



# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

**MAY 2025**

QUALITY, INTEGRITY, PROFESSIONALISM

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# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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## CONTENTS

GLOSSARY .....	1
PART 1: INTRODUCTION AND METHODOLOGY .....	2
PART 2: SUPPLY AND DEMAND ASSESSMENT .....	8
PART 3: CONCLUSION.....	38

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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## GLOSSARY

ANOG	Assessing Needs and Opportunities Guide
KKP	Knight Kavanagh & Page
ONS	Office of National Statistics
NGB	National Governing Body
NPPF	National Planning Policy Framework
PPS	Playing Pitch Strategy

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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## PART 1: INTRODUCTION AND METHODOLOGY

### 1.1: Introduction

- 1.1 This report presents a Golf Needs Assessment, which has been produced by Knight Kavanagh & Page (KKP). It has been commissioned by Blaby District Council to inform future decision making processes in relation to golf provision.
- 1.2 The study will also inform the Council's preparation of its emerging Local Plan (covering a period up to 2042). There is a need for this to plan for significantly more growth due to an agreement to meet some of Leicester City's unmet housing need (as identified in the Leicester and Leicestershire Housing and Economic Needs Assessment). To date, two Regulation 18 consultations have taken place, with working continuing towards the Regulation 19 version (planned for July 2025).
- 1.3 The Council's existing Local Plan consists of the Core Strategy (2013) and the Delivery Development Plan Document (2019), with the latter setting out the protection for existing open space, sport and recreation facilities. Policy CS15 states that "Blaby District Council will seek to ensure that all residents have access to sufficient, high quality, accessible open space, sport and recreation facilities."
- 1.4 The study has also been carried out with regard to the National Planning Policy Framework (NPPF). As part of this, particular consideration has been given to Paragraph 104, which states that existing open space, sports and recreational buildings and land should not be built on unless:
  - a) An assessment has been undertaken which has clearly shown the open space, buildings or land to be surplus to requirements; or
  - b) The loss resulting from the proposed development would be replaced by equivalent or better provision in terms of quantity and quality in a suitable location; or
  - c) The development is for alternative sports and recreational provision, the benefits of which clearly outweigh the loss of the current or former use.

### 1.2: Methodology

- 1.5 In order to produce this assessment, Sport England's 'Assessing Needs and Opportunities Guide' (ANOG) has been followed. This features the following staged approach:
  - ◀ Stage A: Prepare and tailor the approach
  - ◀ Stage B: Gather information on supply and demand
  - ◀ Stage C: Assessment – bringing the information together
  - ◀ Application: Application of an assessment

#### **Stage A: Prepare and tailor the approach**

##### ***Purpose, objectives and strategic context***

- 1.6 The purpose of this study is to provide a robust, comprehensive assessment of golf provision in Blaby as well as across its wider catchment area. This will enable future strategic decisions to be made that can inform Blaby District Council's emerging Local Plan and conform with the NPPF.

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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1.7 Other key objectives identified by the Council are to:

- ◀ Identify the quantitative and qualitative needs for golf facilities in the District.
- ◀ Review current supply and demand evidence and identify trends.
- ◀ Analyse the financial viability and profit/loss trends of existing sites.

1.8 To meet the objectives, the following outputs have been identified as requiring an analysis:

- ◀ An assessment of existing provision, including those sites outside of Blaby, but reasonably accessible to residents of the District.
- ◀ Liaison with adjoining planning authorities on sites which are being promoted for development outside of Blaby but which could be meeting needs.
- ◀ Consultation with operators and assessment of the sites.
- ◀ Current and previous usage levels, and trends in demand for both membership and pay and play access.
- ◀ Impact of changes to population and household numbers on demand for golf facilities.
- ◀ Financial viability and profit/loss trends of existing sites (high-level analysis as current and future viability does not determine need).

1.9 In addition, regard is also required in relation to Blaby District Council's Playing Pitch Strategy (PPS). This includes golf and was produced in 2020 before being updated in 2024. It highlights a strong level of golf provision in Blaby, containing a combination of 18-hole and 9-hole courses, with significant further facilities available within neighbouring authorities. The existing supply was therefore considered to be sufficient to meet current and future demand, although it is noted that England Golf believes that all current facilities should be retained and protected to ensure that no provision gaps are created.

1.10 Specific recommendations relating to golf in the PPS are to:

- ◀ Protect existing golf provision unless appropriate mitigation is secured in line with planning policy, or an independent needs assessment identifies a course as being surplus to requirements.
- ◀ Sustain course and ancillary facility quality and seek improvements where necessary.
- ◀ Support clubs in membership retention and potential growth and encourage clubs and providers to work more collaboratively in terms of creating pathways for players.

## **Scope**

1.11 The study has focused on golf facilities within Blaby to identify historic, current and future supply and demand aspects across the District. However, consideration has also been given to other golf facilities within an agreed catchment area by means of examining additional provision within the locality that could be meeting need.

1.12 As is advised by both England Golf and Sport England for studies such as this, an industry-standard 20-minute drivetime catchment area around Blaby has been utilised. This captures seven golf facilities within Blaby and an additional 13 sites outside of the District (20 overall), as shown in the following table.

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Table 1.1: Golf facilities in Blaby and within a 20-minute drivetime catchment area

Golf site	Local authority
Blaby Golf Centre	Blaby District Council
Cosby Golf Club	Blaby District Council
Enderby Golf Course	Blaby District Council
Kirby Muxloe Golf Club	Blaby District Council
Whetstone Golf Club	Blaby District Council
Kingstand Golf & Country Club	Blaby District Council
Beedles Lake Golf Centre	Charnwood Borough Council
Charnwood Forest Golf Club	Charnwood Borough Council
Longcliffe Golf Club	Charnwood Borough Council
Rothley Park Golf Club	Charnwood Borough Council
Birstall Golf Club	Leicester City Council
Leicestershire Golf Club	Leicester City Council
Leicester Golf Centre	Leicester City Council
Western Park Golf Course	Leicester City Council
Forest Hill Golf & Conference Centre	Hinkley & Bosworth Borough Council
Hinckley Golf Club	Hinkley & Bosworth Borough Council
Lutterworth Golf Club	Harborough District Council
Ullesthorpe Court Hotel & Golf Club	Harborough District Council
Bramcote Water Golf Course	Rugby Borough Council
Glen Gorse Golf Course	Oadby & Wigston Borough Council

## ***Project management***

- 1.13 A project team from Blaby District Council has worked with KKP to ensure that all relevant information is readily available so that project stages and milestones have been delivered on time. Together, the group has been responsible for the direction of the assessment from a strategic perspective and for supporting and checking and challenging its findings.
- 1.14 England Golf has also supported the project, providing club and course data, where available and required.

## **Stage B: Gather information on supply and demand**

- 1.15 A clear picture of the supply and demand for golf facilities within Blaby and its catchment area is provided to enable an accurate assessment of need. This is achieved through a variety of elements, including site visits, club/operator consultations and information provided by England Golf.

## ***Supply - quantity***

- 1.16 Where known, all golf facilities within Blaby and its catchment area are included within the assessment, irrespective of ownership, management and use. Sites have been identified using Sport England's Active Places web-based database before being checked and challenged with the Council and England Golf as well as through site assessments. Desk-based research has also been carried out to ensure that all provision is accounted for.
- 1.17 Three different types of golf facilities are recognised by Sport England and governed by England Golf, with these being standard hole courses, Par 3 courses and driving ranges. Any provision meeting this criterion is therefore included within the study.

# BLABY DISTRICT COUNCIL

## GOLF NEEDS ASSESSMENT

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### ***Supply - accessibility and availability***

- 1.18 Not all golf facilities offer the same level of access to the community and the ownership and operating model in place can also influence their actual availability. To better understand this, the assessment identifies whether sites are members clubs, proprietary facilities or private sites and considers both membership and pay and play aspects.
- 1.19 Whilst sites may theoretically be available for access, capacity may be limited due to current membership and/or usage levels, whilst pricing and other factors such as course quality and length may also deter some users. Such details relating to each site are therefore also included within the study, as discovered through site assessments, consultation with providers and online research.
- 1.20 In addition, some golf facilities may no longer be in use and are therefore categorised as disused or lapsed, as is the case for two courses in Blaby (Western Park Golf Course and Kingstand Golf & Country Club). Such sites are not used by any golfers and are also unavailable for community hire; however, they do require consideration as they could theoretically meet some level of need in the event that they are brought back into use. They are also still offered the same level of protection as active sites via local and national planning policy.

### ***Supply – quality***

- 1.21 The capacity of provision to adequately provide for competitive play, tournaments and practice is most often determined by quality. As a minimum, the quality of a site can impact on the playing experience and people's enjoyment of golf, whilst in some circumstances it can result in a facility being unable to cater for all or certain types of play during peak and off-peak times.
- 1.22 Notwithstanding the importance of quality, it can be difficult to measure for golf as it is often linked to the price of access, with better quality provision generally having higher membership costs and green fees. Quality is therefore considered relative to other aspects of a site, meaning it is not always reasonable to draw site-to-site comparisons as some golfers are happy to accept poorer quality facilities for lower cost access. Furthermore, quality can be subjective, with certain golfers preferring conditions that would not always be considered best practice and with difficulty also needing to be factored in.
- 1.23 In addition, even sites generally considered as providing the best quality facilities can have particular issues that the operators wish to resolve, such as drainage in specific areas or problematic greens and tee beds. Some will also have clubhouse, car parking and and/or practice facility aspirations, with such provision key to income generation and sustainability.
- 1.24 Based on the above, the quality of all provision identified in the assessment and the ancillary facilities supporting them have been assessed, regardless of ownership, management and availability, along with capturing any detail specific to the individual facilities and sites. This information has been determined via site assessments and through consultation with operators and England Golf as it is accepted that these stakeholders are best placed to provide an overview.

## **BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT**

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### ***Demand - current***

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

### ***Demand - future***

- 1.30 Alongside current demand, it is important for the assessment to consider future demand for golf provision in order to understand to what degree it is likely to exist and to assess if it can be met. One method of undertaking this is via use of Office of National Statistics (ONS) population projections. Through this, an estimate can be made of the likely future demand for facilities based on current participation levels, with assumptions then made as to whether existing provision can cater for such growth.
- 1.31 Membership generation rates are used to provide an indication as to how many people may play golf within Blaby and its catchment area in the future. This is calculated by determining what percentage of the population are currently members at sites, with this ratio then applied to predicted population growth to help estimate future levels of demand for the sport. This is run to 2042, in line with the Council's emerging Local Plan.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 1.32 Another information source used to help identify future demand include club targets, with operators asked during consultation whether they have plans to attract additional members/users and what this might mean in quantitative terms and what impact it may have on capacity levels.
- 1.33 In addition, various modelling tools have been used, including those provided by England Golf. Wider England Golf participation targets and priorities have also been considered.

### **Stage C: Assessment – Bringing the information together**

- 1.34 The supply and demand information gathered is used to assess the adequacy of golf provision in Blaby and its 20-minute drivetime catchment area. This forms the basis of this report and includes the key issues, challenges and aspirations identified as well as an overall supply and demand analysis.

# BLABY DISTRICT COUNCIL

## GOLF NEEDS ASSESSMENT

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### PART 2: SUPPLY AND DEMAND ASSESSMENT

#### 2.1: Introduction

- 2.1 Golf is the fifth largest participation sport in England, with around 730,000 members belonging to one of 1,750 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 also have other habitats with high wildlife value. Many other courses also exist within designated heritage coast sites, areas of outstanding natural beauty, or are listed as historic parklands.
- 2.2 Nationally, the sport is governed by England Golf. Its role includes providing competitions for players of all ages and abilities, identifying and developing the most talented golfers, maintaining a uniform system of handicapping, administering and applying the rules, and introducing new golfers via its initiatives such as 'Get into Golf'.

