



Golf Product Overview

BUILDING TOURISM WITH INSIGHT

GOLF

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This profile summarizes information on the British Columbia golf tourism sector. Information provided includes trends in golf tourism, an overview of the sector, a demographic and travel profile of Canadian and American travellers who participated in golfing activities while on pleasure trips, and other outdoor and cultural activities participated in by golf travellers. Also included are trends in golf participation within the Canadian population, trends in golf travel amongst US golfers, golf travel decision factors and an inventory of the golf course supply within British Columbia.

Information in this report has been compiled from several sources, including the 2006 Travel Activities and Motivations Study (TAMS), research conducted for the Royal Canadian Golf Foundation, the US National Golf Foundation, Golf Digest Magazine in the United States as well as figures provided by BC Golf Guide.

For the purpose of this report, information that summarizes TAMS data, “participating” golf travellers are defined as those who have taken at least one overnight trip in 2004/05 where they *participated* in one of three golf activities: (1) Occasional game of golf; (2) Stayed at a golf resort; or (3) Part of an organized golf tour. Golf “motivated” travellers are those who have taken at least one overnight trip in 2004/05 where the trip was *motivated* by one of the three golf activities (listed above).

Demographic Profile¹

DEMOGRAPHIC PROFILE OF CANADIAN AND US GOLF PLEASURE TRAVELLERS

Pleasure travellers participating in the 2006 Travel Activities and Motivations Survey (TAMS) who had been to British Columbia in the past two years (2004/05), were asked to indicate if they had participated in a golf activity while travelling. Those who had participated in these activities were further asked if a golfing activity had been a primary motivating factor for any of their trips.

- Two thirds of golf pleasure travellers from both Canada and the US who had been to British Columbia in the past two years and participated in a golf activity while on a trip were male. Among those travellers for whom golf was the primary motivation for at least one trip, the proportion of males was even higher (74% in the US Golf Motivated market, Table 1).
- Canadian participating golf travellers were less likely to be between the ages of 55-64 compared to other golf pleasure travellers (Canadian Participating & US Participating/Motivated golf travellers).
- Canadian travellers who had participated in a golf activity while on a trip were younger than their American counterparts. Nearly 49% of Canadian participating golf travellers were aged between 18 and 44 years compared to 38% of Americans indicated who had participated in a golf activity while travelling.
- Participating golf travellers tend to be high income earners with over 43% of Canadians and over 50% of US travellers earning \$100,000 or more per annum. In both instances, the proportion of those earning greater than \$100,000 is even higher for travellers motivated by golf than for those participating in golf. The overall income distribution of golf travellers is notably much higher than that of the typical pleasure Canadian and American pleasure travellers.

¹ Unless otherwise noted, information in this section is from the 2006 Travel Activities and Motivations Survey.

- The majority of golf travellers were well-educated, with American golf travellers even more so. Just over 59% of participating Canadians and 74% of participating Americans had completed post-secondary education. In the case of Canadian travellers motivated by golf this increases to 61%. The proportion of American travellers who were motivated by golf and had completed post secondary education was 72%.

