



# Golf Facility Types, Technical Requirements & Market Opportunities

by Roger Jones



There are different types of golf facility to cater for all sectors of the golf population.

## Golf Courses

**Daily Fee Courses** - Also known as 'Pay as you Play' courses, are where golfers pay a fee per round or per day [usually referred to as a green fee] to be able to play the golf course. This type of golf course is generally accessible to all golfers of all levels of playing ability, even complete novices.

In the US, and Great Britain and Ireland, many daily fee courses are owned by local government authorities. They are often located in areas of high population, charge lower fees than privately-



owned courses, and in some cases the local authority subsidises annual operational costs. Other daily fee courses are privately-owned, they charge a higher level of fees because they are in business to make a profit. They are usually still reliant on high volumes of play in order to achieve their commercial objectives.



Two of the most famous daily fee courses are St Andrews in Scotland [the 'home of golf' and the home of the Royal & Ancient Golf Club] and Pebble Beach in California, both of which are owned by their respective local government authorities.

**This type of facility is important, and needed, in every country, particularly in emerging golf countries, because it promotes and encourages golf participation by providing easy access at affordable fees.**

**Semi-Private Courses** - Are golf courses that are either privately-owned, or owned collectively by the members, and operated as clubs for the benefit of the members and non-members.

Initial admission to membership is generally by payment of an 'entrance fee' or 'preference share' although some clubs have reduced or abolished these initial admission fees in recent years. To retain membership, members pay an annual fee [a subscription] to have the right to play the golf course whenever they wish without payment of any additional green fees.

At a semi-private course that is privately-owned, the owner provides, manages and maintains the course and off-course facilities, and generates revenue from the entrance fees and annual fees paid by members, as well as from visitor green fees, retail sales, hire charges, and food and beverage sales.

Members are given the right [usually under a licence agreement or similar with the owner] to collectively form the 'club'. The club is established and operates in accordance with a defined set of rules and regulations [a constitution]. Most golf club constitutions are standardised documents, pre-approved by the national golf body. This ensures that the clubs, who are the affiliated members of the national golf body, all operate to the same, or very similar structure.





The main functions of the 'club' is the organisation and management of competitions and social events for members, administration of player's handicaps, liaising with the national golf body as required, and liaising and co-operating with the golf facility owner on issues affecting both parties. The club normally sets up a variety of committees and sub-committees to manage these affairs.

Most semi-private courses actively promote their facilities to visitor golfers, in groups or as individuals, as this income forms a very important part of their total annual revenue. Most semi-private courses will require visiting golfers to have a reasonable level of competency, possess a golf handicap and may require them to be a member of a golf club elsewhere. This is a key difference to daily fee [pay as you play] courses who generally allow open access to all. It is not unusual for there to be times of the day or week when members are given priority to use the golf course over visitors, particularly at weekends.

**This type of facility is to be found in almost every country and they are important to the commercially sustainability of any golf market.**

**The golf tourism market will always be susceptible to fluctuations whereas club members and 'local' golf visitors can provide a consistent golf demand.**

**Private Courses** - Are golf courses that are usually privately-owned and operated for the sole benefit of members and member's guests. By definition they are not open to green fee paying visitors unless in exceptional circumstances, or by special invitation.

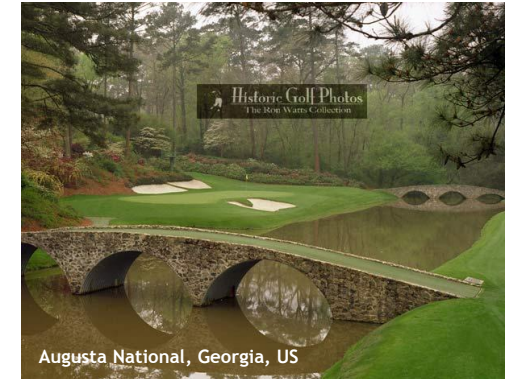
Membership of such courses is usually also by invitation or after a formal interview and acceptance procedure. The entrance fee or preference share fee is usually high, as are annual fees.

Revenues are generally only derived from membership fees and associated sales to members, including food and beverages. These have to be sufficient to cover all of the golf business annual operational costs.

The number of members at such facilities is usually small and they are generally wealthy individuals looking for the exclusivity that they believe membership gives them.

Famous examples of private courses include Augusta National in Georgia, USA [home of the US Masters Tournament] and Queenwood Golf Club in Surrey, England.

**Outside of the US, this type of golf facility is not widely found. However it is recognised that in every country there is a sector of the population who demand greater exclusivity than they believe is available to them at a semi-private member's golf club.**





**Resort / Estate Courses** - Can be daily fee or semi-private courses, or a combination of the two i.e. they have a membership structure but encourage as many visitor golfers as possible.