#### Consultation

- 2.3 A site visit was carried out at all courses in Blaby and within its 20-minute drivetime catchment area. Furthermore, consultation has been undertaken with the operators of the following 16 sites by means of acquiring information relating to their facilities and associated demand:
- ◀ Beedles Lake Golf Centre
  - ◀ Birstall Golf Club
  - ◀ Blaby Golf Centre
  - ◀ Bramcote Water Golf Course
  - ◀ Charnwood Forest Golf Club
  - ◀ Cosby Golf Club
  - ◀ Enderby Golf Course
  - ◀ Forest Hill Golf & Conference Centre
  - ◀ Hinckley Golf Club
  - ◀ Kirby Muxloe Golf Club
  - ◀ Leicester Golf Centre
  - ◀ Longcliffe Golf Club
  - ◀ Lutterworth Golf Club
  - ◀ Rothley Park Golf Club
  - ◀ Ullesthorpe Court Hotel & Golf Club
  - ◀ Whetstone Golf Club
- 2.4 The above equates to an 89% response rate, with only two active sites not taking part in the consultation process. Glen Gorse Golf Club did not respond to requests, whilst the Leicestershire Golf Club responded to state that it did not wish to take part. A site visit was still carried out at both venues.
- 2.5 To further inform the study, England Golf has provided relevant information for the golf facilities included within the scope. This has formed part of a wider consultation with the National Governing Body (NGB).

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

2.6 In addition, representatives from neighbouring local authorities have been contacted to better understand the future of their golf provision, with this process encompassing facilities in Charnwood, Rugby, Hinckley & Bosworth, Leicester and Harborough. However, Rugby Council responded to state that it did not have anything to contribute on the matter, whereas City of Leicester Council and Harborough Council did not respond.

## 2.2: Supply

2.7 The three different types of golf facilities recognised by Sport England and governed by England Golf are defined in the table below. Facilities such as pitch and putt courses and miniature/crazy/adventure golf courses are not included as these are not considered to be traditional formats of the game and are not comparable offerings. That being said, it is acknowledged that these can and do play a role in accommodating demand and can act as a gateway to more established participation.

Table 2.1: Definitions of golf facilities

Facility type	Description
Standard	A standard par course, with a minimum of 9 holes but normally associated with 18-hole courses; many 9-hole courses have different tee boxes which allow the provision to be played as an 18-hole course. Some courses provide 27 holes, with any two loops of 9-holes played to make up an 18-hole round.
Par 3	Shorter length of holes than a standard course, with no hole longer than par 3. Most likely to be a 9-hole course although 18-hole offerings do exist. Does not include pitch and putt courses, which are even shorter offerings and are not considered to be a traditional version of the sport.
Driving Range	Includes covered and uncovered driving range bays but not practice areas within golf courses; ranges are based on the hiring of balls, with users not required to retrieve, whereas practice areas are generally for members to use with their own balls (although a growing number have dispensers). Does not include 'entertainment' ranges or virtual offerings, although some driving ranges have expanded to also provide these features.

2.8 There are 18 active golf venues within Blaby and its 20-minute drivetime catchment area that conform to the above definitions, as identified in Table 2.2 and Figure 2.1 below. This represents a relatively large supply of provision. Across all sites, there are a total of 288 standard holes, 18 par-3 course holes and 99 driving range bays.

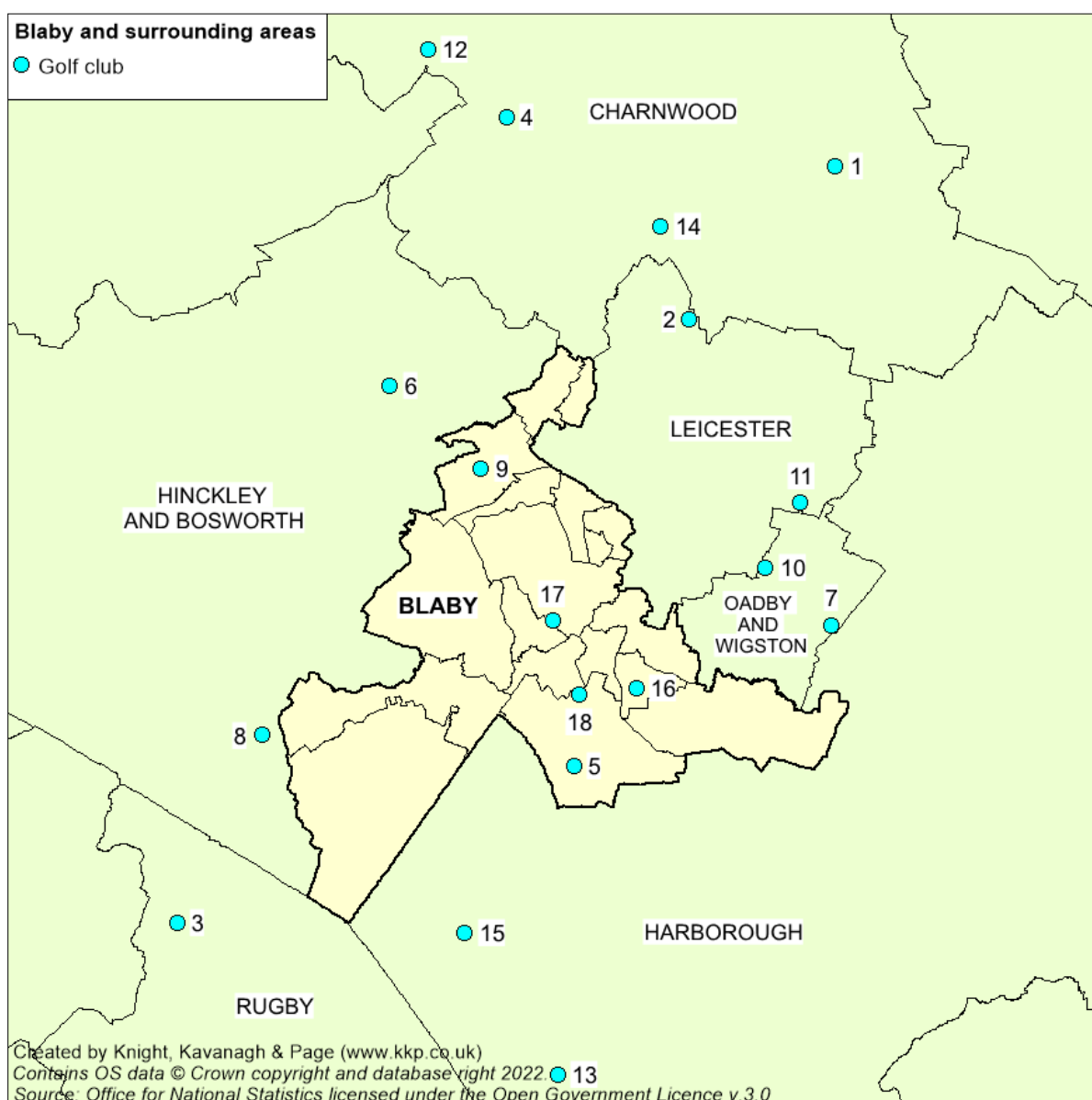
Table 2.2: Summary of active golf facilities within catchment area

Site ID	Site name	Local authority	Standard holes	Par 3 holes	Driving range bays
1	Beedles Lake Golf Centre	Charnwood	18	9	18
2	Birstall Golf Club	Hinkley & Bosworth	18	-	-
3	Bramcote Water Golf Course	Leicester	18	-	-
4	Charnwood Forest Golf Club	Charnwood	9	-	-
5	Cosby Golf Club	Blaby	18	-	10
6	Forest Hill Golf & Conference Centre	Leicester	18	-	20
7	Glen Gorse Golf Course	Oadby & Wigston	18	-	-
8	Hinckley Golf Club Ltd	Leicester	18	-	-
9	Kirby Muxloe Golf Club	Blaby	18	-	4
10	Leicester Golf Centre	Rugby	9	-	16

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Site ID	Site name	Local authority	Standard holes	Par 3 holes	Driving range bays
11	Leicestershire Golf Club	Hinkley & Bosworth	18	-	10
12	Longcliffe Golf Club	Charnwood	18	-	10
13	Lutterworth Golf Club	Harborough	18	-	-
14	Rothley Park Golf Club	Charnwood	18	-	-
15	Ullesthorpe Court Hotel & Golf Club	Harborough	18	-	-
16	Blaby Golf Centre	Blaby	9	9	-
17	Enderby Golf Course	Blaby	9	-	-
18	Whetstone Golf Club	Blaby	18	-	11
-	-	<b>Total</b>	<b>288</b>	<b>18</b>	<b>99</b>

Figure 2.1: Location of active golf facilities within the catchment area



## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

- 2.9 As seen, the facilities are also relatively well spread across the catchment area, with five active sites in Blaby, four in Charnwood, three in Leicester, two in both Harborough and Hinkley & Bosworth and one in both Rugby and Oadby & Wigston. This also means that there are several sites to the north, south, east and west of Blaby, as seen via the imagery below.

### Standard hole golf courses

- 2.10 Within the catchment area there are 14 standard 18-hole courses in addition to four standard 9-hole courses, with this including three 18-hole and two 9-hole courses in Blaby itself. Each site provides one course, with the exception of Charnwood Forest Golf Club, which has two (one 18-hole and one 9-hole). These are further summarised in the following table.

Table 2.3: Summary of standard hole golf courses within catchment area

Site ID	Site name	Holes	Par	Yardage <sup>1</sup>			Slope rating <sup>2</sup>
1	Beedles Lake Golf Centre	18	72	6639	6237	5559	128-131
2	Birstall Golf Club	18	70	6239	6094	5456	129-138
3	Bramcote Water Golf Course	18	66	-	4961	4868	113
4	Charnwood Forest Golf Club	9	34	3111	3111	2648	110-120
		18	69	6125	6125	5435	110-120
5	Cosby Golf Club	18	71	6474	6232	5472	131-140
6	Forest Hill Golf & Conference Centre	18	73	6539	6238	5517	118-121
7	Glen Gorse Golf Course	18	72	6751	6294	5681	132-140
8	Hinckley Golf Club	18	71	6429	6089	5477	132-115
9	Kirby Muxloe Golf Club	18	71	6292	6074	5425	128-132
10	Leicester Golf Centre	9	35	2947	2843	2361	113
11	Leicestershire Golf Club	18	68-72	6125	5976	5495	130-120
12	Longcliffe Golf Club	18	72	6612	6418	5550	138
13	Lutterworth Golf Club	18	70	6243	5878	5393	123-130
14	Rothley Park Golf Club	18	71/72	6490	6131	5669	126-139
15	Ullesthorpe Court Hotel & Golf Club	18	72	6376	6057	5443	119-123
16	Blaby Golf Centre	9	34	2275	2221	2067	N/A
17	Enderby Golf Course	9	36	2930	2930	2850	117-119
18	Whetstone Golf Club	18	70	6207	5912	5440	118-130

- 2.11 As seen, a large proportion of the 18-hole courses are relatively similar in length and are in the range of what would be expected from traditional provision. Nearly all (13 of the 14) play over 6,000 yards from the back tees, with ten playing over 6,000 yards from the yellow (usually middle) tees. The longest provision is offered at Glen Gorse Golf Course, which can play up to 6,751 yards.
- 2.12 The shortest 18-hole course in the catchment area is at Bramcote Water Golf Course, which is 4,961 yards from the yellow tees and 4,868 yards from the red tees. This is therefore markedly different from the other 18-hole courses and is likely to attract a different kind of golfer such as beginners and those less mobile.

<sup>1</sup> White denotes Championship tees, yellow denotes men's tees and red denotes ladies' tees.

