

Economic Impact of Golf in Canada (2019)

National Allied Golf Associations (We Are Golf)

Released in November 2020



SUMMARY FINDINGS

About the Research

The Canadian Golf Economic Impact Study (2019) was conducted by Group ATN Consulting Inc. on behalf of the National Allied Golf Associations (*We Are Golf*).

The 2020 economic data adds to an accumulated data set on Canadian golfers and courses that includes nearly 10,000 observations and provides a robust picture. Economic data included in the present study was collected through two online surveys promoted through *We Are Golf* partner channels:

- The Operator Survey which collected complete financial responses from 143 Canadian golf course operators between January 2020 and March 2020.
- The Golfer Survey which collected complete financial responses from 955 Canadian golfers between July 2019 and February 2020.

Previous editions of the Canadian Golf Economic Impact Study were released in 2014 (based on 2013 data) and 2009 (based on 2008 data).

Economic Impact of Golf in Canada (2019)

Based on Group ATN's (GATN) primary research, Canadian golfers spent around \$19.3B on the following:

- \$5.0B on membership and green fees
- \$108.9M on lessons and coaching
- \$8.2B on golf-related travel expenditure in province, out of province or outside of Canada
- \$814.2M on golf events, including charitable events and tournaments
- \$2.7B on golf equipment and supplies
- \$104.6M on storage, maintenance, and equipment repair
- \$1.3B on food, beverage, and entertainment
- \$935.3M on transportation to and from the golf club
- \$47.7M on miscellaneous expenditures

The golf industry accounted for \$16.5B in initial expenditure, representing around \$44.0M per 100,000. Based on these expenditures, the golf industry accounts for **\$18.2B of Canada's gross domestic product (GDP)**, up from \$15.9B (2019\$) in 2013.

In 2019, the golf industry in Canada generated the following economic impact:

- The golf industry directly employed **149,844** full-time, full-year equivalent positions, representing many more individuals who are employed in the sector.
- This number grows to **248,878** when accounting for direct, indirect, and induced employment.
- The golf industry directly contributed **\$4.8B** in household income, rising to \$10.6B when considering the combined direct, indirect, and induced impacts.
- The golf industry generated **\$4.5B** in government tax revenue; including \$1.8B in federal tax revenue and \$2.1B in provincial tax revenue.
- Conservatively, operators invested **\$727M** industry-wide on capital expenditures.

The golf industry in Canada provided additional benefits beyond economic impact, including:

- **Employment** - The golf industry is a significant job provider for youth with **48%** of its workforce identified as students.
- **Travel** – Canadians made approximately **4.8M** trips involving golf, including 3.0M in their home province and 1.8M outside their home province and abroad.
- **Land management** – Golf course operations manage between **155,000 and 175,000 hectares**, including 30,000 to 35,000 hectares of wildlife and wetland area.
- **Charitable Impact** - The golf industry generated an estimated **\$330M** in charitable impact including \$205.9M raised through golf related charitable events, \$91.5M raised from non-golf related charitable events, and \$32.5M through in-kind donations.
- **Golf Participation** – Canadian golfers played an estimated **57.0M** rounds in 2019.

Trends in the Golf Industry – 2013/2019 Comparison

Despite a decrease in golfer direct expenditures, the golf industry in Canada has experienced growth on several indicators between 2013 and 2019, emulating global trends.

- The golf industry contributions to Canada’s GDP through direct, indirect, and induced impact grew by **14%** between 2013 and 2019, increasing from \$15.9B to \$18.2B (2019\$).
- Household income generated by golf and golf-related industries through indirect, direct, and induced impacts reached **\$10.6B** in 2019, up from \$9.3B (2019\$) in 2013.
- The share of student employment on golf operations grew, reaching **48%** in 2019, up from 37% in 2013.
- Golf generated **\$3.9B** in federal and provincial tax revenues, up from \$2.4B (2019\$) in 2013.
- The estimated number of rounds played in 2019 was 57.0M, down from 60M in 2013.

This analysis validates the important economic contribution that the golf industry makes to the Canadian economy and its GDP. Certainly, the growth on so many indices since 2013 is encouraging. Overlaying the ancillary benefits related to youth development, the industry’s close association with charitable activities and its pervasiveness across the country, the golf sector’s value proposition continues to track positively.

The table below presents an overview of key indicators of changes between 2013 and 2019 (in 2019\$):

Indicator	2013	2019	% Change
GDP Contribution	\$15.9B	\$18.2B	14%
Federal and Provincial Tax Revenue	\$2.4B	\$3.9B	63%
Household Income	\$9.3B	\$10.6B	14%
Share of Student Employment	37%	48%	30%

ABOUT WE ARE GOLF

We Are Golf is a Canada-wide coalition of the National Allied Golf Associations (NAGA) aimed at increasing awareness of golf as a key driver of our economy, a steward of our environment, and a vital way in which millions of Canadians stay fit and healthy every year. The National Allied Golf Associations acts as the administrative body for *We Are Golf*.

We Are Golf aligns with the American golf industry for allied association activities, such as National Golf Day, and provides a consistent North American brand under which the industry is united.

We Are Golf partners are members of the National Allied Golf Associations (NAGA), made up of five national associations:

- Golf Canada
- Canadian Golf Superintendents Association
- Professional Golfers' Association of Canada
- The Canadian Society of Club Managers
- National Golf Course Owners Association Canada



ABOUT GROUP ATN CONSULTING INC.

Team lead and the co-founder of [Group ATN Consulting Inc.](#) (GATN), Thomas McGuire, has led all previous economic impact studies (EIS) studies for *We Are Golf*. As a leading Canadian economist, Thomas brings strong credentials in economic impact analysis to this assignment.

As a primary practice of GATN, the team lead previously authored the 2009 and 2014 Economic Impact Studies of Golf in Canada. GATN has deep experience in the design, activation, and analysis of surveys with golfers, course owners, and related businesses, targeting key stakeholders and utilizing a wide range of data collection platforms. This expertise leverages GATN's deep experience in sport and event-based impact analysis, bringing a strong and diverse toolkit and providing access to a proprietary Input / Output model.

GATN is also adept at the innovative design and use of research methodologies, while adhering to the highest standards and guidelines for research and economic impact analysis. GATN's I/O model is not simply wired for event or sport but accommodates all sectors of the economy, while providing the study lead full control over all parameters – not just a narrow array of variables as is common for sector specific models.

GATN's team lead in charge of this research led and designed Canada's first ever nation-wide study of the economic impact of golf in this country. This current work builds on that methodology and leverages a similar, although updated, economic impact model, building on the lessons learned in survey research from 2009, 2014, and throughout this current iteration of the study.

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1 INTRODUCTION

Group ATN Consulting Inc. (GATN) was commissioned by *We Are Golf* to undertake an economic impact study of golf on Canada's economy. The study provides evidence of the economic significance of the sport and business to the overall Canadian economy as well as to each province and territory and offers an up-to-date understanding of the economic dimensions of golf in Canada.

