

Members' and Proprietary Golf Clubs' Survey 2024/25 Report

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Welcome to the 2024/25 annual members' and proprietary golf club survey report from Hillier Hopkins, now in its 19th year.

I would like to start by thanking every single golf club that took the time to complete this year's comprehensive survey and our survey partners at the Golf Club Secretary Newsletter and the UK Golf Federation. Without their help this survey and report would not be possible.

This year's findings reflect a sector that has not only weathered recent economic and environmental pressures but has shown remarkable resilience, growth, and adaptability. As always, our report serves as a resource for club managers, board members, and stakeholders eager to benchmark their performance and chart a sustainable course for the future.

Over three-quarters of Members' Clubs (85%) and Proprietary Clubs (89%) surveyed had seen the 2023/24 report. They had typically used last year's report for benchmarking against competitors, making strategic decisions, gleaning specific industry information and providing information for the board.

The report's findings underline the critical role that adaptability and innovation play in the continued success of golf clubs. Membership figures are rising, with 59% of members clubs and 55% of proprietary clubs surveyed now boasting over 600 playing members compared to 56% and 55% respectively in 2023.

This growth is accompanied by a surge in flexible membership options, which cater to increasingly diverse lifestyles and needs. Members clubs offering flexible membership has grown from 34% to 40%, while proprietary clubs have embraced them at a rate of 64%, illustrating the sector's commitment to inclusivity and accessibility.

These shifts are helping clubs attract younger players, retain existing members, and accommodate those who prefer a more tailored approach to membership.

Financially, the picture is encouraging. A significant 77% of members clubs and 73% of proprietary clubs, rising from 68% and 54% in 2023, now report annual turnovers exceeding £1 million, signalling a strong recovery from the challenges brought about by the pandemic.

Bar revenues, too, have surged from 70% last year to 81% of members clubs generating annual revenues of more than £150,000. Proprietary clubs, while generally operating on a smaller scale, have also seen revenue growth, particularly in areas such as green fees and swing studio income.

These financial achievements are a testament to the ingenuity and resilience of club leaders, who continue to find innovative ways to diversify income streams and enhance member satisfaction.

Of course, success does not come without its challenges. Rising costs remain a persistent concern, particularly as wage increases and energy prices continue to exert pressure on budgets. However, there is good news on the horizon. Anticipated energy price increases have subsided considerably, with members clubs expecting average rises of just 3% and proprietary clubs bracing for a less manageable 9%. Even so, clubs must remain vigilant, with wage costs driven by living wage adjustments proving a significant factor for both members and proprietary clubs.

Investment remains a central focus, with clubs prioritising upgrades to courses, irrigation systems, and clubhouses. Members clubs lead the way in this regard, with 60% reporting the installation of fairway irrigation systems. Proprietary clubs are also making strides, particularly in integrating new technologies and facilities, such as swing studios, which have become a hallmark of modernisation. While spending levels differ between members and proprietary clubs, the shared commitment to maintaining and improving facilities underscores the importance of long-term planning and reinvestment.

Amidst this progress, the sector remains acutely aware of the challenges ahead. Demographic changes, environmental sustainability, and inclusivity are areas of focus for clubs as they prepare for the future. The willingness of 95% of members clubs and all proprietary clubs to update their rules and regulations is a clear indicator of the sector's readiness to adapt. From modernising dress codes to addressing water usage concerns, clubs are taking steps to ensure their relevance and sustainability in a changing world.

We hope you find this year's members and proprietary golf club survey report interesting and helpful and would welcome your thoughts.



Sam Hodson
Principal

A word from our survey partners

Jeremy Ellwood, Editor of The Golf Club Secretary newsletter

Managing a golf club can, at times, be a bit like being a fund manager in the financial sector. There will be times of relative feast and famine over the years in the life of most golf clubs and retaining a healthy financial position can be much easier at certain times than others. The best golf club managers equip themselves with the best information to smooth out the peaks and troughs.

Covid brought an unexpected feast, but as we all know, nothing lasts for ever and the years since then have brought different challenges in the form of vastly increased energy costs and weather patterns that seem hell-bent on making things ever trickier for those tasked with maintaining and caring for our courses in their desire for year-round playability.

Some of the issues influencing the ebb and flow cannot be foreseen or predicted – who knew Covid was on the way and that, despite the initial shock, it would ultimately somehow end up being one of the best things to happen to many golf clubs for quite some years. Other issues can be foreseen a little more easily, making preparing for their arrival and impact more of a pre-planned judgement call than a kneejerk response.

But where can you tap into the information that will help you tread the best path through the many challenges golf clubs and their managers face? This Hillier Hopkins annual golf club survey is one of the best places to start, making for interesting and enlightening reading as it highlights benchmark figures and current trends within the industry.

The Golf Club Secretary newsletter is pleased to have been associated with this invaluable survey and report for 12 years now, with the extensive excerpts we run in the newsletter always very well received by our subscribers and readers. It helps to better inform their thoughts about various issues so they can guide their boards and committees towards the best decisions for their golf clubs and members.

We very much believe that combining this survey's findings with an annual subscription of £295 for our newsletter is a very wise move for any golf club, as every month we highlight and tackle all the important issues relating to legal matters, agronomy, course management, golf course architecture, insurance, employment law, health and safety, history and heritage and much more, courtesy of contributing experts in those various fields.

We would recommend checking out the headline figures on page 7 of this survey and then diving in to study the full findings to see how your club stacks up against industry averages and help you keep your finger on the pulse.



Douglas Poole, Chief Executive Officer of the UK Golf Federation

The 2024 Hillier Hopkins Annual Report is a must read for all involved in operating a golf facility across the UK. For many years the UK Golf Federation has shared important data with Hillier Hopkins, helping them to provide our sector and all sectors of the golf industry with up to date, accurate and valuable information on market trends, costs and developments. This can clearly help us all to keep ahead of industry trends and enable our businesses to grow and prosper.

The 2024/25 Survey and Report is a great source of information and starts to show the impact of the higher inflation in the country and huge increases in operations materials and power costs etc. Last year also brought in new costs and change through the new government's budget changes in employment and tax additions. Our changing climate has had an impact as well with courses being closed more often through wetter seasons and new costs in working in a sustainable manner. Therefore, I believe this year's report is a recommended read for all with golf facilities and is a great way to check performance and costs against others in our business.

This Report highlights the challenges of owning or managing a golf facility over 2024 and the value of staying informed about industry trends, staffing and all service costs. It emphasizes that passion alone isn't enough to ensure success and warns about common pitfalls like rising costs and external pressures affecting customer engagement. The Hillier Hopkins Annual Report is presented as an essential resource for golf facility operators, offering insights into market trends, costs, and developments.

The 2024/25 Hillier Hopkins Report notes its focus on the impacts of high inflation and increased operational expenses, makes it a valuable tool for benchmarking and strategic planning.

The logo for the UK Golf Federation is displayed within a rounded rectangular border. It consists of the words "UK GOLF" on the top line and "FEDERATION" on the bottom line, both in a bold, black, sans-serif typeface.

**UK GOLF
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Members' clubs

Members' clubs' key highlights

69 clubs

This year we bring you data from 69 members' clubs across 9 regions, with 30% from London and the South East (outside of the M25). Clubs are predominantly 18-hole clubs.

59%

An increasing proportion of members' clubs have 600+ members. The proportions of lady and junior members and age profiles have remained consistent.

48%

An increase in the percentage of members' clubs who have a waiting list. This has also been accompanied by more people on waiting lists.

55%

A majority of members' clubs now have subscription levels above the CASC £1,612 threshold – an increase from 43% in 2023. 94% of members' clubs are also planning to increase subscription fees, by an average of 6%.

77%

In 2024, 77% of clubs have a turnover exceeding £1 million, compared to 68% in 2023. Only 3% have a turnover below £600,000, compared to 11% in 2023.

81%

Of members' clubs now have annual bar revenues exceeding £150,000, recovering from just 37% in the COVID affected 2020.

3%

Average energy price rises of just 3% are anticipated by members' clubs over the next year – a sharp decline from the 35% increases expected last year.

95%

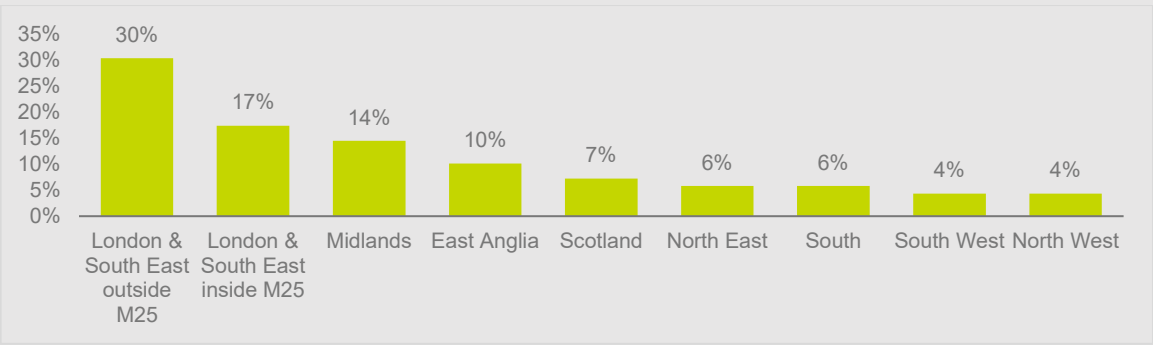
Of members' clubs were prepared to change their rules and regulations to modernise.

Members' clubs' results 2024

69 clubs, typically with 18-hole courses

This year we bring you data from 69 members' clubs from across nine regions of the UK, with 30% from London and the South East (outside of the M25). These were predominantly 18-hole clubs (86% - slightly more than in 2023), with 6% 27-hole, 4% 9-hole and 4% 36-hole (or more) clubs.

Residence of members' clubs



Members' clubs

Staffing

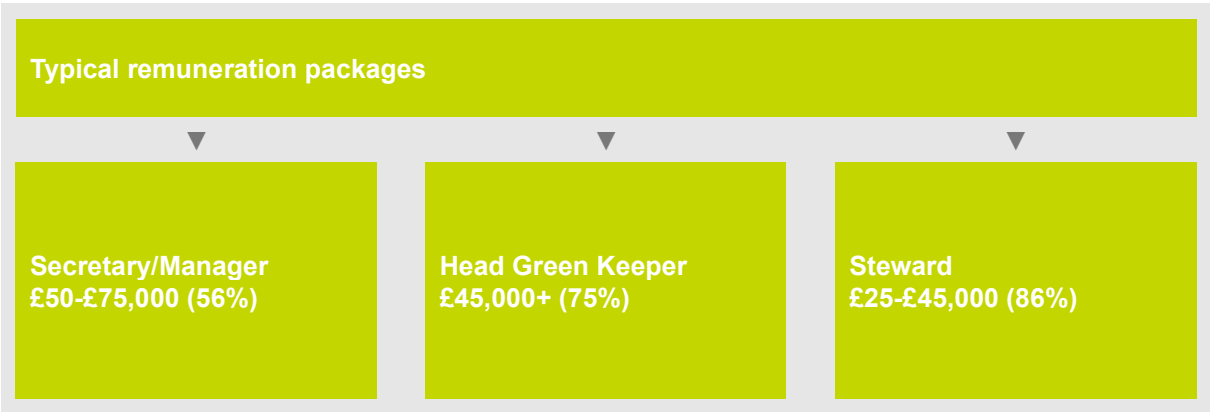
Staffing

Increasing remuneration packages

Typical respondent remuneration packages were higher than 2023, with 91% of Secretaries/General Managers earning in excess of £40,000, compared to 84% last year.

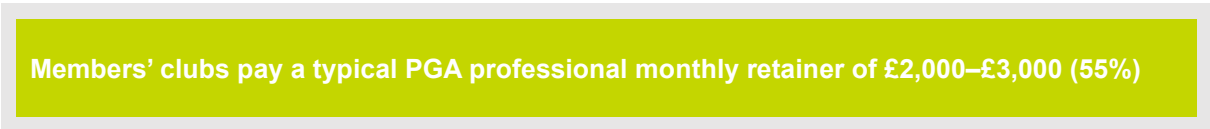
Head Green Keeper remuneration packages also increased this year, with 56% earning in excess of £50,000, compared to 45% in 2023.

43% of members' clubs do not have a steward (a reduction from 55% in 2023), but among those who do, 73% earn in excess of £30,000.



PGA professionals with retainers

93% of members' clubs have a PGA professional – slightly less than the 94% in 2023. These are typically (90%) paid a retainer. The level of retainer has increased since last year, with 73% earning in excess of £2,000 (65% in 2023).

