Bob Hunt

was educated at the University of Bristol. One of his first projects as a young architect was a golf-changing complex. Since then he has been involved in the planning, design and development of over 250 golf projects as far apart as China, the West Indies and Norway.

Keywords:

golf, development, planning, consents, land values

Golf development and the planning process in the UK — Is it worth the gamble?

Robert Hunt

Received (in revised form): 10 October 2001

Abstract

The planning system is about to change and golf development is caught between the need for sport, the commercial requirements of developers and the desire to pickle the country in aspic. This paper seeks to set out a synopsis of the current system and argues for a forward-looking regime to regulate golf-related development.

INTRODUCTION

Hindsight is a wonderful thing! When the R&A published their report¹ suggesting a need for 700 golf courses (to bring the provision to one 18-hole course for every 25,000 of the population), who would have guessed that the market would have taken their advice so readily. Sadly the advice was not 'qualified'. Would anyone have predicted that golf would become the fastest-growing sport in the world and that there are now over 30,000 courses worldwide?

The market in the UK has changed dramatically, with commercial courses now accounting for 35 per cent of the courses in the UK. Municipal courses have reduced to nine per cent as part of the Best Value process, with average rounds played reducing from 47,000–64,000 at the peak to 35,000–50,000 today. Private members clubs remain virtually static in numbers.²

Everyone seen statistics illustrating the dire state of the golf course industry in the UK and doom-mongers have prophesied that, by now, up to 20 per cent of new courses should be bankrupt. True — the industry has had its fair share of businesses in difficulties, but no more than the average of new business start-ups in this country. Just think back to the headlines, which if true would have meant that the golf scene would be awash with golf courses in administration or returning to agriculture. Perhaps caution in predictions is a lesson to be learned.

However, it is not all sweetness and light. Who would have guessed that last year the country would have suffered the wettest autumn, winter and spring in history and then be hit by a foot-and-mouth epidemic, which has added to the number of courses closed. Links courses, never having been known to close, have had to do so because of floods. Some courses closed last November and were still closed months afterwards.

One only has to look at the drop in the rate of new course

Robert Hunt
Technical Director
PGA Golf Management
Bush House
72 Prince Street
Bristol, BS1 4HU, UK.
Tel: +44 (0)117 9298181
Fax: +44 (0)117 9253706
E-mail: bobhunt@pgagm.com

Environment impact assessments

contracts from over 70 a year at the best to less than ten a year now to understand that the boom is over. After the R&A report, 'The Way Forward',³ landowners, leisure operators and farmers saw an opportunity to add value. There was a significant Japanese influence and millions were offered for golf-course sites. The R&A identified the need for 700 more courses, and since the publication of the document this number has been exceeded.

But the distribution of the courses did not match demand, financiers rushed in with high-cost loans, sites were developed in very poor locations, costs were not controlled and consequently as provision increased and demand tailed off some developments were in trouble.

The start of new construction projects is now a rarity and many British designers are seeking work elsewhere. The rest are left refurbishing courses and making minor changes to existing courses. It is still possible to buy completed developments with trading records at less than construction cost, especially when finance costs are included. So why take the risk in building a new facility?

Those owners who invested in obtaining consents are in one way lucky and in another way remain unfortunate. Most unimplemented planning consents were gained before planning applications for golf became subject to full environmental impact assessments (EIAs). Such assessments involve the provision of a vast quantity of information to a local authority to enable them to assess whether such a development is environmentally acceptable. This requires any developer to assemble information on the following:

- survey of the site topography
- ecological survey of the flora and fauna of the site, often in the four different seasons (which can add a year to the application process)
- existing traffic situation
- existing on-site noise
- existing landscape
- existing archaeology
- existing hydrology
- existing agricultural quality and soils profile.

Having studied all this information a developer may now make a planning application but even if he has satisfied all environmental criteria he may still find a local authority which is not prepared to accept the land use.

The cost to any developer of preparing this information at the risk of subsequent rejection on planning grounds can now run to hundreds of thousands of pounds. This has increased significantly since golf became subject to the EIA regulations. The high level of financial risk has helped reduce the number of new golf course planning applications in England to single figures.

For those who obtained consent before these regulations came

into force, the initial boom in golf saw land values run to £12,000 per acre (one acre equates to 0.405 hectares). It did not take long before the invasion of rich golf developers came to understand that it was pretty difficult to add hotels, residential property and leisure clubs to golf courses.

The value of consented sites plummeted as the boom in construction decreased and overseas developers retreated from the UK. The position has now been reached where there is seldom a premium over agricultural land values.