Table 1: Demographic profile of BC golf travellers from Canada and the US

Demographics of Golf Travellers from Canada and the US who have been to BC	Canada		US	
	Participate	Motivate	Participate	Motivate
Adults 18+	1,357,812	399,074	1,284,294	443,131
Unweighted Numbers	1,891	591	390	138
Gender				
Male	63.5%	67.8%	65.5%	73.7%
Female	36.5%	32.2%	34.5%	26.3%
Age				
18-34	27.9%	22.9%	23.7%	23.1%
35-44	20.9%	19.8%	14.3%	17.4%
45-54	22.3%	18.4%	24.1%	23.3%
55-64	16.8%	25.4%	17.6%	15.9%
65+	12.0%	13.6%	20.2%	20.2%
Household Income				
Under \$40,000	10.9%	9.8%	9.3%	8.9%
\$40,000-\$59,999	9.5%	8.4%	7.2%	6.3%
\$60,000-\$99,999	26.5%	26.1%	24.5%	21.0%
\$100,000 or more	43.5%	48.6%	50.4%	54.9%
Not stated	9.6%	7.1%	8.5%	8.9%
Education				
Less than Secondary	3.7%	5.4%	1.4%	1.1%
Completed Secondary	25.8%	21.6%	4.9%	6.6%
Some Post Secondary	10.2%	11.3%	18.0%	15.3%
Completed Post Secondary	59.2%	61.0%	73.8%	71.6%
Other	n/a	n/a	0.6%	1.9%
Not stated	1.0%	0.8%	1.3%	3.4%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

* Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHICS BY SPECIFIC GOLF ACTIVITY – CANADIAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- The TAMS research study estimates that there were 3.4 million golf travellers in Canada and of those, approximately 34% had also made a trip to British Columbia during the study period (2004/05).
- When looking at all Canadian pleasure travellers to British Columbia, they were equally likely to be male or female; however, the gender split changes when looking at travellers motivated by golf. The breakdown of the three different golf travel activity types shows that nearly 70% of Canadian golf travellers were male when the type of motivated golf travel is an occasional game of golf or a package golf tour. However, the proportion of males drops slightly to 63% and the share of women increase to 37% when the type of golf motivated travel is staying at a golf resort (Table 2).
- Canadian travellers motivated by golf and have also travelled to BC, tend to be older than the general population of Canadian travellers to British Columbia with over a quarter of general Canadian pleasure travellers aged 55 plus (28%). In comparison, 37% of those Canadian travellers motivated by golf that played the occasional game of golf while on a trip and/or stayed at a golf resort were aged 55 years or older. The proportion in the older age categories drops to 28% for those taking a package golf tour.
- Canadian travellers motivated by golf activities also earn significantly higher incomes than the general population of Canadians travelling to British Columbia. Three in ten Canadian travellers to British Columbia reported annual

household incomes over \$100,000. This increases to one in two for motivated golf travellers. In fact, for Canadian travellers who took a package golf tour, the proportion reporting income over \$100,000 is approximately three in five (58%).

- The majority of Canadian travellers were well-educated, with more than half (55%) having completed post secondary education. Canadian motivated golf travellers were even more likely to have attained this high education level (60%). Again, motivated golf travellers, especially those on a package golf tour, have an even higher proportion of post secondary education completion (65%).

Table 2: Demographics by specific golf activity types for (motivated) travellers from Canada

Demographics of Canadian Travellers who have been to BC by Golf Activity Type	All Canadian Travellers who Visited BC	Type of Golf Activity (Motivated)		
		Golf – Occasional Game	Golf – Stay at Golf Resort	Golf – Package Golf Tour
Total	5,651,177	261,186	179,831	104,115
Unweighted Numbers	7,315	360	307	162
Gender				
Male	49.9%	69.9%	63.1%	68.3%
Female	50.1%	30.1%	36.9%	31.7%
Age				
18-34	31.4%	24.1%	19.4%	27.1%
35-44	18.8%	21.1%	19.2%	20.4%
45-54	21.3%	16.9%	24.6%	24.9%
55-64	14.9%	25.5%	23.5%	13.9%
65+	13.5%	12.4%	13.3%	13.8%
Household Income				
Under \$40,000	17.6%	12.0%	7.7%	2.2%
\$40,000-\$59,999	13.9%	9.5%	7.5%	4.1%
\$60,000-\$99,999	27.4%	24.3%	26.2%	29.6%
\$100,000 or more	29.1%	48.1%	49.8%	58.2%
Not stated	12.0%	6.2%	8.8%	5.9%
Education				
Less than Secondary	7.2%	4.7%	4.2%	5.4%
Completed Secondary	24.9%	22.7%	20.8%	18.4%
Some Post Secondary	12.0%	10.9%	13.0%	10.3%
Completed Post Secondary	55.1%	61.0%	61.7%	65.0%
Not stated	0.7%	0.6%	0.3%	0.8%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

