



Rustington Golf Centre

Golf Course Needs Statement

on behalf of BDW

March 2022

Contact

4 Pear Place
London
SE1 8BT



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1. Introduction

1.1 This Golf Course Needs Analysis Statement has been prepared on behalf of Barratt David Wilson (BWD) in support of a proposed development on part of the Rustington Golf Centre ("the Site") for the erection of 167 new homes with associated landscaping, parking, open space, play areas, construction of a new access from Golfers Lane, and all other associated works ("the Proposed Development").

1.2 A planning application for the erection of 191 dwellings on the Site was refused by Arun District Council (ADC) in October 2021. Refusal reason 3 states:

"The proposed development would result in the re-development of an existing par 3 golf course (pitch and putt) which would be contrary to Policy OSR DM1 of the Local Plan as no robust and up-to-date assessment has been submitted clearly showing the facilities to be surplus to requirements (as required by Policy OSR DM1(a)). The proposed development does not include the provision of a replacement outdoor sports facility of equivalent or better provision elsewhere in the District in terms of quantity and quality and suitability of location (as required by Policy OSR DM1(b)); and the proposed development is for housing and apartments, not for alternative sports provision and is therefore contrary to Policy OSR DM1(c) and the National Planning Policy Framework."

1.3 In view of the above, this Golf Course Needs Analysis Statement has been prepared in support of the Proposed Development in order to assess the needs and demand for golf course provision.

2. Rustington Golf Centre

- 2.1 Rustington Golf Centre has been in operation for 30 years. The Par 70 parkland style course can be played as either 18 holes (5,768 yards) or 9 holes (par 35, 2,520 yards), with two tees per hole. The course is described as being suitable for all levels of golfers. The separate Par 3 course comprises 9 holes over 740 yards.
- 2.2 The Golf Centre's driving range has 28 floodlit, covered bays and 5 outdoor bays and a large practice bunker. 20 bays are fitted with Toptracer, whereby users can play a variety of virtual game modes such as virtual golf at Pebble Beach or St. Andrews, nearest the pin, points game, or long drive etc. The Toptracer facility provides a good starting point for beginners or juniors to learn the fundamentals of the game or for a more experienced player to hone in their skills.
- 2.3 The Golf Centre provides different membership options (full and flexible) and is also accessible on a pay and play basis. To support the growth of the game and give children and young people access to the game the Golf Centre has a junior membership option and has a youth academy (the Cranfield Golf Academy) to help develop and improve golfing skills. The Cranfield Golf Academy at Rustington Golf Centre are the coaching base for Sussex and England regional squads.
- 2.4 The Rustington Golf Centre also has an American Golf Store, a café and an 18-hole adventure golf course.
- 2.5 In 2018 Rustington Golf Centre made the decision to make the golf course more environmentally sustainable. The objective being to greatly reduce pesticide inputs by introducing a more biological approach and using more cultural practices on the course. By doing this it will help encourage soil microorganisms to thrive and help fight disease as well as helping to break down organic matter in a more natural way. In time this will stop the need to hollow core or scarify the greens meaning less surface disruption in the spring and autumn.
- 2.6 As a result of the Proposed Development, with the exception of the Par 3 course, all of the above functions and activities would remain i.e.
- Membership and pay & play access
 - Par 70 course that can be played as either a 9 holes or 18 holes course
 - 28 bay driving range
 - Pro tuition (Cranfield Golf Academy)
 - Pro Store
 - Junior golf and youth academy (Cranfield Golf Academy)
 - 18-hole adventure golf course
 - Café.
- 2.7 The supply and demand analysis within this assessment has been undertaken on the basis that the Site has ceased use as a golf course i.e. the Proposed Development has been implemented. However, where relevant, a comparison has been provided with the Site in effective operation.

3. Policy and Guidance Position

National

- 3.1 The National Planning Policy Framework (NPPF), updated in July 2021, outlines (paragraph 98) that:

“Access to a network of high quality open spaces and opportunities for sport and physical activity is important for the health and well-being of communities, and can deliver wider benefits for natural and support efforts to address climate change. Planning policies should be based on robust and up-to-date assessments of the need for open space, sport and recreation facilities (including quantitative or qualitative deficits or surpluses) and opportunities for new provision. Information gained from the assessments should be used to determine what open space, sport and recreational provision is needed, which plans should then seek to accommodate.”

- 3.2 NPPF paragraph 99 states:

Existing open space, sports and recreational buildings and land, including playing fields, should not be built on unless:

- (a) an assessment has been undertaken which has clearly shown the open space, buildings or land to be surplus to requirements; or*
- (b) the loss resulting from the proposed development would be replaced by equivalent or better provision in terms of quantity and quality in a suitable location; or*
- (c) the development is for alternative sports and recreational provision, the benefits of which clearly outweigh the loss of the current or former use.*

- 3.3 The NPPF Glossary defines open space as:

“All open space of public value, including not just land, but also areas of water (such as rivers, canals, lakes and reservoirs) which offer important opportunities for sport and recreation and can act as a visual amenity.”