They are generally privately-owned and almost always have a range of other facilities connected to, or associated with them. Such associated facilities may include real estate [year-round occupancy or rental], hotels, spas and wellness centres, business and conference centres, casinos, other sports facilities, marinas, and sometimes commercial and business centres.

The business model of resort courses, [other names include residential golf communities, golf estates or golf & country clubs] started in the US back in the 1970s with resorts and country club communities developed in Florida and the Carolinas. Over 20% of existing golf facilities in the US are residential community golf courses, but as many as 70% of new projects are being developed in this same model. This business model has proven successful for many reasons and is being emulated in many countries around the world where new golf facilities are being developed.

Resort courses also provide the product that is most applicable and beneficial to golf tourists [and accompanying non-golfers]. Golf tourists can stay in hotels or other accommodation within the golf resort, play the golf course, or courses where resorts have more than one, use other leisure and sporting facilities available, and visit bars and restaurants all without having to go outside the resort gates.

Some examples of mature, and newer, golf resorts in the EMA region are outlined below. Some of these have been in existence for many years and have established international reputations. Others are amongst the supply of facilities that have emerged more recently.

### Gleneagles, Scotland

When Gleneagles opened in 1924 it was described as the 'Riviera of the Highlands'. In the 1950's it became part of high society's social calendar and today the name Gleneagles is synonymous with luxury, golf, grouse shooting and country pursuits.

It boasts three championship golf courses and will play host to the 40th Ryder Cup Matches in 2014.

The Gleneagles estate extends to over 344 hectares and is situated at the foot of the Scottish Highlands but within one hour's drive of both Glasgow and Edinburgh international airports.



### La Manga Club, Murcia, Spain

Since 1972, La Manga Club has grown into a complete leisure resort covering 567 hectares and including three 18-hole golf courses plus a golf academy.

Situated in Murcia, the southern Spanish region known as the Costa Calida, La Manga Club benefits from the warm Mediterranean climate and is easily accessible - only 20 minutes from Murcia airport, and approximately 1 hour from Alicante airport.

In addition to golf, La Manga Club also has a 28 court Tennis Centre and high quality facilities for football and cricket. A wide range of other outdoor activities are catered for together with a spa and fitness centre, including indoor pool and gymnasium.

Property is a key feature of La Manga Club and a wide range of options are available.

Hotel and conference facilities are provided at the 5\* La Manga Club Principe Hotel, with self-catering apartments at Los Lomas Village.





### Vilamoura, Algarve, Portugal

Vilamoura is one of the largest single tourist complexes in Europe and covers some 2,000 hectares of land. Located virtually in the middle of the Algarve coast, within easy reach of the main airport at Faro, Vilamoura's accessibility has helped it become one of Europe's largest beach resorts.



The 20 square km of purpose-built resort is home to practically every form of sport, entertainment and amenity imaginable. Combined with wide, well laid out roads, manicured gardens and public spaces, and five golf courses, Vilamoura is a world class holiday destination.

The town is built around the upmarket, 1,200 berth Vilamoura Marina which was constructed with private money in the 1970s. Facilities are extensive and the marina caters for the whole spectrum of boats from small speedboats through to 40+ metre yachts. The harbourside is the 'in-place' for the yachting set and is home to a number of chic bars, restaurants and hotels.

### Vale De Lobo Algarve, Algarve, Portugal

Founded in 1962, Vale do Lobo was the first development in the Algarve. At that time, the Algarve was mainly inhabited by farmers and fishermen. It was only after the initial establishment of Vale do Lobo that Faro International Airport was opened.



Sander van Gelder, a Dutch entrepreneur, discovered Vale do Lobo during a holiday in the mid 1970s, and recognising its potential, he bought the resort and moved to Portugal in 1977.

Over 30 years later, Vale do Lobo has transformed into a 450 hectare self-contained community offering

endless facilities and services in a unique location. Towards the end of 2006, the resort was sold to a group of Portuguese and international investors, including the largest national bank Caixa Geral de Depósitos. Under its new owners, Vale do Lobo initiated a strategic 'face-lift' in 2007, implementing a number of significant improvements, developments and plans for international expansion. The most significant being the initiation of a €500 million investment programme for the development of three new prime areas in the resort.

At the beginning of 2008, they also initiated a programme of rebranding and the resort was renamed as Vale do Lobo Algarve and integrated under the umbrella of a new brand of Vale do Lobo Resorts, the first move towards future international expansion.

Vale do Lobo Algarve is recognised as one of the foremost resorts in Europe and is today the largest luxury resort of its kind in Portugal operated by the same company.



### Aphrodite Hills, Paphos, Cyprus

Aphrodite Hills resort near Paphos, is set in one of the most scenic locations in Cyprus, overlooking the very spot where Aphrodite, the Goddess of Love, is said to have emerged from the shimmering Mediterranean Sea.