The goal of this study has been to estimate the contribution golf makes to the Canadian economy by examining Employment, Gross Domestic Product (GDP), Government Tax Revenues, and Household Income.

This study found that in 2019, the golf industry in Canada generated:

- \$18.2B in GDP
- 248,878 jobs
- \$10.6B in household income
- \$4.5B in government tax revenue

Findings from this study have been contrasted with benchmarks provided in past editions of the report to profile trends and assess changes over time.

These findings will elicit and support a variety of policy discussions at the local, provincial, and national levels.

2 METHODOLOGY

Economic data was collected through two online surveys: The **Golfer Survey** which targeted Canadian golfers, and the **Operator Survey** which was shared among Canadian golf course operators. Both surveys were promoted through *We Are Golf* partner channels. However, unlike previous studies, no survey incentive was offered to encourage participation.

Data collection occurred between July 2019 and February 2020 for the Golfer Survey and between January 2020 and March 2020 for the Operator Survey. Survey results included complete financial responses from 143 Canadian golf course operators and 955 Canadian golfers.

Results from the Golfer Survey were weighted using golfer segments and memberships to account for an overrepresentation of avid golfers and golfers with a membership. Market segments were weighted using the estimated distribution in the Canadian Golf Consumer Behaviour Study (2012), while memberships were weighted using the estimated distribution in the 2014 Economic Impact Survey Findings. Results from the Operator Survey were weighted by Province using the 2017 Golf Facilities in Canada Report and the National Golf Course Owners Association Canada (NGCOA) Database provided by *We Are Golf*.

The economic impacts were assessed using a proprietary economic impact model that maps the interprovincial industry and consumer transactions of the entire economy, allowing a national and provincial level breakdown of the economic effects.

The team lead for this research also led and designed Canada's first ever nation-wide study of the economic impact of golf. This report and the findings herein build on that original methodology and leverages a similar, although updated, inter-provincial economic impact model, building on the lessons learned in survey research from 2009, 2014, and throughout this current study. Collectively, the team has access to tens of thousands of data points on Canadian golfers and course operations combined.

The resulting findings in this report make use of the most current and most detailed impact tables available from Statistics Canada and leverages the work from earlier economic impact studies, ensuring robust data quality on which to conclude the results contained herein.

Findings from this study were contrasted with benchmarks provided in earlier reports to profile trends and assess changes over time. Data collected in previous studies was CPI (Consumer Price Index) adjusted to account for inflation, i.e. the change of a goods price over time. This adjustment was done using the [Bank of Canada Inflation Calculator](#).

3 ECONOMIC IMPACT OF GOLF IN CANADA

This section of the report examines the Economic Impact of Golf in Canada, including detailed direct spending by courses and golfers.

3.1 Estimated Direct Expenditure

Initial expenditures were estimated using financial data obtained in the 2019 Golfer Survey and Operator Survey. Golfer expenditures directly relating to golf operations, such as membership fees, food, and beverage purchases at courses and more were excluded from the analysis.

Nation-wide direct golf-related expenditure totaled **\$16.5B**, with the following regional breakdown:

- \$6.0B in Ontario
- \$3.4B in British Columbia
- \$2.9B in Quebec
- \$2.4B in Alberta
- \$932.4M in Atlantic Canada
- \$477.7M in Manitoba
- \$416.8M in Saskatchewan
- \$46.0M in Yukon, Northwestern Territories and Nunavut

These initial golf-related expenditures stand around **\$44.0M per 100,000**. British Columbia demonstrates the highest per capita expenditure standing at approximately \$66.5M per 100,000, followed by Alberta with \$54.7M and Ontario with \$41.4M. The lowest per capita contribution is seen in Quebec at \$33.8M per 100,000, and Manitoba at \$34.9M.

Detailed initial expenditure by province is presented in **Figure 1**, while detailed per capita direct expenditure is presented in **Figure 2**.

Figure 1: Initial Expenditure (Millions)

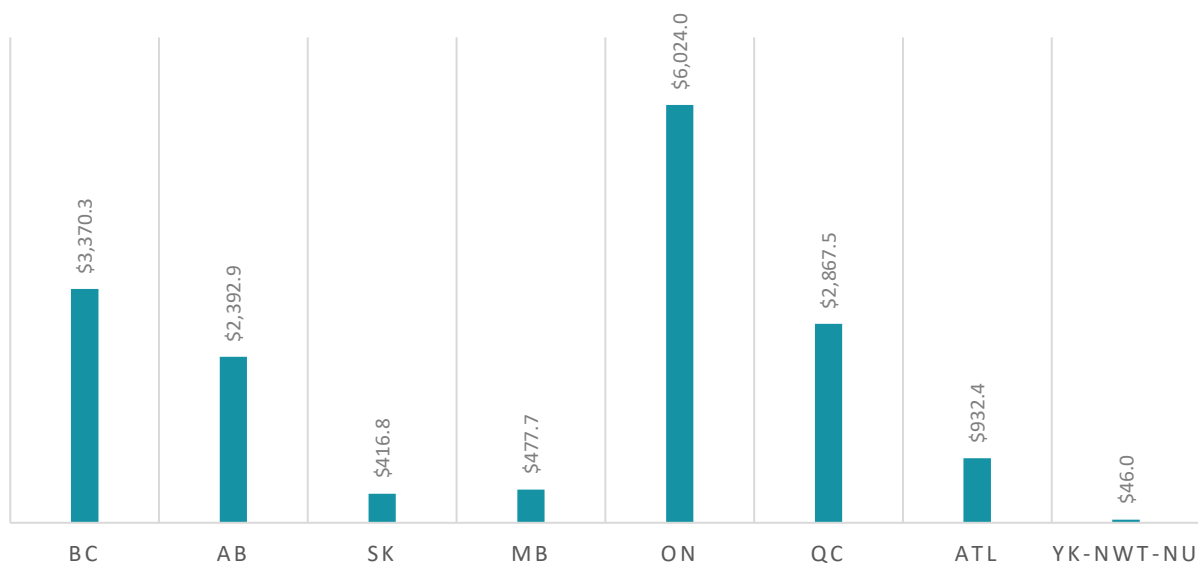


Figure 2: Initial Expenditure per Capita (100,000) (Millions)



3.1.1 Golfer Golf-Related Expenditure

Canadian golfers spent an **average of \$1,795** on golf, **totaling to \$10.2B in expenditures**. Ontarians spent the most with a total expenditure of \$3.6B, followed by British Columbians at \$2.0B and Quebecers at \$1.9B. Residents of the Territories spent a high average of \$2,298 per party, followed by Albertans at \$2,062 and British Columbians at \$1,908.

In 2019, Canadian and visiting golfers spent:

- \$8.6B on travel
- \$2.7B on golf equipment and supplies
- \$935.3M on transportation
- \$19.8M on golf related events

Accommodation, transportation, and food and beverage expenditure account for the largest share of travel expenditures with \$2.7B, \$2.7B, and \$1.9B, respectively.