- 3.4 The Planning Practice Guidance (PPG) which accompanies the NPPF provides further guidance on how open space should be taken into account in planning. The PPG outlines that it is for local planning authorities to assess the need for open space and opportunities for new provision in their areas (ID: 37-001). When assessing the needs for sports and recreation facilities the PPG refers local authorities and developers to Sport England’s guidance (ID: 37-022).

Local

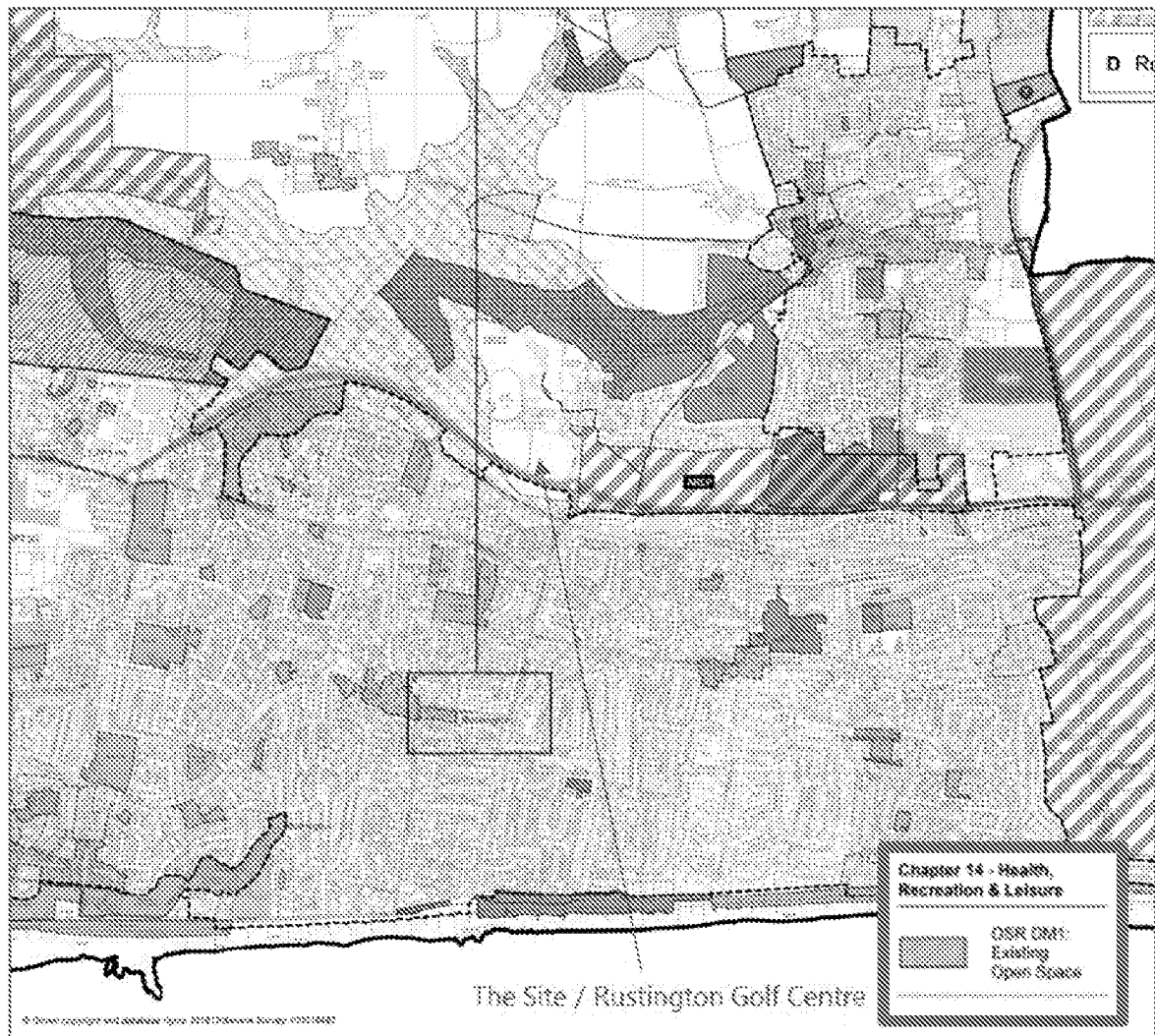
- 3.5 Policy OSR DM1: Open Space, sport & recreation of the adopted Arun Local Plan (2018) outlines that existing open space, outdoor and indoor sport, community, arts and cultural facilities should not be built on, or redeveloped for other uses unless:

- (a) A robust and up-to-date assessment has been undertaken which has clearly shown the facilities to be surplus to requirements; or
- (b) The loss resulting from the proposed development would be replaced by equivalent or better provision of open space, outdoor and indoor sport, community arts and cultural facilities which

will be assessed in terms of quantity and quality and suitability of location; or

- (c) The development is for alternative open space, sports, community, arts or cultural provision, the needs for which clearly outweigh the loss.

3.6 As illustrated within the Arun Local Plan Proposals Map extract below, neither the Site of the wider Rustington Golf Centre is designated under Policy OSR DM1: Existing Open Space. However, Ham Manor Golf Club to the north and north east of the Site and Rustington Golf Centre is designated under Policy OSR DM1.