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DEMOGRAPHICS BY SPECIFIC GOLF ACTIVITY –US PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- The TAMS research study estimates that there were 18.2 million golf travellers in the United States in 2004/05; of those, approximately 7% had made a trip to British Columbia during the same period.
- Among all American pleasure travellers to British Columbia, there was little difference in gender (52% male & 48% female). However, when looking at the gender distribution across golf motivated activity categories, there are noticeable differences. As many as three out of four golf motivated travellers were male. The highest incidence is among those staying at a golf resort and the lowest proportion of males is for those on a packaged tour. When compared to their Canadian counterparts, US golf travellers to British Columbia (participate and motivate) were even more likely to be male.
- The age distribution of American golf travellers is similar to the typical American pleasure traveller, although there is a higher tendency for golfers to be between the ages of 35-64 rather than 65 years or more.
- The household income distribution of US motivated golf travellers is similar to those from Canada with half the group reporting incomes over \$100,000. US golf motivated travellers earn higher incomes than the typical US pleasure travellers who visit BC. For those staying at a golf resort or on a package golf tour, the proportion of households earning more than \$100,000 per year reaches 55%.

- US golf motivated travellers to BC were even more likely to have completed post secondary education than the typical US pleasure traveller to BC. Again, travellers who were motivated to travel to either stay at a golf resort or take part in a package golf tour showed the highest proportions in higher education categories.

Table 3: Demographics by specific golf activity types for travellers from the US

Demographics of US Travellers who have been to BC by Golf Type	Type of Golf (Motivated)			
	All US Travellers who Visited BC	Occasional Game	Stay at a Golf Resort	Package Golf Tour
Total	7,025,878	288,792	247,820	113,766
Unweighted Numbers	2,196	91	71	32
Gender				
Male	52.2%	72.7%	75.1%	68.2%
Female	47.8%	27.3%	24.9%	31.8%
Age				
18-34	21.5%	21.9%	26.6%	18.3%
35-44	13.6%	19.5%	14.7%	23.8%
45-54	21.9%	21.6%	28.9%	32.8%
55-64	19.7%	11.0%	21.1%	22.3%
65 +	23.3%	26.1%	8.7%	2.8%
Household Income				
Under \$40,000	13.0%	13.6%	7.6%	6.4%
\$40,000-\$59,999	13.6%	8.1%	4.8%	5.3%
\$60,000-\$99,999	27.4%	25.4%	16.8%	16.5%
\$100,000 or more	34.5%	48.7%	55.6%	54.7%
Don't Know/Not Stated	11.6%	4.1%	15.2%	17.1%
Education				
Less than Secondary	1.6%	1.7%	0.0%	0.0%
Completed Secondary	7.9%	6.0%	5.8%	7.5%
Some post Secondary	23.4%	18.3%	19.0%	11.9%
Completed Post Secondary	64.7%	68.7%	70.5%	74.6%
Other	0.5%	0.0%	3.3%	4.4%
Not Stated	1.9%	5.3%	1.4%	1.5%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