Aphrodite Hills is the first ever fully-integrated golf, leisure and real estate development in Cyprus. Built at a cost of around CYP 150 million, the resort's facilities include a five-star deluxe InterContinental Resort Hotel, featuring





290 rooms and suites, plus a presidential suite complete with private pool.

Built on 234 hectares, Aphrodite Hills offers a wide range sports and leisure facilities. Residents and guests alike can enjoy golf on the 18-hole championship course, competition-standard tennis courts, excellent fitness facilities and the sophisticated *Retreat Spa* with its Greco-Roman thermae.

### Fancourt Hotel & Country Club Estate, South Africa

Fancourt Hotel & Country Club Estate is a business and leisure destination with golf, hotel, spa residential property and numerous other leisure and sporting facilities.

Starting out as a family home many years ago, the old Manor House is now a National Monument, which has 34 bedrooms, two restaurants and various business lounges. But it has had a long and sometimes difficult history.



Fancourt is South Africa's premier golf resort, featuring three 'championship' golf courses, where play is restricted to members, their guests and hotel guests; as well as being home to the Western Cape's premier 18-hole public course.

### Soma Bay Resort, Hurghada, Egypt

Soma Bay is situated on the eastern shores of Egypt in what is known as the Red Sea Riviera. The residential resort first opened in 1999, and is one of many similar high quality resorts emerging in North Africa. The resort includes a number of leading hotel brands, thalasso-therapy spa, an 18-hole golf course named The Cascades, a 9-hole golf academy course called The Challenge, as well as a golf range.

The location is renowned for superior scuba diving and snorkelling with some of the best dive sites in the Red Sea and the resort includes a fully equipped dive centre. Other watersports include wind surfing, sailing, and kitesurfing. There is also a marina for yachts.

The project is also developing a range of residential properties around the resort; some with ocean views others with golf views.





**Executive Golf Courses** - Executive courses [or Academy Courses] generally have all of the characteristics and features of full-size golf courses but are shorter in length. The greens will generally be smaller because of the reduced course length. Some executive courses may have teeing areas surfaced with synthetic grass rather than real grass as this may be more durable [depending on volumes of play].

The term Executive Course encapsulates 'par 3 courses' [i.e. every hole is a par 3 with no hole longer than 200m] and courses in which there are a combination of par 3 and par 4 holes. Executive courses can be 9-hole or 18-hole but are more commonly 9-hole. With a combination of par 3 and par 4 holes it would be unusual, although not impossible, to find a 9-hole executive course longer than about 1,800m and an 18 hole course longer than about 3,600m.

Some executive golf courses are developed because of the lack of available land for a full-size alternative; others are developed intentionally shorter, usually as a second complementary course to a full-size companion. As a second course at a golf facility, owners/operators can target different sectors of the golf market.

An executive course can enable newcomers to golf to experience a real golf course without the distance requirements demanded by a full-size one. Experienced golfers wishing to play more than one round of golf in a day at a golf facility may choose to play an executive course for their second round, and or they may simply enjoy the different challenge offered by it.

The level of technical difficult built into an executive course will determine the extent to which the course is targeted at the 'golf learner' market or at the more experienced player. It is more common to target such facilities at the learner and inexperienced golfer market.



Executive golf courses containing a mix of par 3s and par 4s are more common in the US than they are elsewhere in the world. Many such courses in the EMA region tend to be 9-hole par 3 courses.

## Golf Ranges

Also known as 'Driving Ranges' or 'Practice Ranges', golf ranges are usually grassed and maintained areas designated for hitting practice balls. Golfers can buy a basket or bucket of balls to hit without having to pick them up [golf balls are collected by golf range staff either manually or, more commonly, using golf ball collection equipment].



Golfers play from synthetic grass mats which are more durable than natural grass. Play from natural grass teeing areas is possible at some ranges but such availability is determined by the local operator and will depend on operational factors including levels of facility usage, and prevailing local weather and ground conditions.





Modern golf ranges include shaped target greens, or other such elements, to emulate golf course features and distances. A modern golf range should measure approx 300m long and approx 100m wide, facing in a northerly or easterly direction, or point in between. This avoids golfers playing directly into sunlight at any time of the day. Many golf ranges are floodlit for use until late at night, and others may have high-level perimeter fencing if there is a potential danger posed from errant golf balls.

In countries with high levels of rainfall, hitting bays are generally covered to allow golfers shelter from the rain. In hot countries, some covered bays would always be advisable to allow players to keep out of the direct sunlight. Local climatic conditions determine whether some or all bays should be covered, and the type of cover.

Golf ranges are the ideal places for people to take golf lessons or practice their golf skills between lessons. Experienced players benefit from the opportunity a golf range presents to practice and improve their skills, or simply to loosen up prior to playing a round of golf.



Large golf ranges can be two-storey where demand requires.