<sup>2</sup> Sourced from [randa.org/en/course-handicap-calculator](http://randa.org/en/course-handicap-calculator)

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.13 Most of the four 9-hole courses within the catchment area also represent traditional provision, with the length of the courses at Charnwood Forest Golf Club, Leicestershire Golf Centre and Enderby Golf Course resembling that of the 18-hole courses if they were to be played through twice. The course at Blaby Golf Centre is then the outlier, with this providing much shorter provision more aligned to the facility at Bramcote Water Golf Course.
- 2.14 Nationally, many 9-hole sites often appeal more to beginner and/or casual golfers, rather than catering for more regular, experienced players. This is therefore likely to be the case at Blaby Golf Centre given its length, but not so much at the remaining three sites with 9-hole courses.

### ***Slope ratings***

- 2.15 Slope ratings are relatively new to golf across the world. The intention is for them to allow the handicap system to reflect course difficulty and the difference in difficulty for players compared to scratch golfers. In effect, this enables people to have a handicap that varies from course-to-course depending on difficulty, as well as a general handicap.
- 2.16 The maximum slope rating that can be achieved is 155, whereas the minimum is 55 and the standard difficulty is considered to be 113. Within Blaby and its catchment area, the large majority of ratings are above the standard difficulty, with the provision collectively ranging from 110-140.
- 2.17 Notwithstanding the above, it should be noted that Blaby Golf Centre does not have an official slope rating. In comparison to the three other 9 hole courses, it is considerably shorter in length and would therefore be likely to have a lower slope rating than its comparable offerings.

### **Par 3 golf courses**

- 2.18 There are two par three courses in the catchment area, with one located at Blaby Golf Centre (in Blaby itself) and the other provided at Beedles Lake Golf Club. Par 3 facilities are much rarer than standard hole courses, with the provision of two presenting a reasonable supply within a 20-minute catchment area.
- 2.19 At Blaby Golf Centre, the Par 3 course has a total distance of 623 yards, with an average hole length of just under 70 yards. However, it is taken out of use during winter months due to a lack of drainage. Aspirations exist to convert all greens to an artificial surface as it is said that this will ensure that the course is kept to a better standard.
- 2.20 In regards to the Par 3 course at Beedles Lake Golf Club, the operator states that it is capable of accommodating golfers of all abilities; however, it is predominantly used by newer golfers finding their way into the game as well as those with time constraints. It is referred to as the "Little Owl Par 3 Course".
- 2.21 Par 3 courses in addition to standard hole courses can be beneficial to golf as they can contribute to the creation of a pathway for users who may not be ready or sufficiently confident to play on a longer course. They can also provide added income for operators through attracting players who are not necessarily interested in playing the more traditional form of the sport.

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

## Driving range bays

- 2.22 There are 99 driving range bays within Blaby and its catchment area, split across eight sites. The two largest have 20 bays, with these located at Charnwood Forest Golf Course and Forest Hill Golf & Conference Centre, whilst the smallest has just four (at Kirby Muxloe Golf Club).
- 2.23 Not all the driving ranges are covered or serviced by sports lighting, which has a significant impact on their usability during evenings and particularly in winter months. Of the 99 bays, only 28 are serviced by sports lights (at Cosby Golf Club and Forest Hill Golf & Conference Centre), whilst 64 are covered.
- 2.24 Furthermore, some of the driving range bays are reserved for members use only, meaning that they are not accessible to the wider public on a pay and play basis. This applies to provision at Kirby Muxloe Golf Club, Longcliffe Golf Club and Leicestershire Golf Club.
- 2.25 Of the driving range bays, 25 are within Blaby itself, with the remaining 74 in neighbouring authorities. This means that only 10 are serviced by sports lighting within the District.

Table 2.4: Summary of driving range bays within catchment area

Site ID	Site name	No. of bays	Sports lighting	Covered	Ball tracking technology	Access type
5	Cosby Golf Club	10	Yes	Yes	No	Pay and play
9	Kirby Muxloe Golf Club	4	No	No	No	Member only
18	Whetstone Golf Club	11	No	No	No	Pay and play
1	Beedles Lake Golf Centre	18	Yes	Yes	No	Pay and play
12	Longcliffe Golf Club	10	No	No	No	Member only
6	Forest Hill Golf & Conference Centre	20	No	Yes	Yes	Pay and play
11	Leicestershire Golf Club	10	No	No	No	Member only
10	Leicester Golf Centre	16	No	Yes	Yes	Pay and play

- 2.26 As well as the above, additional sites also advertise the presence of a driving range; however, these more closely resemble practice grounds and are generally used by members only. Such provision has therefore not been included in the table above, although it is acknowledged that they provide an alternative offer for many players.
- 2.27 Two facilities have installed ball tracking technology to enhance the overall user experience, with this being the case at Forest Hill Golf & Conference Centre and Leicester Golf Centre. Such features allow users to simulate playing on courses around the world, while also providing ball tracking and statistical feedback. Additionally, the visual and interactive nature of the technology makes the driving range experience more engaging and appeals to a less traditional market, thus helping to drive demand.
- 2.28 Beedles Lake Golf Centre notes that it has experienced record-breaking year for driving range visitors and that it is now also considering adding ball tracking technology to attract additional visits. Similarly, Cosby Golf Club also reports that it considering adding the use of technology to its driving range offer.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.29 Kirby Muxloe Golf Club also reports that it may enhance its driving range offer, linked to the aforementioned potential sale of some of its land.

### **Disused provision**

- 2.30 In addition to the active golf facilities within the study area, two disused golfing sites have also been identified. These are found at Western Park Golf Club and Kingstand Golf & Country Club, with the former previously providing an 18-hole course and the latter providing a 9-hole course.
- 2.31 In regards to Western Park Golf Club, this is a proposed allocation for mixed used housing and employment in Leicester City Council's emerging Local Plan. This is currently at an advanced stage of preparation.

### **Additional provision**

- 2.32 In addition to its traditional offerings, a crazy (miniature) golf course is also provided at Blaby Golf Centre. This features 18 holes and has recently received investment with the intention to create a full pathway for junior/beginner golfers who could transition from crazy golf to the Par 3 course and then the 9-hole standard course. The crazy golf course is well attended during the summer months, with as many as 5,000 visitors per month reported during the holidays.
- 2.33 Leicester Golf Centre has also developed an 18-hole adventure golf course to increase its appeal beyond those seeking a traditional golf experience.

### **Future supply**

- 2.34 Three sites have identified issues regarding their long-term future, with these being Blaby Golf Centre, Enderby Golf Centre and Whetstone Golf Club. This could be particularly problematic as all three reside within Blaby and offer similar facilities that would generally be associated with cheaper access and less experienced users. As such, the loss of the provision could have a significant impact on the wider offer across the study area, particularly in terms of the golfing pathway.
- 2.35 In relation to Blaby Golf Centre, the land on which the golf facilities reside is currently leased and under threat due to potential planning applications. One application simply proposes a redesign of the 1st and 9th holes, whereas another threatens the loss of the entire golf course.
- 2.36 Similarly, the future of Enderby Golf Centre is considered to be uncertain, with plans in place for up to 800 houses and a distribution centre at the site. In addition, some of its land is only leased from Santander, with reports stating that it is likely to sell this to developers at the end of the current period. This land enabled the course to be extended in 2010.
- 2.37 Whetstone Golf Club owns half of the land on which its golf course is built and leases the half nearest Cambridge Road, where the clubhouse and pro shop are situated. Consultation with the Club highlights that it is unlikely that this lease will be renewed due to the land potentially being sold off for housing developments. This will result in a best-case scenario of the course being reduced to a 9-hole offering, although it is currently unsure if this is a viable option. A new shop and clubhouse would also have to be developed.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

- 2.38 Elsewhere in the study area, Kirby Muxloe Golf Club reports that it has intentions to sell off a large portion of its land (estimated to be approximately 220 acres), although it notes that this is unlikely to affect the current course length or layout. Instead, it is stated that the land sale will help raise finances to undertake course and clubhouse developments/improvements.
- 2.39 Leicester Golf Centre has the option to extend its current 9-hole course into a full 18-hole course by taking on additional land as part of its lease agreement with the nearby racecourse. This is something it is considering moving forward, but it notes that it has more short-term projects to complete first.

### Management and ownership

- 2.40 The three main types of ownership and management models for golf facilities in England are members clubs, proprietary sites and municipal facilities. The definition for these is summarised in the following table.

Table 2.5: Types of ownership and management of golf facilities

Management type	Description
<b>Members</b>	Traditionally owned by members and run by committees. Most members' clubs offer some level of pay and play and encourage golf societies but are mostly focused on membership numbers.
<b>Proprietary</b>	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.
<b>Municipal</b>	These are generally owned by a local authority, although in a growing number of instances, management has been contracted and externalised to private companies. Due to a lack of financial viability, many have closed across the Country in recent years and many that remain are under threat.

- 2.41 It is recognised that members clubs and visitors to such clubs are normally expected to dress appropriately, have a registered handicap (a certificate issued by the Council of National Golf Unions) and be familiar with the sport's rules and etiquette. This is not uncommon at proprietary sites, but municipal facilities tend to be more relaxed with regard to a dress code and do not require people to have handicaps, making golf much more accessible. Consequently, municipal courses are, in many instances, seen as entry level facilities, with players using them before having the confidence and ability to move on to a members' clubs or high-end proprietary sites (although many people can and do stay attached to a particular course). They also tend to offer a more affordable golfing experience.
- 2.42 The business model for members clubs tends to rely heavily on income via membership subscriptions and use of ancillary facilities, rather than pay and play usage, although the balance has altered at many sites in recent years. The same can be said for some proprietary sites, although, in general, more emphasis is placed on supplementing regular activity with green fee sales. That being said, some proprietary sites have large membership clubs operating out of them, meaning that they have more of a focus on members than what would otherwise be expected.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

- 2.43 Conversely, municipal sites have always been heavily reliant on visitors even though memberships are normally available (often in the shape of season tickets). In some instances, these are linked to access to local authority operated sports facilities, such as leisure centres and swimming pools, but they can be standalone offerings too. Some local authorities also have multiple municipal courses that they tie together within a usage package.
- 2.44 Despite the above generalisations, each golf facility, regardless of management, will have its own processes in terms of how much focus is placed on membership and pay and play usage, or whether it equally encourages both. There is no correct way to run a site. A club that focuses on members has guaranteed income, but this can often deter more casual players or nomadic golfers through, for example, a lack of peak time availability. In contrast, a site that depends on visitors can struggle to be viable if there are spells of inclement weather and can discourage people who wish to be part of a club environment. On the other hand, more income can be brought in through regular users compared to what would be the case had they been members.
- 2.45 Of the 18 active sites within Blaby and its catchment area, ten are considered to be members clubs (two in Blaby), seven are proprietary owned (two in Blaby) and one is a municipal site (in Blaby). This is summarised by site in the table below.

Table 2.6: Summary of ownership/management in catchment area

Site ID	Site name	Management type
1	Beedles Lake Golf Centre	Proprietary
2	Birstall Golf Club	Members
3	Bramcote Water Golf Course	Proprietary
4	Charnwood Forest Golf Club	Members
5	Cosby Golf Club	Members
6	Forest Hill Golf & Conference Centre	Proprietary
7	Glen Gorse Golf Course	Members
8	Hinckley Golf Club	Members
9	Kirby Muxloe Golf Club	Members
10	Leicester Golf Centre	Proprietary
11	Leicestershire Golf Club	Members
12	Longcliffe Golf Club	Members
13	Lutterworth Golf Club	Members
14	Rothley Park Golf Club	Members
15	Ullesthorpe Court Hotel & Golf Club	Proprietary
16	Blaby Golf Centre	Proprietary
17	Enderby Golf Course	Municipal
18	Whetstone Golf Club	Proprietary

- 2.46 There is a strong supply of member and proprietary owned golf clubs within the catchment area, with only one golf course operated by a local authority. This is Enderby Golf Course, which is owned by Blaby District Council and managed by Everyone Active on its behalf. The lack of other municipal offerings could potentially put additional pressures on proprietary and members golf courses to accommodate pay and play access.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.47 Leicester Golf Centre was also previously a council-operated course, managed by Leicester City Council. However, it has now been leased out in an agreement that runs until 2067.
- 2.48 Notwithstanding the above, the current split of golf facilities conforms with the national picture, with a decreasing supply of municipal sites across the Country. This is primarily due to many local authorities closing or offloading their provision as part of cost-cutting measures. That being said, some councils are still successfully operating their provision, evidencing that financial viability can be achieved.