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Travel Profile

TRAVEL BY CANADIAN AND US GOLF PLEASURE TRAVELLERS

- The 2006 Travel Activities and Motivations Survey estimated that a total of 5.6 million Canadian travellers visited British Columbia for at least one overnight, pleasure trip in 2004/05. Among these travellers, 24% participated in golf while on at least one trip in the past two years and approximately 7% were motivated golf travellers.
- Among the estimated 7 million US travellers who had visited BC for at least one overnight, pleasure trip in 2004/05, a lesser proportion (18%) participated in golf, while 6% were motivated golf travellers (Table 4).
- The clear majority of both Canadian and American travellers to British Columbia indicated that they had taken more than 5 out-of-town pleasure trips over the past two years (58% and 65% respectively). An even higher proportion of frequent trips were reported among travellers who participated in or were motivated by golf activities. A total of 72% of participating and 78% of motivated Canadian golf travellers could be considered frequent travellers with 5 or more trips, while 78% of participating and 83% of motivated American golf travellers reported similar frequency levels within the past two years.
- The appeal of British Columbia was rated highly by the majority of travellers across all categories. Of all Canadian travellers to BC, 88% rated British Columbia an 8 or higher (on a 10-point scale), while 76% of all US travellers to

BC rated the province an 8 or higher. Canadians who said they participated in golf or were motivated by golf when they travelled were the most likely to rate BC between 8 and 10 on the scale (90%). For both participating and motivated US golf travellers, 76% rated BC between 8 and 10 on the appeal scale.

- All travellers indicated that they more often travel in the summer compared to winter, although participation rates were very high (over 80%) for both seasons across all Canadian and US segments. Americans generally were slightly more likely than Canadians to travel in winter.

Table 4: Travel profile of Canadian and US Golf Travellers

	Canada			US		
	All Travellers who visited BC	Participate	Motivate	All Travellers who visited BC	Participate	Motivate
Total	5,651,177	1,357,812	399,074	7,025,878	1,284,294	443,131
Unweighted Numbers	7,315	1,891	591	2,196	390	138
Total number of out-of-town pleasure trips taken in past two years						
One	6.9%	3.3%	2.9%	3.3%	1.0%	0.0%
Two	11.8%	6.8%	4.3%	8.7%	3.9%	3.6%
Three	11.9%	8.4%	7.3%	9.5%	4.6%	2.2%
Four	11.5%	9.1%	7.9%	11.7%	10.9%	9.7%
Five Or More	57.9%	72.3%	77.6%	65.4%	78.3%	82.9%
Not Stated	0.0%	0.0%	0.0%	1.3%	1.3%	1.6%
Appeal Of British Columbia – Rated on a scale of 1 to 10						
8 to 10	87.5%	89.6%	90.5%	75.7%	76.2%	76.6%
4 to 7	9.6%	9.5%	8.6%	18.2%	17.0%	16.3%
1 to 3	1.1%	0.4%	0.6%	2.6%	3.2%	3.7%
Don't Know	0.6%	-	-	2.2%	1.8%	1.9%
Not Stated	1.2%	-	-	1.2%	-	-
Season travelled						
Summer	89.9%	94.5%	92.9%	87.7%	92.1%	92.5%
Winter	71.0%	81.2%	82.3%	77.4%	86.8%	85.1%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

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OTHER DESTINATIONS VISITED

- British Columbia golf travellers were well-travelled and were slightly more likely to have travelled to Alberta, Ontario, Quebec, the US, and Mexico and the Caribbean compared to the overall Canadian traveller to BC.
- Virtually all US golf travellers had travelled within the US in the past two years. Their next most likely destination was Mexico/Caribbean.

OTHER ACTIVITIES (OUTDOOR AND CULTURAL) PARTICIPATED IN

- Overall, participation rates in other outdoor and cultural activities that golf travellers took part in were quite similar between British Columbian, Canadian and US travellers (Table 5).
- Some of the most popular trip activities for the three golf markets included: sunbathing/sitting on a beach; swimming in lakes; strolling to see city buildings; visiting a nature park (national or provincial); visiting historic sites/buildings; and swimming in oceans.
- British Columbian golf travellers were nearly twice as likely to include swimming in lakes in their travel activities compared to US golf travellers. BC and US golf travellers were more likely than Canadian golf travellers to include visiting national and/or provincial nature parks.
- Motivated US golf travellers had particularly high participation rates in many cultural/heritage-type activities, such as strolling a city to see buildings (68%), visiting historic sites or buildings (64%), and seeing well-known natural wonders (48%).
- Hiking, skiing and fishing were the most common complementary sports-related outdoor activities of interest to golfers, although less than a third of participating or motivated golf travellers indicated taking part in these activities in the past 2 years. Of the groups, US motivated golf travellers tended to be the most likely to participate in these activities.