Canadian and visiting golfers spent on average \$1,347 on travel, including \$427 on accommodation, \$423 on transportation, and \$301 on food and beverages. Additionally, Canadian golfers spent on average \$479 on golf related equipment and \$164 on transportation to and from golf club.

Detailed golfer expenditure by location and type are provided in the tables below:

Table 1: 2019 Canadian Residents Golf Related Expenditure by Location

Region	Per Party	Overall (Millions)
British Columbia	\$1,908	\$1,956.1
Alberta	\$2,062	\$1,606.0
Saskatchewan	\$1,716	\$197.6
Manitoba	\$1,589	\$300.4
Ontario	\$1,789	\$3,579.3
Quebec	\$1,640	\$1,908.9
Atlantic	\$1,587	\$669.8
YK-NWT-NU	\$2,298	\$12.2
Canada	\$1,795	\$10,230.3

Table 2: 2019 Canadian Resident and Foreign Travel Golf Related Expenditure

Expenditure Type	Per Party	Total (Millions)
Transportation to and from Club	\$164	\$935.3
Golf Related Events	\$3	\$19.8
Golf Equipment and Supplies	\$479	\$2,729.8
<i>Clubs</i>	\$153	\$869.9
<i>Bags & Carts</i>	\$81	\$459.9
<i>Balls</i>	\$46	\$262.9
<i>Apparel</i>	\$156	\$888.1
<i>Magazines and Subscriptions</i>	\$22	\$127.5
<i>Others</i>	\$23	\$131.5
Travel	\$1,347	\$8,572.2
<i>Food & Beverages</i>	\$301	\$1,917.8
<i>Recreational</i>	\$68	\$433.5
<i>Transportation</i>	\$423	\$2,691.5
<i>Accommodation</i>	\$427	\$2,716.6
<i>Golf Gear and Supplies</i>	\$29	\$186.9
<i>Shopping</i>	\$78	\$495.4
<i>Other</i>	\$21	\$130.6
Total	\$1,994	\$12,257.1

3.1.2 Operator Revenue and Expenditure

Operators generated an **average of \$2.1M** in total revenue per course (18-hole equivalent), and a **total of \$4.3B nation-wide**. Operators in British Columbia generated the highest level of revenue per course, with an average of \$3.2M followed by Alberta at \$2.6M and Quebec at \$2.2M. On a per province basis, Ontario operators generated the highest revenue, totaling \$1.5B followed by British Columbia at \$842.6M and Quebec at \$679.2M.

The highest share of revenue is generated through course operation with an average of \$1.3M per course, totaling \$2.7B nationally. Food and beverage emerged as the second most important revenue source, generating an average of \$528,829 per course and totaling to \$1.1B nation-wide.

Detailed operational revenue by location and sources are provided in the tables below:

Table 3: 2019 Operator Revenue by Location

Region	Per Course (Millions)	Total (Millions)
British Columbia	\$3.2	\$842.6
Alberta	\$2.6	\$671.1
Saskatchewan	\$1.7	\$210.7
Manitoba	\$1.7	\$155.2
Ontario	\$1.8	\$1,498.2
Quebec	\$2.2	\$679.2
Atlantic	\$1.3	\$205.1
YU-NWT-YK	\$1.4	\$8.8
Canada	\$2.1	\$4,270.8

Table 4: 2019 Operation Revenue by Source

Source	Per Course (Thousands)	Total (Millions)
Course Operation	\$1,335.6	\$2,728.3
Pro-shop Purchases	\$163.0	\$332.9
Food and Beverages	\$528.8	\$1,080.2
Investment and Interest Income	\$13.8	\$28.2
Other	\$49.6	\$101.2
Total	\$2,090.8	\$4,270.8

The average operator's expenditure is **\$1.9M per course** (18-hole equivalent), **totaling to \$3.8B nation-wide**. Operators in British Columbia faced the highest operational cost per course, at an average of \$2.9M; followed by Alberta at \$2.2M and Quebec at \$1.9M. Total operational costs were highest in Ontario, at \$1.4B; followed by British Columbia at \$752.7M and Quebec at \$605.5M.

The greatest share of costs were associated with wages and salaries, at an average of \$795,855 per course, totaling \$1.6B nation-wide. Course operation emerged as the second highest expenditure category, with an average of \$371,842 per course, totaling \$759.6M nation-wide.

Additionally, operators spent on average \$355.9K in capital expenditure in 2019, with an estimated \$727.0M nation-wide.

Detailed operational costs by location and type are provided in the tables below:

Table 5: 2019 Operator Expenditure by Location

Region	Per Course (Millions)	Total (Millions)
British Columbia	\$2.9	\$752.7
Alberta	\$2.2	\$570.8
Saskatchewan	\$1.6	\$192.8
Manitoba	\$1.6	\$142.1
Ontario	\$1.6	\$1,355.2
Quebec	\$1.9	\$605.5
Atlantic	\$1.2	\$192.0
YK-NWT-NU	\$1.2	\$7.8
Canada	\$1.9	\$3,818.9

Table 6: 2019 Operator Expenditure by Source

Source	Per Course (Thousands)	Total (Millions)
Wages and Salaries	\$795.9	\$1,625.7
Course Operations	\$371.8	\$759.6
Pro Shop and Retail Sales	\$128.3	\$262.2
Food and Beverage Services	\$245.7	\$501.9
Office and Administration	\$142.6	\$291.3
Repayment & Interest on Long-Term Debt	\$80.3	\$164.0
Income Taxes	\$29.5	\$60.3
Property Taxes	\$44.1	\$90.1
Donations	\$6.8	\$14.0
Other	\$24.5	\$50.0
Total Expenses	\$1,869.5	\$3,818.9

3.2 Estimated Economic Impact

The golf industry in Canada generated the following nation-wide economic impact:

- 248,878 jobs
- \$10.6B in household income
- \$4.5B in government tax revenue
- \$18.2B in Gross Domestic Product (GDP)

Detailed economic impact projections for employment, household income, government tax revenue and Gross Domestic Product (GDP) are presented in the following sections.