Many of the banks, which had rushed to loan vast sums to farmers and developers at high rates, were suffering from investment in courses that had been built in the wrong places and were not trading well. Banks became big golf course owners.

Sadly, the PGA Golf Management (PGAGM) has been tasked by the receivers of nine such bankrupt clubs with managing them and turning them back into profit. Fortunately the PGAGM was able to improve revenue and reduce costs to the extent that the businesses all generated operating profits. It must be said that they also suffered the luxury of having capital cost written off. Perhaps this goes to prove that even the worst developments can work if managed properly.

Valuation

Golf club valuation has changed enormously from 'asset valuation' to 'multipliers of bottom-line profit'. The same has not happened to golf sites.

While recent land values at such places as Queenswood in Surrey have been reported as high as £3.4m for 190 acres (£18,000 per acre), most sites with golf consents have seen nothing like the value appreciation recently experienced by clubs that have been sold.

ARE CONSENTS VALUABLE?

Many courses were developed in the boom of commercial golf but a point of virtual saturation has now been reached, with some parts of the country having one course for every 12,000 people within 30-minute drive times.

Provision

Thankfully the predictions of doom for many new clubs have been shown to be nothing more than sensationalism that has done great harm to the golf development industry. Such 'news' scares financiers and adds unnecessary despondency to the golf industry. The normal reasons cited for success or failure can be summarised as follows:

- location
- demographics
- competition
- proximity to major road connections
- proximity to large commercial organisations
- proximity to areas with high tourism figures
- controlled budgets and costs
- a well-implemented business plan.

While there are still purchasers for existing clubs in the market-place and it is still possible to buy established clubs for less than the cost of construction, the value of sites with planning consent for golf will seldom generate significant premiums over agricultural value without some 'added value'. There is, however, a lack of good clubs and a particular lack of clubs where further development is easy.

One good example is a resort development opportunity recently offered for sale with consent for a hotel where the expected price is approximately £1m less than the development costs to date.

A site with three-star hotel and golf was for sale at the guide price of only £2.5m which is an approximate discount of 60 per cent on construction cost. Golf course construction costs alone are being seen in excess of £2.5m, let alone the value of the built facilities and the land. An 18-hole golf course with a fitness centre was also recently available for less than £2.5m. With complete resorts available at these prices it is easy to see why new developments are few and far between. Stand-alone clubs vary in cost, but a number are on the market or have been sold for £1.2–1.8m.

Values

Golf development sites are available at between £2,500 and £4,700 per acre. When compared to agricultural values of £2,000–3,750 per acre and understanding the potential fees involved in gaining consent, careful thought must be given before embarking on the development process.

Feasibility

The PGAGM spends a considerable amount of time trying to convince developers to prepare an outline feasibility study before committing to huge fees at significant risk. If the feasibility study meets the necessary criteria then it may be worthwhile preparing a business plan, but even this does not need huge amounts of design fees to be expended.

Return on investment

If the business plan meets the commercially acceptable hurdle rates which most lending institutions would seek of around 11–15 per cent pre-tax, pre-profit and pre-finance and the planning authority appears supportive, then the design process can start in earnest. The bottom line profit is seen as a percentage of the development cost and that percentage will be the return on capital. Most developers or chains have a hurdle rate of, say, 11 per cent. Some put depreciation costs, finance costs and so forth against the bottom line profit, thus decreasing the percentage. So hurdle rates are pre-depreciation, pre-finance etc or after finance and after depreciation.

Although there are exceptions, it is the PGAGM's view that unless indications can be gained from planning authorities, it is unwise for any developer to risk the fees which need to be expended for a detailed planning application and EIA for a new stand-alone golf development.

The PGAGM's records show 163 sites with unimplemented consents in England and Wales compared to the total current provision of over 2,400 courses. Most will never be developed, but even the best of these will struggle to meet financing criteria. So

Table 1: Golf course prices

1995	1996	1997	1998	1999	2000
£1.7m	£1.9m	£2.1m	£1.5m	£2.4m	£2.9m

Source: Savills

apart from the odd few sites, consents for pure golf are worth relatively little more than agricultural value. The market-place for such sites is small and any significant premium value will be exceptional.

CONSENTED LAND VALUES

New sites have been sold recently for as little as £2,200 per acre and as much as £17,800 per acre. Average prices over the last few years for completed 18-hole developments sold show a rise in sale prices but still only to an average level where costs do not exceed value. Table 1 indicates the average price for an 18-hole course sold.