Golf Ranges can be an element of the golf facilities offered at a golf course or club, or 'stand-alone' i.e. they are separate businesses and operating in isolation of other golf facilities. As 'stand-alone' facilities they are always more commercially successful when situated in highly populated areas.

## Putting Courses & Putting Greens

Putting Courses and Putting Greens come in a variety of sizes and styles. Most golf courses, of all kinds, have a putting green available to golfers prior to the start of the round of golf. These have several holes cut into them and are intended to allow players to experience the speed and character of the greens on the actual golf course. They are usually located adjacent to the golf

clubhouse or on route to the opening hole. As they also provide the opportunity for aesthetically pleasing landscaping they are regularly found close to golf clubhouses.

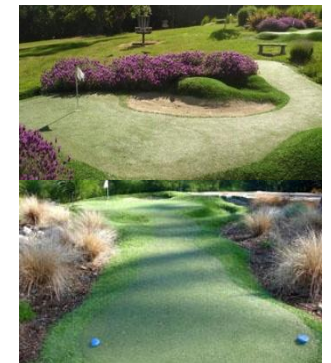
Putting courses are effectively miniature versions of golf courses where golfers play the holes from a defined starting point putting to the hole cut at the opposite end of the mini fairway, which will vary in length from hole to hole.



At the high-end of the market they are constructed to the same standard as greens on a golf course, and maintained in a similar fashion. They have irrigation systems and provide the opportunity for creative landscaping. They can be 9 or 18 holes depending on the amount of land available. Putting courses of this type and standard are almost always found at golf facilities rather than being stand-alone because of the maintenance requirements.

At the opposite end of the market, historically many public parks in UK had putting courses. These were low quality grass facilities as public amenities and charged at low-cost to include the rental of a putter and golf ball. Many of these have now disappeared.

Alternatively, putting courses are constructed using synthetic grass to negate the intensive maintenance demands, and be more durable. Putting courses of this kind are more likely to be found as stand-alone facilities targeted at the general public more than golfers. As with grassed facilities they can be very sophisticated or very basic.



At the sophisticated level they have brought about the creation of what has been termed 'adventure golf', themed and styled very creatively to provide a golf-related tourist attraction in resorts and holiday towns and villages. There are specialist companies around the world who are designing and building such facilities as they are not within the normal realm of golf designers.



The following table provides a summary of the different types of golf facility, land requirement and other relevant commercial and technical data. The table is an indicative guide and every golf facility will have different requirements at all stages of development and operation.