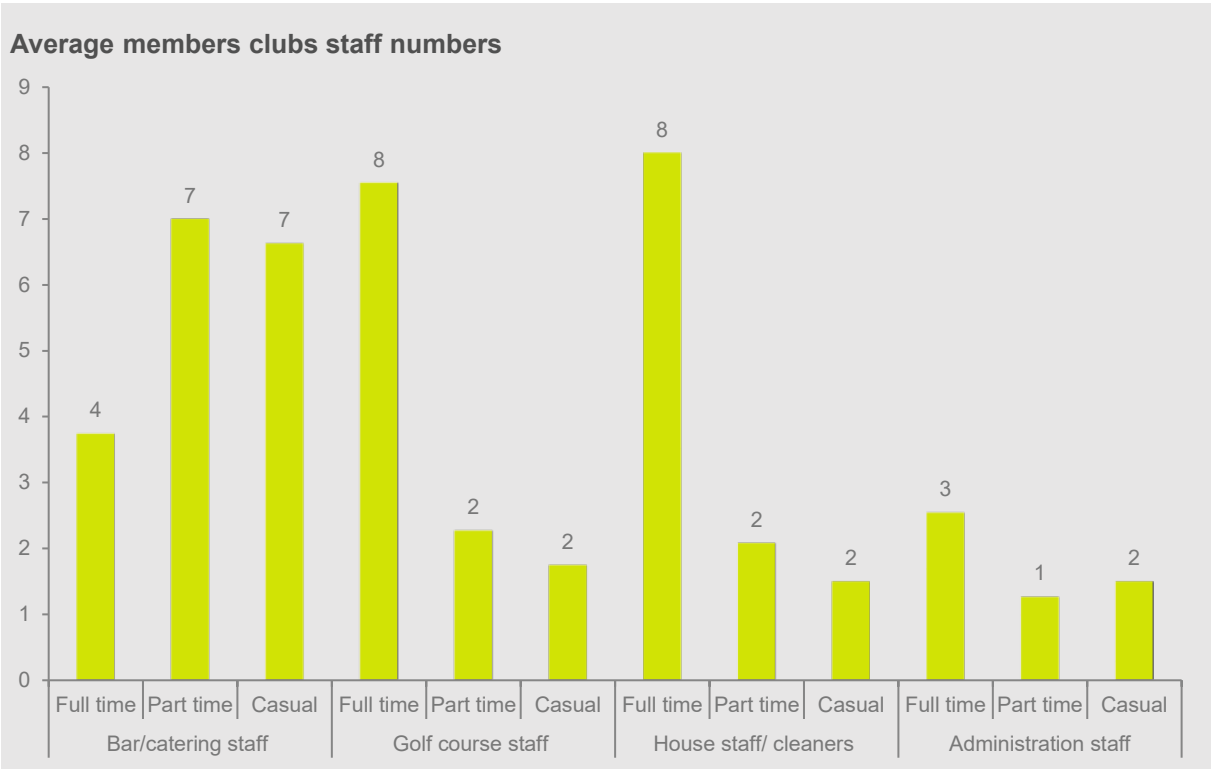


More members' clubs pay commission to their professionals

57% of members' clubs pay commission to their professional, a significant increase from the 23% paying commission in 2023. Actual commission rates are typically in the same range (5-10%). For the few members' clubs where the professional pays the club a percentage of their golf lesson income, the amount is between 2%-50%, with most (40%) paying 15%.

Staff numbers at members' clubs

Always highly variable and dependent on the size and needs of each club in question, total staffing figures range from 6 to 106 across members' clubs, with an average of 26 total staff (identical to 2023). Average numbers across each function are broken down as follows.



Most figures are within 1 person of the numbers recorded in 2023. The exception is for house staff/cleaners, where the average number of full-time staff has increased from 1 to 8, impacted by one club having 63 staff in this category.

Members' clubs

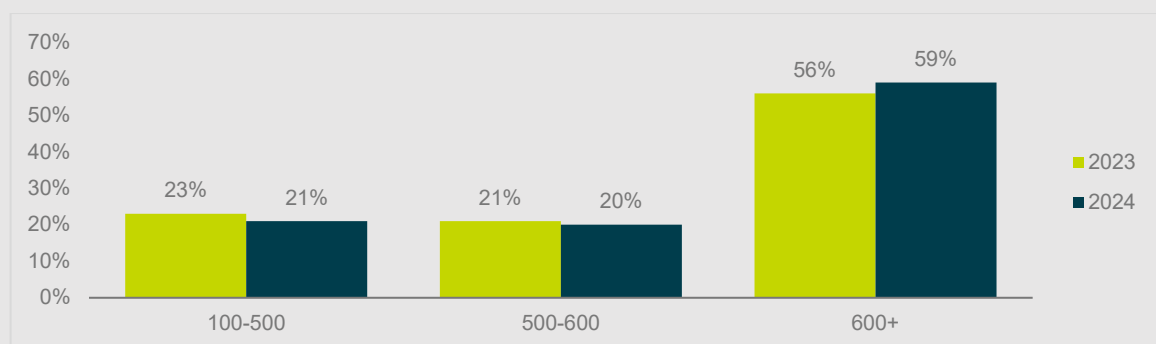
Members

Members

Member numbers increasing

The proportion of members' clubs with more than 600 playing members has continued to increase, rising from 56% in 2023 to 59% in 2024.

Playing members at members' clubs



Flexible membership

The proportion of members' clubs who offer flexible membership has increased this year. After falling in recent years to 34% in 2023, it was offered by 40% of members' clubs in 2024.

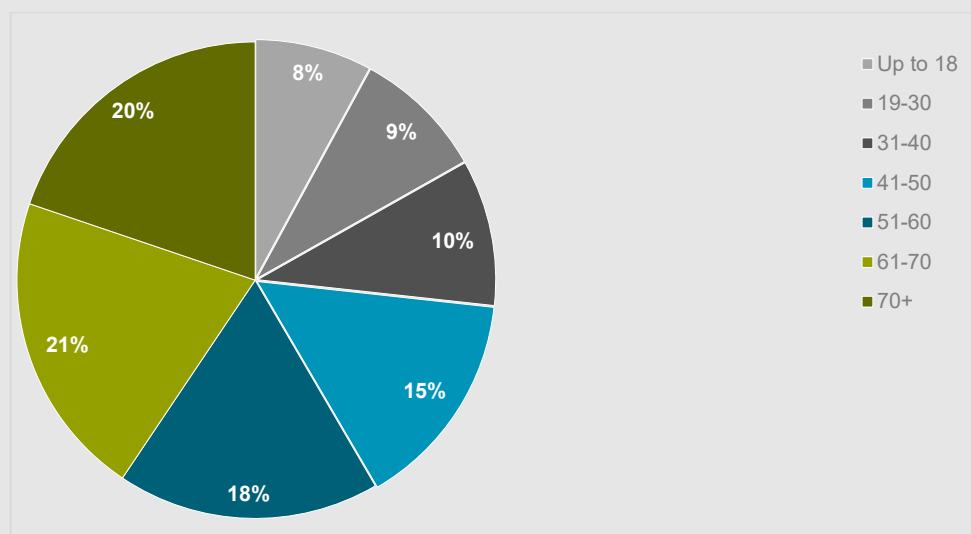
Deals included:

- Linked to number of rounds played.
- Benefits for Lady and Junior members.
- Benefits for different age groups – both younger and senior members
- Points-based schemes.
- Voucher and credits-based systems.
- “Lifestyle” schemes, often related to times, days of the week and seasons.

A consistent age profile of members

As in previous years, the age distribution of members' clubs shows fewer younger members and more older members. The profile split is similar to last year, with most categories within 2% of the 2023 figures. The exception is the age 41-50 category, which has increased from 12% to 15%.

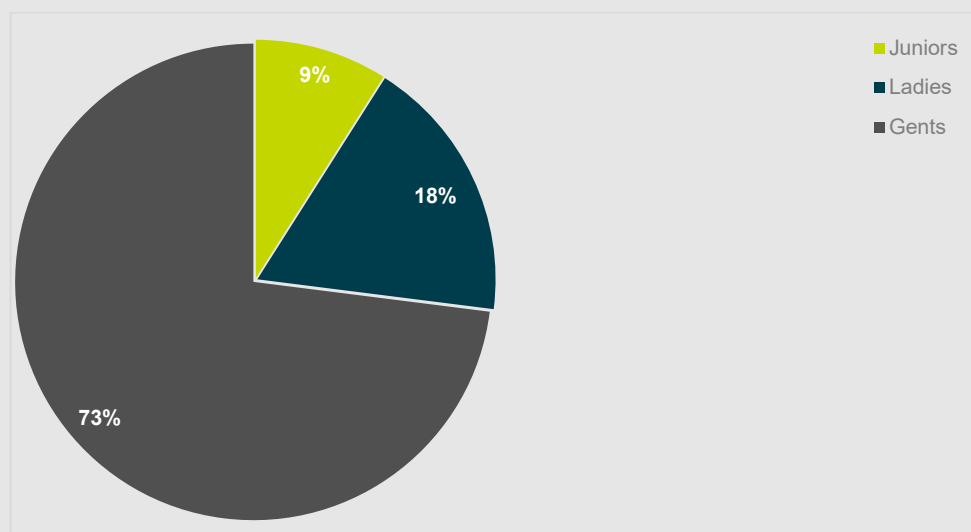
The age of members club members



Consistent gender profiles

In 2024 the proportions of junior, lady and gentlemen members were identical to those of 2023.

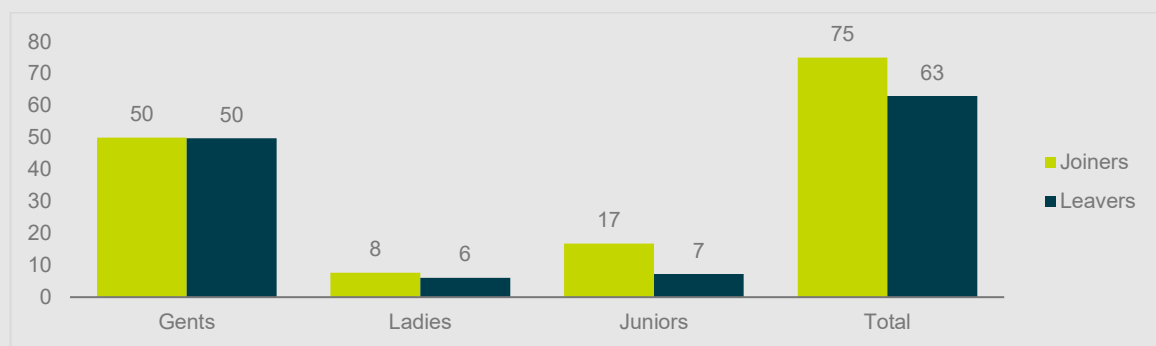
The profile of playing members at members' clubs



Joiners and leavers

In 2024, there were an average of 75 joiners for members' clubs, similar to the 73 in 2023. The numbers of lady and junior joiners – 8 and 17 – were the same as in 2023. However, this year there were slightly more gentlemen joiners (50, compared to 48 in 2023). There was also an increase in the average number of leavers this year – from 56 in 2023 to 63 in 2024. Most of these leavers were gentlemen members – 50 in 2024, compared to 42 in 2023. 22% of members' clubs reported more leavers than joiners in 2024 – an improvement on the 24% reported in 2023.

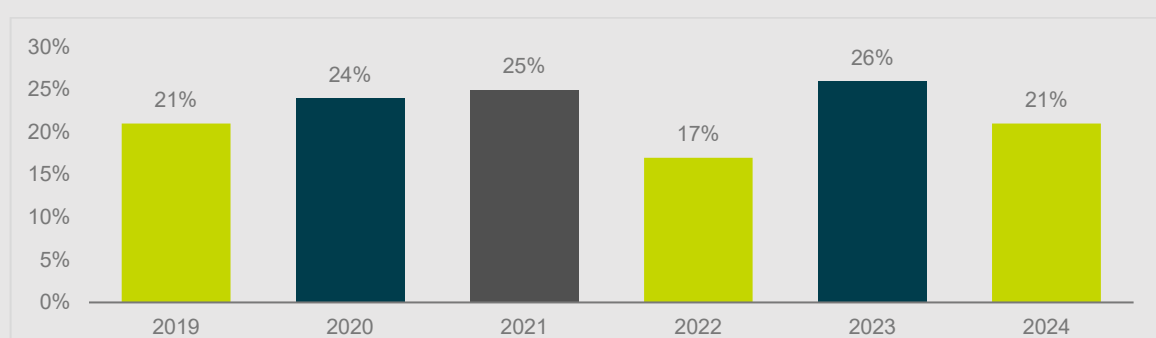
The profile of joiners and leavers at members' clubs



Fewer social members

The proportion of members' clubs with a social membership exceeding 100 (21%) has reduced this year.

Members' clubs with over 100 social members



Rounds of golf delivered annually

Members' clubs were delivering between 400 and 210,000 rounds of golf to MEMBERS each year. The highest number of rounds played has increased from the 85,000 reported in 2023, and the average number of rounds played in 2024 (32,000) has increased from 27,000 in 2023.

The equivalent figures for VISITORS ranged from 800 to 41,000 with an average of 5,900 in 2024, similar to the 5,800 in 2023.

Society rounds

The number of rounds played by societies ranges from 12 to 10,000. The average number of rounds played this year (1,300) is more than the 1,100 in 2023.

Welcoming new members

In 2024 there were more activities offered by clubs to welcome new members. The most popular activities were:

- Social events – 63% in 2024, compared to 42% in 2023.
- Introduction to the club professional – offered by 61% of members' clubs in 2024, compared to 55% in 2023.
- Induction programmes – 57% in 2024 and 55% in 2023.

Other popular activities include a complimentary round of golf (37%) and free coaching sessions (22%).

Member social activities

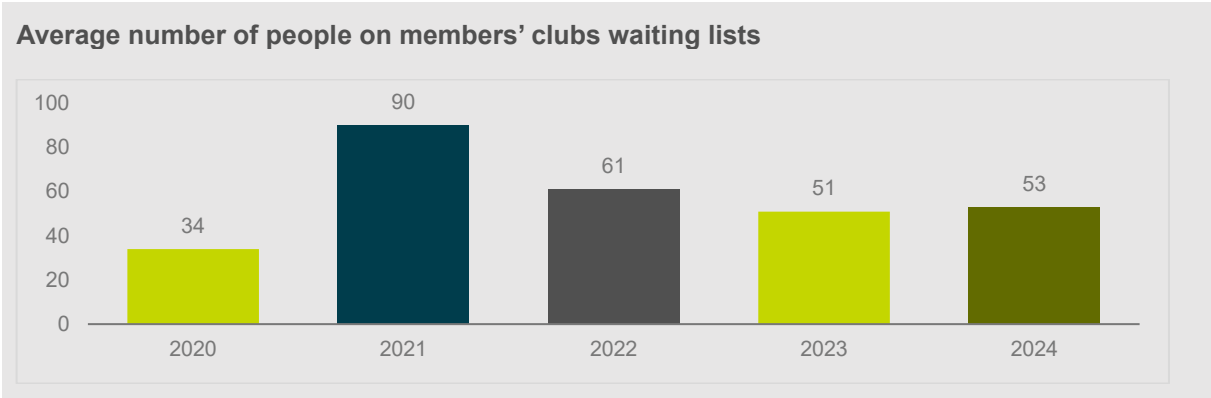
Members' clubs often ran member social events during 2024, with the number of activities at each club ranging from 0 to 100. The average number of 15 events run by members' clubs in 2024 is an increase on the 11 reported in 2023.