Source: Arun Local Plan Proposals Map, July 2018

Arun Open Space Sport and Recreation Study

3.7 To inform the Local Plan, ADC prepared an Open Space Sport and Recreation Study ("the OSSRS"). The OSSRS outlines that the purpose of the study was to undertake an audit and assessment of open space across the Arun District. The key outputs of the study include:

- A full audit of all applicable open spaces across Arun District categorised according to the primary purpose of the site. The open space typologies include: parks and gardens, natural and semi

natural open space, amenity green space, outdoor sports facilities, provision for children and young people, allotments and community gardens, green corridors, beaches and coastal areas, churchyards and cemeteries and civic spaces.

- An assessment of the open space, sport and recreational needs of people living, working and visiting Arun.
- Production of local provision standards (quantity, quality and accessibility) for each type of open space where appropriate, in accordance with local needs.
- Application of local standards to the existing open space provision, enabling the identification of surpluses and deficiencies based on quantity, quality and accessibility.
- Recommendations to address the key findings and drive future policy.

3.8 The OSSRS splits the district into three areas, the Eastern, Downlands and Western regions. The Site is located within the Eastern region.

3.9 Golf courses are listed as an example of the 'outdoor sports facilities' typology within the OSSRS (paragraph 6.1). Section 6 of the OSSRS specifically relates to Outdoor Sport Facilities (OSF). OSF types include: grass pitches, synthetic turf pitches, tennis courts, bowling greens and golf courses.

3.10 Although golf is identified as an 'outdoor sports facility' within the OSSRS, no assessment of golf facilities is undertaken. Notwithstanding this, the OSSRS recommends a 20 minute drive-time accessibility standard for golf courses (page 80). This being a widely accepted accessibility standard for golf courses accessibility across England.

Leisure and Cultural Strategy 2013-2028

3.11 The Arun Leisure and Cultural Strategy 2013-2028, September 2013 provides a strategy to improve facilities for leisure and culture across the District. Whilst no specific golf recommendations are made it is noted that with regard to golf the strategy states that one of the districts strengths is "there are good parkland and links golf courses".

Other Guidance

Sport England

3.12 Sport England's 'Assessing needs and opportunities guide of indoor and outdoor sports facilities' (2014) provides guidance on how to undertake and apply needs assessments for sport facilities, in order to be compliant with the NPPF. The approach adopted to develop the assessment within this Golf Course Needs Analysis statement has drawn on the following process set out with the Sport England guide:

Preparation – establish the purpose, scope and scale of the assessment. The approach should be proportionate in approach, sport and geographical scope, strategic context and project management.

Quantity – what facilities there are in the area, and how many there are. It is also necessary to look at different catchments to assess the quantity in a more segmented way.

Quality – how good facilities are.

Accessibility – where facilities are located. This will include catchment areas and demonstrate whether there are sufficient courses in the area.

Availability – how available golf course facilities are.

Building a picture – Drawing on the previous stages build a picture of provision.

4. Supply Analysis

- 4.1 There are three different types of golf facilities recognised by Sport England and governed by England Golf, as defined below:

Standard	A standard par course, with a minimum of 9 holes but normally associated with 18-hole courses; many 9-hole courses have different tee boxes which allow the provision to be played as an 18-hole course.
Par 3	Shorter length of holes than a standard course, with no hole longer than Par 3.
Driving Range	Includes covered and uncovered driving range bays but not practice areas within golf courses; ranges are based on the hiring of balls, with users not required to retrieve, whereas practice areas are generally for members to use with their own balls (although a growing number have dispensers).

- 4.2 In addition to the above 'traditional' formats of the game there are also pitch and putt courses and miniature / adventure formats of the game. There is a growing trend for 'entertainment' ranges or virtual offerings.
- 4.3 As illustrated within Figure 4.1 below, within Arun there are six standard golf courses and two Par 3 courses. Within the Eastern Region there are three standard golf courses and currently two Par 3 courses (one being the Site). The Downland Region and Western Region both have a single standard golf course. The Western Region also has a Par 3 course.