### Pricing

- 2.49 A key issue for the wider golf population is whether golf courses are available to the general population at a price point accessible to the majority of residents. Better quality courses tend to cost more to use, whilst 18-hole provision is generally more expensive to access than 9-hole provision.
- 2.50 Nationally, over the past decade, many facilities have altered their pricing structure to allow for discounts following a previous decline in golf membership. England Golf encouraged this and continues to do so as its view is that clubs are more likely to experience growth when flexible packages are available. For instance, five and/or six-day memberships are now common (whereby members can access a site on specific days but not on one or both weekend days), whilst discounts are regularly in place that are no longer limited solely to juniors (e.g., discounts for those aged 18-21 and 21-30 or for those aged 65 and over).
- 2.51 A prior reduction in membership also resulted in a growing number of facilities openly encouraging visitors, with nomadic golf participation increasing. Whilst this has always been the case at some venues, other, more membership orientated sites were previously reluctant to promote green fee usage as capacity did not exist. Now, most venues actively promote non-member access, especially outside of peak times and to accommodate larger groups and societies. However, this situation is more acute at lower grade sites than at higher grade sites, where high quality can enable a provider to maintain exclusive usage and a premium price.
- 2.52 England Golf reports that the average cost of a 7-day membership at a standard 18-hole golf course in England is £1,071 per year. Within Blaby and its catchment area, the average cost of accessing the same type of facility is £1,179 per year, representing an uplift of around 10% and suggesting a bias towards higher end facilities. However, in Blaby itself, the average cost is only £837, suggesting that the immediate area leans towards lower grade facilities.
- 2.53 Notwithstanding the above, on a site-by-site basis, there is a relatively good split across the price points, with the range enabling opportunities across income demographics and providing a strong pathway for beginner golfers to enter the game before progressing onto more exclusive or expensive clubs. Seven sites operate below the average national membership costs, although this includes the 9-hole courses at Enderby Golf Course and Blaby Golf Centre. The lowest cost to use 18-hole provision is £600 at Bramcote Water Golf Course, which aligns with it providing a smaller course.
- 2.54 The lower pricing structures at sites such as Whetstone Golf Club and Bramcote Water Golf Course are said to provide a middle ground between attracting club members alongside pay and play visitors. Whetstone Golf Club reports that it has reduced membership costs in recent years in an attempt to attract more members, whilst keeping pay and play costs in line with the areas more affordable courses.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

- 2.55 At the other end of the spectrum, 10 sites operate above the average national membership cost (including two in Blaby), with Rothley Park Golf Club providing the highest fee (£1,630 a year). These courses are therefore at the higher end of the golfing market and would be expected to provide better quality facilities. Moreover, it should also be noted that in addition to the yearly membership fees, a joining fee is applicable at Rothley Park, Kirby Muxloe and Longcliffe golf clubs, which further adds to their exclusivity.
- 2.56 Table 2.7 below outlines the membership costs at all sites within the catchment area, based on a full 7-day membership. Please note, however, that no membership scheme is in place at Leicester Golf Centre (pay and play access only).

Table 2.7: Membership costs of a 7-day membership

Site ID	Site name	Joining fee	Membership cost
1	Beedles Lake Golf Centre	£500	£985
2	Birstall Golf Club	£500	£999
3	Bramcote Water Golf Course	Unknown	£600
4	Charnwood Forest Golf Club	-	£988
5	Cosby Golf Club	-	£1,255
6	Forest Hill Golf & Conference Centre	£600	£1,206
7	Glen Gorse Golf Course	-	£1,431
8	Hinckley Golf Club	-	£1,345
9	Kirby Muxloe Golf Club	-	£1,497
10	Leicester Golf Centre	-	N/A
11	Leicestershire Golf Club	-	£1,450
12	Longcliffe Golf Club	-	£1,330
13	Lutterworth Golf Club	-	£1,236
14	Rothley Park Golf Club	-	£1,630
15	Ullesthorpe Court Hotel & Golf Club	£10	£1,175
16	Blaby Golf Centre	-	£380
17	Enderby Golf Course	-	£269
18	Whetstone Golf Club	-	£785

- 2.57 Away from membership costs, green fees are also available across the sites, although some restrictions exist particularly at the more expensive sites. Rothley Park Golf Club is the most expensive course for a visitor to play on both weekdays and weekends, with a midweek price of £90 and a Saturday and Sunday price of £100. It is marketed as an exclusive golf club with very few opportunities for visitor golfers, with this ensuring that the most sought after tee times are available to members.
- 2.58 At the other end of the scale, the cheapest green fees are found at the likes of Enderby Golf Course, Blaby Golf Centre, Leicester Golf Centre and Whetstone Golf Club, with this aligned to their cheaper membership costs (where offered). Again, this means that a good level of variety is offered across the catchment area, with all golfer types likely to be accommodated, collectively.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

- 2.59 The low green fee costs at Leicester Golf Centre, Enderby Golf Course and Blaby Golf Centre also reflects that the sites are primarily set up to appeal to pay and play golfers, with all three indicating that they give very little priority to growing a membership base. Leicester Golf Centre, as an example, states that it does not offer a membership package as it wants to focus solely on attracting visitors to play golf in a more relaxed, less traditional environment. In addition to its open access policy, the site has adopted an open dress code and a loyalty scheme to encourage more casual golfers to use the facility.
- 2.60 The green fees across the sites are further summarised in the following table.

Table 2.8: Pricing structures at golf facilities within the catchment area

Site ID	Site name	Weekday green fee	Weekend green fee
1	Beedles Lake Golf Centre	£15 - £30	£18 - £35
2	Birstall Golf Club	£35	£40
3	Bramcote Water Golf Course	£18	£20
4	Charnwood Forest Golf Club	£23 - £36	£25 - £42
5	Cosby Golf Club	£35	£30
6	Forest Hill Golf & Conference Centre	£45	£55
7	Glen Gorse Golf Course	£38	£45
8	Hinckley Golf Club	£40	£50
9	Kirby Muxloe Golf Club	£35	£40
10	Leicester Golf Centre	£12.50 - £20	£14.50 - £25
11	Leicestershire Golf Club	£35	£40
12	Longcliffe Golf Club	£55	£70
13	Lutterworth Golf Club	£42	£45
14	Rothley Park Golf Club	£90	£100
15	Ullesthorpe Court Hotel & Golf Club	£25	£35
16	Blaby Golf Centre	£9.50 - £14	£9.50 - £14
17	Enderby Golf Course	£10.50 - £13	£11.50 - £16
18	Whetstone Golf Club	£15	£20

### Quality

- 2.61 Judging the condition of golf facilities can be difficult, with there being no official national or county golf facility rankings to inform quality aspects and with it often being relative to the provision on offer and the price point for access. Generally, the better course quality and supporting infrastructure is, the higher joining/membership and green fees are likely to be. Some sites gain status through hosting county, national and international golf events and some tend to feature in ranking articles put together by golf magazines. However, quality can also be subjective and can be dependent on, amongst other aspects, golfer preference and ability.
- 2.62 For this study, all courses in Blaby and its catchment area have been assessed, with this taking place in February 2025. Whilst this provided a good overview of the facilities, it means that the visits took place outside of the golfing season, during a time when winter rules, temporary greens and course maintenance were generally being implemented. Furthermore, in the months prior to the site visits taking place, the area had experienced large volumes of flooding over the previous months, which therefore needed to be accounted for. As a result, greater emphasis has been placed on the club consultation element, with this enabling the opportunity for the operators to discuss general course quality and any key issues.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

- 2.63 Broadly, it is considered that quality is generally good. Sites such as Glen Gorse Golf Course, Hinckley Golf Club, Leicestershire Golf Club, Longcliffe Golf Club and Rothley Park Golf Club are of a particularly high standard and are clearly premier offerings, linked to their higher price points, whilst more basic provision is in place at the likes of Blaby Golf Centre, Enderby Golf Centre and Leicester Golf Centre, which would be expected given their accessibility. As such, the quality findings are reflective of each facility's place in the golfing market and aligned to what would be expected.
- 2.64 In addition, it is also worth noting that several courses within the catchment area have a similar profile, such as providing relatively flat parkland courses that have naturally poor drainage due to the commonality of sites being built on Leicestershire clay. As such, several operators have invested into drainage and irrigation systems to ensure the courses remain playable throughout the year.
- 2.65 As well as the playing facilities, all clubs also have some form of ancillary provision servicing their sites, with this often including an all-encompassing clubhouse with a bar, social room and changing facilities. 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, there is a current emphasis on increasing levels of female and junior golf membership across the Country, meaning it is also imperative that ancillary provision can adequately cater for all types of users e.g., by providing gender specific changing facilities.
- 2.66 For a full quality analysis, both in relation to playing facilities and ancillary provision, descriptions of each site have been provided below in Table 2.9. This also includes details relating to development/improvement plans, where applicable.

Table 2.9: A description of courses within the catchment area of Blaby

Site ID	Site name	Course description
1	Beedles Lake Golf Centre	<p>The site operates on a 'golf for everybody' ethos. The Par 3 course is a more beginner-friendly option due to the length of the 18-hole course, which is the second-longest in the catchment area (it is also expected to gain an additional 50 yards in length when the Club extends hole 2 in 2025). The site is one of the flattest in the Leicestershire area, making it particularly suitable for less mobile users.</p> <p>The courses are prone to flooding due to its proximity to Beedles Lake. Despite this, the facility remains open with permanent tees and greens all year round, which is testament to a sophisticated maintenance regime that is implemented. The main course is heavily tree-lined in parts, with several long dog-leg holes and heavily protected greens.</p>

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Site ID	Site name	Course description
2	Birstall Golf Club	<p>A modern, attractive tree-lined golf club with an appealing clubhouse and pro shop. The course itself is hilly and undulating, particularly the first few holes, and most of the fairways are tight and as a consequence more suited to experienced and low handicap golfers.</p> <p>The tee boxes, fairways and greens are kept to a very high standard.</p>
3	Bramcote Water Golf Course	<p>The shortest 18-hole golf course in the catchment area, with several holes sharing the same green. The fairways are generally wide, making this an attractive option for beginner golfers. Nevertheless, this is one of the hillier golf courses in the catchment area and the perimeter is surrounded by a large volume of trees, as is typical for parkland courses. Furthermore, the large volume of hazards can make the site challenging, with ponds and ditches protecting many of the greens.</p> <p>This course is most comparable to Whetstone Golf Club in terms of accessibility and design. It is also rarely closed, even during periods of wetter weather, as it encourages a high volume of pay-and-play users who may choose to access this facility if they are unable to use their home course.</p>
4	Charnwood Forest Golf Club	<p>One of four 9-hole courses within the catchment area, this course can be played twice from different tee boxes to complete 18 holes. It is built on heathland rock, which means it drains extremely well compared to other courses in the local area. It features undulating fairways and steep inclines on four of the holes.</p> <p>Unusually, the course does not feature any bunkers, as they cannot be built into the rock base. Instead, a series of trees, ponds and heavy rough make this course challenging. Several slopes also surround the greens.</p> <p>The operator is currently in the process of upgrading the clubhouse, which will be followed by the refurbishment of the locker rooms. The clubhouse does not feature a function room, which limits fundraising.</p>
5	Cosby Golf Club	<p>This is the longest golf course in Blaby and the seventh longest course within the catchment area. It is a well-presented parkland course with undulating fairways and a short incline around the 9th hole, although several bunkers are currently under repair, which is to be expected outside of the peak season. The Club reports increased costs in maintaining the course to the high standard it has set for its members.</p> <p>The Club is satisfied with the state of the course and has no plans to undertake any major changes to the provision. That being said, as with several clubs in the region, it is built on Leicestershire clay and therefore experiences poor drainage. The Club recognises the need to reduce the amount of water from the course that flows into the local village and is seeking measures to prevent flooding as part of its Water Security Project.</p> <p>The Club also has longer-term plans to refurbish the clubhouse, which has become dated. It is focusing on becoming more climate friendly and has a net-zero aim that includes the installation of solar panels, electric mowers and increased recycling. It has already installed LED lighting throughout the clubhouse and has begun a shift away from using gas (it aims to use no gas energy by 2030).</p>