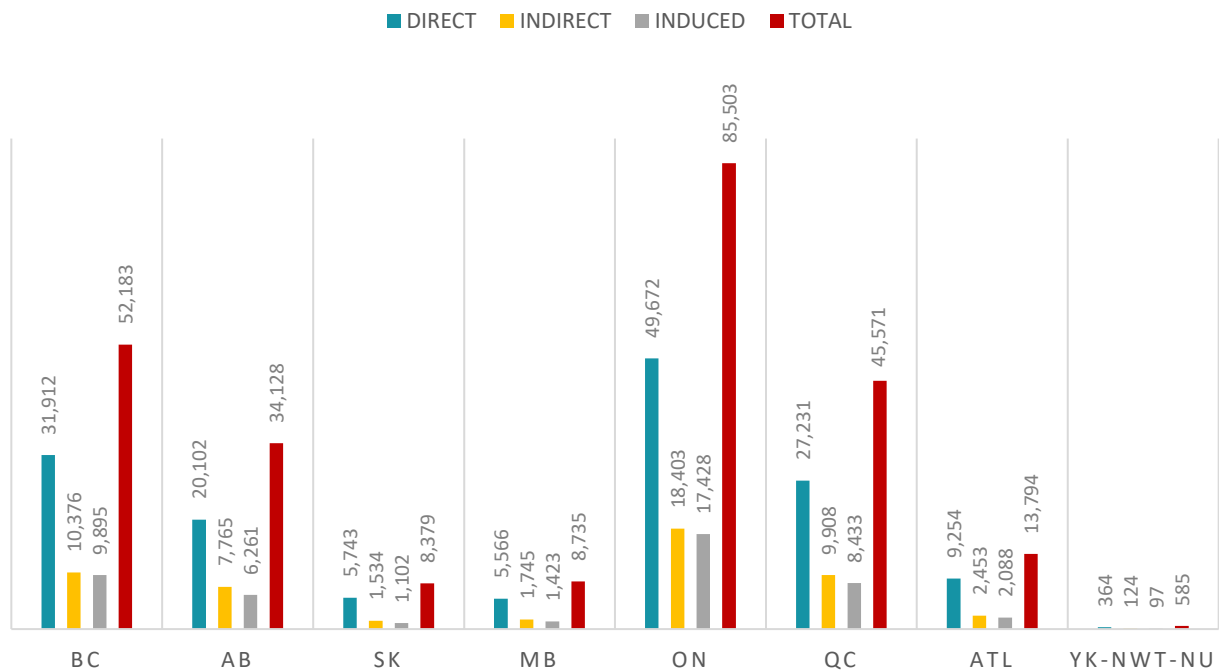
3.2.1 Employment

Golf generated a total of **248,878 jobs nation-wide** in 2019 including 149,844 direct, 52,307 indirect, and 46,727 induced.

Ontario accounted for 34% of total golf related employment with 85,503 jobs, including 49,672 direct positions, 18,403 indirect and 17,428 induced jobs; followed by British Columbia with 52,183 jobs (21%), Quebec with 45,571 jobs (18%), and Alberta with 34,128 (14%). Atlantic Canada accounted for 6% of golf-related employment while Manitoba and Saskatchewan respectively accounted for 4% and 3%.

The golf industry's impact on employment is detailed in the figure below:

Figure 3: 2019 Total Employment in Persons Years



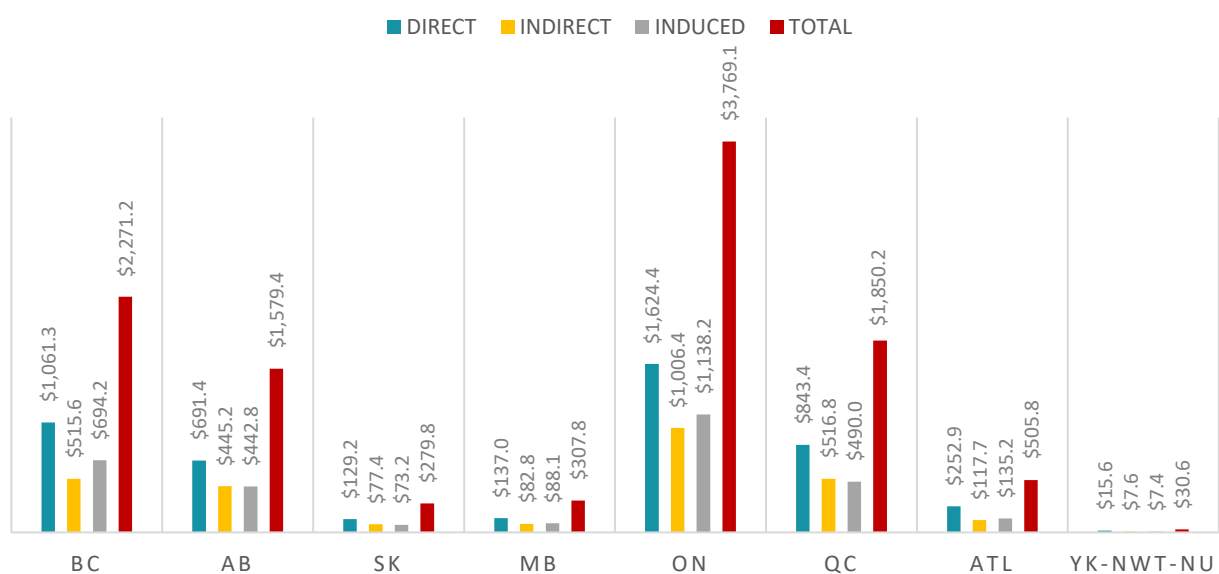
3.2.2 Household Income

Golf related employment generated **\$10.6B in household income nation-wide**, including \$4.8B direct, \$2.8B indirect, and \$3.0B induced.

Ontario accounted for 36% of generated income with a total of \$3.8B, including \$1.6B direct, \$1.0B indirect, and \$1.1B induced; followed by British Columbia with \$2.3B total household income (21%); Quebec with \$1.9B (17%); and Alberta with \$1.6B (15%). Atlantic Canada accounted for 5% of the total household income generated while Manitoba and Saskatchewan each accounted for 3%.

The golf industry’s impact on household income is detailed in the figure below:

Figure 4: Household Impact (Millions)



3.2.3 Government Tax Revenue

\$4.5B in government tax revenue was generated through golf related activities nation-wide, including \$2.2B direct, \$891.7M indirect, and \$1.4B induced. This includes **\$1.8B in federal tax revenue**, with \$865.7M generated directly, \$426.4M indirectly and \$535.5M induced; as well as **\$2.1B in provincial tax revenue**, with \$1.1B generated directly, \$331.9M indirectly and \$632.1M induced.

Ontario accounted for 38% of golf-related tax revenue with \$1.7B, including \$821.7M direct, \$343.3M indirect and \$558.2M induced; followed by British Columbia with \$858.0M in total tax revenue (19%), Quebec with \$855.0M (19%), and Alberta with \$562.3M (13%). Atlantic Canada generated 6% of tax revenue while Manitoba and Saskatchewan respectively accounted for 3% and 2%.

Ontario accounted for 37% of federal tax revenue with \$676.2M, including \$302.9M direct, \$164.3M indirect and \$209.0M induced; followed by British Columbia with \$375.6M (21%), Alberta with \$324.0M (18%), and Quebec with \$262.3M (14%). Atlantic Canada generated 5% of federal tax revenue while Manitoba and Saskatchewan respectively accounted for 3% and 2%.

Ontario accounted for 38% of provincial tax revenue with \$810.1M, including \$433.7M direct, \$124.5M indirect, and \$251.9M induced; followed by Quebec with \$495.1M (23%), British Columbia with \$399.8M (19%), and Alberta with \$151.9M (7%). Atlantic Canada generated 7% of provincial tax revenue while Manitoba and Saskatchewan respectively accounted for 3% and 2%.