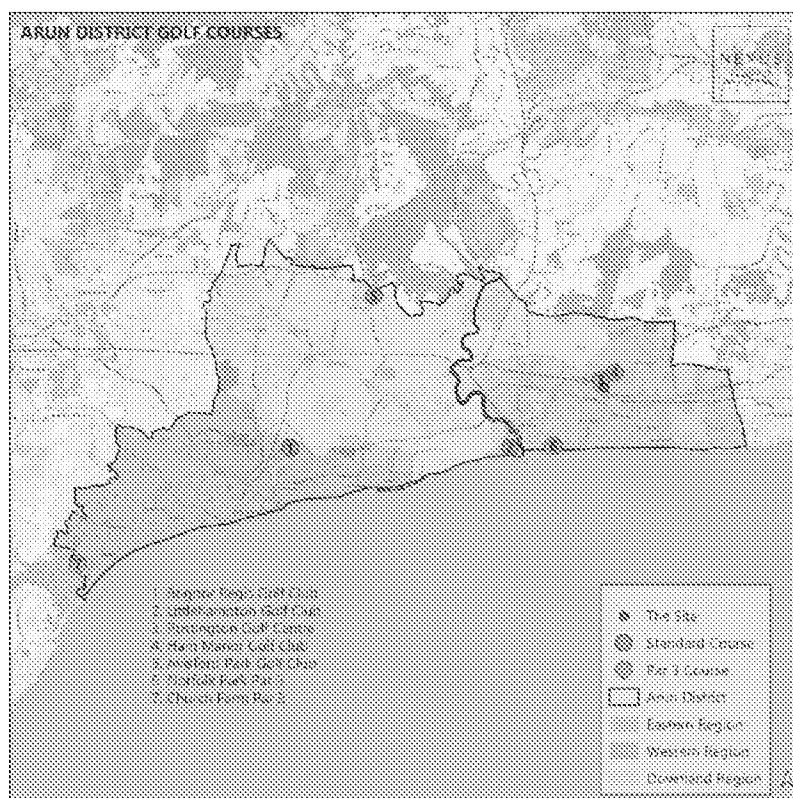


Figure 4.1: Arun District Golf Courses

- 4.4 However, as illustrated within Figure 4.2 there are a further 11 standard golf courses and a Par 3 course within the Arun District 20 minute / 10 mile drive-time catchment. 20 minutes being the typical and recognised drive-time catchment area for golf course¹ accessibility.
- 4.5 Overall, excluding the Site, within Arun District and the wider 20 minute drive-time catchment ("the Arun District Study Area") there are 16 standard golf courses and 3 Par 3 courses.