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Site ID	Site name	Course description
6	Forest Hill Golf & Conference Centre	<p>The fourth longest golf club in the catchment area. It is similar in design to Beedles Lake Golf Centre, with a traditional up and down course layout. This, paired with the flatness of the front nine holes of the course, makes it one of the more beginner friendly courses in the catchment area, particularly when playing from the front tees (the back nine has more undulating slopes).</p> <p>It is a tree lined parkland course with a mixture of wide and narrow fairways and reasonable quality tee boxes and greens.</p>
7	Glen Gorse Golf Course	<p>An attractive, well-thought-of 18-hole golf course with a traditional layout similar to that of The Leicestershire Golf Course. It provides a challenging round of golf due to its status as the longest course in the catchment area, as well as the heavily sloping and undulating fairways and tight greens. It is therefore considered best served towards low handicap players and experienced golfers.</p>
8	Hinckley Golf Club	<p>A venue capable of hosting county championship competitions, it is recognised as one of the best courses in the local area. It is a relatively flat course, notwithstanding an incline leading up to the second tee box, and is most comparable to Lutterworth Golf Club and Longcliffe Golf Club.</p> <p>The course is well-kept and visually attractive, with high-quality tee boxes and greens. Several large streams and lakes also make the course more challenging.</p> <p>Work is currently being carried out on the 10th fairway, where drainage improvements are underway. Since a housing development was completed nearby, the course has experienced severe waterlogging in areas, whilst damage to the properties has occurred on several occasions due to the close proximity. The Club has planted several trees and is considering relocating a tee box to address both issues.</p> <p>The Club is also currently undergoing a bunker project and plans to improve its irrigation system across the site.</p>
9	Kirby Muxloe Golf Club	<p>The course is an 18-hole parkland layout. It is a relatively flat par-71 course, although several of the fairways feature undulation. Several prominent bunkers are strategically placed, particularly on holes 17 and 18, where players must play over a large pond with a water feature. The course is generally well-kept and attractive, although it is considered challenging for beginner or inexperienced golfers.</p> <p>The course is built on Leicestershire clay, which makes it prone to poor drainage. However, a new irrigation system was installed in 2020. The Club also has further development plans in place and is currently in the process of selling 220 acres of land that will generate income for improvements to the course, practice facilities, and clubhouse (the current layout of the course is not expected to change).</p> <p>The Club has particularly good practice facilities, including a practice area, a 4-bay driving range, two greens, two nets and a short game area. The layout of these facilities is likely to change following the redevelopment of the site, with potential additions such as increased driving range bays featuring more advanced technology.</p>

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Site ID	Site name	Course description
10	Leicester Golf Centre	<p>A previously council-owned golf course situated next to Leicester Racecourse. The current lease runs until 2067, with an option to extend the course further to accommodate an additional nine holes in the centre of the racetrack. The 9-hole course is flat, tree-lined parkland with a target market of novice golfers.</p> <p>Eight of the nine holes play straight, with one hole featuring a dogleg around a tree line. Most greens are protected by greenside bunkers, with a small brook running through the south side of the course.</p>
11	Leicestershire Golf Club	<p>A prestigious golf course with high-quality tee boxes, fairways, and greens. It features a traditional layout with a combination of straight and dogleg holes, with a brook running through the course. It is the second shortest 18-hole course in the catchment area, measuring 6,125 yards from the back tees. However, with a par of 68 and a high slope rating, it is less accessible for beginner or inexperienced golfers.</p>
12	Longcliffe Golf Club	<p>An attractive and well-kept parkland golf course located in Charnwood Forest, previously ranked as the number one course in the Leicestershire area. It is one of the longer courses in the catchment area, which, alongside the several doglegged holes, means that it is a particularly challenging course as a degree of strategy and golfing experience is required. Several of the fairways slope due to the nature of the course being built into the hillside, which can also cause difficulty for less mobile golfers underfoot and less experienced golfers with keeping the ball in bounds.</p> <p>The greens, fairways and tee boxes are in immaculate condition. It is also installing a new irrigation system in 2025 and plans to increase the amount of storage for greenkeeping equipment. It has also invested heavily in its practice area, which now contains three nets, a 10-bay driving range, two chipping greens, bunkers and a putting green.</p>
13	Lutterworth Golf Club	<p>A high-end golf course with a modern, attractive clubhouse and a tree-lined parkland layout. The course is one of the more undulating in the catchment area, with holes six and seven proving particularly challenging for less mobile users. Some older members reportedly choose to skip these holes.</p> <p>The course is of medium length, featuring a combination of wide and narrow fairways. There are several ditches to play over, adding to the challenge. The River Swift, situated to the west of the course, has been known to burst its banks which results in the closure of the front nine.</p> <p>A new clubhouse, opened in May 2023, replaced the original clubhouse that was destroyed by a fire in 2021. It now boasts an attractive bar area, function room, and a viewing balcony. The facility also includes a practice range, putting and chipping area, teaching area and an indoor bay with a simulator.</p>

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Site ID	Site name	Course description
14	Rothley Park Golf Club	<p>An attractive and exclusive parkland golf course, which has previously been ranked number one in Leicestershire. It is the fifth longest course in the catchment area from the back tees, but is relatively flat and straight, with trees lining a combination of wide and tight fairways. It contains many recently planted trees, which could make the course more challenging over time.</p> <p>The site has a practice range and one net for players to warm up in prior to their round.</p>
15	Ullesthorpe Court Hotel & Golf Club	<p>An 18-hole golf course with a tree-lined parkland layout. Most of the holes are relatively flat, although a raised public footpath running through the centre of the course ensures players must be comfortable walking uphill and downhill, as well as performing high-to-low shots. The footpaths are well-maintained.</p> <p>The fairways are wide and welcoming for newer and less experienced golfers, although it is said that the greens can play particularly fast. In terms of condition, the greens (none of which were temporary at the time of the visit) are in great condition.</p> <p>The course generally holds a lot of water during periods of wet weather, with drainage maintenance currently being carried out on the 9th green. The Club is also experiencing a mole issue in the area around the 12th tee box.</p>
16	Blaby Golf Centre	<p>A tree-lined 9-hole course featuring a combination of par 3s, 4s, and 5s, which are generally on the shorter side, making it particularly accessible and attractive to new golfers. The holes vary in width, with some narrower fairways. The fairways also generally drain well, allowing the course to stay open when other local courses are forced to close, attracting a high proportion of visiting golfers from other clubs during these times. The site is less protective of the course than other local clubs, which improves accessibility but makes it more susceptible to greater wear and tear.</p> <p>The greens are sand-based and, as a result, drain well. However, this also means that they tend to play slower than soil or clay-based greens. The excellent drainage reduces the need for winter greens during wetter periods, while the slower pace makes it easier for newer golfers to read the greens.</p> <p>The 9-hole course is supported by a variety of non-traditional golfing provisions. This includes the Par 3 course, although this facility is forced to close over the winter months due to poor drainage. Investment is planned for this in 2025, when artificial greens are set to be installed that will reduce the need to maintain these greens, which have become problem areas on the site.</p> <p>Both the bar and restaurant at the site have undergone significant refurbishment since 2022.</p>

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Site ID	Site name	Course description
17	Enderby Golf Course	<p>A 9-hole municipal golf course located at the back of Enderby Leisure Centre. The course is most comparable to Blaby Golf Centre due to its flat, parkland nature, although it is 655 yards longer from the back tees. The course is relatively flat, with some undulating fairways, whilst each hole is gently lined with trees, although to a lesser extent than most other courses in the catchment area. The management committee has plans to plant additional trees on the course to offset the carbon footprint of the wider site, but it has no intention of making the course more challenging as part of this effort.</p> <p>Unlike Blaby Golf Centre, the course is more prone to closures during periods of bad weather in order to protect the provision. This is also because it attracts a number of less experienced golfers, who are more likely to cause greater wear and tear.</p>
18	Whetstone Golf Club	<p>The third shortest 18-hole golf course within the catchment area, it is a tree-lined course built on Leicestershire clay, which causes drainage issues. The heavy footfall, alongside the drainage problems, impacts the quality of the course as it attracts a high number of pay-and-play users due to its pricing structure.</p> <p>The course was originally a 9-hole layout, but extra land was acquired when the Club agreed to lease enough space to extend the course to 18 holes. The original lease on this land is due to expire in 2030, and the club is currently unsure if it will be able to renew it, as the land could potentially be used for housing developments. Due to the current layout of the course, it is unlikely that the course could revert to its original 9-hole structure and would therefore likely be lost.</p> <p>The 11-bay driving range attracts a number of beginner golfers, many of whom progress onto playing the full course. This is a popular facility, but it will not be retained if the existing lease on the land is not renewed.</p>

# BLABY DISTRICT COUNCIL

## GOLF NEEDS ASSESSMENT

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### Playability

- 2.67 Playability of golf provision is particularly key when determining need due to the varied nature of facilities, what they offer and who they are commonly accessed by. Unlike many other sports, judging supply simply in quantitative terms is not suitable for golf as a large number of sites may not be catering for all types of players, whilst a smaller number of sites could be theoretically meeting all demographics and adequately accommodating demand levels if the facility mix is varied. If all golf provision is similar, elements of the golfing market will not be provided for.
- 2.68 Across Blaby and its catchment area, it is considered that the current facility stock is well suited to meet golfers of all abilities, as further indicated in the quality section above. This is because many sites are well suited to accommodating golfers of all levels due to providing less challenging course layouts, whereas others are much more difficult and require a degree of experience. The sites considered least challenging are:
- ◀ Blaby Golf Centre
  - ◀ Charnwood Forest Golf Club
  - ◀ Enderby Golf Centre
  - ◀ Leicester Golf Centre
  - ◀ Ullesthorpe Court Hotel & Golf Club
  - ◀ Whetstone Golf Club
- 2.69 These sites are considered to be comparable offerings, aimed more towards beginners and higher handicappers as well as being at similar price points. Furthermore, the mix of 9-hole courses, Par 3 courses and driving ranges, across these sites and others, also provide opportunities for those who cannot or do not want to play a full 18 holes. This therefore ensures that more time-pressed individuals are accommodated as well as providing a pathway to the more established sites.
- 2.70 Conversely, better and more experienced players, as well as those with enough spare time and disposal income, would be more likely to access sites such as:
- ◀ Bramcote Water Golf Course
  - ◀ Cosby Golf Club
  - ◀ Glen Gorse Golf Club
  - ◀ Kirby Muxloe Golf Club
  - ◀ Leicestershire Golf Club
  - ◀ Rothley Park Golf Club
- 2.71 These courses are not beyond the capabilities of newer golfers; however, they would be more of a challenging experience when compared to less difficult courses. Such provision generally has a heavier tree line, narrower fairways and/or well protected greens in comparison to the more playable courses. In addition, whilst the course layouts at Forest Hill Golf & Conference Centre and Beedles Lake Golf Centre are more open, the length of these courses could prove problematic for certain user groups whilst being preferable to others.
- 2.72 Linked to the above, there is also a good mix in terms of course layouts across the study area. Whilst flat, tree-lined parkland courses with a combination of narrow and wide fairways and greens protected by hazards are a common theme, exceptions are found at Charnwood Forest Golf Course, Lutterworth Golf Club, Birstall Golf Club and Bramcote Water Golf Centre. These are less accessible to those with mobility issues but will be providing for younger golfers.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.73 The same can also be said when looking specifically at sites within Blaby itself. Provision at Blaby Golf Centre, Enderby Golf Centre and Whetstone Golf Club is likely to attract different player profiles than both Cosby Golf Club and Kirby Muxloe Golf Club, but collectively it is considered that most users will be adequately accommodated across the supply.