Facility Type	Characteristics	Associated Facilities	Market Appeal	Technical	Additional Comments
<b>Daily Fee Golf Courses</b>	<p>Open to visitors upon payment of appropriate round/daily fee.</p> <p>Usually lower cost than other types of full size golf courses.</p> <p>Can be 9 or 18 holes.</p>	<p>Clubhouse with changing rooms, golf shop, administration, food &amp; beverage. <i>[functional standard]</i></p> <p>Golf cart/trolley storage.</p> <p>Golf Range &amp; Practice Putting Green.</p> <p>Golf course maintenance complex.</p> <p>Car parking</p>	<p><u>Targets</u> Learner Golfers* Regular Golfers* Experienced Golfers* <i>*resident or tourist</i> <i>[quality of course will determine level of desirability to experienced players and tourists]</i></p> <p><u>Opportunities</u> Golf School Open Competitions Low-cost entry to golf</p>	<p>9 hole - c. 30 hectares 18 hole - c. 60 hectares <i>[proximity to roads, properties and on-site encumbrances affects amount of land required]</i></p> <p>Irrigation System</p> <p>Topographically - can be all terrains - more slopes and hills require more earthworks during construction. Very flat terrain needs shaping to create interest and for drainage.</p>	<p>Best located close to towns and cities. [within 30-40 minutes]</p> <p>Aesthetic value of land and surroundings less important.</p> <p>May have an affiliated 'Members Club' that uses the course but would not have any executive powers.</p>
<b>Semi-Private Golf Courses</b>	<p>Usually privately-owned or owned by the Club members.</p> <p>9 holes, 18 holes, or more.</p> <p>Open to members, member's guests, and non-member visitors upon payment of appropriate round/daily fee. <i>[visitors may be subject to time restrictions]</i></p> <p>Members pay an annual subscription. Members may also pay an initial entrance fee or for a preference share to become a member.</p>	<p>Clubhouse with changing rooms, golf shop, administration, food &amp; beverage. <i>[standard, service and styling in accordance with pricing structure]</i></p> <p>Golf cart/trolley storage.</p> <p>Golf Range &amp; Practice Putting Green.</p> <p>Golf course maintenance complex.</p> <p>Car parking</p>	<p><u>Targets</u> Prospective Members <i>[may be newcomers to golf or regular players]</i> Property purchasers</p> <p>Visitor Golfers* <i>*resident or tourist</i> <i>[quality of course and accessibility will determine level of desirability to tourists and experienced players]</i></p> <p><u>Opportunities</u> Golf School Member Competitions Open Competitions Corporate Golf Days</p>	<p>18 hole - 60 hectares plus [Up to 100 ha. if other facilities to be included]. <i>[proximity to roads, properties and on-site encumbrances affects amount of land required]</i></p> <p>Irrigation System</p> <p>Extensive and or high impact landscaping where appropriate.</p> <p>Topographically - can be all terrains - more slopes and hills require more earthworks during construction. Very flat terrain needs shaping to create interest and for drainage.</p>	<p>Could have real estate and other sports and leisure facilities included in the development.</p> <p>Premium on real estate with views of golf course.</p> <p>Best located within 30-40 minutes of towns and cities where business emphasis is on domestic market.</p> <p>Location may determine desirability and market positioning [better locations may derive higher fees]</p> <p>To maximise potential tourism business needs to be part of a cluster of min 3 and up to 6 golf courses.</p>
<b>Private Golf Courses</b>	<p>Almost always privately-owned but could be member-owned.</p> <p>18 holes or more</p> <p>Usually restricted to members and member's guests.</p> <p>Members pay high cost entrance fee/shareholding, and high annual subscription.</p>	<p>Clubhouse with changing rooms, golf shop, administration, food &amp; beverage. <i>[may be more luxurious with higher level of service and facilities commensurate with level of fees charged]</i></p> <p>Golf cart/trolley storage/members club storage.</p> <p>Golf Range &amp; Practice Putting Green.</p> <p>Golf course maintenance complex.</p>	<p><u>Targets</u> Prospective members <i>[usually wealthy individuals]</i></p> <p><u>Opportunities</u> Usually only interested in services and events for members.</p>	<p>18 hole - 60 hectares plus [Up to 100 ha. if other facilities to be included]. <i>[proximity to roads, properties and on-site encumbrances affects amount of land required]</i></p> <p>Irrigation System</p> <p>Extensive and or high impact landscaping where appropriate.</p> <p>Topographically - can be all terrains - more slopes and hills require more earthworks during construction.</p>	<p>Could have real estate and other sports and leisure facilities included in the development - all facilities being for the use of members and member's guests only.</p> <p>Premium on real estate with views of golf course.</p> <p>Best located reasonably adjacent to wealthier residential areas of towns and cities.</p>