The golf industry’s impact on tax revenue is detailed in the figure below:

Figure 5: Government Tax Revenue (Millions)

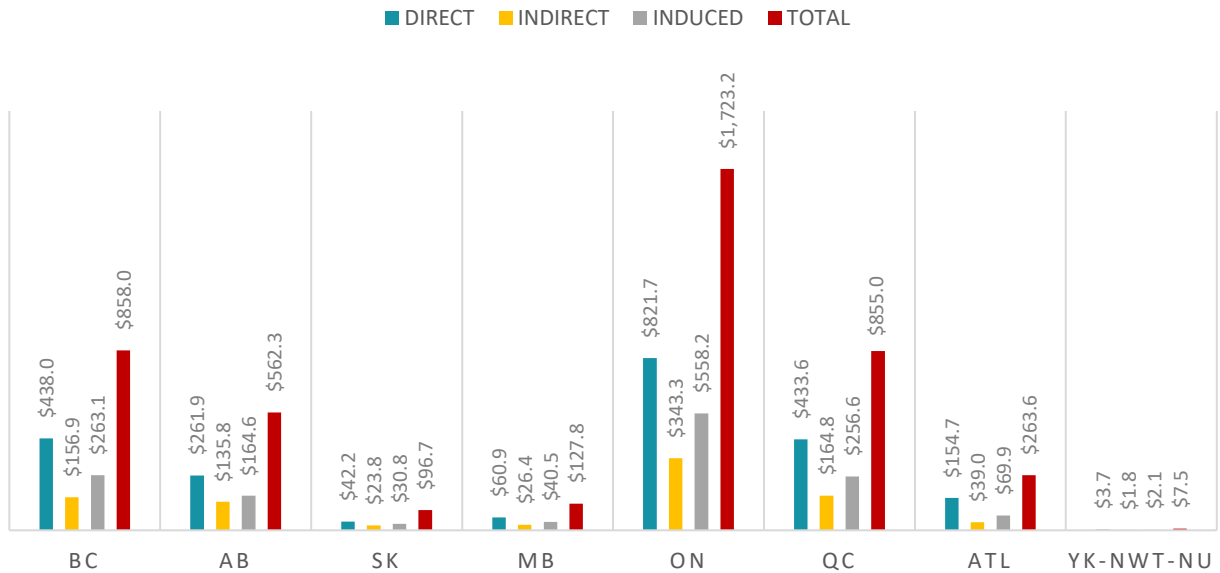


Figure 6: Federal Tax Revenue (Millions)

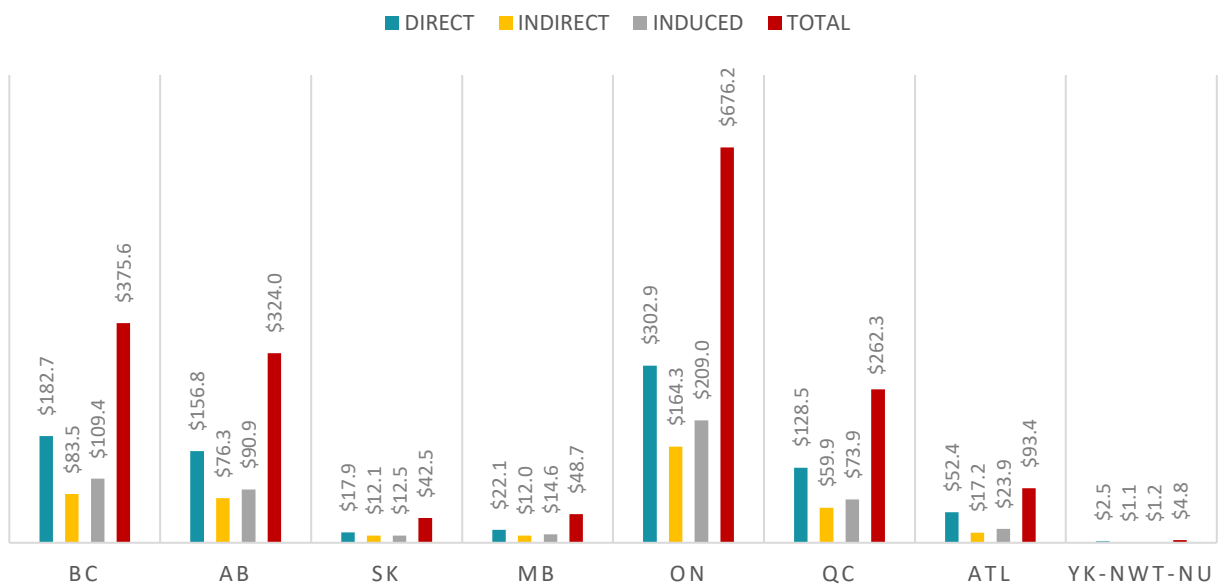
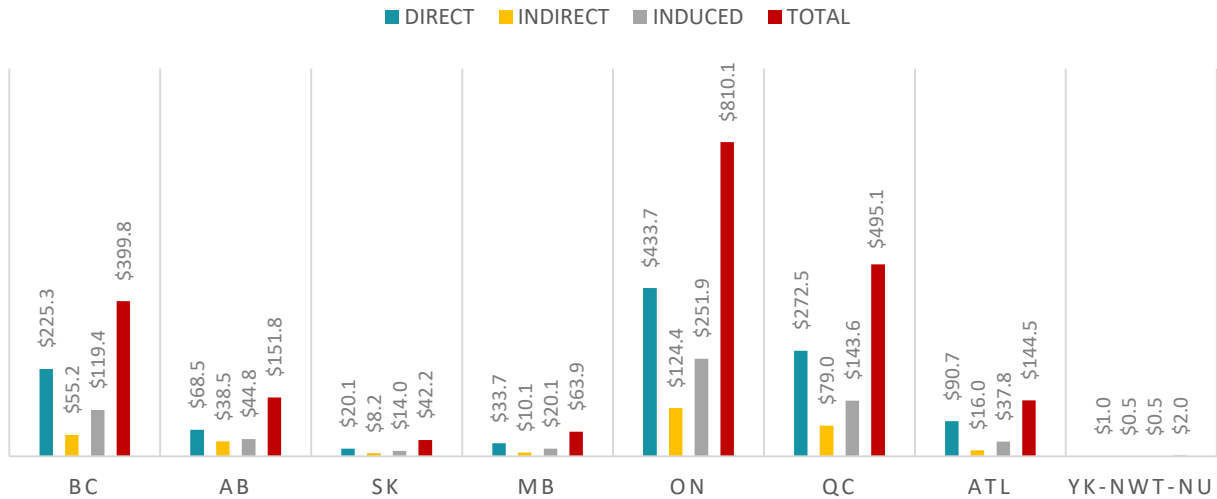


Figure 7: Provincial Tax Revenue (Millions)



