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"From Market to Maintenance": Aligning Golf Course Quality Standards and Market Demographics

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This case study examines the concept of golf course quality, and its relationship with market positioning and maintenance standards. A qualitative meta-synthesis of academic and industry literature was combined with 10 semi-structured interviews with senior golf representatives, to reveal three key themes: defining what 'quality' means in context, emerging trends toward naturalistic course design, and strategies for managing player expectations within the experience economy. Results show that aligning course quality standards with target market demographics is critical for operational success and long-term sustainability. Clubs positioned along the golf club continuum – from high-end venues to entry-level facilities – require tailored maintenance strategies that reflect environmental constraints, financial realities, and customer expectations. Future directions involve a cultural shift away from cosmetic perfection toward authentic, environmentally responsible layouts, supported by transparent communication and stakeholder engagement. While such changes challenge traditional norms, they offer opportunities to enhance playability, reduce resource dependency, and strengthen golf's appeal in an increasingly experience-driven leisure market. Ultimately, adapting to change while preserving core traditions is essential for securing the sport's future viability.

There have been many great achievements in the world of golf during recent times, such as inclusion in the Olympic Games showcasing the sport on a global platform (in 2016, 2021, and 2024) and record spectator attendance at various major golf events – including The Open Championship at St Andrews in 2022 (290,000 people) and Royal Portrush in 2025 (278,000) (R&A, 2025). Active golf participation is also on the rise, increasing from a low point of 763,000 people (1.7% of population of England) between November 2020 and 2021 up to 1,022,300 (2.2% of population) between November 2023 and 2024¹ (Sport England, 2022, 2025).

¹ Sport England's Active People and Active Lives surveys represent a consistent yearly measure of sport participations amongst adults and children in in the England. Historical trends in golf reveal that 889,100 (2.18% of population) participated in golf at least once per week over the previous four weeks between October 2005 and October 2006, compared with 729,300 (1.64%) between October 2015 and 2016 – a reduction of over 150,000 people (Sport England, 2016). Golf participation has increased since 2016, however, rates still remain comparatively low, at 1,022,300 (2.2% of UK population) between November 2023 and 2024, using the more lenient measure of playing twice per month (rather than once per week) now adopted by Sport England, and thus still represent a significant growth area going forward (Sport England, 2025).

However, such accomplishments have been achieved amongst a landscape of increasing pressures that threaten the sustainability of the game, including a series of environmental concerns. Evidence for climate change patterns are well established, with research highlighting significant shifts in environmental conditions and their socio-economic implications (Abbass et al., 2022; Bunds & Casper, 2018; Hausfather & Peters, 2023; Massetti & Mendelsohn, 2018). This poses numerous challenges for golf clubs, including: an increase in the frequency of hotter, drier summers, that places pressure on water resources; winters are experiencing greater precipitation, leading to higher river flows and an increased risk of flooding; and more variable winter temperatures that are altering growing seasons and contributing to the growth of pests, diseases, and invasive weeds. Golf clubs are required to implement maintenance adaptations, incur increased resource costs, and comply with more stringent regulatory frameworks (Millington & Wilson, 2015).

The issue of sustainability is exacerbated by golf's changing relationship with the environment. Golf's original ecological footprint was relatively small, reflecting early integration with natural landscapes (Nguyen, 2017). Over time, however, the sport has gradually moved away from its natural environment, driven by increasing demands for aesthetic and functional course design (Millington & Wilson, 2015; Wheeler & Nauright, 2006). This process led to many courses requiring extensive land and water use, significant physical alterations, and the introduction of non-native vegetation maintained through chemicals and irrigation – landscapes that are highly artificial and rarely sustainable without continuous inputs of labour, capital, and resources (Fitzpatrick et al., 2021; Millington & Wilson, 2014, 2016; Priestley, 2006; Tapias & Salgot, 2006). In the context of such pressures, issues of golf course quality levels are the cause of much debate between academics, agronomists, designers, architects, greenkeepers, and, of course, the players themselves. However, much of this focusses on specific maintenance practices carried out across various areas of the course, such as greens, teeing areas, fairways, and bunkers, and fail to recognise the wider business impacts of such decisions.