The rise does appear to reflect supply and demand, with few well-performing courses coming to the market despite purchasers with a ready supply of money. This period has also seen the growth of some golf groups which have now increased the percentage of commercially owned courses from 13 per cent to 35 per cent, with a reduction of private courses to 56 per cent.⁴ The top 18 chains now control 146 18-hole equivalent courses. So few undeveloped sites have been sold that the figures are meaningless.

DRIVING RANGES

Driving ranges can be seen as stand-alone developments or 'added value' to existing clubs. PGAGM research shows that it is impossible to create fixed guidelines for successful development since much depends on the local competition, the type of local demand and the development costs. Eighty-seven per cent of golfers recently interviewed have had a golf lesson and 76 per cent have done so within the last year; 42 per cent practice once a week and another 27 per cent practice more than twice a month.⁵ This is borne out by the success of many new golf driving ranges, but the UK is still way behind the USA where practice is even more common. Ranges are not specifically referred to in most policies, and even guidance on what is acceptable in open countryside is unclear.

Some planning officers see ranges as high netting, bright lights and high traffic levels, which in their minds denote urban development. In other areas ranges are viewed as a necessary part of the sport of golf, which is acceptable and even encouraged on the urban fringe on sustainability grounds. There is no doubt that the addition of floodlights is the most controversial element of a driving range development. Ranges have been allowed in historic parklands and have been refused on Grade 3 agricultural land.

Planning applications will need to be based on the provision of all normal information, but may have to be accompanied by proof of need, a business plan, proof that the land is not best and most versatile (which is still protected) and lighting design. Planning authorities are demanding details of floodlighting design, which they do not even understand, in order to protect themselves from subsequent complaints from the public about skyglow. They may also seek proof that any lighting will not harm adjacent residents or local wildlife.

From virtually all feasibility studies it is possible to conclude that, for any operator or owner, there is no financial justification for building ranges which are not floodlit even in the best locations.

Floodlighting

It is still amazing how many people start developments without even trying to write a full budget. Netting, car parking, roadworks, drainage and floodlighting have all been forgotten from budgets of new ranges which the PGAGM has seen within the last 12 months.

GETTING CONSENTS FOR GOLF COURSES

The planning system in the UK has evolved into a zoned plan-based system with increasingly restrictive guidance on golf development. Each planning authority has carried out a zoning exercise designating most forms of development. Some have gone so far as to designate golf development sites, but most have thankfully realised that such designation is folly and unlikely to yield new golf developments. Draft Planning Policy Guidance Note 17 seeks to place a duty on local authorities to continue this policy. Many authorities now require proof of need, whereas in the past the developer had been left to make the investment decision based on his own view of the risk of failure.

The test process involves an analysis of the competition of available courses, usually set against the supply guidelines set by Sport England. This has not stopped many consultants trying various ruses to prove need for another course.

In the past, the planning system was based on two stages — outline planning permission and detailed planning permission. An application for outline consent left open external appearance, siting, landscape, design and means of access for subsequent consideration, and just established land use. The lack of detailed information required for an outline application was used by some developers to import large quantities of fill material on the basis of developing a new course. Such developers tended not to be really interested in the delivery of a golf course, but were more interested in the possibility of profit from landfill.

Ancillary facilities

Others were interested in added value from ancillary operations and in some cases the creation of value by conversion of derelict farm buildings around the golf course site. These problems led local authorities to require the certainty of a detailed planning application. Such applications demonstrate finished levels of the courses and give authorities greater comfort in granting consent.

Developers were thus forced to commission detailed applications, which cost considerably more.

Sadly the situation now allows officers within the system to read the policies and apply them without the need to apply common sense. In the PGAGM's experience of recent golf applications in the UK, the interpretation of guidance and policies has varied dramatically from area to area. Golf has been quoted as intensification of use on an urban fringe location in one area, and an interpretation that all 18-hole golf courses are subject to EIA processes is widespread. This is not necessarily true and depends on each situation. While much of the previous planning system was based on precedent, the local plan system is now depreciating the precedent value — although authorities are still happy to say that they cannot consider any changes to their plans for fear of setting new precedents.

Local plans

With some plans lasting ten years, following the plan process can be very frustrating. Even having been through all stages of such a plan process, and having a proposal incorporated into a plan at the inquiry in public, does not guarantee success. After 11 years of trying to get consent for a new golf resort in Leeds and having convinced the planning authority, the inquiry inspector threw out the policy. This process cost the developer over £500,000. It is easy to understand why developers and professionals alike have become frustrated by the process.