Member competitions

The number of member competitions run during the year ranged from 6 to 324, with an average of 123 – similar to the 121 in 2023.

Waiting lists

The proportion of members’ clubs with a waiting list has increased this year – from 46% in 2023 to 48% in 2024. This has been accompanied by an increase in the average number of people waiting to join – currently standing at 53, compared to 51 in 2023. Most clubs (59%) keep those on the waiting list informed about the situation, and during 2024 an average of 21 members at each club progressed from the waiting list to membership at the last renewal.



Fewer downgraded memberships

The number of downgraded memberships (i.e., reducing from a 7-day to a 5-day member, etc.) reduced in 2024. This figure ranged from 0 to 40, with an average of 9, compared to 18 in 2023.

Upgraded memberships

The survey also asked clubs about the number of upgraded memberships during the year (i.e., going from a 5-day to a full membership or flexible to full membership, etc.). This figure ranged from 0 to 30, with an average of 8, a fall from the 13 in 2023.

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Hillier Hopkins LLP
2024 Report

Members' clubs

Facilities

Facilities

Most members' clubs have a driving range or practice ground

78% of members' clubs confirmed that they have a driving range or practice ground, very close to the 77% reported in 2023.

43% of members' clubs reported driving range income in excess of £5,000 in 2024, a similar figure to the 41% in 2023. In 2024, 30% of members' clubs earned over £10,000 from their driving range, slightly less than the 32% in 2023.

For most members' clubs (76%) the driving range income in 2024 was about the same as in 2023. 20% saw an increase (compared to 15% last year) and 4% reported a decrease.

Just 2% of members' clubs offered pre-bookable driving range slots (less than the 5% in 2023). Ball tracking technology was used by 8% of members' clubs driving ranges, slightly more than the 5% reported in 2023.

Short game practice area

90% of members' clubs have a short-game practice area, slightly more than the 88% reported in 2023.

Few members' clubs offered a hotel, on-site accommodation, or spa

Only one members club offered any hotel or on-site accommodation, and this was in the form of Dormy rooms. Spa facilities were offered by two members' clubs and only one club had a gym.

Most members' clubs have swing studios

Swing studio facilities were offered by 56% of members' clubs in 2024, a decrease on the 64% in 2023. Most (76%) were run by the club professional and generated an average income of £4,400 (slightly less than the £4,700 reported in 2023). For the majority of members' clubs (88%) this swing studio income was about the same as the previous year, whilst 8% saw an increase and 4% a decrease.

Retail shops

Most members' clubs retail shops are operated by the PGA professional (75%, similar to the 77% in 2023). A further 22% of members' clubs operate a shop themselves. Annual revenue generated by these shops is over £150,000 for most (54%) members' clubs – similar to the 57% in 2023.

Members' clubs

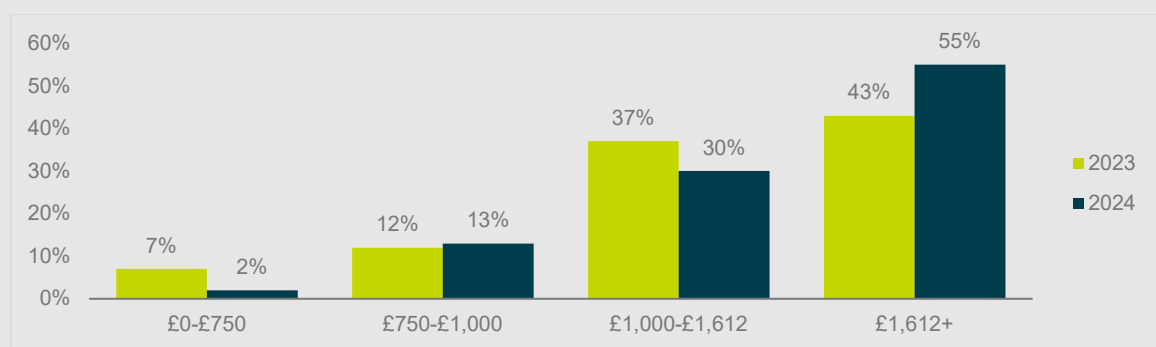
Fees & charges

Fees & charges

Higher standard playing member subscriptions

This year has seen a significant increase in members club subscription levels above £1,612 (the upper CASC threshold) – rising from 43% of clubs in 2023 to 55% in 2024.

Members' clubs' standard playing member subscription



Most members' clubs planning to increase subscription charges

A substantial majority (94%) of members' clubs are planning to increase subscription fees, comparable to the 95% in 2023. The levels of planned increases range from 2% to 15%, with an average of 6% (the same as the 6% average in 2023).

Social membership charges

The most typical social membership charge (for 49% of members' clubs) was, as in previous years, £50-£150 – although slightly lower than the 53% in 2023.

Entrance fees

The proportion of members' clubs charging an entrance fee continues to rise, to 72% in 2024 compared to 70% in 2023 and 53% as recently as in 2021. An additional 7% are also intending to introduce a charge in the future.

Joining fees range from £75 to £6,200, with an average fee of £1,830, increasing from the £1,770 in 2023. 62% of members' clubs allow joining fees to be paid in instalments, falling from 74% in 2023. These range from 1 – 5 years, with payments over 2 or 3 years being the most typical options.

Booking systems

An online tee booking system was used by 73% of members’ clubs, an increase on the 64% in 2023. Most (75%) of those members’ clubs who use a tee booking system use a specialist company for this.

Green fee charges at members’ clubs

In 2024, proprietary clubs’ average green fee charges ranged from £30.61 to £128.00. All categories showed an increase from the 2023 charges, with the largest increase for all day usage without a member.

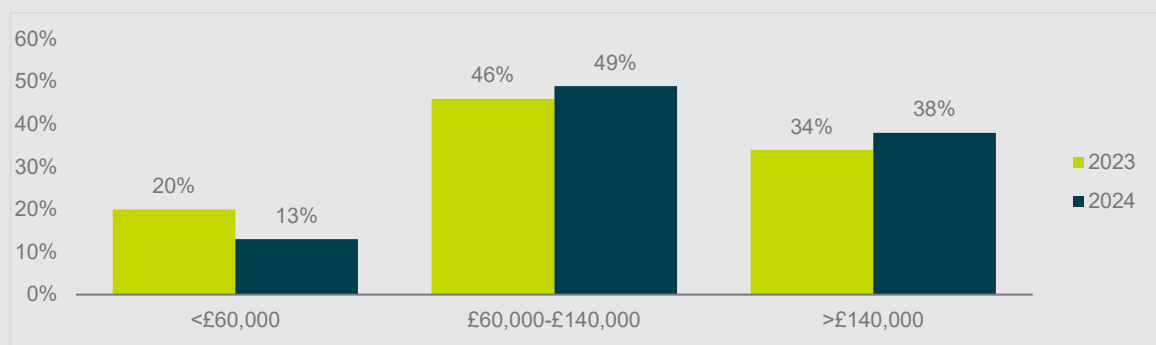
Members’ clubs’ green fee charges



Increasing green fee incomes at members' clubs

Members' clubs' green fee income has increased again this year, with 87% of clubs now generating annual green fee incomes in excess of £60,000, compared to 80% in 2023.

Members' clubs' green fee incomes



Green fee ticket systems

28% of members' clubs were using a numbered green fee ticket system in 2024 – exactly the same proportion as in 2023. In order to ensure that all visitors have paid before play, these clubs used a variety of ways of monitoring this system, the most popular of which were control by the pro-shop and monitoring by Course Marshalls.

Society packages and their costs

93% of members' clubs indicated that they allow society usage – slightly less than the 99% in 2023. Society package costs are shown below. Costs have risen since last year for all packages, with increases of between 9 - 54%.

Members' clubs' society package costs

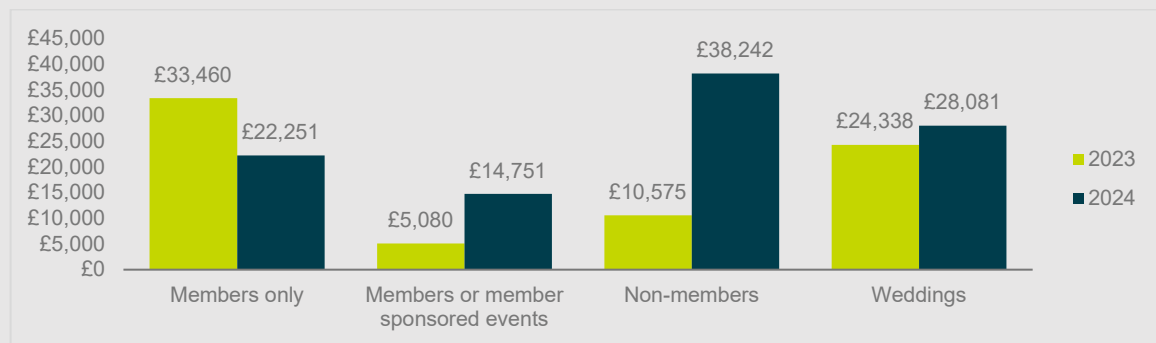


Average room and facility hire

As in 2023, this year celebrations/parties were the most frequent reason for room hire, for 78% of members' clubs – an increase on the 68% in 2023. Other reasons included business events/seminars (62%), weddings (48%), and health and fitness classes (6%). 20% of members' clubs in 2024 did not permit external hire – less than the 29% in 2023.

Average annual revenues generated from room hire show both increases and decreases between 2023 and 2024. However, there was a substantial increase in revenues generated by hire from non-members.

Room / facilities hire average annual revenue



Members' clubs

Financial information

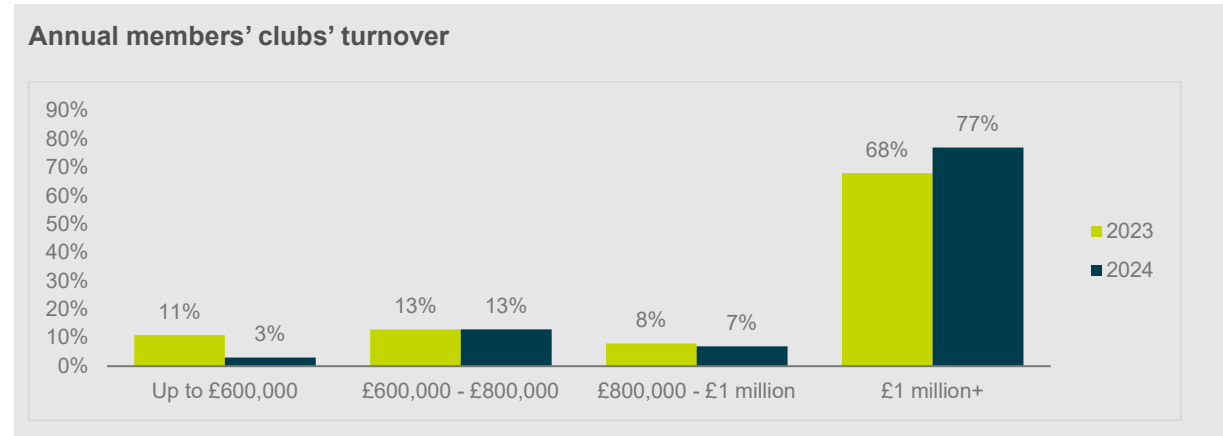
Financial information

VAT partial exemption

In 2024, 42% of members’ clubs had made a VAT COVID claim, increasing slightly from 39% in 2023. 55% of members’ clubs dealt with their VAT partial exemption in-house, slightly more than the 53% in 2023.

Members’ clubs with higher turnover

Members’ clubs report turnover levels ranging from £400,000 to £1million+. This year saw more clubs generating turnover above £1 million.

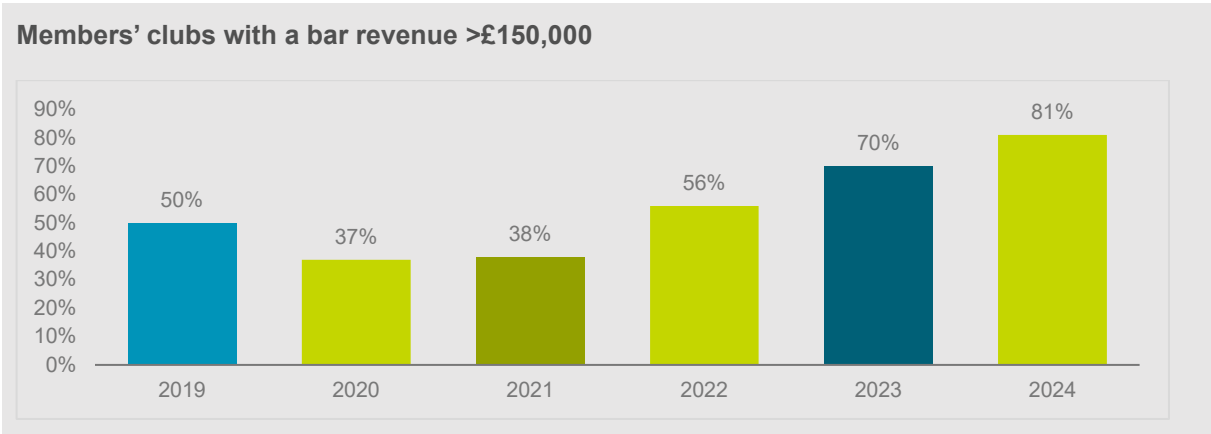


Society income at members’ clubs

Society income of £20,000-£40,000 was reported by 21% of members’ clubs in 2024, less than the 28% in 2023. However, more clubs now receive Society income of over £40,000 – 57% in 2024, rising from 55% in 2023.

Increased bar revenue and activity

In 2024, 81% of members’ clubs generated annual bar revenue exceeding £150,000, the highest level since this survey started.