The central aim of this case study research is to analyse the concept of golf course quality levels. In doing so, it strives to move beyond viewing the maintenance and business aspects of golf as completely separate and independent entities, but rather focus on the *relationship* between them both. Despite growing interest in sustainability, golf course management, and golfer behaviour, limited attention has been paid to the relationship between golf course quality standards, market demographics, and maintenance strategy. This study seeks to address this gap through the following research questions:

RQ1. How is golf course quality conceptualised within the academic and industry literature?

RQ2. How do market positioning and target demographics influence expectations of golf course quality?

RQ3. How are sustainability pressures influencing approaches to golf course conditioning and player expectations?

This research brings together, for the first time in one place, the key academic and industry research that has been undertaken around the golf course quality and membership demographics, and offers practical action points which can help inform strategy decisions within golf clubs and the wider governing body landscape, thus help secure the future of the sport in challenging times. Prior to outlining the methodological approach adopted, it is important to overview the existing literature.

Literature Review: Golf Course Quality, Stakeholders and Sustainability

The concept of 'quality' has been widely examined across sport, tourism, and leisure management research. Research demonstrates that quality should not be viewed as a fixed concept, but rather one that is shaped by customer expectations, organisational objectives, and market conditions (García-Fernández et al., 2017; Martínez-Tur et al., 2010; Pop et al., 2024). Consequently, assessments of quality are often subjective and dependent upon the perspectives of those evaluating a product or service. As such, interpretations of quality can be highly subjective making it difficult to establish consistent standards for management and evaluation, particularly where multiple stakeholder groups may hold competing expectations. In golf, this presents a particular challenge because perceptions of course quality are influenced by a combination of conditioning standards, playability, visual aesthetics, environmental conditions, and individual player preferences (Amundsen et al., 2024; Brown & Fry, 2021).

Stakeholder theory provides a useful framework for understanding competing interpretations of quality. While the theory originated with Freeman's (1984) seminal work, it has continued to evolve and remains widely applied across sport, tourism, and environmental management research (Donaldson & Preston, 1995; Freeman et al., 2021). The theory suggests that organisations operate within a network of 'stakeholder' relationships, each possessing different interests, expectations, and levels of influence. Within golf, these stakeholders may include golfers, club managers, greenkeepers, governing bodies, local communities, and environmental organisations. Although stakeholder theory offers a useful lens for understanding competing interests, it can be difficult to prioritise stakeholder claims when objectives conflict, creating challenges for practical decision-making. On one hand, golfers may prioritise course conditioning and playing experience, whereas course managers and greenkeepers must simultaneously balance financial realities, labour requirements, environmental responsibilities, and long-term sustainability objectives. Consequently, decisions concerning golf course quality frequently involve competing priorities rather than universally accepted standards.

These tensions have become increasingly significant as golf clubs operate within more challenging environmental and economic landscapes. Climate change, water availability, regulatory pressures, rising maintenance costs, and changing participation patterns have intensified scrutiny of traditional golf course management practices (Fitzpatrick et al., 2021; Millington & Wilson, 2015, 2016). Historically, many golf courses pursued highly manicured and visually pristine conditions that required substantial resource inputs, despite growing evidence that such approaches are often neither environmentally nor financially sustainable (Fitzpatrick et al., 2021; Hudson & Hudson, 2014). In response, both researchers and practitioners have increasingly advocated more naturalistic golf course management approaches that prioritise ecological function, biodiversity enhancement, resource efficiency, and strategic playability over purely aesthetic conditioning standards (Brown & Fry, 2021).

The diversity of golf club markets further complicates questions of quality, as facilities operate across a broad spectrum ranging from traditional private member clubs to more accessible family-orientated and pay-and-play venues (Danylchuk et al., 2015; R&A, 2018). Different market segments attract different participant groups, with different resource capabilities, and different expectations regarding course condition and playing experience. Quality standards, therefore, that may be appropriate for one club may be unsuitable or economically unsustainable for another. Understanding the relationship between market positioning and maintenance expectations therefore becomes critical for effective golf club management. While existing research has examined sustainability, course conditioning, golfer satisfaction, and participation trends independently, little attention has been given to the relationship between golf course quality, market positioning, and maintenance strategy.