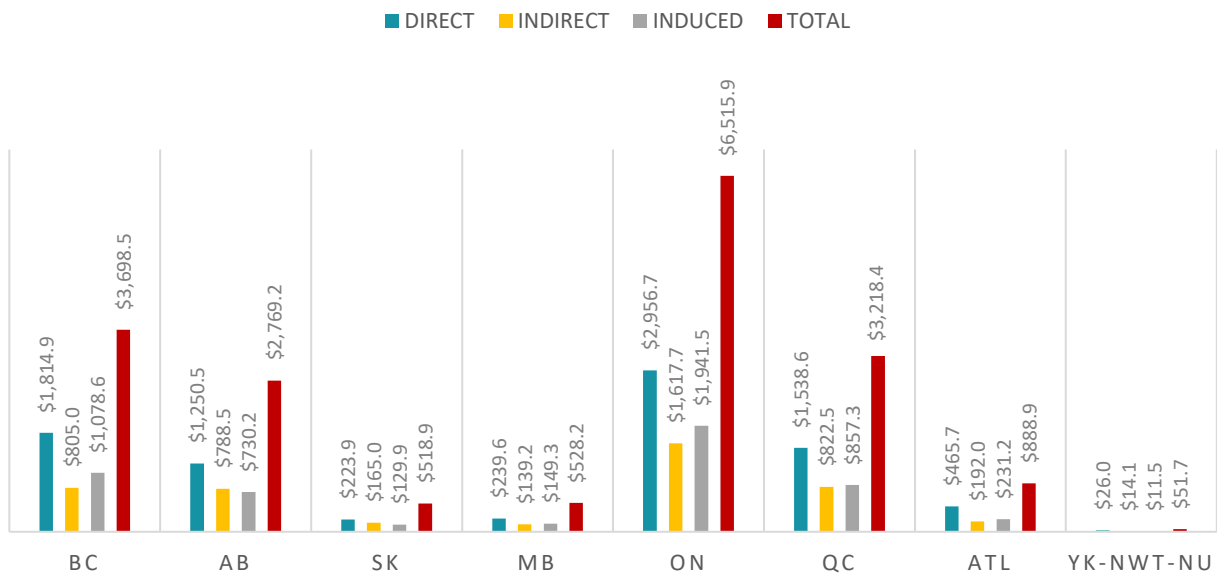
3.2.4 Gross Domestic Product

Golf-related activities in 2019 generated **\$18.2B in GDP**, including \$8.5B directly, \$4.5B indirectly, and \$5.1B induced.

Ontario accounted for 36% of the GDP generated by golf related activities with \$6.5B, including \$3.0B direct, \$1.6B indirect, and \$1.9B induced; followed by British Columbia which generated \$3.7B in GDP (20%), Quebec with \$3.2B (18%), and Alberta with \$2.8B (15%). Atlantic Canada accounted for 5% of golf-related GDP while Manitoba and Saskatchewan each accounted for 3%.

The golf industry’s impact on GDP is detailed in the figure below:

Figure 8: Gross Domestic Product (Millions)



4 CANADIAN GOLFER AND COURSE OPERATOR

This section of the report examines the economic impact of Golf in Canada, including detailed direct spending by courses and golfers.

Golf Participation

- On average, **golfers played 12.2 rounds** in Canada with an **estimated 57.0M annual rounds played**. Most rounds were played in home provinces (82%), with only 4% of rounds played outside of Canada.
- Based on GATN's primary research, Canadian golfers spent around \$19.3B on the following:
 - \$5.0B on membership and green fees
 - \$108.9M on lessons and coaching
 - \$8.2B on golf-related travel expenditure in province, out of province or outside of Canada
 - \$814.2M on golf events, including charitable events and tournaments
 - \$2.7B on golf equipment and supplies
 - \$104.6M on storage, maintenance, and equipment repair
 - \$1.3B on food, beverage, and entertainment
 - \$935.3M on transportation to and from the golf club
 - \$47.7M on miscellaneous expenditures
- Virtual golf equipment was only purchased by avid and frequent golfers. Additionally, golfers having purchased special equipment played significantly more virtual golf games, with the annual average number of games passing from 2.4 to 21.8.

Canadian Course Operators

- A total of **2,283 facilities** were estimated to be operational in 2019, accounting for 2,043 courses (18-hole equivalents).
- Based on GATN's primary research, Canadian course operators spent approximately **\$3.8B** on the following:
 - \$1.6B on wages and salaries
 - \$756.6M on course operation
 - \$164.1M on pro shop, retail, food, and beverage services
 - \$291.3M office and administration
 - \$150.3M on income and property taxes
 - \$163.9M on repayment and interest on long-term debt
 - \$14.0M on donations
 - \$49.9M on miscellaneous expenditures

Tournaments and Charitable Golf Events

- A total of **51,266 tournaments and charitable golf events** were hosted by participating operators in 2019, with an average of **25** tournaments per course.
- Seven in ten golfers attended a charitable golf event, of which 67% attended as participants. Surveyed golfers planned to attend on average 1 charitable golf event in the upcoming year.
- **Charitable impact is estimated at \$330M**, including \$205.9M raised through golf-related charitable events, \$91.5M raised from non-golf related charitable events, and \$32.5M through in-kind donations.

5 PROVINCIAL SUMMARIES

5.1 British Columbia

The game of golf contributed an estimated \$3.7B to the GDP in British Columbia in 2019 (\$2.3B in 2013) including:

- 52,183 jobs (44,000 in 2013)
- \$2.3B in household income (\$1.4B in 2013)
- \$858.0M in government tax revenue (\$331.2M in 2013)

Golf directly contributed \$1.8B in GDP in British Columbia and employed 31,912 individuals.

A detailed summary of the economic impact for the province in 2019 is provided in the table below:

Table 7: Economic Impact of Golf in British Columbia

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	31,912	\$1,061.3	\$438.1	\$1,814.9
Indirect	10,376	\$515.6	\$156.9	\$805.0
Induced	9,895	\$694.2	\$263.1	\$1,078.6
Total	52,183	\$2,271.2	\$858.0	\$3,698.5

5.2 Alberta

The game of golf contributed an estimated \$2.8B to the GDP in Alberta in 2019 (\$2.7B in 2013) including:

- 34,128 jobs (43,000 in 2013)
- \$1.6B in household income (\$1.4B in 2013)
- \$562.3M in government tax revenue (\$343.4M in 2013)

Golf directly contributed \$1.3B in GDP in Alberta and employed 20,102 individuals.

A detailed summary of the economic impact for the province in 2019 is provided in the table below:

Table 8: Economic Impact of Golf in Alberta

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	20,102	\$691.5	\$261.9	\$1,250.5
Indirect	7,765	\$445.2	\$135.8	\$788.5
Induced	6,261	\$442.8	\$164.6	\$730.2
Total	34,128	\$1,579.4	\$562.3	\$2,769.2

5.3 Saskatchewan

The game of golf contributed an estimated \$518.9M to the GDP in Saskatchewan in 2019 (\$665.7M in 2013) including:

- 8,379 jobs (17,000 in 2013)
- \$279.8M in household income (\$391.2M in 2013)
- \$96.7M in government tax revenue (\$90.3M in 2013)

Golf directly contributed \$223.9M in GDP in Saskatchewan and employed 5,743 individuals.