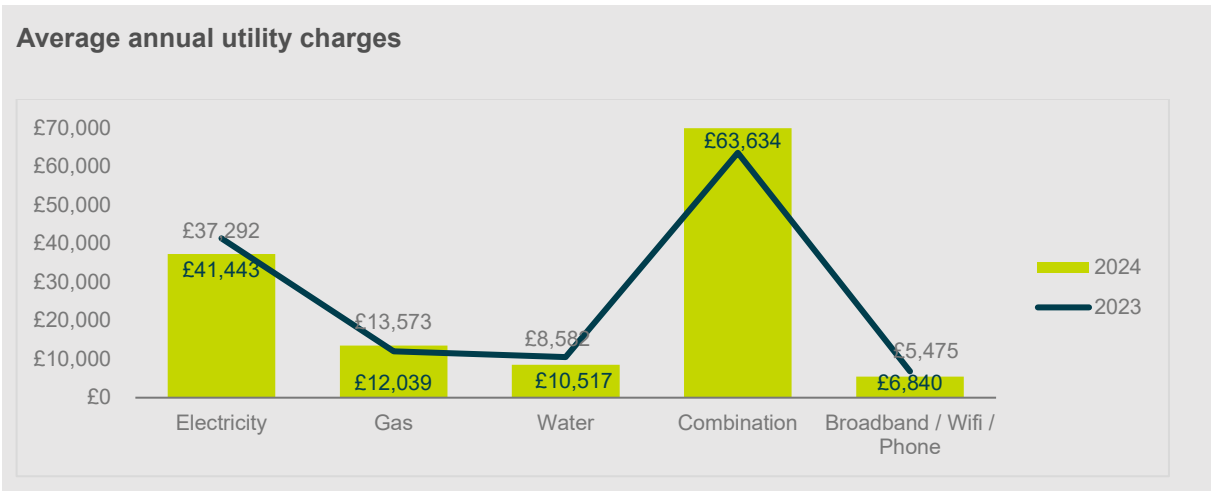
Average margins and rate costs this year were:

- Gross margin 59% (57% in 2023).
- Net profit 27% (25% in 2023).
- Rate cost £36,585 (£28,443 in 2023).

61% of members’ clubs indicated that their bar revenue had increased in 2024, slightly less than the 62% reported in 2023.

Stabilising utility costs

Average annual utility costs have fluctuated in 2024, after the cost increases in previous years. Averages are as follows, with comparisons to 2023 showing that gas and combination costs have increased, but electricity, water and broadband costs have reduced. Clubs were also asked what percentage increase they expected in energy costs over the next 12 months. The maximum increase anticipated was 20%, a healthy reduction from the 300% in 2023, and the average expected increase was just 3%, compared to 35% in 2023.



Average course maintenance and wage costs

Average members club course wage costs in 2024 of £275,054 are 8% higher than the costs in 2023. However, this year the average course maintenance costs have fallen by2%

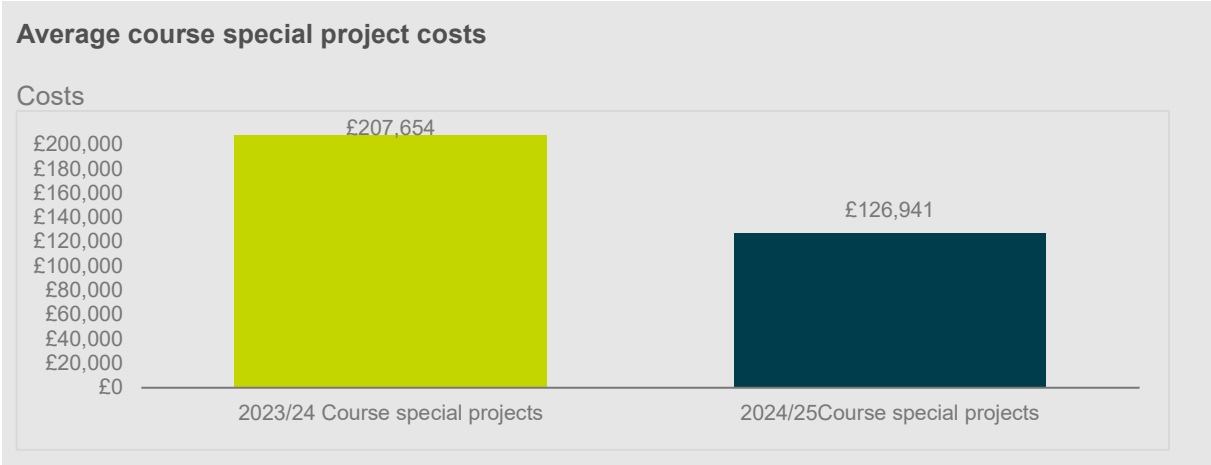


Irrigation

60% of members’ clubs reported that they had fairway irrigation installed in 2024 – a slight increase from the 57% in 2023. For those members’ clubs who *do not* currently have fairway irrigation installed, 33% are considering it (35% in 2023). Greens and tees’ irrigation systems have been updated recently by 44% of members’ clubs – compared to 38% in 2023. There was a wide range in the costs of these updates, from £6,000 to £1,150,000, with an average cost of £301,000.

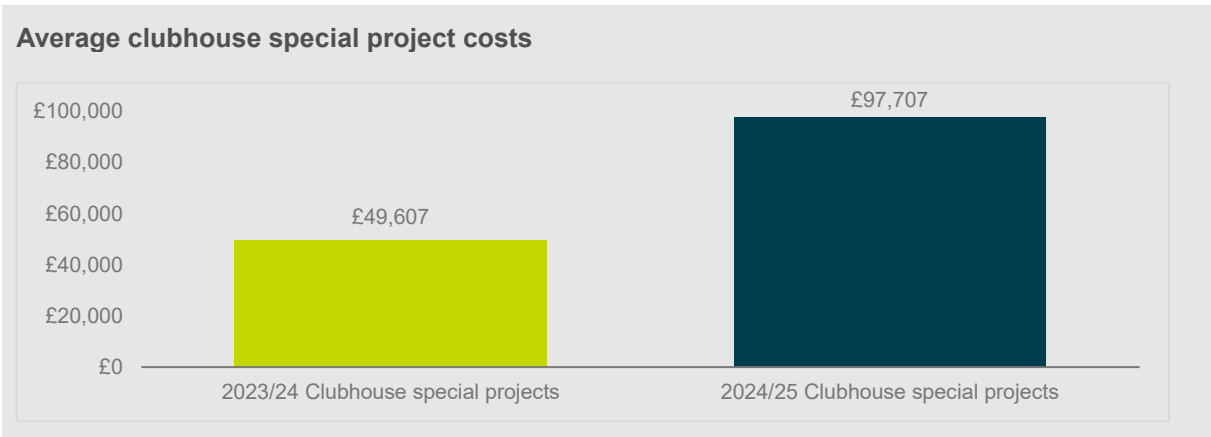
Average course special project costs

The average spend of members’ clubs on course special projects is expected to reduce next year, from overt £200,000 in 2023/24 to £126,941 in 2024/25.



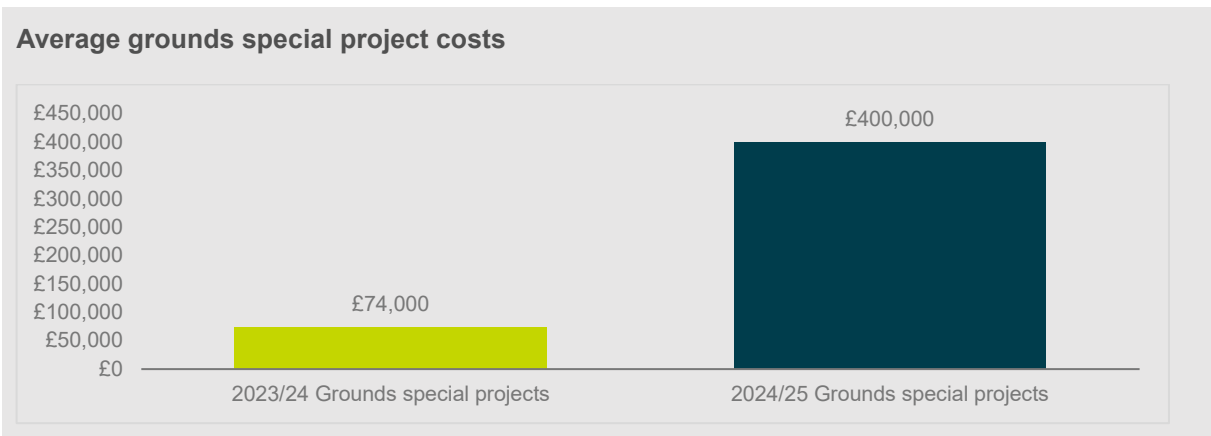
Average clubhouse special project costs

Spending is expected to increase on next year’s special project clubhouse costs, rising from £49,607 in 2023/24 to £97,707 in 2024/25.



Average grounds special project costs

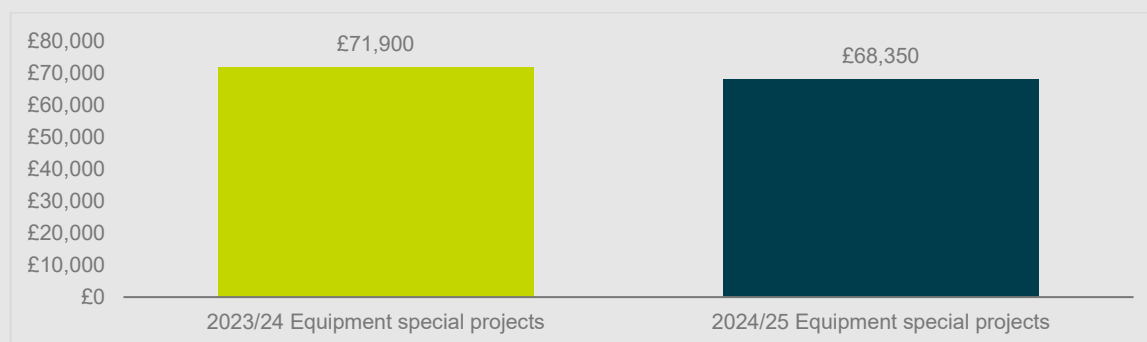
Spending is expected to increase significantly in 2024/25’s special project grounds costs, rising from £74,000 in 2023/24 to £400,000 in 2024/25.



Average equipment special project costs

In contrast, spending is expected to decrease slightly on 2024/25's equipment special projects – from just over £70,000 in 2023/24 to less than £70,000 in 2024/25.

Average equipment special project costs



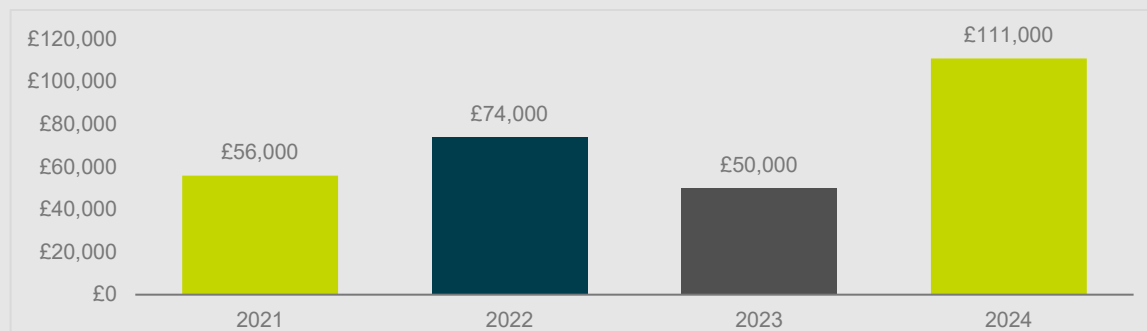
Other special projects

Two members' clubs gave an indication of other special projects they were undertaking this year, an irrigation upgrade and a new reservoir.

Clubhouse maintenance costs and staffing

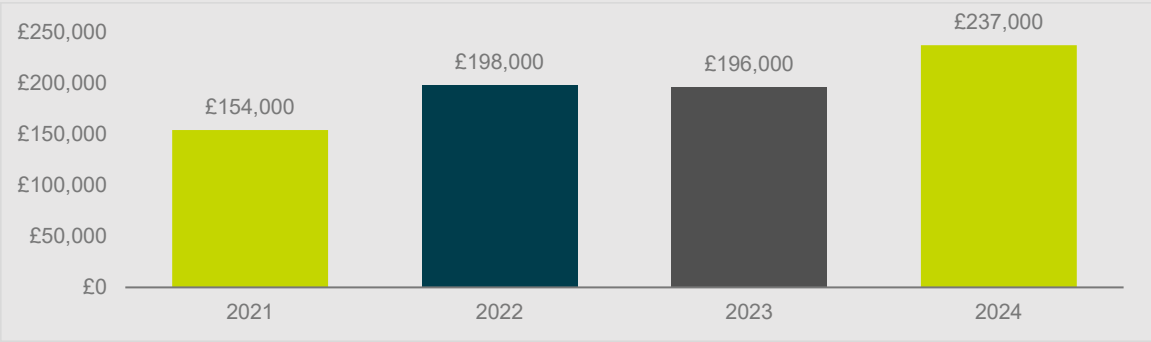
Average clubhouse maintenance costs increased substantially this year, from £50,000 in 2023 to £110,000.

Members' clubs' clubhouse maintenance costs



Average clubhouse staff wages among members’ clubs also increased this year, from £196,000 in 2023 to £237,000 in 2024.

Members’ clubs’ clubhouse staff wages



Members’ clubs catering

In 2024, 31% of members’ clubs were using franchise catering, increasing from 18% in 2023.