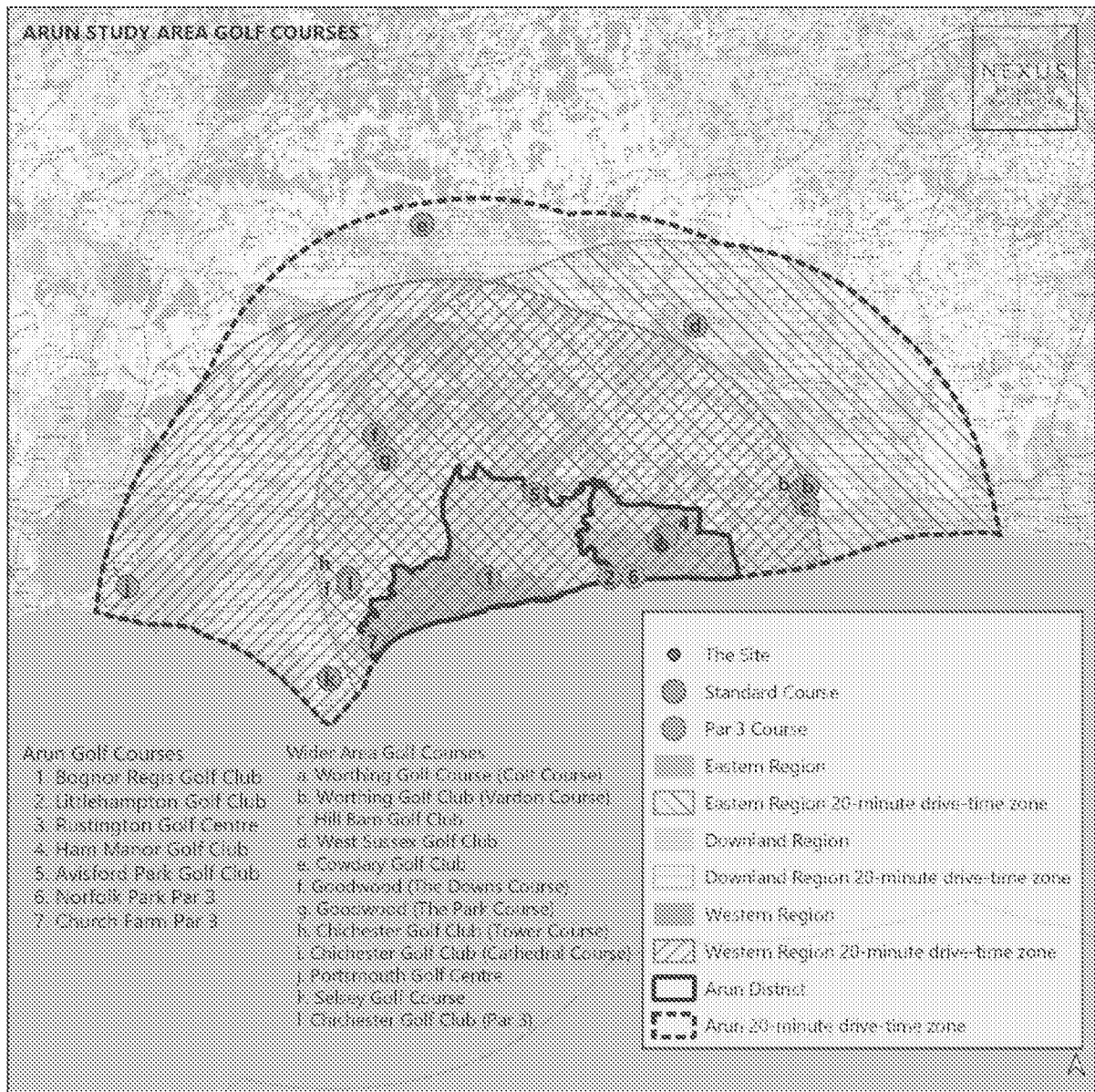


Figure 4.2: Arun and Wider Area Golf Courses

¹ ADC Open Space Sport and Recreation Study, Table 6.2

Standard Courses

- 4.6 Within the Arun District Study Area eight golf courses provide standard hole provision. With the exception of Rustington Golf Centre and Selsey Golf Course, all are full 18-hole courses. Rustington and Selsey comprises nine holes, but with two-tees at each hole that enables players to undertake two loops of the course to play 18 holes:

Course Ref	Course name	Administrative Area	Holes	Par	Yards
1	Bognor Regis Golf Club	Arun	18	70	6,121
2	Littlehampton Golf Club	Arun	18	70	6,207
3	Rustington Golf Course	Arun	18*	70	5,768
4	Ham Manor Golf Club	Arun	18	70	6,280
5	Avisford Park Golf Club	Arun	18	70	5,924
a	Worthing Golf Club	Worthing	18	71	6,505
b	Worthing Golf Club	Worthing	18	66	5,211
c	Hill Barn Golf Club	Worthing	18	70	6,229
d	West Sussex Golf Club	Horsham	18	70	6,264
e	Cowdray Golf Club	South Downs National Park / Chichester	18	70	6,325
f	Goodwood (The Downs Course)	South Downs National Park / Chichester	18	72	7,134
g	Goodwood (The Park Course)	South Downs National Park / Chichester	18	72	6,650
h	Chichester Golf Club (Tower Course)	Chichester	18	71	6,109
i	Chichester Golf Club (Cathedral Course)	Chichester	18	72	6,442
j	Portsmouth Golf Centre	Portsmouth	18	69	6,040
k	Selsey Golf Course	Chichester	18*	68	5,849
Eastern Region Area Average Yards					6,229
Downland Area Average Yards					6,201
Western Area Average Yards					6,182
Arun Study Area Average Yards					6,191

*Courses with 9 holes but with two tees at each hole

- 4.7 There is a broad range of course lengths across the Arun District Study Area with the average course length being 6,191 yards. The longest course, at 7,134 yards is the Downs Course at Goodwood Golf Club and the shortest course is Rustington Golf Course at 5,768 yards. Each of the three Arun sub-regions also have a good range of course lengths with both the shortest (Rustington) and longest (Goodwood Downs) being within each regions drive-time accessibility zone.

Par 3 Course

- 4.8 With the inclusion of the Site, there are currently four Par 3 courses within the Arun District Study Area. As confirmed within Figure 4.2, all Par 3 courses are within the respective Arun sub-regions accessibility

areas.

Course Ref	Course name	Administrative Area	Holes	Par
6	Norfolk Gardens	Arun	9	27
7	Church Farm	Arun	9	27
I	Chichester Golf Club	Chichester	9	27
The Site	Rustington Golf Centre	Arun	9	27

Management and Ownership

- 4.9 There are three main types of ownership and management models of golf facilities in England; members clubs, proprietary clubs and municipal facilities:

Management Type	Overview
Members	Traditionally owned by members and run by committees. Most members' clubs offer some level of pay and play and encourage golf societies but are mostly focused on membership numbers.
Proprietary	Owned or managed by businesses or individuals, these can include country club type facilities at the high end of the golfing market alongside more localised facilities. Many have clubs operating within them but can also take a much more relaxed attitude to dress and traditions of golf. Pay and play opportunities tend to be available.
Municipal	These are generally owned by a local authority, although a growing number are managed by external contractors.

- 4.10 Members clubs and visitors are normally expected abide by a dress code; have a registered handicap certificate and be familiar with the rules and etiquette of the game. Proprietary clubs are more relaxed, but often have some dress code and rules and etiquette requirements. Municipal courses are generally more relaxed and do not require people to have handicaps or abide by a certain dress code.
- 4.11 Municipal courses are therefore seen more as entry level facilities, with players using them before progressing on to a members' or higher-end proprietary club courses. That said many golfers continue to favour a particular course. Municipal courses and lower end proprietary courses tend to offer a more affordable and relaxed golfing experience. An overview of the management type of the Study Area golf facilities is provided below:

Course Ref	Course Name	Management Type
Standard Course		
1	Bognor Regis Golf Club	Members
2	Littlehampton Golf Club	Members
3	Rustington Golf Course	Proprietary
4	Ham Manor Golf Club	Members
5	Avisford Park Golf Club	Proprietary
a / b	Worthing Golf Club	Members
c	Hill Barn Golf Club	Members
d	West Sussex Golf Club	Members
e	Cowdray Golf Club	Proprietary
f / g	Goodwood	Members
h / i	Chichester Golf Club	Proprietary
j	Portsmouth Golf Centre	Municipal
k	Selsey Golf Course	Members
Par 3		
6	Norfolk Gardens	Municipal
7	Church Farm	Proprietary
l	Chichester Golf Club	Proprietary
<i>The Site</i>	<i>Rustington Golf Course</i>	<i>Proprietary</i>