Methods

The primary research method comprised a comprehensive review of academic and industry literature related to golf course quality and membership demographics. This qualitative meta-synthesis involved systematically identifying relevant studies guided by the initial research questions, using abstract and citation databases of peer-reviewed articles, industry reports, and governing body publications accessed publicly or through direct contact with relevant organizations (Dawson, 2019; Lachal et al., 2017). Inclusion criteria focused on publications that directly addressed golf course quality, conditioning standards, sustainability, playability, golfer expectations, or golf club management. Each article was critically appraised for quality and relevance before comparing patterns, concepts, and meanings across studies. Coding was undertaken inductively using NVivo software, allowing themes to emerge from the data rather than being imposed a priori. A coding framework was developed and refined iteratively throughout the analytical process, allowing recurring points of significance and emerging trends were identified through a six-phase iterative framework: familiarization, coding, theme development, review, definition, and reporting

(Braun & Clarke, 2006, 2022). This flexible yet rigorous approach to pattern identification and interpretation, supported by systematic coding and thematic analysis, ensured alignment with the research questions and facilitated the development of key themes (Braun & Clarke, 2006, 2022). These themes were synthesized into broader conceptual insights concerning golf course quality and membership demographics, which underpin the empirical discussion sections: 'Establishing what 'quality' means', 'new directions', and 'managing player expectations'.

Semi-structured interviews were conducted with 10 participants serving as head greenkeepers at golf clubs across Northwest England, to corroborate and 'test' the literature by examining its application in real-world contexts (Bryman et al., 2021; Clark et al., 2021; Jones, 2022). This method was chosen for its ability to generate rich, interpretive data and its suitability for complementing and deepening insights from the literature review. Participants were recruited through introductions facilitated by the R&A via their Golf Course 2030 strategy, that enabled a snowball sampling approach from those who responded positively to initial invitations. Interviews were held at the participants' respective golf courses, allowing for 'walk and talk' discussions that provided practical explanations of the issues under scrutiny. Interviews were audio-recorded typically lasted between 30 and 45 minutes, and transcribed verbatim, generating a substantial body of qualitative data for analysis. Transcripts were imported into NVivo and analysed alongside the literature data using the same inductive coding procedures. An interview guide was developed with questions informed by the academic literature, that ensure consistency while allowing participants the flexibility to elaborate beyond rigidly structured questions. This approach supported an open-minded stance, enabling the researchers to follow the direction of emerging data and maintain interpretive distance from the project. Participants were encouraged to articulate the realities of their experiences within the golf club environment, including emotional responses, thereby enriching the qualitative findings (Bryman et al., 2021; Veal & Darcy, 2014).

The project was commissioned by the R&A and received ethical approval from University Centre Myerscough's Faculty Research Ethics Committee (FREC). To minimise interpretive bias in analysing both the academic literature and interview data, the research was explicitly guided by empirical evidence (Bloyce, 2004; Lever & Powell, 2017). The reflexive thematic analysis framework described earlier enabled the data to shape the narrative organically, avoiding the imposition of any pre-existing ideological lens (Braun & Clarke, 2006, 2022). Coding decisions and theme development were discussed amongst the research team throughout the analytical process. Reflexive notes were maintained to encourage critical reflection on emerging interpretations and to enhance the transparency and credibility of the findings, helping ensure researchers distanced themselves from personal assumptions and frames of reference to enhance transparency and credibility (Bloyce, 2004; Thurston & Green, 2004; Veal & Darcy, 2014).

Figure 1. Golf club continuum

	High End Venues	Private Members Clubs			Entry Level Clubs
Characteristics & Target Market	Price point ≈ £££££ Tourism / affluent members	Price point ≈ ££££ Tourism / affluent members	Price point ≈ £££ Members clubs	Price point ≈ ££ Corporate clubs	Price point ≈ £ Casual golfers
	Traditional golf clubs / Formal competition structure / Strict dress code / Strict membership criteria / Priority area: members		Mixed	'Family' oriented golf clubs / Relaxed, informal play / No dress code / Open membership criteria / Priority area: pay and play	

Participants were assured that all data would remain confidential with anonymity protected, and are referred to as "industry voice" in this case study. Access to data was restricted to the research team, with sensitive files password-protected and stored on secure systems. A key ethical consideration concerned potential harm to interviewees, given their senior roles at golf clubs and the potential sensitive nature of the topics discussed. This risk was mitigated through clear participant briefing, provision of an information sheet, and signed consent forms confirming willingness to participate. Before interviews commenced, participants were informed of the study's purpose and how their data would be used. They were also assured of their right to withdraw at any stage and provided with researcher contact details for support throughout data collection and analysis.