		Car parking		Very flat terrain needs shaping to create interest and for drainage.	
<b>Resort/Estate Golf Courses</b>	<p>Usually privately-owned. Development companies or individuals. Private or publicly listed companies</p> <p>18 holes or more [<i>depending on land available</i>].</p> <p>Open to members, member's guests, and non-member visitors upon payment of appropriate round/daily fee.</p> <p>Members usually pay an annual subscription.</p> <p>Hotel or other residents may have guaranteed start times allocated each day.</p>	<p>Clubhouse with changing rooms, golf shop, administration, food &amp; beverage. [<i>could be attached to, or integral part of hotel</i>]</p> <p>Golf cart/trolley storage/bag storage.</p> <p>Golf Range &amp; Practice Putting Green.</p> <p>Golf course maintenance complex.</p> <p>Hotel</p> <p>Other sports and leisure facilities</p> <p>Other commercial/service facilities</p> <p>Spa &amp; Wellness Centre</p> <p>Car parking.</p>	<p><b>Targets</b> Prospective members Property purchasers Visitor Golfers* *resident or tourist</p> <p><b>Opportunities</b> Links with tour/travel companies Golf School Member Competitions Open Competitions Corporate Golf Competitions</p>	<p>18 hole course plus real estate plus other facilities - min. 80 hectares - better 100 hectares</p> <p>Irrigation System</p> <p>Extensive and or high impact landscaping where appropriate.</p> <p>Topographically - can be all terrains - more slopes and hills require more earthworks during construction. Very flat terrain needs shaping to create interest and for drainage.</p>	<p>More emphasis on integration of golf course and other facilities, particularly hotels and real estate.</p> <p>Premium on real estate with views of golf course.</p> <p>Locations that attach to sea and beaches particularly desirable, or close to existing tourist centres.</p> <p>Located ideally within 60 minutes of nearest airport.</p> <p>Some international resorts extend up to 1000ha in size and contain 3 or 4 golf courses. Effectively towns in themselves with a town centre and numerous local centres.</p> <p>To maximise potential tourism business needs to be part of a cluster of min 3 and up to 6 golf courses.</p>
<b>Executive Golf Courses</b> [otherwise referred to as Academy Courses]	<p>Open to golfers and non-golfers upon payment of appropriate round/daily fee.</p> <p>Usually lower cost than full size golf courses.</p> <p>Can be 9 or 18 holes.</p> <p>Can be all par 3 holes or a combination of par 3 and par 4. Usually max. 1800m 9 holes, and 3600m 18 holes.</p> <p>Could be a second golf course to a facility with a full size 18-hole course.</p>	<p>Clubhouse with changing rooms, golf shop, administration, food &amp; beverage. [<i>functional standard</i>]</p> <p>Golf cart/trolley storage.</p> <p>Practice Putting Green.</p> <p>Golf course maintenance complex.</p> <p>Car parking.</p>	<p><b>Targets</b> Learner Golfers* Regular Golfers* Experienced Golfers* *resident or tourist [<i>quality of course will determine level of desirability to experienced players and tourists</i>]</p> <p><b>Opportunities</b> Open Competitions Low-cost entry to golf</p>	<p>9 hole - c.15-25 hectares 18 hole - c.30-40 hectares [<i>proximity to roads, properties and on-site encumbrances affects amount of land required</i>]</p> <p>Irrigation System.</p> <p>Teeing areas grass or synthetic.</p> <p>Topographically - can be all terrains - more slopes and hills require more earthworks during construction. Very flat terrain needs shaping to create interest and for drainage.</p>	<p>If stand alone facility, best located close to towns and cities. [within 30-40 minutes]</p> <p>Could be an add-on facility to existing sports complex, or hotel, or residential community.</p> <p>Location dependant on whether stand-alone facility or part of complex with other golf facilities.</p>
<b>Golf Ranges</b> [otherwise referred to as Driving Ranges or Practice Ranges]	<p>A grassed and maintained area designated for hitting practice balls.</p> <p>One can buy a basket or bucket of balls to hit without having to pick them up.</p> <p>Play usually from synthetic grass mats [more durable than natural grass]</p> <p>Modern golf ranges include shaped</p>	<p><i>The extent of associated facilities will depend on whether the golf range is a stand-alone facility or part of an inclusive facility with golf course.</i></p> <p>If stand alone the following will always be required; Reception area, golf shop incl. confectionery and beverages, male and female toilets, administration, maintenance equipment storage</p>	<p><b>Targets</b> Non-golfers* Learner Golfers* Regular Golfers* Experienced Golfers* *resident or tourist</p> <p><b>Opportunities</b> Golf School</p>	<p>In total in the region of 4 hectares.</p> <p>Ideal size 300m long x 100m wide - facing between north and east.</p> <p>Irrigation system</p> <p>Additional space required for car parking and other facilities if included.</p> <p>Topographically - can be all terrains</p>	<p>If stand alone facility, best located close to towns and cities. [within 20-30 minutes]</p> <p>Aesthetic value of land and surroundings less important.</p> <p>In many countries some or all of the hitting bays are undercover to provide shelter against weather, and floodlit for night time use.</p>



	<p>target greens to emulate golf course features and distances.</p> <p>Large golf ranges can be two-storey where demand requires.</p>	<p>incl. ball collecting machinery, ball washing and dispensing.</p>		<p>- more slopes and hills require greater earthworks during construction.</p>	<p>A putting green and an area for the practicing of 'short game' shots is desirable to provide a more inclusive facility.</p> <p>May need fencing if located near to existing properties or roads.</p>
<b>Putting Courses</b>	<p>Can be 9 or 18-hole.</p> <p>Natural grass or synthetic.</p> <p>Effectively golf courses in miniature with associated landscaping.</p> <p>Regulation sized golf holes.</p>	<p><i>The extent of associated facilities will depend on whether the putting course is a stand-alone facility or part of an inclusive facility with golf course.</i></p> <p>If stand alone the following will always be required; Reception area incl. confectionery and beverages, male and female toilets, administration, maintenance equipment storage.</p>	<p><b>Targets</b> Non-golfers* Learner Golfers* Regular Golfers* Experienced Golfers* *resident or tourist</p>	<p>Can be any size over 1000m2 for 9 holes. Larger area offers greater scope and more interest. Also offers more landscape opportunities.</p> <p>Irrigation system if grass.</p> <p>Topographically - more level terrain is preferable.</p>	<p>Could be an add-on facility to existing sports complex, or hotel, or residential community.</p> <p>Location dependant on whether stand-alone facility or part of complex with other golf facilities.</p> <p>When made synthetic can become a completely 'public' facility as an 'adventure golf putting course'</p> <p>Use by all sectors of population.</p>
<b>Putting Greens</b>	<p>Not really suitable as a standalone facility.</p> <p>Natural grass or synthetic.</p> <p>Associated landscaping.</p> <p>Regulation sized golf holes</p>		<p><b>Target</b> Non-golfers* Learner Golfers* Regular Golfers* Experienced Golfers* *resident or tourist</p>	<p>Can be any size over 500m2. Larger area offers more interest. Also offers more landscape opportunity.</p> <p>Irrigation system if grass.</p> <p>Topographically - more level terrain is preferable.</p>	<p>Considered by some in the golf industry to be the very best way of introducing people to golf.</p> <p>Capable of use by all sectors of population</p>

Source: Roger Jones Golf Design



## Associated facilities

All golf courses need certain 'associated facilities' to enable them to operate.