- 4.12 As outlined above 62% of the standard courses within the Arun District Study Area are members' clubs. However, there are 4 (30%) are proprietary courses and a municipal course (Portsmouth Golf Centre). Overall the Arun District Study Area has a broad range of management and ownership types that cater for the full spectrum of golfer types.
- 4.13 Specifically within the Eastern Region accessibility area whilst there is not a municipal standard course there is a good mix of both proprietary and members' courses.
- 4.14 Of the four current Par 3 courses three are proprietary course and one is municipal (Norfolk Gardens). However, Norfolk Gardens is operated by a contractor (Tivoli Lifestyle) who effectively manage and operate on a proprietary basis.

Cost

- 4.15 A key issue for golf participation is whether golf courses are available to the general population at an accessible price to the majority of residents. Higher quality courses naturally cost more to use. Dedicated 18-hole courses are generally more expensive than 9-hole courses (including 18-hole courses comprising two loops of 9-holes with dual tee areas).
- 4.16 England Golf indicates that the average cost of a full adult membership across the Country is currently (2020/21) £901.00. As outlined below, within the Arun District Study Area, all facilities offer some form of membership package. Where price information is public, all but three charge more than the national average, with membership to Goodwood being the most expensive at £1,540 per year. The average annual membership across the Arun Study area is £1,305 – again a level higher than the national average. This suggests that most of the sites are high-end and that, subsequently, the cost of playing golf in the Arun Study Area is generally high.

Course Ref	Course Name	Membership	Green Fee (per round)	
			Weekday	Weekend
1	Bognor Regis Golf Club	£1,334	£47.50	£55
2	Littlehampton Golf Club	£1,323	£30	£38
3	Rustington Golf Course	£675	£28	£29.50
4	Ham Manor Golf Club	£1,449 + £500 joining fee	£35	£45
5	Avisford Park Golf Club	£600	£16	£30
a /b	Worthing Golf Club	£1,520	-	-
c	Hill Barn Golf Club	£1,325	£32	£37
d	West Sussex Golf Club	POA	-	-
e	Cowdray Golf Club	£1,176 + £500 joining fee	£55	£55
f / g	Goodwood Golf Club	£1,540	£20	£20
h/ i	Chichester Golf Club	£1,524	£30	£35
j	Portsmouth Golf Centre	-	£19	£25
k	Selsey Golf Course	£893	£18	£20
Arun Study Area Average		£1,305	£30	£35

- 4.17 Whilst the average within the Arun Study Area is above the national average, there are three courses with membership options below the national average (Rustington, Selsey and Avisford). In addition most standard courses within the Arun Study Area are open to visitors and guests. The average weekday green fee across the Arun Study Area being £30 and the average weekend green fee being £35. It is however noted that the Arun Study Area average green fees are partly inflated by the high costs associated with Cowdray Golf Club (£55 weekday and weekend) and Bognor Regis Golf Club (£47.50 weekdays and £55 weekends) as all the other courses have green fees within a £16 to £35 weekday range and £20 to £45 weekend range.
- 4.18 Overall there is a broad range of standard course cost options available to golfers within the Arun District Study Area, and the respective Arun sub-region accessibility areas.

Par 3 Courses

- 4.19 As outlined below the average green fee price across the four existing Par 3 courses is £9.86. It is noted that Norfolk Gardens and the Site (Rustington Golf Centre) are broadly the same price. Church Farm Par 3, which is linked to the Church Farm Holiday Village has the highest green fee rate for general public admission.

Course Reference	Course Name	Green Fee (per round)
6	Norfolk Gardens	£7
7	Church Farm	£13.95
l	Chichester Golf Club	£10
<i>The Site</i>	<i>Rustington Golf Centre</i>	<i>£8.50</i>

Quality

- 4.20 There are no official national or other golf facility rankings in terms of quality. In short, the better the course and club, the higher the membership and visitor green fees. In terms of quality of the golf courses within the Arun Study Area, whilst no assessments have taken place to inform this Statement, it is assumed to be good across the Study Area and the respective Arun sub-region areas, as reflected by the relatively high price point at the majority of the facilities. No significant quality issues have been identified.

Supply Against Population

- 4.21 To analyse the level of supply of golf facilities within the Arun Study Area and the respective sub-regions (Eastern, Downland and Western), provision has been analysed and compared to national, regional and West Sussex rates. This analysis helps understand 'standards' and considers the number of golf holes (both standard and Par 3) per head of population.
- 4.22 Analysis of population is based on official Office for National Statistics (ONS) mid-year estimates for mid-2020. 'Best fit' analysis of the Lower Super Output Area (LSOAs) associated with each of the Arun District's sub-regions has been applied.

Standard Course

- 4.23 The provision of standard golf course holes per head of population by area is provided below.