PPG

During the life of a plan other guidance does not stand still. Regional planning guidance and planning policy guidance notes (PPGs) are particularly important and can dramatically affect new developments. In some cases possible legislation such as white papers can also affect planning cases. The Rural white paper published in November 2000 is one such example.

It aimed to deal with the issues affecting the countryside and in fact mentions a number of sports. Amazingly with thousands of golf courses in the countryside, golf is not mentioned. Grants are mentioned in the paper, including £152m from the England Rural Development Programme for farmers to redirect their businesses and £130m for spaces for sports and the arts. While tourism is recognised as a marketable product and the paper emphasises community-based facilities and the potential of the rural economy, sadly experience indicates that any reflection in the value of sport tourism in subsequent policies and attitudes will be minimal.

There has been much recent publicity about the problem of the government acting as 'author and judge of planning policies and planning applications' being in conflict with European legislation. This threat seems to have disappeared temporarily with a decision by the House of Lords, which maintains the existing appeal, call-in, public inquiry and judicial review process. Further challenges are still pending.

Any interested party may make representations during the reviews of the local plan, which are then reviewed by officers of the

local or unitary authority. The local plan is open to public consultation and may be reviewed further at an inquiry in public before the plan is adopted. Out of about 500,000 planning applications each year about 130 are called in by the Minister, and 13,000 appeals are dealt with by planning inspectors of which about 100 go to the Secretary of State.

Local plans have lives of five or ten years and are reviewed in whole or in part at these intervals. Representations may be made at each review in an attempt to convince the planning authority or the inspector that the plan should be amended to incorporate any changes, which may be beneficial to the person or organisation making the application. If an application were made, which is not in compliance with the local plan, it would normally be necessary to demonstrate that there are special circumstances which warrant a minor amendment. If the application requires a major change to the plan and the local authority wish to support it, the application would be referred to the Secretary of State to decide whether it needs to be 'called in' or whether an inquiry is warranted.

The local plan will indicate all local planning policies, which might affect individual sites. Regional and national policies may be reflected to differing extents in a local plan, but reference should be made to any appropriate policies in any planning application. Special landscape designations may be important, and before the preparation of any new application is considered, it is important to check which policies apply to the particular site.

The most difficult designations to deal with are green belt or designations such as areas of outstanding natural beauty or sites of special scientific interest. These are covered in PPG2, which was last revised in 1995.

PPG

When PPG16 came into force, developers were faced with having to provide archaeological information with the submission documentation. Most authorities realised that for a golf course such investigations could cost thousands of pounds, and accepted desktop studies with appropriate conditions on consented sites where nothing significant was identified.

In other situations, the developer could be asked to carry out significant exploratory work before the authority would accept the registration of an application for planning permission. This just added even greater up-front cost for any golf developer.

Consultation on a new draft PPG17 on sport and recreation has now closed. The 1991 issue of PPG17 states that associated developments should be considered on merit. Sadly most local authorities have sought to minimise any extra development added to golf facilities in their local plans. Merit seems no longer to be an issue. If a designation were shown covering a proposed development site in the local plan, it would be important to take expert advice to understand whether it is even worth pursuing the possibility.

A normal planning application provides information to a local authority on the existing site, proposed changes to the topography,

plan sections and elevations of all buildings, landscape design and visual impact of the development, water supply and hydrology, ecology, traffic, noise, archaeology, drainage design and public access and rights of way.

The provision of a plan for the future management of the landscape is also becoming a frequent requirement to obtain planning consent. The implementation and monitoring of such plans is still a problem, which varies dramatically across the country particularly where cost and local authority officer time is concerned.

THE COSTS OF A PLANNING APPLICATION

In situations where an EIA is required, considerable work is needed to accompany the planning application. This requires a wide range of inputs from consultants, and until a local authority has both tested the application against policies and considered the politics of the application the money involved can be completely wasted. Sadly, it is impossible to test formally the acceptability of the land use with a local authority prior to undertaking all the support studies, but an off-the-record approach to the local authority is worthwhile to 'test the water'. This situation is now common across Europe but differs very dramatically across the rest of the world. For the local developer such costs may accumulate, as shown in Table 2.