Establishing what 'quality' means: Identifying core market and aligning the golf product

Research in sport, tourism, and leisure reveals that 'quality' is not a fixed concept but varies according to factors such as customer expectations, organizational context, and market dynamics (García-Fernández et al., 2017; Martínez-Tur et al., 2010; Pop et al., 2024). It is important, therefore, that golf clubs assess their place in the wider market, and that their golf offer accurately reflects this, to ensure satisfaction and competitiveness. Rather than try and offer 'everything for everybody', clubs should look to identify their core market demographic align the product offered appropriately. This is supported by the following interviewee quote, highlighting that "maintenance programs must innovate and adjust to changing demographics and economic conditions". Furthermore, the need to carefully consider market demographics is just as important for elite clubs with financial resources as their disposal, as the following quote highlights "there has to be a balanced approach. This is an open championship venue, and people want that experience but you've also got to get people round, and it not be impossible. It's about balance and listening to feedback".

One of the key strengths of the golf industry is the rich mix of club facilities nationwide, across a range of offerings, from 'top end' private clubs through to local council municipal clubs. The 'golf club continuum' has been proposed to illustrate the range of golf club models from traditional to family-oriented formats, and can be used to guide decisions on quality levels (R&A, 2018). At one end, traditional golf clubs emphasise formal

competition structures, strict dress codes, and exclusive membership criteria, often prioritizing members and operating at a higher price point. At the opposite end, family golf clubs offer a more relaxed and informal experience, with no dress code, open membership, and a focus on pay-and-play access at lower cost (R&A, 2018). This continuum highlights the diversity of golf club offerings, where clubs fall somewhere between these two extremes, and should adapt their structure to meet different social and economic needs. It is important golf clubs first determine their position on the golf club continuum, to better understand their identity and market offering, and how this translates to required course quality levels. Clear strategic vision and brand identity allows club managers to drive focussed and meaningful change. To achieve this, clubs should assess their internal facilities -such as course size, type, and clubhouse – in addition to external market factors like player demographics, and tailor their offerings effectively. This process requires creative strategies that showcase the club's unique features, supported by an engaging marketing campaign to clearly communicate what is available. This not only strengthens the club's image but also focussed the approach to course conditions and playability, ensuring alignment with member expectations and long-term goals.

Furthermore, golf courses are influenced by a range of topographical and environmental factors that shape course condition and playability standards (Brown & Fry, 2021; Straw et al., 2022). Elements such as climate, weather patterns, landscape, and soil type all have a significant impact on greenkeeping practices, ultimately determining the quality and characteristics of playing surfaces. As one interviewee succinctly put it, "all golf courses are different, for the simple reason they are part of the natural environment located in different places. The optimum 'condition' of a green in one location will be different to another". Similarly, another highlighted that "context is critical", adding "quality and performance cannot be considered without other considerations. For example, weather, golf course design, willingness to develop the course, maintenance strategy, constraints such as budget, usage levels". This indicates that course quality and performance are inherently context-dependent, and must be viewed reference to environmental conditions, design choices, and management strategies.

'Back to the future': New directions in golf course condition and playability

The visual appearance of golf courses has traditionally been the key indicator of playing conditions, but aesthetic appeal is highly subjective and often criticised without reference to criteria that rewards skill (Barton, 2008). Furthermore, challenges such as climate change, resource constraints, and regulation make it harder, and more expensive, to maintain courses in pristine condition (Hudson & Hudson, 2014). Future trends, therefore, point toward more "rugged and natural" layouts that resemble traditional designs, with firmer, faster turf and greater emphasis on creativity and shot-making. Barton