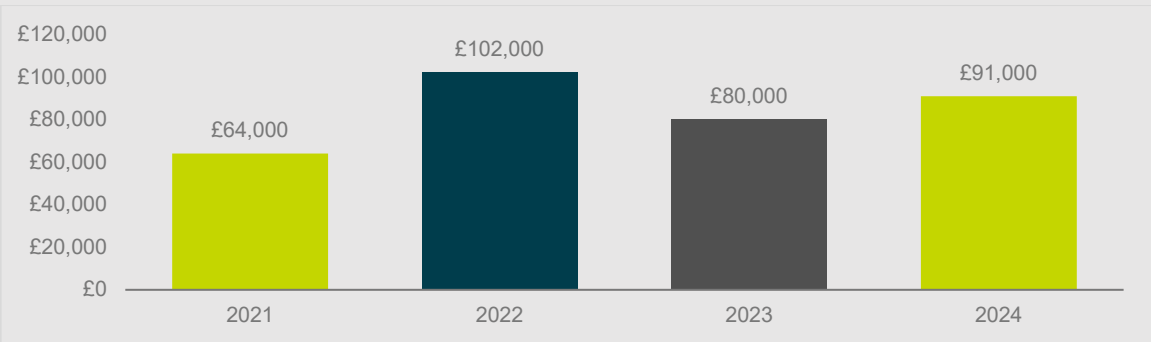
Among those members’ clubs who cater *without* the services of a franchise, revenue levels from catering range from less than £50,000 to £250,000 plus. In 2024, 62% of these clubs generated revenues of over £200,000, a significant increase from the 46% in 2023.

64% of members’ clubs indicated that their catering revenues increased in 2024 and only 18% saw a decrease. Gross profit margins in 2024 range from 40-78%, with an average of 59% (similar to the 54% average in 2023). Net profit margins range from a loss of 15% to a profit of 65%. The average net profit of 19% was an increase from the 8% in 2023.

Club surpluses and deficits

Among members’ clubs, the highest surplus figure was over £770,000, with a highest deficit of £80,000. The average surplus of £91,000 this year was an improvement on the £80,000 in 2023.

Members’ clubs’ average surplus



Annual general insurance

45% of members' clubs pay less than £15,000 for their annual general insurance, an increase from the 36% in 2023.

Freehold properties

36% of members' clubs (47% in 2023) indicated that they hold freehold properties other than the clubhouse. These clubs each held between 1 and 6 such properties, with 32 properties in total - 13 of which were valued at over £500,000. 64% of these were being rented out, mostly to third parties, but also to staff.

The survey also established that:

- 72% of members' clubs own freehold land and buildings.
- Annual ground rent at each club is an average of £69,300 (£51,500 in 2023).
- Members' clubs each cover an average area of 154 acres (160 in 2023).

Cost of supplying a round of golf

The cost for members' clubs of supplying a round of golf ranged from less than £10 to more than £100, but for most clubs (39%) it was between £10-£30

Raising finance

A variety of methods are used by members' clubs to raise finance for the club, the most popular being hire purchase/finance leases, which were used by 39% of clubs - an increase from 32% in 2023.

Other popular methods included:

- Bank loans (33% in 2024 and 38% in 2023)
- Loans from members (31% in 2024 and 19% in 2023).
- Donations from members (19% in 2024 and 16% in 2023).
- Grants (6% in 2024 and 16% in 2023).
- Private finance (6% in 2024 and 5% in 2023).
- Bank overdraft (3% in 2024 and 11% in 2023).

Other methods included cash reserves, member levies and sale of property.

Regarding how members' clubs had financed any shortfalls or fixed asset additions: the most popular methods were by member loan notes and sale of land or buildings, both used by 29% of members' clubs. Bank loans, mortgaging properties, cash reserves and overdrafts were also used.

Members' clubs

Business Development

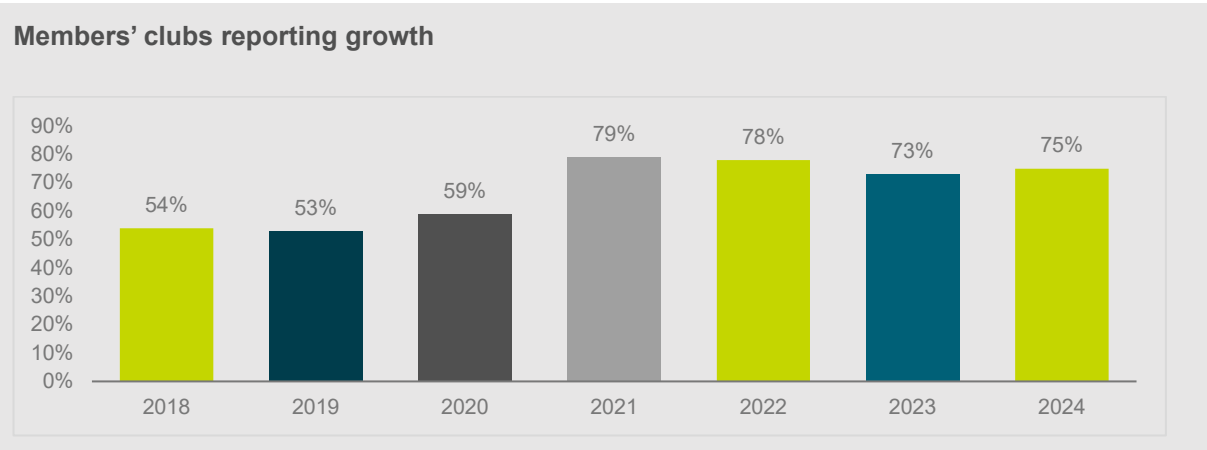
Business Development

A steady proportion of members’ clubs reporting growth

The number of members’ clubs reporting growth was 75%, slightly higher than the 73% in 2023.

The level of growth in the last 12 months varied between 2% and 18%, with an average of 8% (11% in 2023).

A further 23% of clubs reported that they were standing still and 3% reported a reduction.



Members’ clubs investing in marketing

Member referrals remain the most utilised method of marketing activity, used by 71% of members’ clubs this year, higher than the 64% in 2023.

The other most commonly used marketing activities in 2024 included social media (60%), advertising (38%) and special offers (17%). Networking, email campaigns and events were all used by 14% of clubs.

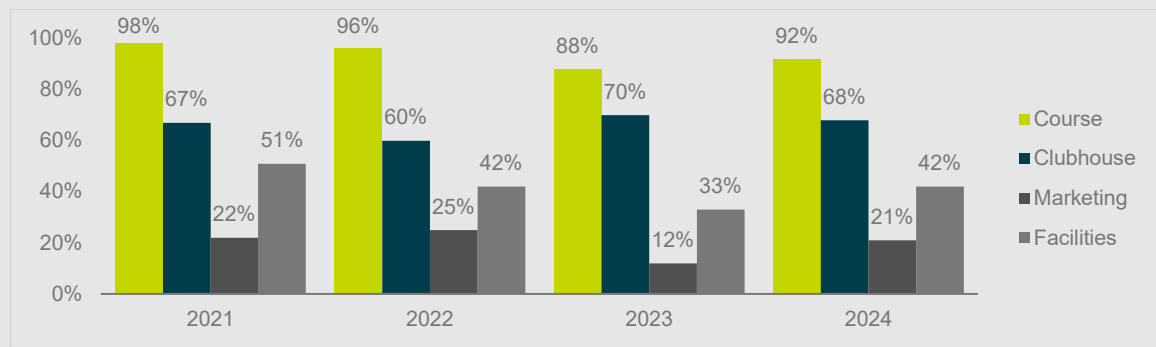
Other forms of marketing used in 2024 included direct mailings (12%), and corporate brochures (10%).

The most *successful* forms of marketing activity in 2024 were perceived to be member referrals (specified by 53% of members’ clubs) and social media (24%).

A continuing focus on the golf course as the major source of investment

Investment in courses, clubhouses and facilities has largely remained steady since 2021, with levels of investment in courses being consistently high. In 2024 there has been a significant increase in investment in marketing and facilities.

Members' clubs' investment



Members' clubs

Miscellaneous

Additional

Information

Miscellaneous additional information

Set opening hours

In 2024, 44% of members' clubs had set opening hours (36% in 2023), another 44 % had hours of 'daylight hours plus' (51% in 2023) and the remaining 12% had no set opening hours (13% in 2023).

Days closed

Members' clubs had closed the course/clubhouse for between 1 and 73 days due to maintenance or bad weather, with an average of 17 days of closure.

Use of temporary greens in winter

The use of temporary greens in winter was less frequent in 2024, falling from 64% in 2023 to 56% in 2024.

Dress codes

94% of members' clubs have a dress code, increasing from 90% in 2023. Codes frequently included 'smart casual' and golfing attire, with discouragement of denim, jeans (with or without rips), slogan clothing, shorts, tracksuits, t-shirts, football shirts and trainers.

Mobile phones policy

66% of members' clubs have a mobile phones policy, a decrease from the 73% in 2023. Codes frequently specified that they could not be used in the clubhouse and that they must be in silent mode.

Dogs

51% of members' clubs allowed dogs, an increase on the 45% in 2023. Where they were allowed, this was often on condition that they were well behaved, kept on leads and not allowed in the clubhouse.

Sports channel subscriptions

The average annual cost of SKY and/or TNT sports (formerly BT Sport) subscriptions has risen slightly from £7,494 in 2023 to £7,620 currently.

Anticipated changes affecting golf clubs in 5-10 years

The following changes were suggested/anticipated by members' clubs. Changes anticipated within the next 5 years largely mirror those anticipated over the next decade, with a definite increase in concerns regarding environmental issues (especially water supply), cost of living and rising costs:

Membership issues

- Falling membership numbers
- Need for more flexible membership options
- Demographic changes and an ageing membership profile
- End of post Covid boom
- Inclusivity and diversity.

Commercial and financial issues

- Staff recruitment and retention
- Staff costs, minimum wage and NI increases
- Cost of living.

Environmental considerations

- Adapting to climate change and sustainability issues
- Managing water security, availability and supply issues, with need for rationing, water storage, reservoirs and upgraded irrigation systems.

The impact of the living wage

In 2024, 64% of members' clubs indicated that they were impacted by the increase in the minimum living wage and workplace pensions – an increase on the 50% in 2023. This typically affected between 5-20 staff (more than the 5-10 in 2023), with cost increases of around 10% and up to £30,000.

Community Amateur Sports Clubs (CASC)

This year, just 5% of members' clubs indicated that they were Community Amateur Sports Clubs, falling from 7% in 2023. 6% of members' clubs indicated that they were considering becoming one.

Rules and regulations

95% of members' clubs confirmed that they were prepared to change their rules and regulations to modernise the club – exactly the same as the 95% reported in 2023.

Club structure

57% of members' clubs indicated that they are currently incorporated, a slight reduction from the 59% in 2023. Of those clubs not already incorporated, only 12% of clubs are considering it (compared to 16% in 2023).

Board structure

In 2024, 91% of members' clubs had board members, a slight increase from the 89% 2023, with an average of 8 members each (also 8 in 2023). The numbers at individual clubs range from 2 to 13.

The expertise present in the boards of members' clubs in 2024 was mainly in Business (85%) and Finance (82%). Other areas of expertise present included Marketing (44%), Legal (29%), HR (26%), and others (such as Construction, Medicine and Project Management – 12%).

Proprietary clubs

Proprietary clubs key highlights

11 clubs

This year we bring you data from 11 proprietary clubs across 7 regions, with 18% each from East Anglia, the South West, South, London and the South East (outside of the M25). Clubs are predominantly 18-hole clubs.

55%

Over half of proprietary clubs now have 600+ members (35% in 2023). This year there were fewer junior members – 9%, compared to 16% in 2023.

20%

Of proprietary clubs have a waiting list (compared to 17% in 2023). The average number of people on waiting lists in 2024 (140) was less than in 2023 (164).

60%

In 2024, 60% of clubs charged standard playing member subscriptions of at least £1,000, compared to 29% in 2023. Another 60% of proprietary clubs are planning to increase subscription fees in 2024, less than the 92% in 2023.

73%

Of proprietary clubs now with a turnover of £1 million+, compared to 54% in 2023.

50%

Of proprietary clubs with annual bar revenues exceeding £150,000, compared to 53% in 2023.

9%

Energy prices anticipated to increase by proprietary clubs by between 5% and 20%, with an average of 9%.

100%

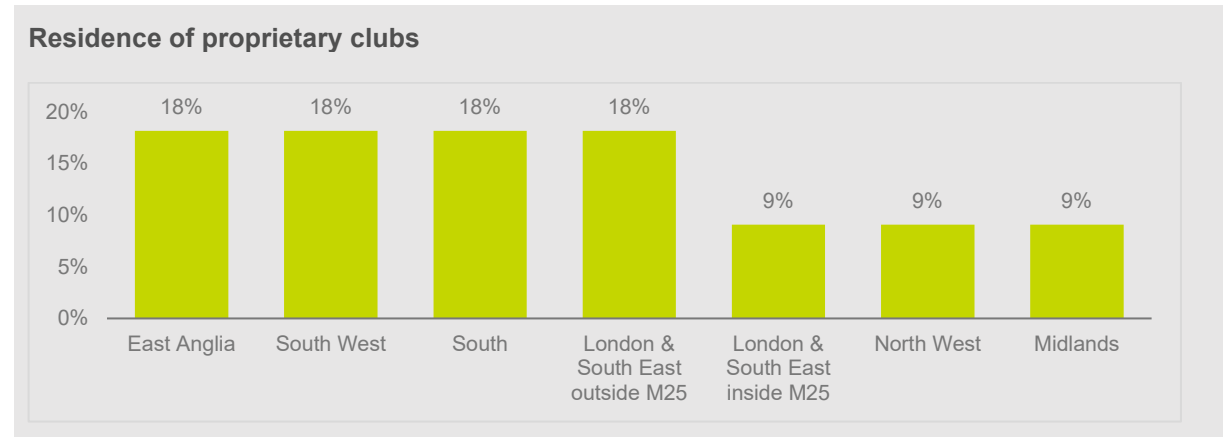
ALL proprietary clubs were prepared to change their rules and regulations to modernise.

Proprietary clubs’ results 2024

11 clubs from across the UK, typically with 18-holes

This year we bring you data from 11 proprietary clubs from East Anglia, the South West, South, London and the South East (outside of the M25) (all 18%) and London and the South East (inside the M25), the North West and Midlands (all 9%).