### Summary

- 2.74 The combination of 18-hole and 9-hole golf courses across Blaby and its catchment area, alongside the variety offered in terms of accessibility, quality and playability, means that a strong supply and good range of provision has been identified. This is supported by the presence of several Par 3 courses, driving ranges and adventure golf facilities that provide further opportunities for all types of golfers.
- 2.75 The above means that a broad range of suitable sites currently exist that are likely to be able to accommodate existing demand levels, as a collective. This is further considered due to the following key findings:
- ◀ The presence of 18 active golf sites within the study area and five within Blaby itself is relatively high.
  - ◀ A good mix of facilities is provided via 14 standard 18-hole courses, four 9-hole courses, two Par 3 courses and eight driving ranges, with this therefore catering for all traditional playing formats.
  - ◀ The good mix of facilities is also provided within Blaby itself, as well as when considering the wider catchment area.
  - ◀ Adventure/crazy/miniature facilities are in place to further complement the traditional provision and to add to the golfing pathway.
  - ◀ Some sites provide a mix of facilities and a clear pathway within their own footprint e.g. Blaby Golf Centre, Beedles Lake Golf Centre and Charnwood Forest Golf Club.
  - ◀ Whilst most courses are relatively long in length with an above average difficulty, shorter and less challenging offerings due exist for those that prefer such provision and/or have physical or time limitations.
  - ◀ Development plans are in place at some sites that will further enhance their offerings.
  - ◀ There is a good split between sites that have an emphasis on membership and those that primarily focus on pay and play activity.
  - ◀ Whilst Enderby Golf Centre provides the only municipal course, others such as Blaby Golf Centre and Leicester Golf Centre operate in a similar manner to council-owned golf provision.
  - ◀ There is a balance of high-end and low-end facilities, with the former better suited to more experienced players and lower handicappers, and the latter being more likely to be used by beginners and higher handicappers.
  - ◀ Although average access costs are higher than national rates, several sites provide lower price points that can cater for less affluent players.
  - ◀ Quality is generally good and reflective of each facility's place in the golfing market (i.e., conditions are better at more expensive sites).
  - ◀ Due to the variety in the facility mix, course layouts, course difficulty and access costs, playability across the venues is collectively good, with all types of golfers having sites that are best suited to them.
- 2.76 However, it must be noted that three sites have potential closures on the horizon due to development plans which could impact on the overall adequacy of the provision, particularly if these all came to fruition and especially as all three are in Blaby. As such, there is a need to balance the supply findings against demand aspects to ensure that capacity exists both currently and to accommodate such eventualities.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.77 Furthermore, the identification of disused provision and in particular the recent loss of municipal sites provides evidence that supply within the study area has already reduced in recent years. Whilst this aligns to the national picture and does not mean that supply is now insufficient, it could be causing growing capacity pressures that could be exacerbated by further losses.
- 2.78 Finally, another issue identified is that despite many driving range bays being provided, only a minority are serviced by sports lighting and fully accessible for pay and play users. This therefore places restrictions on capacity and could be leading to this particular golfing format being under-provided for.

### **Demand**

- 2.79 The following section examines demand for golf courses across Blaby and its catchment area. In addition, it also considers recent trends and a variety of potential and future demand elements.
- 2.80 More generally, it is important to note that golf participation has seen recent increases across the Country, with this primarily resulting from the Covid-19 pandemic. Nationally, some courses reported a near doubling of demand following the lifting of restrictions, both initially in 2020 and again following the later lockdown period in 2021, with opportunities then existing for this to be preserved in the long-term. Whilst some operators have since reported that retention has been challenging, especially with increasing economic issues, others suggest that usage has remained high and, in some cases, continued to rise. This has consequently increased pressures on the facility stock, especially with more sites being lost to development and/or closing.
- 2.81 Prior to the growth in demand, participation in golf had generally been in decline, although there were signs showing that the reduction had been levelling off prior to 2020. The landscape of demand was also changing, with fewer users taking up membership packages and more golfers becoming nomadic and using a range of courses on a pay and play basis.

### **Membership**

- 2.82 England Golf reports that the average membership of a golf club nationally is 407, with this based on its central national handicap platform. Using this, demand for golf in Blaby and its catchment area is seemingly significant, with an average of 549 members identified across the sites. This is 35% above the national rate.
- 2.83 Additionally, when studying only sites in Blaby, the average figure rises to 576, which is 42% above the average across England. Again, this shows a high demand for golf in the locality, especially when considering the good level of supply that has been identified.
- 2.84 England Golf does not supply membership by site as it considers this to be commercially sensitive (hence the use of averages). However, such data has been requested from the operators for this study, with most willing to provide the information, or at least a ball-park figure. Table 2.10 below outlines the membership information that has been acquired, with this covering 13 of the 18 active sites.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

Table 2.10: Membership within the catchment area (site-by-site)

Site ID	Site name	Current membership (2025)
1	Beedles Lake Golf Centre	658
2	Birstall Golf Club	Unknown
3	Bramcote Water Golf Course	135
4	Charnwood Forest Golf Club	988
5	Cosby Golf Club	712
6	Forest Hill Golf & Conference Centre	c.200
7	Glen Gorse Golf Course	Unknown
8	Hinckley Golf Club	1,029
9	Kirby Muxloe Golf Club	679
10	Leicester Golf Centre	0
11	Leicestershire Golf Club	Unknown
12	Longcliffe Golf Club	Unknown
13	Lutterworth Golf Club	796
14	Rothley Park Golf Club	728
15	Ullesthorpe Court Hotel & Golf Club	Unknown
16	Blaby Golf Centre	c.100
17	Enderby Golf Course	50
18	Whetstone Golf Club	800

- 2.85 As seen, some venues have substantial levels of demand, well in excess of the national average. In total, eight of the sites are known to be operating over a membership of 407, with Hinckley Golf Club providing for the most. This has 1,029 members, followed by Charnwood Forest Golf Club with 988 and Whetstone Golf Club with 800.
- 2.86 The large membership base at Whetstone Golf Club in particular requires highlighting given the uncertainty that exist in relation to its future. With a membership of 800, it is clear that high levels of demand exist for the site, which equates to a clear need for the supply. It would also be difficult given the high membership levels elsewhere for such demand to be catered for at alternative, suitable venues.
- 2.87 Conversely, five sites are below the national rate, including Leicester Golf Centre which does not provide a membership offer. The others are Forest Hill Golf & Conference Centre (200 members), Bramcote Water Golf Course (135 members), Blaby Golf Centre (100 members) and Enderby Golf Course (50 members). However, each of these is primarily set up and marketed towards attracting a higher percentage of visitor and play and play golfers, which means that their membership base does not necessarily equate to low levels of overall demand or need.
- 2.88 In relation to the clubs not willing to discuss their membership data (Leicestershire, Longcliffe, Birstall and Glen Gorse golf clubs), these are generally well established and high-end sites with little reliance on casual activity. It can therefore be assumed that their figures would be in excess of the national average, although exactly to what degree is unclear.
- 2.89 Longcliffe Golf Club, which did not disclose its membership data, did state that it has a high proportion of female members in comparison to other local clubs. It estimates that 15% of its members are female.

# BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

## Membership trends

- 2.90 England Golf reports that there has been a national increase in golf participation in recent years, particularly following the Covid-19 pandemic. Furthermore, it states that over 70% of clubs have reported an increase in membership in recent years, suggesting that usage continues to rise, although this could be in part due a growing number of courses closing and/or being developed upon (the fewer courses there are, the higher membership will become at those that remain).
- 2.91 When analysing membership levels across the catchment area of Blaby, the average number of members at sites remained steady between 2015 and 2018, before surging when data was collected again in 2022. This is aligned to the national picture following the Covid-19 outbreak. Overall, membership between 2015 and 2024 rose by an average of 106 per club, with this equating to a 24% increase, although a small decline is seen between 2023 and 2024.

Table 2.11: Membership trends within the catchment area

2015	2016	2017	2018	2022	2023	2024	Change in membership (2015 – 2024)
443	457	475	437	534	556	549	+24%

- 2.92 Similarly, when assessing sites only in Blaby itself, overall membership has increased by 103 members over the time period, representing growth of 21.7%. Notably, the same decline between 2023 and 2024 is not identified, with further growth experienced, albeit relatively minimal.

Table 2.12: Membership trends at sites within Blaby

2015	2016	2017	2018	2022	2023	2024	Change in membership (2015 – 2024)
473	472	486	467	553	568	576	+21.7%

- 2.93 Even prior to the Covid-19 pandemic, the average club membership in Blaby and its catchment area sat above the national average for England. This shows long-term high interest levels for golf in the area.
- 2.94 Aligned to the averages, no clubs within the study report a recent decline in membership for this audit, with the majority stating that they have experienced growth. As an example of this, Lutterworth Golf Club identifies that it has gained approximately 195 members over the last five years.

## Pay and play

- 2.95 Whilst it is acknowledged that pay and play usage has generally increased across England in recent years, usage figures for the sites within the catchment area can be difficult to determine as it is not something that is tracked by England Golf. Furthermore, some operators have been generally unwilling to disclose details as part of this study due to commercial sensitivity. Nevertheless, all sites seemingly have capacity for such usage, with immediate booking slots remaining available via most of their websites, with this suggesting that ample opportunities and availability exists.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.96 Notwithstanding the above, whilst pay and play is available at all sites across the catchment area, it is limited at some of the more member-focused sites due to access being reserved on specific days and/or at specific times. An example of this is at Rothley Park Golf Club, which offers pay and play access but notes that this is not particularly well marketed and that the price point could put many potential users off. The Club admits that it is not interested in attracting a large number of visitor golfers, with less than 5% of all tee times booked by non-members.
- 2.97 Similarly, Longcliffe Golf Club reports that it is reluctant to host visitors as they have historically not shown the same level of respect for its facilities as members do. It does accept bookings but limits this to weekday afternoons when membership usage is at its lowest.
- 2.98 Conversely, Cosby Golf Club states that it struggles to attract visiting golfers to its course, despite wanting to, with bookings mostly limited to weekends due to members using up the majority of the tee times on weekdays. This means that green fee bookings must be accommodated in and around internal competitions, which causes its own logistical issues. Less than 10% of rounds are from visitors, which is something the Club is seeking to improve by changing its marketing strategy. The Club also identifies that it is in close proximity to more affordable pay and play golf offerings in Blaby (i.e., Blaby Golf Centre and Enderby Golf Centre), with this potentially impacting the number of people willing to pay its fees.
- 2.99 Hinckley Golf Club has adopted a modern approach to visitors in comparison to other member-owned clubs in the catchment area. It utilises online booking platforms such as GolfNow to dynamically price tee times during quiet periods in which members are not utilising tee times. Following this, it had 402 tee times booked in 2024, with a further 370 visitors booking with members.
- 2.100 Away from the member-orientated sites, pay and play access is likely to be higher at the proprietary venues, particularly those such as Blaby Golf Centre, Beedles Lake Golf Centre and Leicester Golf Centre. These all have a prominent golf offer and several formats of play in place, which increases opportunities for visitor access. Such sites also state that income generated from visitor golf was higher than that of membership packages, evidencing the importance of this usage from a business perspective. If facilities with low membership numbers do not have high green fee demand, long-term viability is questionable as attracting pay and play usage is key to the business model and sustainability of these sites.
- 2.101 To further use Blaby Golf Centre as an example, due to it relying on a high percentage of visitor rounds, the operator notes that it has adopted a non-traditional model of no dress code or tee times to appeal to the more casual golfer. In that regard, it has experienced an increase in users playing nine holes over the last 12 months, with 24,000 rounds played in 2024 compared to 19,000 in 2023. However, it reports lower levels of demand for 18 holes, with only 2,000 bookings in 2024. Particularly busy periods at the site include Saturday and Sunday mornings, when queues for the first tee are the norm.
- 2.84 Leicester Golf Centre appeals to a similar demographic to that of Blaby Golf Centre, with no dress code in place, although it has implemented a booking system to avoid queues. It is advised that this is used during peak times such as weekend mornings; however, users are still welcome to turn up and await an available tee time. From a pay and play perspective, the site benefits from having no membership scheme in place, meaning capacity is solely reserved for visitors and that no additional management/programming is needed.