As a minimum, a golf course needs a base from which the golf course is controlled and administered from day to day. A minimum level of service will provide a point of contact/information, a location for the payment of green fees, and the provision of toilet facilities. This is the clubhouse.

Very few golf facilities offer such a basic clubhouse but essentially this is all that is absolutely necessary, and a golf course business can operate in this way. Conversely, many new golf facilities offer associated facilities that are way in excess of what is required for their business, and find them a drain on the revenues generated by the golf course.

Some developers choose to provide small functional clubhouses, others choose to provide 'iconic' or 'statement' buildings. A clubhouse with 700m<sup>2</sup> - 1,000m<sup>2</sup> of internal space can be sufficient to accommodate the functions of a full-service golf facility with 18 holes and more. Depending on the facility, and its operational management strategy, a reasonable level of functions can be provided with as little as 150m<sup>2</sup> - 200m<sup>2</sup>, whilst at the other end of the scale there are clubhouses that are well in excess of 5,000m<sup>2</sup>.

The other primary requirement for any golf facility is a place for the storage and safe-keeping of the machinery and equipment necessary for the proper maintenance of the golf facility - the maintenance complex. The maintenance complex also provides a working area and welfare facilities for maintenance personnel.



The size of the maintenance complex largely depends on the size of the golf facility i.e. the number of golf holes to be maintained and the overall area of the golf course. To accommodate the components described above, the maintenance complex for an 18-hole golf course will need to have covered buildings measuring in the region of 300m<sup>2</sup> -

400m<sup>2</sup>, together with a secure external yard area of a similar size.

The level of security required will depend on local conditions but the value of golf course maintenance equipment and all the other tools and products, together with the importance of the golf course maintenance, makes appropriate security necessary in every location.

## Complementary facilities

### Real Estate

Golf facilities now regularly have other facilities developed alongside them. The development of residential real estate surrounding and within golf facilities has been the most significant development trend in many countries in recent years, emulating the model of residential golf communities developed in the US back in the 1970's when the early trend became a market influence in the wake of the growth in popularity of golf via television. Golf, at that time, captured the aspirational value that affirmed success, inclusion and a desirable lifestyle.

Locating apartments and villas alongside golf courses has helped developers to increase sales velocity and add a sales premium to pricing, premiums which can range from 5% to as much as 30%. Numerous studies have indicated that golf courses come second only to water as the most desirable amenity for a residential community.

In Europe, the majority of golf real estate developments are concentrated in Western Europe, and typically marketed as second homes. On the African continent, South Africa has a significant number of golf real estate developments, and in more recent years the North African countries of Egypt, Morocco and Tunisia have followed this trend, a trend which also continues in the Middle East.

In 2008, in its report '*The Value of Golf to Europe, Middle East and Africa*', KPMG published the results of its research





[undertaken in conjunction with Oxford Economics] into golf real estate in the region in 2006. Their findings were as follows;

- In 2006, more than 150 golf real estate projects were completed in the EMA region.
- These projects provided 2.25 million square metres of residential space, in just over 17,000 individual villas, townhouses and apartments.
- 72% of these properties were built in the south of France, Portugal and Spain [favourable climate and established image as golf tourist destinations]
- 14% of the properties were built in South Africa.
- Eastern Europe accounted for 4%, with GB & Ireland just 3%.
- Other areas of Europe, Africa and the Middle East accounted for just 2% each.
- In total these golf real estate developments generated Euro €18.8 billion in revenue in the EMA economy and Euro €4.9 billion to EMA GDP.
- The developments supported more than 120,000 jobs, paying Euro €2.6 billion in wages.
- The greatest impact occurs in Europe where the majority of golf real estate is built.

## Hotels

Hotels are very regularly found as an integral component of a golf and leisure facility, and have been associated with golf facilities longer than real estate or other complementary facilities.

They vary in size, style and level of service, and most generate their revenue not only from the golf course activities but also from other activities such as non-golf residents, meetings, conferences, weddings and other social functions.

A lot of golf hotels also have other sports facilities, leisure centres and spas as additional facilities to broaden market appeal.

A number of international and national hotel management companies operate within the golf industry, at properties that they own, lease, manage under contract, or franchise their brand



to owners and local operators. There are also golf hotels in many countries that are owner-managed.

## Light Industrial, Hi-Tech, Research & Development Business Units

In theory there is no reason why commercial light industrial, Hi-technology, and research and development type business units cannot be developed on land immediately adjacent to a golf course.