A detailed summary of the economic impact for the province in 2019 is provided in the table below:

Table 9: Economic Impact of Golf in Saskatchewan

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	5,743	\$129.2	\$42.2	\$223.9
Indirect	1,534	\$77.4	\$23.8	\$165.0
Induced	1,102	\$73.2	\$30.8	\$129.9
Total	8,379	\$279.8	\$96.7	\$518.9

5.4 Manitoba

The game of golf contributed an estimated \$528.2M to the GDP in Manitoba in 2019 (\$706.8M in 2013) including:

- 8,735 jobs (16,000 in 2013)
- \$307.8M in household income (\$421.2M in 2013)
- \$127.8M in government tax revenue (\$112.2M in 2013)

Golf directly contributed \$239.6M in GDP in Manitoba and employed 5,566 individuals.

A detailed summary of the economic impact for the province in 2019 is provided in the table below:

Table 10: Economic Impact of Golf in Manitoba

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	5,566	\$137.0	\$60.9	\$239.6
Indirect	1,745	\$82.8	\$26.4	\$139.2
Induced	1,423	\$88.0	\$40.5	\$149.3
Total	8,735	\$307.8	\$127.8	\$528.2

5.5 Ontario

The game of golf contributed an estimated \$6.5B to the GDP in Ontario in 2019 (\$6.0B in 2013) including:

- 85,503 jobs (110,000 in 2013)
- \$3.8B in household income (\$3.6B in 2013)
- \$1.7B in government tax revenue (\$795.7M in 2013)

Golf directly contributed \$3.0B in GDP in Ontario and employed 49,672 individuals.

A detailed summary of the economic impact for the province in 2019 is provided in the table below:

Table 11: Economic Impact of Golf in Ontario

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	49,672	\$1,624.4	\$821.7	\$2,956.7
Indirect	18,403	\$1,006.4	\$343.3	\$1,617.7
Induced	17,428	\$1,138.2	\$558.2	\$1,941.5
Total	85,503	\$3,769.1	\$1,723.2	\$6,515.9

5.6 Quebec

The game of golf contributed an estimated \$3.2B to the GDP in Quebec in 2019 (\$2.8B in 2013) including:

- 45,571 jobs (52,000 in 2013)
- \$1.9B in household income (\$1.6B in 2013)
- \$855.0M in government tax revenue (\$711.2M in 2013)

Golf directly contributed \$1.5B in GDP in Quebec and employed 27,231 individuals.

A detailed summary of the economic impact for the province in 2019 is provided in the table below:

Table 12: Economic Impact of Golf in Quebec

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	27,231	\$843.4	\$433.6	\$1,538.6
Indirect	9,908	\$516.8	\$164.8	\$822.5
Induced	8,433	\$490.0	\$256.6	\$857.3
Total	45,571	\$1,850.2	\$855.0	\$3,218.4

5.7 Atlantic Canada

The game of golf contributed an estimated \$88.9M to the GDP in Atlantic Canada in 2019 (\$739.8M in 2013) including:

- 13,794 Jobs (16,700 in 2013)
- \$505.8M in household income (\$430.3M in 2013)
- \$263.6M in government tax revenue (\$126.4M in 2013)

Golf directly contributed \$465.7M in GDP in Atlantic Canada and employed 9,254 individuals.

A detailed summary of the economic impact for the region in 2019 is provided in the table below:

Table 13: Economic Impact of Golf in Atlantic Canada

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	9,254	\$252.9	\$154.7	\$465.7
Indirect	2,453	\$117.7	\$39.0	\$192.0
Induced	2,088	\$135.2	\$70.0	\$231.2
Total	13,794	\$505.8	\$263.6	\$888.9

5.8 Yukon, Northwest Territories and Nunavut

The game of golf contributed an estimated \$51.7M to the GDP in Yukon, the Northwest Territory and Nunavut in 2019 (\$46.0M in 2013) including:

- 585 jobs (800 in 2013)
- \$30.6M in household income (\$26.0M in 2013)
- \$7.5M in government tax revenue (\$4.7M in 2013)

Golf directly contributed \$26.0M in GDP in Yukon, Northwest Territories and Nunavut and employed 364 individuals.

A detailed summary of the economic impact for the region in 2019 is provided in the table below:

Table 14: Economic Impact of Golf in Yukon, Northwest Territories and Nunavut

	Employment	Household Income (Millions)	Government Tax Revenue (Millions)	GDP (Millions)
Direct	364	\$15.6	\$3.7	\$26.0
Indirect	124	\$7.6	\$1.8	\$14.1
Induced	97	\$7.4	\$2.1	\$11.5
Total	585	\$30.6	\$7.5	\$51.7

6 BACKGROUND & PAST STUDIES

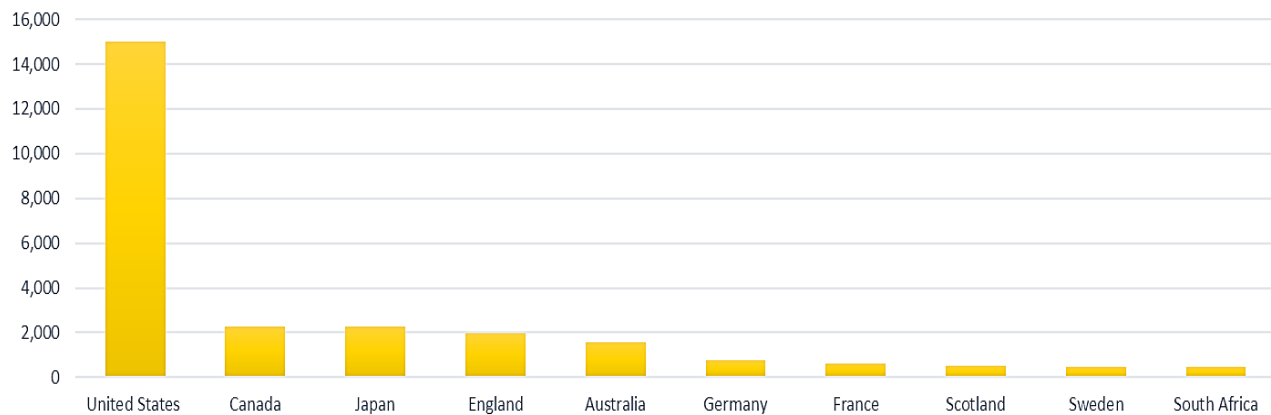
Golf in Canada generates significant economic impact. Past Canadian Golf Economic Impact Studies conducted for the National Allied Golf Associations (*We Are Golf*) and published in 2009 and 2014 illustrate that golf consistently contributes billions to the Canadian economy through course operations, spending by players, tournaments, tourism revenues, and taxes¹². These studies also found that golf generates significant charitable donations through events held at golf courses throughout the country³. Additionally, the two studies showed that the economic impact of golf in Canada grew between 2009 and 2014.