Table 2: Golf course development costs

Cost	Budget allowance £
Topographical survey	8,000
Building survey	8,000
Ecological survey including tree survey	8,000
Soil tests	10,000
Agricultural desktop study	4,000
Archaeological desktop study	2,000
Town planning and building regulations fees	20,000
Project management	15,000
Quantity surveyor	9,000
Architecture of clubhouse, pumphouse, maintenance buildings	40,000
Traffic engineering including traffic count and junction design	10,000
Landscape design and management plan	20,000
Golf design for planning application	30,000
Noise — existing, proposed situations and mitigation measures	3,000
Planning supervisor	3,000
	190,000
Possible archaeological site investigation	30,000

NEW GOLF CONCEPTS

Golf court

The golf court concept has been around for some time, but the first one has now opened at the Lensbury Club in Teddington. This allows 18 holes to be built within approximately 20 acres and relies on a designed method of play with multiple tees and four greens. Golf can be played by the hour.

Concepts

Top golf

This is an intelligent driving range where target greens are replaced by segmented electronic targets. Smart golf balls are hit into an individual segment where points are allocated depending on the proximity to the flag. The game can be used for practice but can also be played between members of a group of golfers racking up points.

Golf simulators

These are becoming more and more sophisticated: the new on-course machines are able to provide images and can also be used for teaching. They are still quite expensive, and tend to be regarded as entertainment rather than serious teaching aids.

Video simulators

Frequently seen on golf driving ranges, it is possible to see a player's swing compared to that of the stars. These systems are useful for teaching and can be a reasonable profit generator from the sale of videos to students.

Executive golf courses

The growth of short, high-quality courses, frequently seen in the USA, has not really hit the UK yet. Those who have given up the sport often cite time pressure. In the USA the traditional design of two loops of nine has also been challenged, with courses of three loops of six holes beginning and ending at the clubhouse. This allows golfers to play one loop of six holes in the evening and enables the club to cope with after-work peaks. Shorter courses have also become popular, with a number of new courses comprising only par 3 and par 4 holes which take less time to play.

Miniature golf courses and putting courses

Both can be achieved with real grass or artificial surfaces. Both are more recognised on the entertainment side of the sport, but when Disney use miniature golf in their complexes it is a good indication that value can be added.

Putting courses are not significantly more expensive than putting greens to build. While few operations charge for the use of the putting green, users tend not to object to paying to use a putting course. This is therefore one way of allowing a return on capital for the cost of providing practice putting facilities. Courses do restrict practice and may not be suitable for easy teaching.

Added value

The zoned local plan effectively fixes allowable development, but in many other countries across the world other uses are allowed and indeed encouraged. This can be in the form of consents for:

- hotels
- residential property

- driving ranges
- caravan parks
- leisure facilities
- tennis centres
- landfill
- resort development
- marinas
- golf academies.

Each of these possible additions will have its own 'success criteria' and they must be considered as part of the overall business plan.

GOLF TOURISM

It is interesting to see that the Greek government identified golf as the tourism driver to extend their season and to upgrade their tourism profile. Yet their planning system has not learned the lessons of those countries which have already used golf to implement the same strategy. Time taken to obtain the necessary consents and grants has caused many projects to be abandoned.

Spain and Portugal are often quoted as models of golf tourism development. While planning policies are not that different to those in the UK, both countries treat the game as an important part of the tourism economy. To that extent, Turkey learned the lessons of some of the less impressive European developments and concentrated the zoning and construction of new golf-based resorts in one area, close to an airport, good beaches and where water and infrastructure were available. These have been very successful in attracting the serious golfer segment of the golf tourism market. Most areas which have realised the tourism benefit have also learned to market the facilities on a comprehensive basis with single contact points, joint marketing of clubs in close proximity and cooperation with local hotels.

In Cuba, the government has only recently been convinced that its golf development strategy must be considered in the light of combined resort development uses rather than viewing golf in isolation from all of those elements, which are now combined into world-class resorts.

While golf tourism is important it is usually balanced against the local market. The downturn in the number of UK golfers is shown in Figure 1, which indicates approximate average growth in the number of golfers over the last five years.

With the exception of some parts of Scotland and Devon and Cornwall, where the value of tourism is recognised in many of the local plans, there is little or no likelihood that significant 'added-value facilities' could be added to a pure golf consent where golf is seen by the authorities as 'green' in the planning sense of the word. Where such developments have occurred in the UK, the PGAGM has created world-class resorts, wonderful housing developments and excellent leisure facilities. Unfortunately, forward planning for

Source: The Golf Research Group

Figure 1: Growth in the number of golfers

leisure is virtually non-existent. The vast majority of plan policies are restrictive rather than proactive in predicting social change in leisure pursuits.