These were predominantly 18-hole (45%) clubs, with 27-hole (27%), 36-hole (18%) and 9-hole (9%) clubs also evident.



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Proprietary clubs

Staffing

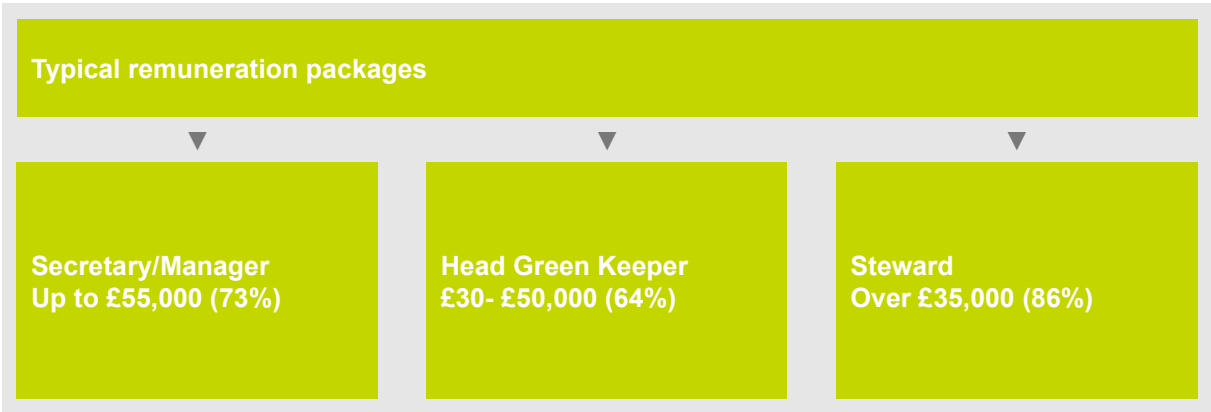
Staffing

Changing remuneration packages

There was again a large variance in the remuneration packages of survey respondents, ranging from under £10,000 to over £80,000. This year, 27% of Secretaries/Managers received a package over £55,000, a slight increase from the 23% in 2023.

The Head Green Keeper remuneration package has also increased this year, with 45% earning more than £45,000 (31% in 2023).

The proportion of clubs with a Steward has increased significantly – from 35% in 2023 to 64% this year. Their remuneration was in excess of £35,000 for 86%, an increase from the 66% in 2023.



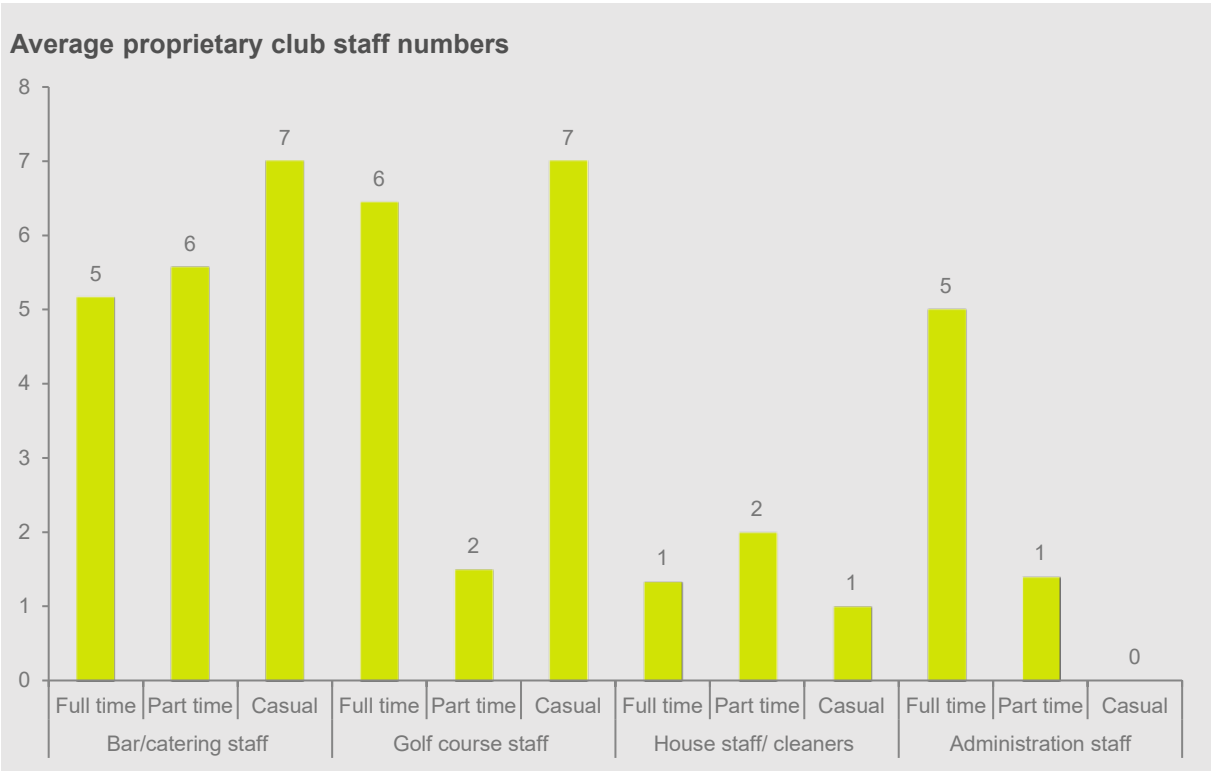
Fewer clubs with PGA Professionals

This year, all proprietary clubs indicated that they have a PGA professional - 100%, compared to 85% in 2023. 37% of proprietary clubs pay a monthly retainer to the pro, very similar to the 35% in 2023. The monthly amount paid in retainers was evenly split, with one third each receiving less than £1,000, between £1,500 and £2,000, and more than £2,000 (in 2023, half of proprietary clubs paid a retainer of less than £1,500 and half between £2,000-£3,000). 63% of the pros pay the club a percentage of their golf lesson income – again very similar to the 65% in 2023 - typically 10%-15% of this income.

An average of 26 staff at proprietary clubs

Always highly variable and dependent on the size and needs of each club in question, staffing figures range from 2 to 63 across proprietary clubs, with an average total staffing number of 26 – identical to the average of 2023.

Average numbers across staff roles are broken down as follows.



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2024 Report

Proprietary clubs

Members

Members

Proprietary clubs with more playing members

This year has seen an increase in the number of playing members at proprietary clubs, with 55% having more than 600 members, compared to 35% in 2023. 36% have between 300 and 600 members - very similar to the 35% in 2023, but only 9% have fewer than 300 members (30% in 2023).

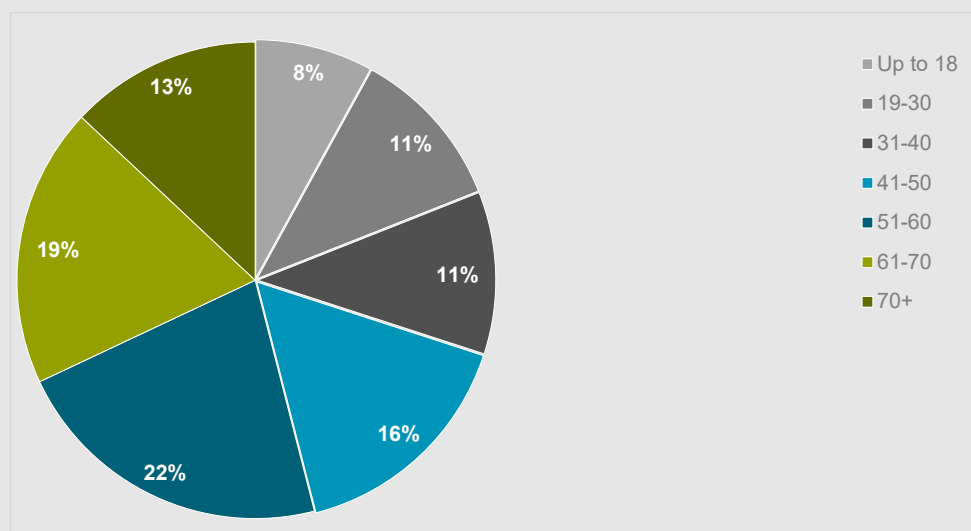
More flexible memberships

In 2024, 64% of proprietary clubs are offering flexible membership – an increase on the 57% in 2023. These offerings typically included points-based systems, a reduction in green fees and schemes related to days of the week.

A comparable age distribution

As in previous years, the age distribution of proprietary clubs shows fewer younger members and more older members. The results in all age brackets are within 2% of the percentages reported in 2023.

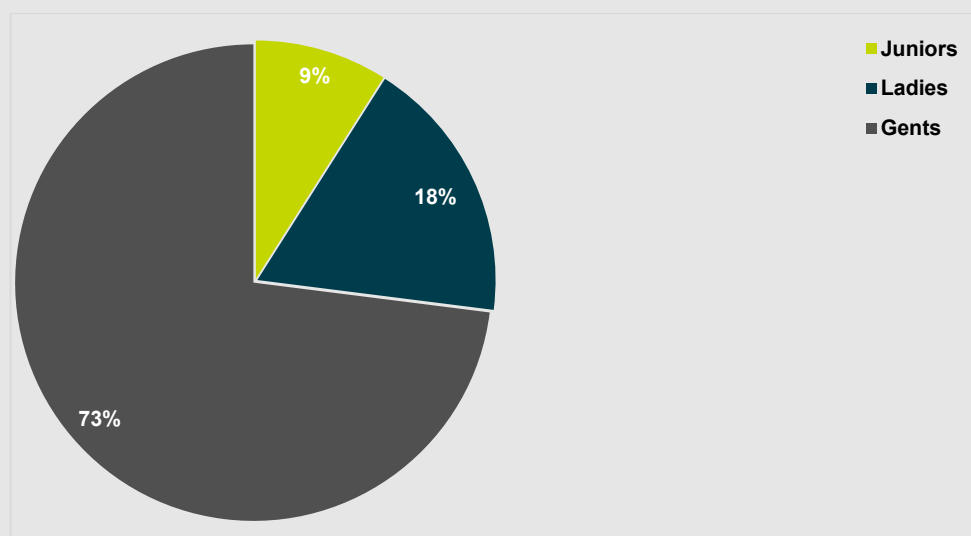
The age of proprietary club members



Fewer junior members and more gentlemen members

There has been a reduction in the proportion of junior members in 2024 – 9%, compared to 16% in 2023. The 18% of lady members reported in 2024 is very similar to the 19% in 2023, but in 2024 there was a larger proportion of gentlemen members – 73%, compared to 65% in 2023.

The profile of playing members at proprietary clubs

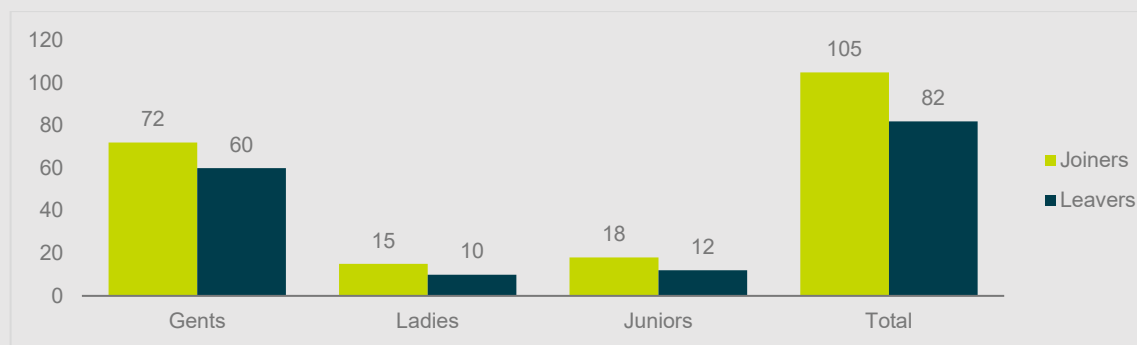


Membership numbers increasing, but at a lower rate

As in 2023, most clubs saw an increase in membership numbers, with only one club reporting a reduction. However, the increases in 2024 were not as healthy as those reported in 2023:

- The average number of joiners was 105, compared to 153 in 2023.
- The average number of leavers – 82 this year – increased from 77 in 2023.
- There was an average of 23 additional net members per club, compared to 76 in 2023.
- The average number of joiners reduced for gentlemen, lady and junior members.
- The average number of leavers increased, again across all member categories.

The profile of joiners and leavers at proprietary clubs



Fewer social members at proprietary clubs

The proportion of proprietary clubs with a social membership exceeding 25 people has fallen to 18%, compared to 60% in 2023.

Society rounds

The number of rounds played by societies in 2024 ranged from 70 to 6,000, with an average of 2,466 – a similar figure to the 2,500 in 2023. 56% of proprietary clubs reported that this had increased from 2023, again very similar to the 58% reported in 2023.

Rounds of golf delivered annually

Proprietary clubs were delivering up to 50,000 rounds of golf to MEMBERS each year – with an average of 31,333, compared to 29,441 in 2023.

The equivalent figures for VISITORS ranged from 8,000 to 50,000 with an average of 20,000, compared to 19,000 in 2023.

Welcoming new members

The most popular activities to welcome new members were a complimentary round of golf (also the most popular in 2023) and an introduction to the club professional. Other activities included induction programmes, social events and free coaching sessions.

Member social events

Proprietary clubs held an average of 8 social events in 2024, the same number as reported in 2023.

More member competitions

Most proprietary clubs ran member competitions during the year, with the number of competitions at each club ranging from 100 to 350, and an average of 203 (compared to 148 in 2023).

Waiting lists

20% of clubs had a waiting list in 2024 – slightly more than the 17% recorded in 2023. The average number of people on waiting lists in 2024 (140) was less than in 2023 (164). 40% of proprietary clubs keep those on the waiting list informed about the situation, and during 2024 an average of 55 members at each club progressed from the waiting list to membership at the last renewal.