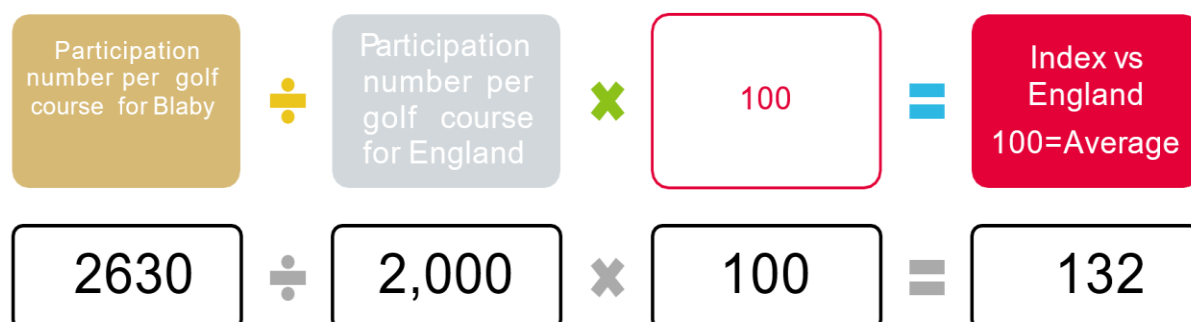
## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

- 2.85 Whetstone Golf Club also relies on a high proportion of visitor rounds and reports that it has aligned its pricing structure to match the likes of Blaby Golf Centre in order to maximise its appeal. Nevertheless, it provides a more traditional environment as tee times must be booked through the pro shop and a stricter dress code must be adhered to. The Club reports an issue with several visitors that are familiar with a more relaxed setup, such as those who attempt to share clubs, which is not permitted as it slows-down play.
- 2.86 Bramcote Water Golf Course reports that it experiences a high percentage of pay and play visitors, accounting for approximately 50% of its usage. Whilst it is actively seeking additional members, it recognises that this would lead to reduced opportunities for visitors at weekends as more tee times would be needed for internal competitions. This would then have a knock-on impact on income.
- 2.87 As a municipal site, Enderby Golf Centre also relies heavily on pay and play visitors, despite carrying a small membership base, with no tee times and a relaxed dress code in place to encourage usage. Across 2024, it reports that it received 28,332 bookings, which was slightly below initial expectations due to wet weather spells, particularly in March and April. It is forecast that there will be a minimum of 33,000 rounds played in 2025. It identifies that a high percentage of users only book to play nine holes, with only around 10% of its bookings being for an 18-hole round.

### Relative demand

- 2.88 Nationally, England Golf utilises a figure of 3.5 million people that are regular golfers, with this defined as those that have played on a standard-length course at least twice within the last 12 months. Using this, it is able to indicate how much demand exists per facility within a local authority before then comparing this to a national benchmark.
- 2.89 Within the formula, England Golf calculates the participation number in an area by establishing what proportion of the population is likely to be golfers, which can then be used to determine the number of participants per facility. This can then be compared to the national rate, with an index created for comparison purposes. Using 100 as the average, anything below this suggests that an area has either low demand or a high facility count, whereas anything above provides evidence that an area has high demand and/or a low level of provision.
- 2.90 The calculations for Blaby can be seen via the image below.

Figure 2.2: Relative Golfer Demand in the catchment area of Blaby



## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.91 As shown, the index rating for the District is 132 and therefore above the national benchmark of 100. This represents a strong level of demand for golf provision. Additionally, further analysis suggests that if even just one of the sites was to be lost, the index result would become 195, leading to a significant deficit. This is particularly pertinent given the development plans/aspirations that exist.
- 2.92 Notwithstanding the above, it must be noted that that the tool has only been run for supply and demand levels in Blaby, with the analysis not possible across the 20-minute drivetime catchment area. This therefore provides only a partial picture at this moment in time, rather than a complete analysis.

### **Unmet demand**

- 2.93 Unmet demand is existing demand that is not getting access to facilities. This is most commonly reflected in golf via waiting lists, although it is often the case that people on a waiting list are still playing elsewhere due to the nature of the sport. This could be via membership of another club or through pay and play access.
- 2.94 Within Blaby and its catchment area, there are four clubs currently operating a waiting list. One of these is within Blaby itself, with Kirby Muxloe Golf Club reporting that it is restricted to 555 adult members by means of ensuring that all members can obtain suitable tee times. This has resulted in a waiting list of 52 currently being in place.
- 2.95 Hinckley Golf Club has the largest waiting list across the study area, with 180 potential full members (7-day) on it. Rothley Park Golf Club has a waiting list containing 34 potential members, whereas Longcliffe Golf Club is also operating a waiting list although the extent of it is unknown.
- 2.96 As aforementioned, it is possible if not likely that the golfers on the waiting lists are already members at other clubs in the catchment area or are accessing courses on a pay and play basis. This is especially the case given that all four sites with a waiting list are well established clubs at the higher end of the golfing market. The sites are associated with high membership fees and good quality facilities.
- 2.97 Based on the above, it is clear that there is some degree of unmet demand for high-end golf provision within Blaby and its catchment area. However, this means that whilst unmet demand exists for some clubs, it does not equate to overall unmet demand for golf, with alternative access possible at other facilities. Furthermore, no unmet demand has been identified in relation to sites with lower price points or that have more of a focus on pay and play access.

### **Latent demand**

- 2.98 Latent demand is demand for golf that is not currently being realised. There are numerous reasons as to why this might be the case, including time constraints, physical limitations, financial reasons and a lack of suitable, available provision.
- 2.99 To help determine latent demand levels, England Golf has a mapping tool that enables an assessment of potential demand within a 20-minute drive time of each golf facility. This is based on research undertaken that identifies that 24% of adults in England are potential players, amounting to circa 9.6 million people and equating to 9% current players, 8% lapsed (former) players and 7% latent players. It can be used by providers to identify what demand may exist for their facilities, thus helping inform marketing, development and investment decisions.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 2.100 Using the tool in relation to Blaby and its catchment area, the analysis provided by England Golf identifies that there are an average of 76,148 potential players per site. This is clearly a substantial number, although it is being met by a significant number of facilities.
- 2.101 On a site-by-site basis, potential demand is identified as being highest for Enderby Golf Centre (97,396 people), whereas it is lowest for Cosby Golf Club (50,404 people). However, these figures are swayed by where the facilities are located in relation to population density and does not account for golfer preferences outside of travel time (e.g., course quality).
- 2.102 The tool also splits the latent demand levels by golfer profiles, with nine established to differentiate between types of players. These are known as:
- ◀ Relaxed members
  - ◀ Older traditionalists
  - ◀ Younger traditionalists
  - ◀ Younger fanatics
  - ◀ Younger actives
  - ◀ Late enthusiasts
  - ◀ Occasional time pressed
  - ◀ Social couples
  - ◀ Casual fun
- 2.103 Across the catchment area, demand is highest from those defined as “relaxed members” (46,122 people), followed by “younger traditionalists” (45,832 people). These segments are most likely to require access to members clubs, suggesting that such facilities are most in demand in the area.

### **Future demand**

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

### ***Club aspirations***

- 2.105 Across Blaby and its catchment area, only Cosby Golf Club reports quantified aspirations to grow its club membership, with an aim to increase by 50 members. This is despite an existing userbase of 712, which is well in excess of the national average membership. In particular, it notes that it has a large proportion of low handicap members and could accommodate more high handicap members.
- 2.106 Elsewhere, despite the overall high levels of membership, several sites report that they are still actively seeking to increase usage, although this is not quantified. Rothley Park Golf Club as an example identifies that it is seeking to attract more female members and has put incentives in place to attract more women and girls to its site.
- 2.107 Bramcote Waters Golf Club is another facility that clearly identifies an ambition to grow its membership, with it reporting that it is open to all potential users.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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2.108 Many sites also report aspirations to increase pay and play usage, with this applying particularly to facilities such as Blaby Golf Centre and Enderby Golf Centre, which have a reliance on such activity. As mentioned previously, Enderby Golf Centre expects to receive considerably higher levels of usage in 2025 (33,000 rounds) compared to 2024 (28,332 rounds).

### ***Population growth***

2.109 Using ONS-based projections, the population within the catchment area of Blaby is forecast to increase to 129,121 by 2042 (in line with the Council's emerging Local Plan). This would be an increase of 27,789 people (a growth of 28%) and will likely result in increased golf demand. In addition, the increases are projected most prominently in older age groups which have a higher propensity to play golf, suggesting that growth could exceed the overall percentage increase.

2.110 If club membership demand was to rise at the same rate as population growth, the current average figure of 549 members per club would increase to 702, which is significant. As such, given that existing membership is already higher than the national average of 407 members per club, the predicted growth would likely lead to additional clubs operating a waiting list.

2.111 In addition, increased demand for pay and play access will also likely emanate from general population growth, although to what degree is more difficult to quantify.

### **Summary**

2.112 Demand for golf within Blaby and its catchment area is high, particularly in relation to membership-based play. The average number of members per club is considerably higher than national rates, even with several sites focusing on a more visitor friendly approach. Furthermore, membership has increased significantly in recent years, aligned to the picture across England, with a sharp rise following the Covid-19 pandemic and only a small drop off since.

2.113 The above is also reflected through utilisation of England Golf's Relative Golfer Demand tool, with this showing a potential undersupply of golf facilities in Blaby when assessed against demand levels. It also identifies that any site closures in the District could be unsustainable, although the wider catchment area is not considered as part of this.

2.114 In addition, four sites within the study area currently have a waiting list in place for membership, further evidencing that some capacity pressures exist. However, based on the setup of these facilities, it is clear that this relates to higher end, traditional offerings rather than cheaper, entry-level provision. That being said, based on population forecasts and other sources of identified future and latent demand, such issues could become more pronounced moving forward.

2.115 In relation to pay and play activity, more existing capacity is seemingly evident, with all sites that have a focus on such usage actively looking to increase demand levels as well as many of the more membership-orientated facilities. The analysis for this format is therefore markedly different than the picture for membership-based play.