Golf hotels

Golf and leisure really came together with the development of the Country Club hotel chain, where the PGAGM staff started at Meon Valley building the first purpose-built golf and leisure club in the UK. The PGAGM staff went on to build 13 such resorts in the UK, creating a successful commercial concept combining golf, leisure and conference facilities. It is virtually impossible to achieve similar consents within areas that meet commercial demographic criteria. The same concept has spread from the USA across the world, but sadly the PGA would never be able to create a new Belfry or Forest of Arden.

New attempts are being made to create gated communities based around golf, but again the planning system is geared up to stop this sort of development.

It is no longer possible for local planning authorities to take a view on whether a development is beneficial for local people, since there are many situations where national and regional guidance and influence from pressure groups can be used to defeat planning applications for golf development. A classic example of this is the apparent general objection to any floodlighting of golf driving ranges on environmental grounds by such groups as the Campaign for Dark Skies.

It took three years to get consent for the floodlighting of Stockwood golf driving range in Bristol. It took six months for consent for a new floodlit range in Hereford. There is no logic

within the regional variations and attitudes to golf development, but there is one common thread — the need to provide very large quantities of information to accompany any application.

Irrespective of the obvious need to provide good practice facilities at times when demand is high (outside working hours), the objections to floodlighting can in some cases run to hundreds. One may begin to wonder whether the UK will ever be able to create world-class sportsmen when practice during evenings is reduced as more applications for floodlit facilities are refused.

Any developer seeking to add anything to an existing or proposed golf development must examine the local plan, decide whether or not the proposal is compatible with the policies, and, if not, decide whether to make a case for consent or to face the whole problem head on and fight the system in the short term at a planning inquiry or in the long term through the plan process.

IS IT WORTH THE GAMBLE?

The gamble depends on the product. The product depends on the market-place. Matching product and demand is the basic premise of success. No demand equals no product.

An initial discussion with the planning authority will determine the extent of information which will be needed to accompany a planning application and the level of compliance with existing policies. The analysis of supply and demand will allow a feasibility study to determine whether it is worth writing a business plan. If the business plan meets the necessary criteria, it may be worth committing to the preparation of a planning application.

The viability of a new golf development in the UK must be viewed with extreme scepticism, but for those courses where the golf club exists it may certainly be worthwhile adding extra facilities. For example:

- Clubhaus has exerted a considerable effort to add leisure clubs to its golf clubs
- Manchester City Council has added a golf driving range to Heaton Park golf club
- Brean Leisure Park added golf to a caravan park to add value
- Whitbread has added or extended tennis centres to existing courses such as Airlinks
- Bovis has developed purpose-designed residential property around a golf course at Biddenham near Bedford
- Oastpark golf club has sacrificed nine holes to landfill; the nine holes will be restored on top of the landfill at a later date.

If the costs of obtaining consent can be kept within acceptable limits, the value of the development will certainly improve if consent can be obtained. However, while valuations remain as multipliers of bottom-line profit the value of the consent cannot be fully appreciated until it has been implemented and the business has matured.

Honesty

In the tight economic times that golf is currently experiencing, looking for added value must be a worthwhile management objective for anyone directly involved in the golf development industry, but no one should commit to large consultancy or design costs until they are fairly sure that the outcome of any application will be successful. It is critical that the necessary advice is obtained at the early stages, and this will usually require valuation and agency advice. It does not require thousands of drawings from expensive designers, that comes later. Probably the most important piece of advice the author can give is to make sure that any advice obtained is honest — find someone who will tell the truth early on. It is often said that every golf designer will always tell a developer that his site is the best that the designer has ever seen. This is the last piece of advice needed — better to be told not to build this golf course (or leisure centre) if it really is going to fail. There are not too many consultants around who will provide such information and miss out on a fee!

For local authorities there must be a realisation that the planning process should seek to deal with the future and not act as a policing system to maintain the past. Changes in leisure and sports are virtually disregarded. The 'destination' leisure facility is common around major conurbations across the world, but the UK's green belt policy is in conflict with reduced travel times required for sustainable developments. In consequence the larger integrated leisure schemes are extraordinarily difficult to deliver in this country.

Until the planning system looks forward instead of back one must expect to have to fight hard to deliver the facilities which many tourists see on their visits to southern Europe and the USA in particular. The UK may not wish to replicate the problems which have occurred in other countries, but it can learn from the successes and failures of others.

As a salutary lesson, there is nothing more upsetting than to find oneself managing a golf club in liquidation for a receiver who wrote the original business plan forecasting exceptional profits — happy developing!

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