Table 5: Other outdoor and cultural activities participated in by Golf travellers who have also visited BC in 2004/05

Activities	BC		Canada		US	
	Participate	Motivate	Participate	Motivate	Participate	Motivate
Sunbathing/Sitting On A Beach	65.1%	59.7%	55.5%	49.9%	52.9%	65.3%
Swimming In Lakes	59.3%	63.7%	54.0%	47.6%	29.5%	31.3%
Stroll A City To See Buildings	68.2%	61.2%	51.8%	43.5%	63.1%	67.9%
Swimming In Oceans	50.7%	46.0%	42.6%	37.7%	50.8%	57.3%
Historic Site/Buildings	56.3%	48.6%	39.5%	36.0%	56.3%	64.3%
Nature Park- National/Provincial	65.0%	65.0%	37.8%	32.7%	49.8%	49.2%
Hiking – Same Day Excursion	32.1%	24.7%	32.5%	20.2%	36.2%	32.9%
Motor Boating	24.9%	27.5%	32.1%	24.6%	25.0%	30.3%
Skiing – Downhill	20.0%	36.5%	32.0%	32.6%	31.9%	35.2%
Well Known Natural Wonders	38.8%	50.9%	30.7%	25.0%	47.6%	48.4%
Other Historic Sites/Buildings	48.2%	36.1%	29.6%	27.8%	48.3%	51.5%
Fishing – Fresh Water	24.6%	16.2%	29.4%	23.2%	26.1%	33.1%
Farmers' Markets/ Country Fair	45.1%	32.4%	28.8%	30.6%	43.9%	48.3%
Museum - History/Heritage	40.4%	41.8%	28.7%	28.5%	38.9%	40.2%
Amusement Park	22.5%	22.6%	28.0%	24.3%	44.9%	46.6%
Mini-Golf	24.3%	31.0%	26.5%	22.2%	27.4%	25.9%
Art Galleries	40.1%	39.8%	24.9%	22.8%	41.0%	45.0%
Live Theatre	18.8%	20.0%	23.8%	21.6%	35.4%	42.0%
Zoos	17.7%	26.0%	23.1%	20.9%	35.8%	43.4%
Wildlife - Land Based Animals	24.2%	26.5%	20.0%	14.9%	31.3%	25.5%
Botanical Gardens	26.3%	33.4%	19.4%	13.8%	34.8%	37.9%

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

TRENDS IN GOLF PARTICIPATION (WHILE AT HOME AND TRAVELLING) WITHIN THE CANADIAN POPULATION²

The following are highlights of a national golf participation study conducted by Ipsos Reid on behalf of the Royal Canadian Golf Association (RCGA) in 2006:

- The number of Canadians participating in golf was estimated at 5.95 million for 2006, which represents a 21.6% increase over the total golfing population in Canada in 2001.
- The 2006 Canadian golf participation rate (for the total Canadian population) was 21.5%, which is among the highest golf participation rates of any country in the world.
- Overall, Canadians spend a projected \$12.9 billion dollars per calendar year on direct golf expenditures such as greens fees/memberships (\$7.25 billion), golf equipment (\$2.24 billion), apparel (\$1.73 billion) and golf travel (\$1.62 billion).
- Nearly three quarters of the total Canadian golf population is male (71%) but the participation rate among women increased from 9.7% in 2001 to 12.3% in 2006.
- The increase in the overall golf participation rate is largely driven by a rise in the population of “core golfers” (defined in the study as those that play at least eight rounds of golf per year). This population increased by nearly half (47.5%) since 2001. The “occasional golfer” population (defined as those who play one to seven rounds) showed moderate growth of 8% overall.
- Saskatchewan (29.2%), Manitoba (28.6%) and Alberta (28.2%) lead the country in terms of overall golfer participation rates. Ontario showed a participation rate of 21.7%; British Columbia ranked seventh in the country with a participation rate of 21.2%.
- Canadians participating in golf are most likely to earn household incomes over \$50,000 per annum. Specifically, 33% of golf participants are in households earning \$50,000 to \$74,999 and 31% of golf participants are in households earning over \$75,000 per annum.