(2008) recognised the trend toward naturalistic golf course design early, with some courses moving away from Augusta-style perfection toward layouts that are more rugged and wild, resembling the traditional links of the British Isles where the game originated. More recently, Hudson and Hudson (2014) highlight the move towards less manicured, irrigated, or groomed spaces and a focus to keep more acreage in its natural state. Courses are increasingly paying attention to what environmental issues are – protection of the habitat, woodlots, animal homes, and buffer strips by the waterways – meaning less chemicals, pesticides, and water (Hudson & Hudson, 2014). Participants from this study echo these sentiments, emphasising the need to adapt maintenance practices to environmental realities. One manager stated, “we try and be a lot more natural with things, if things brown off then we’re ok with that, it’s all about the playability”. Similarly, another manager explained that during drought conditions “fairways and semi are left to burn off”, with resources prioritised elsewhere. There is also a time aspect to such decisions, as articulated by another interviewee, “everything we are looking at now is, can we do it quicker? Can we do it better? These are important questions for course maintenance, quality, and sustainability”. The move towards golf’s original roots and a more authentic playing environment is not only environmentally beneficial, it is increasingly viewed as essential for the sustainable development of the sport, reflecting a growing acceptance that sustainability considerations must increasingly influence perceptions of course quality.

Trends in golf course design towards more traditional and rugged layouts lend themselves to reduced reliance on artificial agents such as chemicals, favouring fewer and more natural inputs (Braun et al., 2023). It is argued that when done correctly, this approach can enhance overall quality while lowering financial commitments. For example, as one industry representative explained, “we have gone from a monthly fungicide to doing three a year. This is better from a financial point of view, but also an environmental point of view. We are replacing these artificial agents with more natural products where we can”. This also applies to highly manicured bunkers, as the following interviewee explains, “the Course Manager sees the bunker redevelopment plan as integral to the future sustainability of the course”, adding that “all new bunkers being a major part of this ... [old] bunkers will be removed or moved ... reduce bunker numbers by about 20 ... liners and revetted to lengthen their life and reduce management costs and needs”. As golf courses trend towards more traditional design features, it is becoming more important to manage players’ expectations of what courses will look like. Certain groups will be open to such changes, whereas other groups less so. Research has shown ‘core’ golfers, typically lower handicap and regular players, are enthusiastic about such changes (Brown & Fry, 2021). Whereas ‘casual’ golfers, those that do not play regularly and tend to have higher handicaps, may not like these changes (Brown & Fry, 2021).

Managing player expectations: Rise of the 'Experience Economy'

Golfers represent the primary stakeholder in determining course condition and playability, as they are the paying customers upon whom the industry depends (Amundsen et al., 2024; Groch & Jiang, 2015). Consequently, their perceptions of course quality significantly influence operational priorities. However, this empirical research support that challenges can arise from lack awareness of the complexities of greenkeeping or the constraints under which course managers operate (Amundsen et al., 2024). For example, the following quote indicates that golfers were often resistant to management initiatives, such as heather restoration and selective tree removal, despite recognising the environmental and strategic benefits of such changes "players most often complain about the rough – too long and thick. They are resistant to heather restoration in these areas ... They also resist any tree removal despite many areas would benefit from this". This illustrates the difficulties that can arise when stakeholder expectations conflict with long-term course management objectives.

Furthermore, one golf course cannot be easily compared to another given environmental differences, amongst other things, as outlined above. This research reveals that aligning player expectations with the level of provision, therefore, is becoming increasingly essential to ensure that golfers understand the quality levels of the product they are buying. As one industry representative commented, "player feedback is challenging, as it's highly subjective and is without objective measurement. But it is significant, because of the impact it can have ... A crucial part of GC2030 [R&A's sustainability support strategy for clubs] will be helping golfers to understand the realities of the future challenges the game faces, and raising their understanding of what changes are needed in the management of golf course elements". This view was consistently reflected by interview participants. As one head greenkeeper explained, "there needs to be better education for golfers, managing their expectations about what is feasible with limited manpower and resources". Another commented that on the importance of "shared knowledge and managing golfer expectations ... [where] more and more regular communication is key", highlighting the importance of communication in shaping perceptions of course quality.

