	£5 - £20
SOCIETY GOLF	Non-members, but play regularly as part of an organised group. Includes corporate golf days.	9 hole course, 18 hole course	<ul style="list-style-type: none"> • Brandhall Golf Course • Dartmouth Golf Course • Dudley Golf Course • Rowley Golf Centre • Sandwell Valley Pitch and Putt • Sandwell Park Golf Club • Warley Woods Golf Course 	£5 - £20

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PARTICIPATION LEVEL	EXPLANATION	EXISTING FACILITY PROVISION	SANDWELL VENUES:	PRICE RANGE
COMPETITIVE GOLFER	Regular players, may be members of golf clubs; take part in competitions (if club member). Need practice and playing facilities.	9 hole golf course (municipal course)	<ul style="list-style-type: none"> • Brandhall Golf Course • Dartmouth Golf Course • Dudley Golf Course • Rowley Golf Centre • Sandwell Valley Pitch and Putt • Sandwell Park Golf Club • Warley Woods Golf Course 	£5 - £20
FUN GOLFER	Participation with family or friends; focus on fun	Crazy/adventure golf	<ul style="list-style-type: none"> • Sandwell Valley 	£4 - £6
		Footgolf	<ul style="list-style-type: none"> • Sandwell Valley 	

3.42 Based on the above golf pathway, it is clear that at all stages of the Golf Pathway there is significant non-municipal provision in the Borough, with the exception of pitch and putt/crazy golf and footgolf i.e. the fun golf facilities.

3.43 The fun golf provision in Sandwell Valley (comprising Crazy Golf, Footgolf and Pitch and Putt) is very popular, with circa 7,000 users predominantly young people and families) in 2018. Given the Crazy Golf is now 7-8 years old there are aspirations to refurbish and update the facility.

4 CONCLUSIONS

- 4.1. From this report it can be concluded that, due to the high-level supply of golf courses in Sandwell and the low latent demand for participating in golf, there is an over-supply of golf facilities in Sandwell.
- 4.2. The golf development pathway also demonstrates that there is significant opportunity for Sandwell residents to participate in golf at all stages.
- 4.3. Given the over-supply of facilities, the revenue subsidy required for the operation of Brandhall Golf Course, and the capital that would be required to bring this facility up to standard, it is recommended that the Council explore further the long-term sustainability of Council-owned golf facilities as well how best to deliver the golf development pathway.
- 4.4. Based upon this, it is considered that a full options appraisal is undertaken on all Sandwell Council golf facilities.

DISCLAIMER

Forecasts and recommendation in any proposal, report or letter are made in good faith and on the basis of the information before the Company at the time. Their achievement must depend, among other things, on effective co-operation of the Client and the Client's staff. In any consequence, no statement in any proposal, report or letter is to be deemed to be in any circumstances a representation, undertaking, warranty or contractual condition.

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