TRENDS IN GOLF TRAVEL IN THE UNITED STATES

In 2007, the US National Golf Foundation commissioned a study³ to examine the characteristics of golf travellers in the United States. Golf travellers were defined as a golfer age 18 years or older who travelled on business or vacation and played golf at least once while on the trip.

- In 2007, 44% of US adult golfers played golf while travelling on business or vacation. That equates to 11.4 million golf travellers.
- One in ten golfers played golf while on a business trip in 2007, while four in ten played golf while on vacation.
- U.S. golf travellers are most likely to be male (80.7%), with business golf travellers are even more likely to be male (95.4%).
- The incidence of golf travel among Americans increases with age and income. Two thirds of golf travel rounds are played by golfers who are 50 years and older.
- According to the research, US golfer travellers have a higher average household income than US golfers (who may not play golf while travelling). The average household income of U.S. golfers is \$82,540, compared to the average household income of U.S. golf travellers which is \$104,000. Business golf travellers' average household income is higher still at \$130,430.
- The more avid the golfer in terms of frequency of play the more likely they are to be a golf traveller, and the more rounds they play while travelling.
- One third of frequent golf travellers (those playing five or more rounds a year while travelling) are private club members.
- 41% of frequent golf travellers indicated that they researched golf travel online in the past 12 months. They were also likely to watch golf on TV on a weekly basis (61%) and subscribe to a golf-related magazine (58%).

² Ipsos Reid. The 2006 Golf Participation in Canada Report. Prepared on behalf of The Royal Canadian Golf Association (RCGA). 2006.

³ Golf Travel in the U.S. Prepared by Synovate for the National Golf Foundation in the United States. 2009.

CHARACTERISTICS OF US GOLF TRAVELLERS

In 2005, *Golf Digest* magazine conducted a Travel and Destination Subscriber Study⁴ of 520 readers. This research explored how golfers plan their golf vacation.

- Based on respondents who took a vacation in the past year, the average length of stay was 5.8 days. Only 18% stayed longer than one week.
- The average number of rounds played per person was 5.0 rounds, or approximately one round per day while away.
- 84% of respondents said they are planning more or the same number of golf vacations compared to five years ago.
- 45% of respondents spend \$1,000 or more on themselves during their most recent golf vacation.

The following are indicators of the most important deciding factors for US golfers when choosing a golf destination:

Table 6: Important Factors in Travel Destination Decision Making

Important Factors in Travel Destination Decision Making	Percent of Respondents
Quality of Golf Course	41%
Value for Money	37%
Availability of Multiple Courses	29%
Weather Conditions	24%
Availability of other Recreational Activities	15%
Reputation based on what you've heard	15%
Choice of Accommodations	13%
Recommendation of Others	11%
Easy to get to	11%

Source: 2005 Golf Digest Travel & Destination Subscriber Study

The same research study also investigated how *Golf Digest* subscribers in the US plan and book their golf vacations. It showed that more than half of all respondents start planning their golf vacations within a three month window period.

Table 7: Golf Travel Planning and Booking Timeframes

Time Frame	Planning Timeframe	Booking Timeframe
Less than 1 Month	12%	16%
1 to 3 Months	37%	45%
3 to 5 Months	28%	22%
5 to 7 Months	10%	9%
7 or more Months	14%	8%

Source: 2005 Golf Digest Travel & Destination Subscriber Study

GEOGRAPHIC GOLFER MARKETS IN THE US

Golf Digest magazine⁵ identified the "Top Ten" geographic golfer markets in the US by state and city. The ranking is based on the number of "Avid Golfers", i.e. those who play 25 or more rounds of golf per year.