### 2.4: Supply and demand analysis

- 2.116 The catchment area used to inform this study provides a large quantity of golf facilities, with 18 active venues existing within Blaby and its 20-minute drivetime. In addition to the traditional 18-hole and 9-hole offerings, there is also a strong supply of alternative provision such as driving ranges and Par 3 courses, alongside activities such as adventure golf. This results in a good facility mix that can collectively cater for and reach a wide demographic of golfers and accommodate all formats of play.
- 2.117 Additionally, the current facility mix provides opportunities for golfers of all lifestyles, abilities and budgets. Several options exist at both the higher and lower end of the golfing market, difficulty and course length and layout differs, and some sites have a focus on membership whilst other prioritise pay and play usage. This also ensures that a suitable pathway is in place across the supply that can take participants from beginner level through to being established players.
- 2.118 The only potential supply issue identified is that despite many driving range bays being provided, only a minority are serviced by sports lighting and fully accessible for pay and play users. This therefore places restrictions on capacity and could be leading to this particular golfing format being somewhat under-provided for. There is also a lack of municipal courses, although this fits with the national picture and some proprietary venues host a comparable offering.
- 2.119 Despite the good level of supply that exists, demand is also evidently high, particularly in relation to membership. This is leading to above average levels in terms of the number of members across the sites, with some capacity pressures existing, particularly at higher end facilities. It has also likely intensified in recent years following increases in participation and on the back of the closure of some sites in the area. Furthermore, latent and future demand projections suggest that this could be further amplified over the coming years.
- 2.120 Notwithstanding the above, most sites do seemingly have capacity for growth, particularly when it comes to pay and play usage. This therefore suggests that the need for member-focused sites is greater than those that prioritise more casual and recreational usage, although this does not necessarily equate to a surplus of provision for such offerings. Blaby Golf Centre, Enderby Golf Centre and Whetstone Golf Centre all have uncertain futures, and the closure of these facilities could markedly alter the picture.
- 2.121 In summary:
- ◀ There are 18 golf venues within Blaby and its 20-minute drivetime catchment area.
  - ◀ The 18 sites provide 288 holes of standard golf provision, with this consisting of four 9-hole courses and 14 18-hole courses.
  - ◀ There are two Par 3 courses and 99 driving range bays, although not all of these are open to non-members and only 28 are serviced by sports lighting.
  - ◀ Miniature/adventure courses are provided at Blaby Golf Centre and Leicester Golf Centre to further complement the traditional supply of provision.
  - ◀ There are two disused sites identified at Western Park Golf Club and Kingstand Golf & Country Club – the former is subject to a site allocation in Leicester City Council's emerging Local Plan.
  - ◀ Blaby Golf Centre, Enderby Golf Centre and Whetstone Golf Club are all at risk of closing in the future due to development plans/aspirations.
  - ◀ Kirby Muxloe Golf Club has an ambition to improve its site via selling off some of its land, whilst Leicester Golf Centre has the option to extend its 9-hole course into a full 18-hole offering.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- ◀ Operating models are varied, with 10 sites being members clubs, seven being proprietary owned and one (Enderby Golf Centre) being a municipal facility.
- ◀ The variation of the sites results in some sites being setup up predominately for members, whereas others have more of a focus on pay and play usage.
- ◀ The average cost of accessing the facilities for members is £1,179 per year, which is above the national rate (£1,071); however, there is a relatively good split across the price points, with seven sites operating below the average.
- ◀ Green fees across the sites are also mixed, with many accessible at high price points and others at more affordable rates.
- ◀ The quality of golf provision in the catchment area is generally good and reflective of each sites' place in the golfing market.
- ◀ The current facility stock is well suited to meet golfers of all abilities, with course quality, difficulty, length and layout varying across the supply.
- ◀ Demand is high across the study area in relation to membership, with an average membership of 549 per site compared to a national average of 407.
- ◀ Eight of the sites are known to be operating over a membership of 407, whilst five sites are below the rate albeit these generally have more of a focus on pay and play activity.
- ◀ Demand has increased significantly in recent years, with an average of 443 members identified in 2015 – this is aligned to national trends, particularly in regards to a growth since 2020.
- ◀ Pay and play is available at all sites, although it is limited at some of the more member-focused facilities such as Rothley Park Golf Club.
- ◀ Green fee usage is highest at the proprietary and municipal venues, although the large majority of operators report aspirations to increase such activity, with capacity existing to enable this across the supply.
- ◀ Four clubs currently operate a waiting list for membership (unmet demand), with these all being higher end facilities.
- ◀ England Golf identifies high levels of overall demand in Blaby via its Relative Golfer Demand tool, with an index rating of 132 compared to a national rate of 100.
- ◀ Latent demand identified by England Golf is also seemingly high, particularly in relation to golfers that are more likely to require access to members clubs.
- ◀ Several sites report future demand aspirations, suggesting that capacity exists for some level of growth, whilst population projections also forecast that usage is likely to increase.

# BLABY DISTRICT COUNCIL

## GOLF NEEDS ASSESSMENT

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### PART 3: CONCLUSION

- 3.1 This study has provided a supply and demand analysis of golf provision in Blaby using a 20-minute drivetime catchment area. Overall, there is clearly a good, well-varied level of supply that can adequately accommodate most usage, meaning that there is not an overarching need for additional facilities. That being said, a greater number of accessible, sports-lit driving range bays would be beneficial.
- 3.2 Notwithstanding the above, demand levels are also considerable. In particular, there is a high proportion of membership-based activity that provides evidence to suggest that all membership-focused sites require protection. A reduction in the quantity of such facilities could not support what current and future demand has been identified as this would exacerbate existing capacity pressures and extend existing waiting lists.
- 3.3 The sites considered to have a primary focus on membership-based play are:
- ◀ Beedles Lake Golf Centre
  - ◀ Birstall Golf Club
  - ◀ Charnwood Forest Golf Club
  - ◀ Cosby Golf Club
  - ◀ Hinckley Golf Club
  - ◀ Kirby Muxloe Golf Club
  - ◀ Leicestershire Golf Club
  - ◀ Longcliffe Golf Club
  - ◀ Lutterworth Golf Club
  - ◀ Rothley Park Golf Club
  - ◀ Ullesthorpe Court Hotel & Golf Club
  - ◀ Whetstone Golf Club
- 3.4 Of these, both Cosby Golf Club and Whetstone Golf Club reside in Blaby. The inclusion of Whetstone Golf Club is also despite its uncertain future, with clear evidence existing to support its retention, in full, regardless of aspirations that exist at the site.
- 3.5 The requirement for provision that primarily caters for pay and play usage is seemingly less pronounced, with most venues that focus on this activity wanting to increase demand, in addition to some members clubs also wanting to grow this area. As such, there could be the potential for the offerings to be condensed onto a lesser number of sites, particularly if those that remained were of enhanced quality and well-located. This would also potentially increase the financial viability and sustainability of such provision, with less competition existing in the area.
- 3.6 The lesser levels of need for pay and play facilities is especially pertinent given the development aspirations that exist at Blaby Golf Centre and Enderby Golf Centre, with both considered to be key sites in the area for recreational/casual demand. However, whilst the findings of this study could be used to support the loss of one of these venues, it does not warrant the closure of both as this would alter the picture significantly. This is especially the case given that they are both located in Blaby and relatively close to each other (9-minute drivetime). The loss of one is likely to considerably increase the demand and need for the other.

## BLABY DISTRICT COUNCIL GOLF NEEDS ASSESSMENT

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- 3.7 When assessing both Blaby Golf Centre and Enderby Golf Centre individually, the need for the former could be said to be higher given that it also provides a Par 3 course and a miniature/adventure course, in addition to its standard hole offering. This helps create a clear pathway at the site and in the region that would be lost without its presence. Furthermore, it has a higher userbase in terms of membership and has undergone recent investment to improve the facilities.

### Assessing Needs & Opportunities Guide

- 3.8 To further evidence the conclusion that has been drawn, the four key categories of ANOG have been considered below against the findings of this study.

#### Quantity

- ◀ There is a good supply and range of golf facilities to meet the needs of all golfers in Blaby and its 20-minute drivetime catchment area, with 18 active sites identified.
- ◀ The mix of 18-hole, 9-hole, Par 3 and adventure/miniature courses means that all golfer types and formats of play can be accommodated and that a pathway is established.
- ◀ The supply of driving range bays further adds to the supply, although the number of sports-lit bays that are accessible to the wider public (non-members) is limited.
- ◀ The supply of courses has a good range of difficulty, length and layout which will collectively cater for all golfer preferences/needs.
- ◀ There is a large quantity of courses at both high and low price points, meaning all budgets can be accommodated.
- ◀ The supply of playing provision is supported by a good supply of ancillary facilities.
- ◀ The supply has reduced in recent years, with two disused courses identified, with this likely to have exacerbated the growth in demand at the sites that remain.
- ◀ Whilst there is a good level of supply, it is clear that the large majority of provision is required, particularly in relation to membership-based sites.
- ◀ The quantity of sites could reduce in the future, with uncertainty existing in relation to Blaby Golf Centre, Enderby Golf Centre and Whetstone Golf Club.
- ◀ The loss of either Blaby Golf Centre or Enderby Golf Centre could be supported based on pay and play usage levels and the proximity of the venues, but at least one is required.
- ◀ The loss of Blaby Golf Centre would potentially cause greater issues due to it providing more provision and a more varied facility mix.
- ◀ All members clubs require protection given demand levels, including Whetstone Golf Club.

#### Quality

- ◀ Quality of golf provision across the study area is generally good and reflective of where each site sits within the golfing market i.e., their price points.
- ◀ Some sites have been identified as being particularly high quality, such as Leicestershire Golf Club, Glen Gorse Golf Club, Longcliffe Golf Club and Rothley Park Golf Club.
- ◀ Many sites have undergone recent improvements through course and ancillary facility developments, with this including Blaby Golf Centre, Hinckley Golf Club, Longcliffe Golf Club and Lutterworth Golf Club.
- ◀ Future aspirations exist for further enhancements, including at Charnwood Forest Golf Club, Cosby Golf Club, Kirby Muxloe Golf Club and Leicester Golf Centre.
- ◀ Some issues have been identified, particularly relating to drainage, with this impacting on several sites such as Enderby Golf Course, Beedles Lake Golf Centre, Lutterworth Golf Club and Kirby Muxloe Golf Club.
- ◀ Some courses are taken out of use during bad weather spells, although this is normal practice.

# BLABY DISTRICT COUNCIL

## GOLF NEEDS ASSESSMENT

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### Accessibility

- ◀ The supply of golf provision is well spread across the study area, with this ensuring that only a small amount of travel is required to access facilities.
- ◀ Whilst driving range bays are provided, only 28 are available to the wider public and serviced by sports lighting, with the remaining provision having more limited capacity.
- ◀ Although course quality is generally good, some sites may be taken out of use during bad weather spells to protect the provision.
- ◀ Due to the variation in course types, layouts and difficulty, all types of golfers can be accommodated across the supply, regardless of their ability.
- ◀ Whilst cost varies significantly based on the quality of provision accessed, all budgets are currently accommodated across the supply both in terms of membership and pay and play access.
- ◀ Several sites focus on membership activity, whereas others are primarily setup for pay and play users, meaning that all golfer preferences can be catered for.
- ◀ Four clubs in the catchment area currently have a waiting list for membership, identifying that access pressures exist in this regard.
- ◀ The loss of any membership-orientated sites (including Whetstone Golf Club) would lead to increased levels of unmet access that could not be supported.
- ◀ Pay and play access is readily available across the provision, with most sites actively looking to grow this aspect of usage.
- ◀ The consolidation of pay and play facilities could enable those that remain to be more financially viable and sustainable, and therefore more likely to be accessible in the long-term.

### Availability

- ◀ With 18 active golf sites across the study area, availability is good, especially as all formats of play are accommodated.
- ◀ Plenty of opportunities exist for golfers looking to acquire a membership, whilst those that prefer pay and play usage also have several available sites to access.
- ◀ Availability of driving range bays is considered most limited, predominately due to the lack of sports-lit provision.
- ◀ Four clubs currently have a waiting list in place for membership, meaning availability at these sites is limited, although alternative options exist.
- ◀ Due to the pressures identified in relation to membership activity, a reduction in such facilities could not be supported as this would create more severe availability restrictions.
- ◀ Pay and play availability is evidently higher, with only Longcliffe Golf Club and Rothley Park Golf Club not actively marketing this.
- ◀ The consolidation of pay and play facilities could enable those that remain to be more financially viable and sustainable, and therefore more likely to be available in the long-term.