Area	Standard Holes	Population (Mid-2020)	Holes Per 1,000 population
Eastern Region Area	234	65,345	3.58
Downland Region Area	252	25,232	9.99
Western Region Area	270	70,546	3.83
Arun Study Area	288	161,123	1.79
Arun District	90	161,123	0.56
West Sussex	697	1,152,705	0.60
South East	6,774	9,217,265	0.73
England	30,932	56,550,138	0.55

- 4.24 As outlined above the standard holes per 1,000 population within the Arun Study Area and the respective Arun sub-region accessibility areas is meaningfully higher than the county, regional and England rates. Whilst the standard hole rate for just Arun District in isolation is marginally lower than the West Sussex average, it remains above the national rate

Par 3 Course

- 4.25 As outlined below, the rate of current Par 3 holes per 1,000 population is again meaningfully higher within the Arun District Study Area and the respective sub-region areas compared to West Sussex, the South East and England. Furthermore, the rate within Arun District itself (0.11 holes per 1,000 population) is broadly double rate within West Sussex, the South East and England.

Current Par 3 Course Provision (including the Site)			
Area	Par 3 Holes	Population (Mid-2020)	Homes Per 1,000 population
Eastern Region Area	27	65,345	0.41
Downland Region Area	27	25,232	1.07
Western Region Area	27	70,546	0.38
Arun Study Area	27	161,123	0.17
Arun District	18	161,123	0.11
West Sussex	63	1,152,705	0.05
South East	567	9,217,265	0.06
England	2338	56,550,138	0.04

- 4.26 As outlined below, the rate of par 3 holes per 1,000 population remains meaningfully higher within all Arun areas with the exclusion of the Site in comparison to West Sussex, the South East and England.

Revised Par 3 Course Provision (excluding the Site)			
Area	Par 3 Holes	Population (Mid-2020)	Homes Per 1,000 population
Eastern Region Area	36	65,345	0.55
Downland Region Area	36	25,232	1.43
Western Region Area	36	70,546	0.51
Arun Study Area	36	161,123	0.22
Arun District	27	161,123	0.17

5. Demand Analysis

- 5.1 Since 2004, participation in golf has generally been in decline, with only recent signs showing that the reduction may be levelling off. The landscape of demand has also changed over this time, with less users taking up membership packages and more golfers becoming nomadic and using a range of courses on a pay and play basis. This is a pattern likely to be seen in Arun District and West Sussex more generally as it has been shown to be the case nationwide.
- 5.2 Notwithstanding the above Sport England Segmentation data provide participation rates for golf (and other sports) based on demographics and other Experian socioeconomic indicators as well as Sport England's own 'Active People Survey' data. Analysis of likely current participation and future participation in golf by residents within Arun District and the three sub-regions (Eastern, Downlands and Western Regions) has been undertaken.
- 5.3 The demographic analysis draws on the 'best fit' analysis of the ONS 2020 mid-year estimates and the 2018-based sub-national population projections. The 2020-based sub-district apportionment is held constant over the projection period to 2036.

Population Change

- 5.4 The current and projected all persons population change for Arun District and the Arun sub-regions is provided below. Overall Arun's total population is projected to increase by c. 20,000 persons over the period to 2035. This representing a c.12% increase in total population.

Area	2020	2025	2030	2035	Absolute Change 2020 to 2035
Eastern Region	65,345	68,883	71,308	73,413	8,068
Downlands Region	25,232	26,598	27,534	28,347	3,115
Western Region	70,546	74,366	76,983	79,256	8,710
Arun District	161,123	169,847	175,825	181,016	19,893

Participation in Golf

- 5.5 However, not all of Arun's existing and future population will play golf. Drawing on Sport England participation rates for the respective sub-regions (Eastern: 3.5%; Downlands: 4.1%; and Western: 3.8%) the level of current and future population who are likely to participate in golf is provided below:

Area	2020	2025	2030	2035	Absolute Change 2020 to 2035
Eastern Region	2,271	2,394	2,478	2,551	280
Downlands Region	1,026	1,082	1,120	1,153	127
Western Region	2,663	2,807	2,906	2,992	329
Arun District	5,960	6,283	6,504	6,696	736

- 5.6 Overall, the total projected increase in Arun's population participating in golf between 2020 and 2035 is at best only 736 persons. This is considered an at best increase as analysis of the demographic profile of the areas population change indicates most (92%) of the District's population growth over the 2020 to 2035 period will be those aged 60 plus. As outlined below, Arun's population aged 30-39 and 50-59 is expected to decline over the same period.



- 5.7 With a third of the District's population change over the next 15 years being aged 80+, the level of new standard course golf participation from the current based position (2020) position could be c. 490 persons on the basis that a limited number of people aged 80+ are actually likely to be physically fit and able to play 9- or 18-holes of standard golf.
- 5.8 Golf participation research conducted by England Golf, Golf Ireland, Scottish Golf and Wales Golf in 2020 found that the average age of golfers fell by five years to 41, with the majority of new golfers aged under 55. Based on this, analysis of the areas population change of those aged under 55 would suggest that the potential increase in new golfers over the period 2020 to 2035 is likely to be only 83 persons (an annual increase of c. 5 persons over the 15-year period). New golfers being those typically attracted to Par 3 courses or lower-end and more relaxed proprietary courses.