- California is the state with the highest number of avid golfers in the country (well over 600,000), followed by Florida, Texas and New York.
- Significant growth (more than 10% in six years) has occurred in the last few years in Florida, North Carolina and Texas.

⁴ 2005 Golf Digest Travel & Destination Subscriber Study prepared by Research Resource Centre. *Golf Perspectives* 2007.

⁵ 2007 *Golf Perspectives* by Golf Digest Research Resource Centre, Database of Golf in America, 2000 and 2006.

Table 8: Top Ten US States Ranked by Total Number of Avid Golfers

State	2006 Total Number of Avid Golfers	% Change over 2000
California	634,368	3.5%
Los Angeles	259,504	3.6%
San Francisco	150,121	0.3%
Florida	414,948	16.6%
Texas	356,657	10.8%
New York	327,560	3.3%
New York	342,528	-.2%
Illinois	282,446	0.8%
Chicago	213,697	-0.1%
Ohio	281,615	3.3%
Pennsylvania	272,565	3.0%
Philadelphia	166,714	1.1%
Michigan	259,538	3.4%
Detroit	130,955	1.4%
North Carolina	190,154	10.9%
New Jersey	175,965	-0.6%
Other US Cities		
Boston	163,041	5.1%
Washington	127,782	3.0%
Atlanta	120,870	9.8%
Minneapolis	120,297	9.3%

Source: Golf Digest

- New York and Los Angeles are the cities with the highest number of avid golfers.
- The greatest growth in the last few years has been in Atlanta and Minneapolis (over 9% in six years), as well as Boston (5.1%) and Los Angeles (3.6%).

International Golf Travel Markets

- The 2007 International Travel Survey by Statistics Canada asked overseas travellers to indicate whether anyone in their travel party had participated in golf on their trip. Among those who had spent at least one night of their trip in BC, 4.7% indicated that golf was part of their trip. This represents an estimated 150,481 international visitors to the province who played golf while on an overnight trip in BC in 2007.
- In terms of size of the golf market internationally⁶, Table 10 provides estimates of the larger markets in Europe. England has the largest number of golfers but Sweden has the highest participation rate. Notably all European golf participation rates are much lower than in North America.

Table 10: Size of Golfer Markets in Europe (2006)

City	Size of Golf Market	Participation Rate
England	930,197	1.9%
Sweden	544,817	6.1%
Germany	506,746	0.6%
Spain	294,441	0.7%
Netherlands	260,000	1.6%

Source: KPMG

⁶ Golf Benchmark Survey by KPMG Consulting, 2006

Economic Impacts of Golf in Canada and the United States

CANADA

- The Canadian National Allied Golf Association (NAGA) commissioned an economic impact study of the game of golf in Canada. The purpose was to quantify golf's Gross National Product as well as estimate the economic impact of golf nationally and for each province.⁷
- The report indicates that golf accounts for an estimated \$11.3 billion of Canada's Gross Domestic Product (GDP), which includes:
 - 341,794 jobs;
 - \$7.6 billion in household income;
 - \$1.2 billion in property and other indirect taxes; and,
 - \$1.9 billion in income taxes.
- It was calculated that golf contributes an estimated \$1,580.7 million toward British Columbia's Gross Domestic Product (GDP). This includes:
 - 46,685 jobs;
 - \$1,087.8 million in household income;
 - \$160.7 million in property and other indirect taxes; and about
 - \$256.5 million in income taxes.
- It was estimated that Canadian travellers make more than 1 million trips involving golf, spending an estimated \$1.9 billion annually on golf-related travel within Canada.