Fewer downgraded memberships

This year the number of downgraded memberships (i.e., reducing from a 7 day to a 5-day member, etc.) ranged from 5 to 25, with an average of 15, fewer than the 20 in 2023.

Fewer upgraded memberships

However, the number of upgraded memberships decreased this year, ranging from 5 to 30, with an average of 14 (compared to 22 in 2023).

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Proprietary clubs

Facilities

Facilities

Driving range and practice ground

All of the proprietary clubs in this year's survey had a driving range or practice ground – an increase on the 77% in 2023.

Income from driving ranges varies from less than £5,000 (36% of proprietary clubs) to over £25,000 (also reported by 36%). This is a decrease from 2023, when 68% earned more than £25,000.

For most clubs (55%) the driving range income was about the same as the previous year. Whilst 36% reported an increase, this is far less than the 74% who saw an increase in 2023.

No proprietary clubs offered pre-bookable driving range slots, but this had not been popular in 2023 either, when they were offered by just 6% of clubs.

There was also a reduction in the proportion of proprietary club ranges providing ball tracking technology – 27% in 2024, falling from 32% in 2023.

Short game practice area

73% of proprietary clubs have a short-game practice area, less than the 88% reported in 2023.

A small proportion of proprietary clubs offer a hotel, on-site accommodation, spa and/or gym

This year, two proprietary club (one in 2023) offered a hotel or other on-site accommodation, which for both clubs was in the form of lodges.

No proprietary clubs had spa facilities or a gym – in 2023 no clubs had a spa, whilst 12% had a gym.

Most proprietary clubs have swing studios

The majority (73%) of proprietary clubs have a swing studio – substantially more than the 27% in 2023. For most of these clubs (63%), the swing studio is run by the club professional (71% in 2023). The average revenue from swing studios is £63,000, lower than the £90,000 reported in 2023. For most proprietary clubs (60%) these revenues were about the same as the previous year.

Retail shops

In 2024, 91% of proprietary clubs had a retail shop - similar to the 96% in 2023. For 36% of these, the shop is operated by the club professional (12% in 2023). Most proprietary clubs have a retail shop turnover below £200,000 (83%) - more than the 74% in 2023.

Proprietary clubs

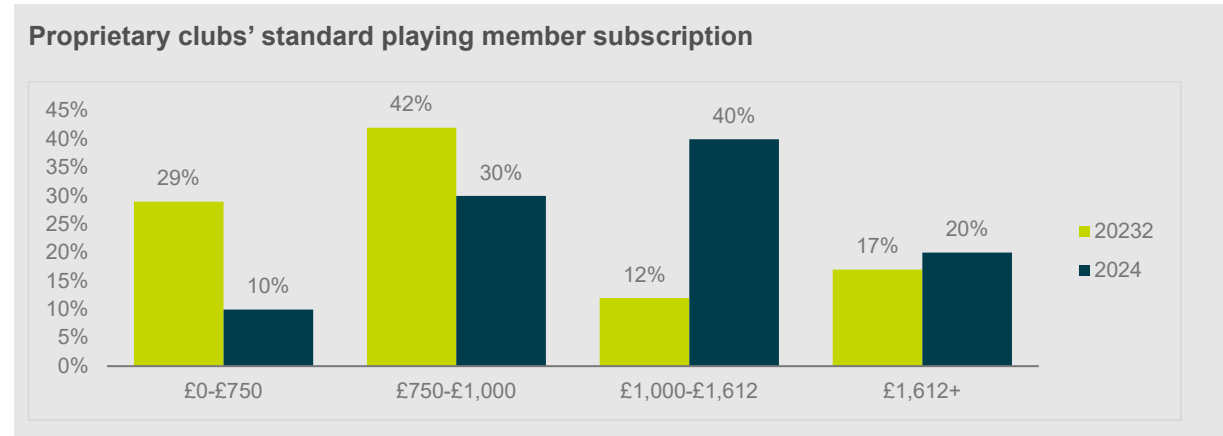
Fees & charges

Fees & charges

Subscriptions

As in previous years, membership fees for standard playing members vary significantly. However, this year there are more clubs in the £1,000 -£1,612 range and 60% exceeding £1,000 (compared to 29% in 2023).

Membership fees tend to be lower in proprietary clubs than in members' clubs.



Increasing subscription charges

60% of proprietary clubs (compared to 92% in 2023) are intending to increase membership fees next year, with planned increases ranging from 2%-5% with an average of 4%.

Social membership charges

Most (62%) of proprietary clubs charge over £25 for social membership subscriptions, an increase from the 53% in 2023.

Entrance fees

Half (50%) of proprietary clubs charged a joining/entrance fee in 2024, compared to 25% in 2023. These fees can be paid in instalments at 20% of proprietary clubs (17% in 2023).

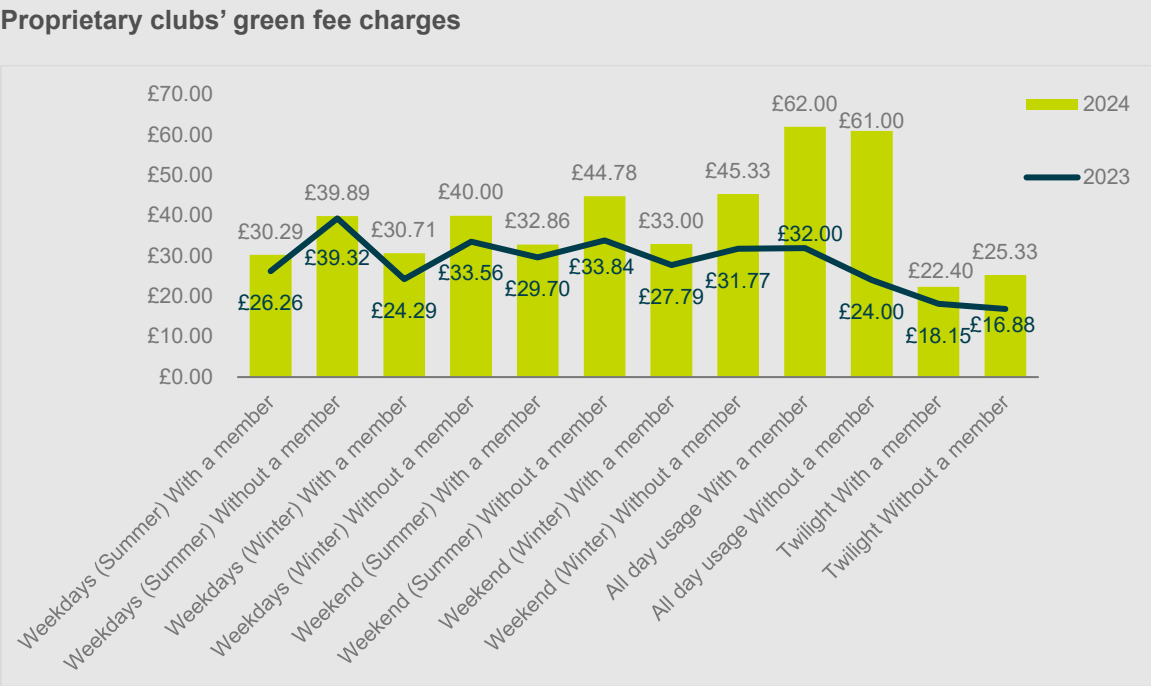
Booking system

Online booking/tee time systems are used at 90% of proprietary clubs, comparable to the 88% in 2023.

Almost two-thirds (63%) of proprietary clubs with a tee booking system used a company/website, far fewer than the 48% in 2023.

Green fee charges

In 2024, proprietary clubs' average green fee charges ranged from £30.29 to £62.00. All categories showed an increase from the 2023 charges, with the largest increases for all day usage.



Green fees collection is typically split between the Pro shop and Course Marshall (50% each). No proprietary clubs paid commission on the green fees collected.

Green fee income

In 2024 all proprietary clubs had a green fees income in excess of £100,000 – in 2023 some had less than £40,000. However, the proportion of proprietary clubs generating income at the top of this range (56%) was lower than 2023 (64%).

Green fee ticket systems

A numbered green fee ticket system was used at 20% of proprietary clubs – an increase from the 13% in 2023.

Society packages

All proprietary clubs indicated that they allow society usage, an increase from the 88% in 2023. Average costs are shown below. For three of these packages, costs have increased since 2023 by between 29%-70%, whilst for the 18-hole packages costs have fallen by 27%.



Room hire

Proprietary clubs hired rooms for a variety of activities, the most popular (both for 78% of clubs providing room hire) being celebrations/parties and business events/seminars. As only a small number of clubs chose to provide information regarding their room hire revenues, meaningful average hire revenue figures are not available.

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Proprietary clubs

Financial information

Financial information

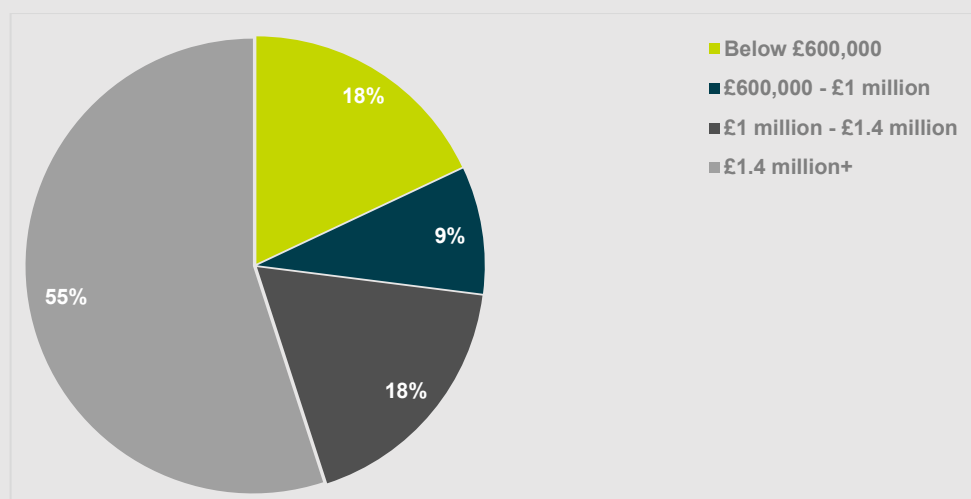
VAT partial exemption

In 2024, 57% of proprietary clubs had made a VAT COVID claim (47% in 2023) and 57% dealt with their VAT partial exemption in-house (87% in 2023).

More clubs with turnover above £1,000,000

Proprietary clubs reported turnover ranges from £500,000 to £4 million. The percentage of clubs with a turnover exceeding £1 million was higher in 2024, increasing from 54% to 73%.

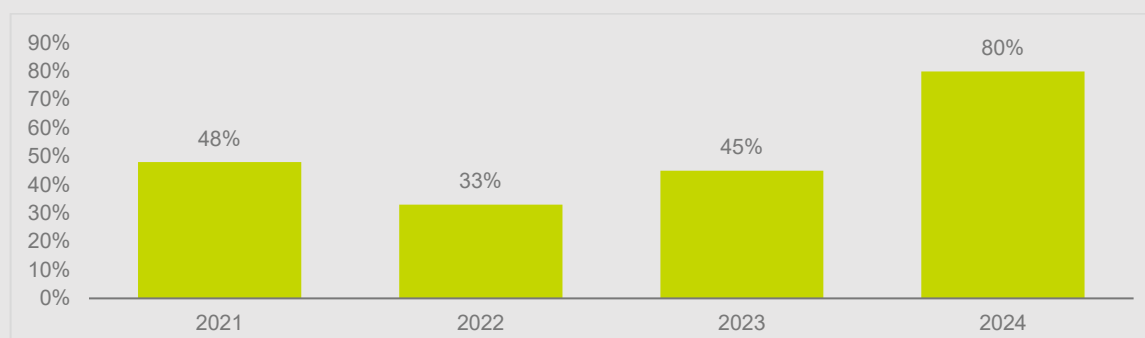
Annual proprietary clubs' turnover



Society income

The number of proprietary clubs with a society income above £60,000 has again increased this year.

Society income above £60,000



Bar revenue and activity

Average margins and other costs this year were:

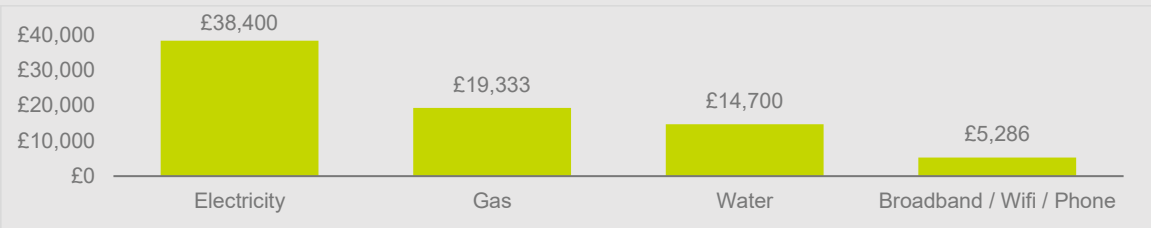
- Net profit 24% (down from 40% in 2023).
- Rateable value £67,000 (significantly down from £249,000 in 2023).
- Rate cost £18,000 (down from £45,000 in 2023).
- Club maintenance cost £19,000 (down from £47,000 in 2023).
- Wages level £153,000 (down from £235,000 in 2023).

These should be regarded as indicative of only those proprietary clubs who chose to disclose figures – with many choosing not to do so. Over 70% of proprietary clubs reported their annual bar revenue, which was in excess of £150,000 for 50% of those reporting (53% in 2023), but 63% of proprietary clubs reported an increase in bar revenues (59% in 2023). The average gross margin of 57% was lower than in 2023 (64%).

Utility costs

Average annual utility charges for proprietary clubs are presented below. Due to the low number of proprietary clubs providing these figures in previous years, it is not practical to compare them. Clubs were also asked what percentage increase they expected in energy costs over the next 12 months. An average rise of 9% and a range of increases of between 5%-20% were expected - lower than in 2023, when increases of up to 100% were anticipated.