Effective communication and marketing of course design changes to players is crucial in their success (Mações & Román-Portas, 2022). For example, this could be presented as an opportunity to return to the traditions of playing the game, a true test of skill by challenging yourself to a contest against the natural elements. While, at the same time, promoting the benefits of this approach to the environment, cost reductions through less inputs, and securing the overall sustainability of the sport can help mitigate resistance. It is worth quoting one interviewee at length regarding this issue,

"Vital that we find compelling and effective ways to help the golfer understand that it's [course changes] are essential, and that some pain during the process is inevitable, but worth it in the long term... We need golfers (and many in the profession) to accept that these challenges are real, and that fighting them through ever more intensive applications of water and chemicals is not the way to go. Challenging, but essential".

Results indicate that ensuring changes are communicated with key stakeholders, particularly members, throughout the maintenance strategy development process is essential. They should be framed as a shared commitment to the long-term health of the game by emphasising sustainability, tradition, and the collective benefits for golfers and the environment in order to promote support.

It is also important to consider the opportunities that arise from the approach to golf course quality standards outlined in this paper. Research indicates that environmental challenges demand a change in mindset – from viewing sustainability as a burdensome compliance requirement to embracing it as an opportunity to not only enhance the sport's reputation but also for the industry must learn to value the natural beauty and diverse hues of golf courses (Hudson & Hudson, 2014; Millington & Wilson, 2016). Offering a more traditional and distinctive golf experience aligns well within the growth of the 'experience economy'. Research suggests the experience economy is replacing the traditional service model, meaning businesses must now deliver memorable experiences rather than just services (Chang, 2020). In this context, the experience itself becomes the product, where consumers increasingly seek meaningful offerings, shifting from accumulating possessions to creating lasting memories and stories (Chang, 2020). For golf, this highlights the rising importance of the playing experience, and clubs should, therefore, focus on 'selling' their unique narrative – such including links to historical roots or local traditions – and reflect this identity through the course design and overall experience.²

Conclusion

The central aim of this paper was to examine the concept of golf course quality levels. It is argued that 'quality' should be viewed as an interdependent relationship between maintenance and business decisions, rather than as discrete separate entities. Results show that 'quality' is inherently context-dependent – shaped by climate, soils, design, budgets, and usage – and that clubs must first locate themselves on the golf club continuum, identify their

² Changes at Prince's Golf Club, Kent England, provide an excellent example of the promotion of the experience economy. Prince's Golf Club redesigned its three nine hole loops to enhance playability and aesthetics while restoring the natural coastal character and promoting sustainability, earning GEO Certified status. The redesign also celebrates the club's rich history through themed holes like the Sarazen bunker and Bloody Point, including physical displays of pirate cargo and information signs, thus connecting players to stories of past champions and local heritage.

core market demographic, and then align course conditioning and playability standards accordingly. Environmental realities, such as water scarcity, regulatory pressure, changing seasons, must be integrated with customer expectations, and used to guide maintenance priorities and performance targets. Taken together, this study offers a critical analysis of the industry's current position and argues for evidence-based ways forward that link strategic positioning, operational practice, and stakeholder value.

Future directions point to a move from cosmetic perfection toward more naturalistic, firmer, faster, and more variable playing surfaces, accompanied by reduced reliance on artificial inputs and greater use of context-appropriate, lower-input practices. This shift aligns with golfers' growing preference for authenticity and challenges traditional media-reinforced golf course ideals, while also mirroring societal acceptance of "imperfect" yet more sustainable products in the food industry, for example (Wheeler & Nauright, 2006). Managing expectations during this development is vital, where transparent communication, objective performance metrics, and targeted messaging is key. Framed within the experience economy, this approach offers sustainability and playability changes as a in terms of improving ecological outcomes, cost control, and member satisfaction.

Ultimately, adapting to change is integral to golf's future security, but that adaptation must be rooted in the game's traditions and values. The sport's history shows that innovation is not new, and well-communicated, tradition-honouring changes can help restore course diversity and creativity diminished by a century of standardisation (Barton, 2008; Fry et al., 2015). Golf clubs will be increasingly required to consider their brand position on the golf club continuum, embed a maintenance philosophy that fits local environmental constraints and market demographics, and use marketing communications to set expectations. Embracing this cultural shift enables clubs to balance tradition with innovation, align market positioning with conditioning standards, and help secure the golf's long-term viability.

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