UNITED STATES

Two comprehensive studies commissioned by the World Golf Foundation's Golf 20/20 initiative were conducted in 2000 and 2005 in the United States. The purpose was to measure the US golf economy and compare data between the two years⁸. The next study is planned for 2010.

- Golf in the US attracted more than 40 million participants in 2005.
- The economic impact research determined that golf in the United States generated \$76 billion in direct economic impact (goods and services) in 2005, up significantly from \$62 billion in 2000.
- The five year growth of approximately \$14 billion represents an average annual growth rate of 4.1 percent, which is well ahead of the average annual inflation rate of 2.5 percent during the years 2000-2005. The increase primarily represents growth in golf facility revenues, real estate and golf-related tourism.
- The estimated size of the US Hospitality and Tourism segment within the US Golf industry was approximately \$18 million in 2005 (compared to \$13.5 million in 2000).
- The research report also indicates that golf generated a total economic impact (including direct, indirect and induced impacts) of \$195 billion in 2005, creating approximately 2 million jobs with wage income of \$61 billion.
- The number of golf courses in the US grew from 15,000 in 2000 to 16,000 in 2005.

⁷ Economic Impact for Golf in Canada. Strategic Networks, Inc. Prepared National Allied Golf Association. 2009.

⁸ The 2000 Golf Economy Report and The 2005 Golf Economy Report. Prepared for World Golf Foundation by Strategics Research International (SRI), 2002 and 2008.

Overview of BC Golf Tourism Sector

- There are in the order of 341 golf courses in British Columbia⁹ (Table 11). This includes private, public and resort golf courses, both 9 and 18 holes:

Table 11: Number of Golf Courses in British Columbia by Tourism Region

Tourism Region	Number of Golf Courses
Vancouver, Coast and Mountains	105
Vancouver Island	68
Thompson Okanagan	78
Cariboo	18
Kootenay Rockies	49
Northern BC	23
Total	341

Source: BCgolfguide.com Inc. (2009)

- Tourism British Columbia and partners recently completed a Columbia Valley Golf Visitor Study (2008). The purpose was to develop a profile of golfers who visited the Columbia Valley in terms of traveller and trip characteristics. Some highlights of the research results are outlined below¹⁰.
 - The majority of non-resident golfers in the Columbia Valley were between the ages of 35 to 64 years with the most frequently stated age category being 45 to 54 years of age (36%).
 - Approximately two-thirds (66%) golf travellers in the region were not currently members of a golf club, almost a quarter (25%) were members of a semi-private/public club and just under one-tenth (9%) were members of a private club.
 - Golf was the primary trip motivation for the majority (78%) of respondents interviewed while 90% indicated that golf was the primary leisure activity while in the Columbia Valley.
 - Overall, the average travel party size was 4.7 people and 26% of travel parties had children. Those parties with children had an average of 6.6 people travelling in their group. Parties travelling without children had an average travel party size of 4.1 people.
 - On average, respondents had taken an average of 3.5 overnight leisure trips over the previous 12 months to purposely play golf. Over one third (34%) of respondents played 40 or more rounds of golf in the past year, half (50%) played between 11-39 rounds, a sixth (16%) played between 1-10 rounds whereas a small fraction (<0.5%) did not play a single round of golf in the preceding 12 month period.
 - Over three-quarters (77%) of respondents indicated their entire travel party played golf on the trip during which they were interviewed. Activities undertaken by those who did not play golf included swimming (34%), shopping (20%), hiking (6%) and relaxing (6%).
 - A majority of respondents were 'very likely' (74%) or 'likely' (16%) to visit British Columbia because of golf. Travellers at the Columbia Valley golf courses spent an average of \$423.23 per party per day or \$106.51 per person per day.

⁹ BCgolfguide.com Inc.

¹⁰ For the full report, please visit: <http://www.tourismbc.com/Research/ResearchByRegion/KootenayRockies.aspx>