Whilst it is unlikely that this type of development would be integrated into a resort development, it would be practical and beneficial to a golf course that derived its main revenues from the local-resident population. Firstly, the close proximity of numbers of people to a golf facility may encourage golf participation, and secondly a golf clubhouse may be able to generate additional food and beverage revenue from the adjacent workers.

## Retail Units

Retail shopping, in one of its many forms [separate units, shopping centre, and outlet village] could also be developed alongside a golf facility. The benefits that could accrue to a golf facility having a working population next to it can similarly be applied to retail shoppers.



## Vineyards/Wineries, Olive Groves & other agricultural activities

There are examples of golf courses located in and around vineyards, olive groves and other agricultural produce in other countries.



## The Author

**Roger Jones** was born in Shropshire, UK in February 1963 and has spent his entire working career involved in the golf and leisure industry.

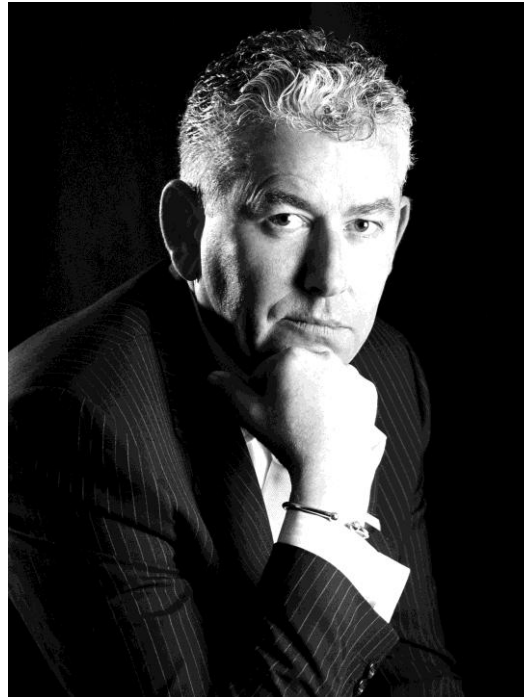
Having taken up golf aged 10, Roger soon fell in love with it. He won numerous club competitions, was Shropshire Junior Champion on two occasions, a Wales Junior International [1979 - 1981] and England Schoolboy International [1979 - 1980].

Roger turned professional in 1981 but after four enjoyable years it was evident that he was not going to reach the level required to be a successful tournament playing professional.

Staying in the world of golf, he established RJ Golf Consultancy in the UK, specialising in the marketing and management of corporate golf events. His contracts included managing an annual national golf championship for The Caravan Club, arranging and managing golf holidays and golf schools for the Club's own travel company Touchstone Holidays, as well as golf day events for many UK based clients from blue chip plc's to local companies.

Roger was also contracted to assist in the establishment of a new golf facility near Paris, France - assisting the owner with the establishment of the golf business, and teaching the many newcomers to the game of golf. On his return from France he became a consultant to Petron Golf Equipment, a company specialising in the manufacture and marketing of tailor-made golf equipment, later becoming responsible for the setting up of a UK network of 'Custom Made Golf Club Fitting Centres'.

In 1990 he first became involved in golf course design and development consultancy in Wales. In 1991 a contract for the design of an executive golf course near Killarney brought him to Ireland and in 1992 he relocated there. Since 1992 Roger has been involved in the design and establishment of golf courses in Ireland, UK, USA and around Europe. Involvement in the development, pre-opening and operational phases of these developments has provided him with a broad knowledge of all aspects of the golf industry.



In 2001 Roger was contracted to design Garnant Park GC in Wales, an 18 hole golf course built on the site of an open-cast coal mine. When construction was completed Roger advised the local authority owners on the first management contract for the course. The club was awarded the honour of 'Best New Golf Club in Wales 2003'.

During 2007/2008 Roger carried out a re-design, renovation and upgrade for Balcarrick GC in Ireland. The course was successfully re-launched in June 2008, and in February 2009 Balcarrick GC was awarded an International Finalist place in the Renovation of the Year 2008, a global competition promoted by Golf Inc magazine in the US.

Roger has established a successful business which is currently concentrating its efforts on a number of different golf markets of the world, including India, Eastern Europe and Middle East. The company also provides a wide range of advisory services for golf development and operational management, and past assignments have included the preparation of a national golf development strategy for a country that has only two existing golf courses, but realises the benefits that golf and golf tourism can bring to its economy in the future.

In his years in business Roger has established solid and lasting relationships with many other specialists in the industry ranging from buildings architects to engineers, agronomists, ecologists, financial advisors, hotel consultants, construction companies, and many more. He has made presentations at a number of industry conferences and is a regular attendee at major industry events.

Roger is the owner and senior designer of Roger Jones Golf Design, and the owner of GreenScape Consulting. For all enquiries Roger can be contacted at any time by phone or email;

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