Average annual utility charges



Average course maintenance and wage costs

Proprietary clubs’ average course maintenance and wage costs are presented below, although once again these results are based on a small number of clubs providing this information.

Average course maintenance and wage costs



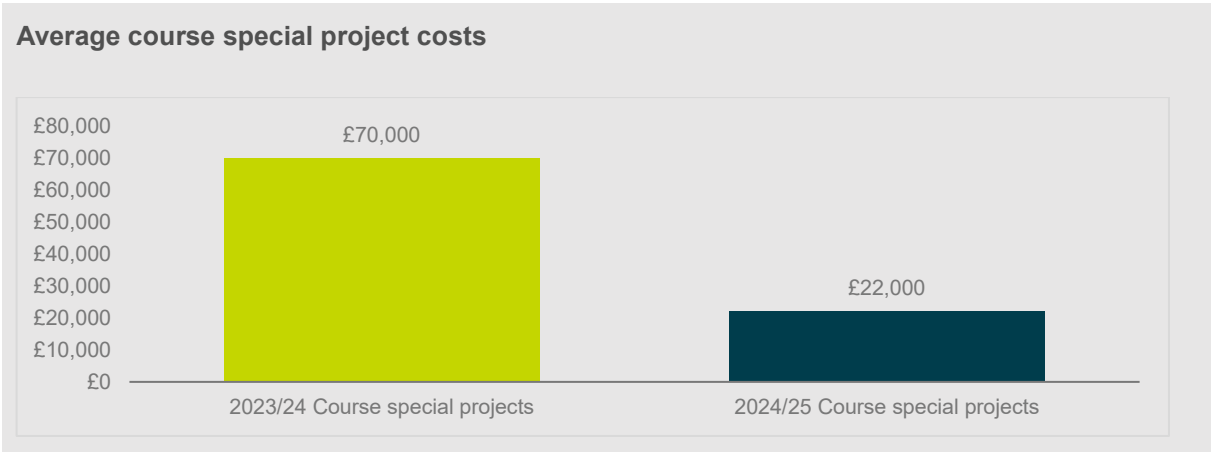
Irrigation

22% of proprietary clubs indicated that they currently have fairway irrigation installed (25% in 2023), but no clubs report that they are considering installing it.

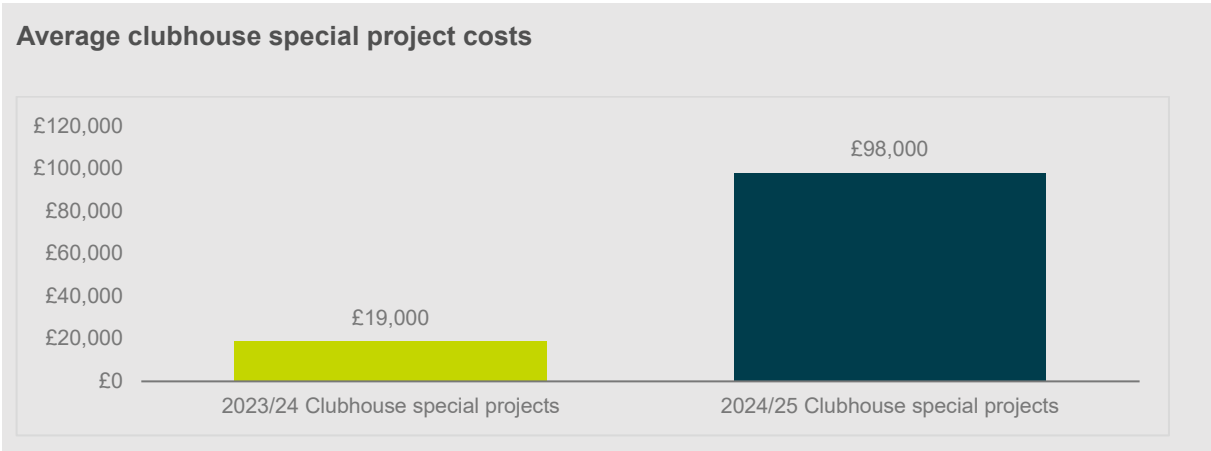
33% of proprietary clubs indicated that they have updated their greens and tees irrigation recently – almost identical to the 32% in 2023.

The following graphs present average current and estimated costs for special projects. Due to the small number of proprietary clubs providing this information it is not possible to comment on trends.

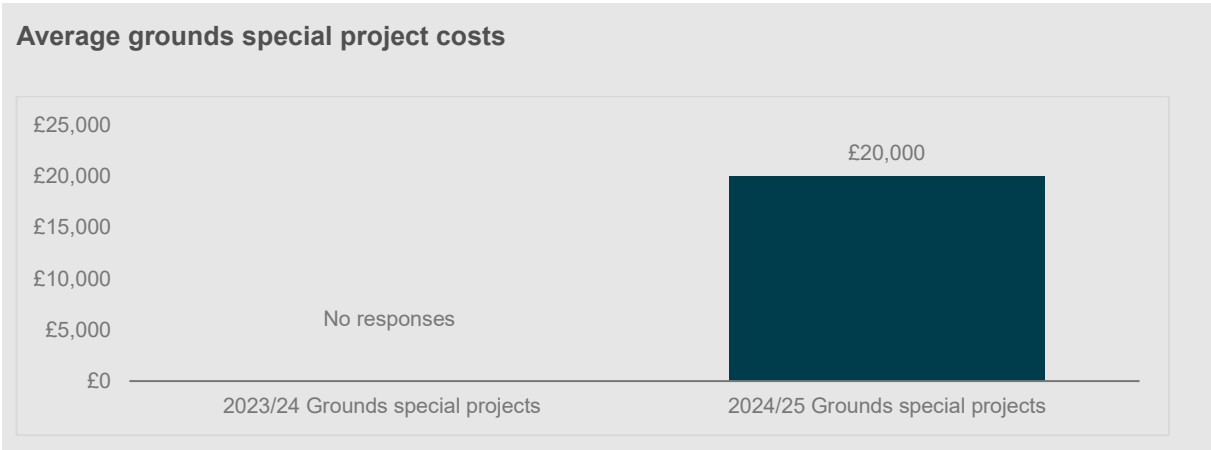
Average current and anticipated course special project costs



Average current and anticipated clubhouse special project costs



Average current and anticipated grounds special project costs



Average current and anticipated equipment special project costs



Other special projects

Proprietary clubs were asked to describe any other special projects they were undertaking this year, with one club indicating that they were investing in padel courts and associated buildings.

Proprietary clubs using franchise catering

No proprietary clubs used a franchise for their catering in 2023 (8% in 2023).

Among these clubs who cater without the services of a franchise, revenues ranged from below £50,000 to over £700,000, with 38% earning in excess of £200,000 (42% in 2023). In 2024, 50% saw a slight or modest increase in catering revenues, whilst 13% reported a decrease. Gross profit margins in 2024 averaged 52% (62% in 2023) and net profit 24% (below the 34% reported in 2023).

Club surpluses and deficits

Proprietary clubs reported an average surplus of £180,000, falling from £192,000 in 2023.

Annual general insurance

Proprietary clubs typically (44%) pay less than £10,000 for their annual general insurance, a similar situation to 2023.

Freehold properties

43% of proprietary clubs indicated that they held freehold properties other than the clubhouse in 2024, an increase from the 18% in 2023. In 2023, all proprietary clubs holding these properties indicated that they were being rented out to staff, but this year half were rented to staff and half to third parties.

The survey also established that:

- 88% of proprietary clubs own freehold land and buildings (48% in 2023).
- Proprietary clubs each cover an average area of 138 acres (204 in 2023).

Cost of supplying a round of golf

The average cost for proprietary clubs of supplying a round of golf ranged from less than £10 to £30; for 67% of clubs the cost was between £10 and £20.

Raising finance

A variety of methods are used by proprietary clubs to raise finance for the club. The most popular was private finance (for 57% of proprietary clubs). Other methods were all equally popular with 14% of clubs using loans from members, donations from members, bank loans and hire purchase/finance leases.

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Proprietary clubs

Business development

Business development

An increase in the number of proprietary clubs reporting growth

The percentage of proprietary clubs reporting growth in 2024 was 78% - an increase from the 65% in 2023. The level of growth in the last 12 months varied between 2% and 12%, with an average of 8% (10% in 2023).

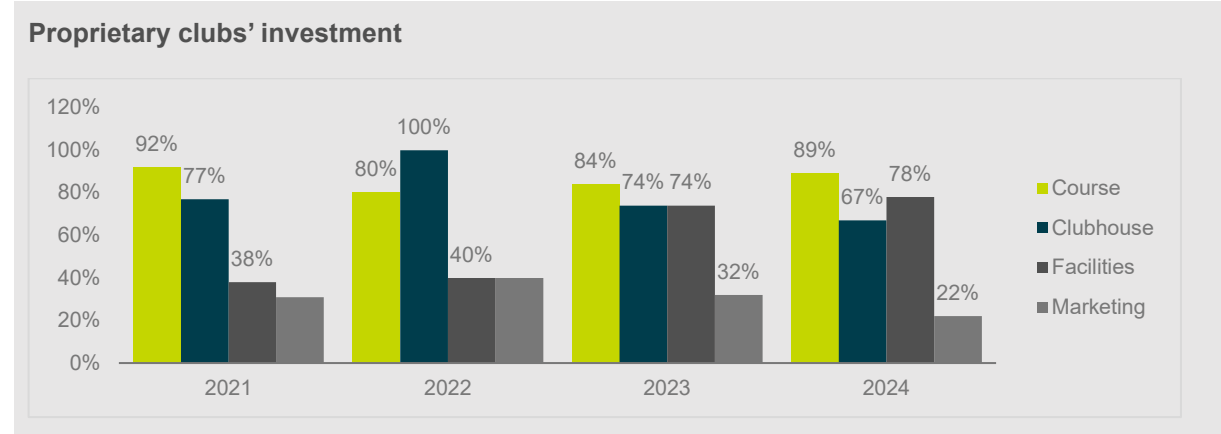
Proprietary clubs continue investing in marketing

Proprietary clubs continue to market their offer, with the most popular activity being social media, used by 78% of clubs. Other popular activities (all used by over 40% of proprietary clubs) included member referrals, advertising and email campaigns.

The most successful marketing activities (for 33% of proprietary clubs) were member referrals.

Proprietary clubs' investment

Investment in the clubhouse and marketing has reduced in 2024, whilst the course and facilities have both seen an increase in investment from proprietary clubs.



Proprietary clubs

Miscellaneous additional information

Miscellaneous additional information

Set opening hours

91% of proprietary clubs indicated that they had set opening hours defined as 'daylight hours plus', compared to 50% in 2023. The remaining 9% had set opening hours.

Days closed

Proprietary clubs had closed the course/clubhouse for between 1 and 35 days due to maintenance or bad weather, with an average of 15 days of closure.

Usage of temporary greens in winter

36% of proprietary clubs indicated that they used temporary greens in winter - a significant decrease from the 69% reported in 2023.

Dress codes

55% of proprietary clubs indicated usage of a dress code – an increase on the 31% reported in 2023.

Mobile phones policy

18% of proprietary clubs have a mobile phones policy, compared to 12% in 2023.

Dogs

45% of proprietary clubs allow dogs, a reduction on the 62% in 2023. Where they are allowed, this is usually on condition that they are kept on leads and under control.

Sports channel subscriptions

Proprietary clubs with a subscription for SKY and/or TNT sports (formerly BT Sport) paid average annual subscription charges of £8,125 (£8,300 in 2023).

Anticipated changes affecting golf clubs in 5-10 years

The following changes were suggested/anticipated by proprietary clubs.

Within 5 Years

- Cost control
- Membership retention and lack of members
- Project funding
- Staffing levels and skills
- Clubhouse improvements and investment
- Flexible membership
- Attractions for non-golfers
- Water use limitations
- Machinery automation
- Closure of some clubs
- Changes in working patterns
- Changes in disposable incomes
- AI.

Within 10 years

- Water use limitations
- Sustainability and inclusivity
- Minimum wage
- Housing developments on golf courses
- Flexible membership
- Machinery automation
- Closure of some clubs
- Changes in working patterns
- Changes in disposable incomes
- Fewer members
- Cost increases
- Loss of skills.

The impact of the living wage

89% of proprietary clubs suggested that the increase in the minimum living wage and workplace pensions impacted upon them – substantially higher than the 55% recorded in 2023.

Community Amateur Sports Clubs (CASC)

No proprietary clubs indicated that they were Community Amateur Sports Clubs - with 14% of clubs considering becoming one.

Rules and regulations

All proprietary clubs agreed that they are prepared to change their rules and regulations to modernise the club.

Club structure

89% (33% in 2023) of proprietary clubs indicated that they are currently incorporated, although no other clubs are considering incorporation.

Board structure

Proprietary clubs reported that they had an average of 3 board members in each club.

The expertise present in the boards of proprietary clubs in 2024 was mainly in Business, Finance, Legal and HR.

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Hillier Hopkins LLP
2024 Report

Our golf club team

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Sam Hodson
Principal

T: +44 (0)1923 634 467
Sam.hodson@hhllp.co.uk



Ellie Kirton
Audit Manager

T: +44 (0)1923 634 472
Ellie.kirton@hhllp.co.uk



Graeme Fox
Senior Tax Manager

T: +44 (0)1923 634 243
Graeme.fox@hhllp.co.uk



Ravi Juthani
Tax Principal

T: +44 (0)1923 634 255
Ravi.juthani@hhllp.co.uk

Hillier Hopkins LLP
Radius House
51 Clarendon Road
Watford
Herts
WD17 1HP

Hillier Hopkins LLP
Chartered Accountants
and Tax Advisers

hillierhopkins.co.uk

45 Pall Mall
London SW1Y 5JG

T +44(0)207 930 7797
F +44(0)330 024 3300

249 Silbury Boulevard
Milton Keynes
Bucks MK9 1NA

T +44(0)1908 232 020
F +44(0)330 024 3300

Radius House
51 Clarendon Road
Watford
Herts WD17 1HP

T +44(0)1923 232 938
F +44(0)330 024 3300