Area	Population Under 55			Population Under 55 participating in Golf		
	2020	2035	Absolute Change (2020 to 2035)	2020	2035	Absolute Change (2020 to 2035)
Eastern Region	37,226	38,139	913	1,294	1,325	32
Downlands Region	14,374	14,727	353	585	599	14
Western Region	40,188	41,174	986	1,517	1,554	37
Arun District	91,788	94,040	2,252	3,395	3,479	83

- 5.9 In view of this, the level of new demand for standard course and Par 3 course is not expected to meaningfully change over the next 15-years.

6. Summary and Conclusion

- 6.1 The Site is currently a Par 3 golf course associated with the Rustington Golf Centre. As result of the Proposed Development the use of the Site as a Par 3 golf course would cease. All other existing golf facilities associated with the Rustington Golf Centre would remain, these being:
- Membership and pay & play access.
 - Par 70 course that can be played as either a 9 holes or 18 holes course.
 - 28 bay driving range.
 - Pro tuition (Cranfield Golf Academy).
 - Pro Store.
 - Junior golf and youth academy (Cranfield Golf Academy).
 - 18-hole adventure golf course.
 - Café.
- 6.2 Policy OSR DM1 of the adopted Arun Local Plan outlines that the loss of existing open space is only possible where either:
- (a) Robust and up-to-date assessment has been undertaken which has clearly shown the facilities to be surplus to requirements; or
 - (b) The loss will be replaced by equivalent or better provision elsewhere.
- 6.3 Notwithstanding the fact that the Site, unlike Ham Manor Golf Course immediately to the north and north east of the Site, is not formally designated as existing open space (Policy OSR DM1) on the adopted Arun Proposals Map, an application on the Site was refused planning permission in October 2021 in part due to perceived conflict with Policy OSR DM1(a).
- 6.4 Given the above, this Golf Course Needs Statement has been prepared and follows Sport England guidance on need assessments for sport facilities.
- 6.5 The assessment within this Statement has been based on Arun District and the three sub-regions (Eastern, Downlands and Western) defined within the Arun Open Space, Sport and Recreation Study. The Site being located within the Eastern region. In accordance with Sport England and the Council's golf course accessibility standard, a 20-minute drive-time accessibility zone has been applied to the respective geographical assessment areas – the 'Arun Study Area' and the 'Sub-region accessibility areas'.
- 6.6 With regard to standard golf course provision, the assessment undertaken has confirmed that there is currently a range of courses within all of the assessment area geographies that provide existing and potential new golfers with:
- A broad mix of course lengths.
 - A good variety of accessibility options i.e. membership courses with formal dress codes; playing etiquette; and player ability standards, down to more informal and relaxed municipal or lower-end proprietary courses.

- A wide range of membership and pay and play prices.

- 6.7 All of the assessment areas also have a standard holes to 1,000 population ratio meaningfully higher than West Sussex, the South East and England.
- 6.8 Within the context of the areas current demographic profile and projected population change over the next 15 years (2020-2035), the level of new demand for standard golf course provision is not expected to meaningfully change.
- 6.9 With regard to Par 3 golf course provision, the assessment undertaken has also confirmed that there is a good level of existing provision within all assessment areas. Indeed, even with the exclusion of the Site, the ratio of Par 3 holes to 1,000 population is very meaningfully higher than West Sussex, the South East and England:

Par 3 Course Provision (excluding the Site)			
Area	Par 3 Holes	Population (Mid-2020)	Homes Per 1,000 population
Eastern Region Area	36	65,345	0.55
Downland Region Area	36	25,232	1.43
Western Region Area	36	70,546	0.51
Arun Study Area	36	161,123	0.22
Arun District	27	161,123	0.17
West Sussex	63	1,152,705	0.05
South East	567	9,217,265	0.06
England	2338	56,550,138	0.04

- 6.10 Within the context of an existing high proportion of Par 3 holes to population it is noted that the areas current demographic profile and projected population change over the next 15 years (2020-2035) is also not expected to meaningfully increase demand for Par 3 golf provision.
- 6.11 Whilst there is no recognised standard for golf provision against which any oversupply or undersupply can be based, we conclude, based on the evidence and analysis undertaken within this statement, that the Proposed Development on the Site would have no material impact on standard golf or par 3 golf provision within the Arun Study Area, or the respective sub-region accessibility areas. The provision of Par 3 golf within the Arun Study Area and the respective sub-region accessibility areas would remain demonstrably higher than that within West Sussex, the South East and England.
- 6.12 In view of the above, against Local Plan Policy OSR DM1 (a), we therefore conclude that evidence has been provided to demonstrate that the Site as a Par 3 course is surplus to current and future requirements. Consequentially the Proposed Development is not in conflict with Policy OSR DM1 (a).

Nexus Research and Analytics
London

4 Pear Place
London
SE1 8BT