The 2014 Canadian Golf Economic Impact Study (based on 2013 data) concluded that the golf industry accounted for an estimated \$14.3B of Canada’s Gross Domestic Product (GDP), an increase from the \$12.2B reported in 2009. The 2014 assessment found that the impact of golf in Canada includes:

- 300,100 direct, indirect, and induced jobs (342,000 in 2009)
- \$8.3B in household income (\$8.0B in 2009)
- \$1.4B in property and other indirect taxes (\$1.3B in 2009)
- \$2.2B in income taxes (\$2.6B in 2009)
- \$14.3B in economy activity (GDP) (\$12.2B in 2009)
- \$533M in philanthropic dollars generated at more than 37,000 events at golf courses
- \$2.5B in tourism revenue generated through golf-related travel
- 60M rounds of golf played in Canada in 2013⁴

A 2017 Report on Golf Facilities in Canada (conducted by the National Golf Foundation on behalf of the PGA of Canada and Golf Canada) showed that Canada is ranked second in the world for number of golf facilities, after the United States (U.S.) (**Figure 7**). The report noted that Canada represented 7% of the world’s total supply of golf facilities.

Figure 9: Golf Facilities Worldwide



Source: [2017 Golf Facilities in Canada Report](#)

¹ http://canadagolfs.ca/wp-content/uploads/2014/06/SNG-Golf-2014-Executive-Summary-FINAL-Report-JUNE-2_ENG.pdf

² http://canadagolfs.ca/wp-content/uploads/2014/09/SNG-Golf-2014-Key-Findings-FINAL-Report-JUNE-2_ENG_Rev0918.pdf

³ <https://golfcanada.ca/article/naga-announces-results-canadian-golf-economic-impact-study>

⁴ Ibid.

The 2017 Golf Facilities in Canada Report found that Canada is home to 2,298 golf facilities (both private and public), with most of Canada’s facilities located in the southern portion of the country. The four largest provinces – Ontario (805), Quebec (359), Alberta (308) and British Columbia (304) – house a combined 77% of Canada’s total golf supply⁵. The report also found that at that time, there were 26 new golf courses in Canada and 12 courses under development. A summary of golf facilities in Canada from the 2017 Golf Facilities in Canada Report is provided below:

Table 15: Summary of Golf Facilities in Canada by Province

Province	Land Area Km2	Population	Total Facilities	Total Holes	Total 18-HEQ	Population Per 18- HEQ
British Columbia	925,186	4,751,600	304	4,698	261	18,205
Alberta	642,317	4,252,900	308	4,716	262	16,232
Saskatchewan	591,670	1,150,600	206	2,415	134	8,587
Manitoba	553,556	1,318,100	130	1,779	99	13,337
Ontario	917,741	13,983,000	805	13,920	773	18,081
Québec	1,365,128	8,326,100	359	6,510	362	23,021
New Brunswick	71,450	756,800	54	846	47	16,102
Nova Scotia	53,338	949,500	75	1,161	65	14,721
Prince Edward Island	5,660	148,600	25	405	23	6,604
Newfoundland & Labrador	373,872	530,100	22	351	20	27,185
Yukon	474,931	37,500	6	72	4	9,375
Northwest Territories	1,183,085	44,500	4	45	3	690
Nunavut	1,936,113	37,100	0	0	0	0
Totals	9,093,507	36,286,400	2,298	36,918	2,051	17,692

Source: [2017 Golf Facilities in Canada Report](#)

Overall, past studies have indicated that the golf industry contributes significantly to the Canadian economy, with strong growth between 2009 and 2014, which is projected to continue to grow considering the number of new and developing golf facilities across Canada. As detailed below, these findings are in line with global trends as golf continues to grow and expand around the world.

⁵ [NGF Golf Facilities in Canada 2017 Report](#)

6.1 The State of Golf in the US, Europe & Australia

In addition to contributing billions to Canada's economy, golf continues to be a multi-billion-dollar industry throughout the developed West, including the U.S., Western Europe, and Australia.

6.1.1 United States

According to a World Golf Foundation (WGF) economic impact study conducted in 2016, golf generates **\$84.1B USD** in economic activity nation-wide.⁶ The study's methodology included measuring direct, indirect and induced economic activity and employment to determine how much golf contributes to state and national economies.

A full breakdown of measurements is provided below in the tables below:

Table 16: Economic Impact of Golf in the US

	Total Output (\$M)	Employment	Compensation (\$M)
CORE INDUSTRIES			
Golf Facility Operations	\$94,094	1,016,787	\$27,813
Golf Course Construction	\$604	4,040	\$191
Tournaments, Associations and Player Endorsements	\$6,568	64,846	\$2,645
TOTAL CORE INDUSTRIES	\$107,701	1,146,565	\$32,670
ENABLED INDUSTRIES			
Golf Residential Construction	\$21,058	739,109	\$25,995
Golf Tourism	\$63,151	598,349	\$19,325
TOTAL ENABLED INDUSTRIES	\$191,911	1,885,674	\$58,665

Source: [US Golf EIS Report 2016](#)

⁶ <http://wearegolf.org/wp-content/uploads/2019/01/US-Golf-EIS-Report-2016-TEconomy-RIMS-19Apr2018.pdf>

Table 17: Summary of the 2016 WGF study of Economic Impact of Golf in USA⁷

Indicator	Total
Jobs	1,885,674
Wages and Benefits	\$58.7B
Economic Activity	\$84.1B
Total Economic Output	\$191.9B

Source: [US Golf EIS Report 2016](#)

Table 18: Demographics of US Golfers & Economic Impact by Segment (2016)⁸

Segment	All participants	Women	Non-Caucasian
Number of Golfers (M)	23.8	5.8 (24%)	4.6 (19%)
Percentage of Total US Population (308.7 M)	7.7 %	1.9%	1.5%
Direct Core Golf Economy (\$M)	\$48,998	\$11,759	\$9,309

Source: [US Golf EIS Report 2016](#)

The direct economy breakdown by demographics assumes equal distribution of women and non-Caucasian players across the price continuum, as data is not available at a granular level. Additionally, women and non-Caucasian segments are not mutually exclusive as “Women” includes both Caucasian and non-Caucasian women, and non-Caucasian includes all genders. The percentage of total number of golf players in 2016 (**23.8M**)⁹ of the total US population (**308.7M**)¹⁰ is **7.7%**.

6.1.2 European Union (27 member states), Great Britain and Ireland

In Europe, the study *The Economic Impact of Golf on the Economy of Europe* (2013)¹¹ conducted by Sports Marketing Surveys (SMS) emerges as the most recent examination of golf’s effects on the European economy. The study examined 27 member states of the European Union, with a total population of 510M. It also includes separate analysis for Great Britain and Ireland, two countries that comprise 41% of Europe’s total golf-related economic activity.

The study found that golf had an overall economic impact of €15.1B between 2011/2012, slightly down from a previous SMS study that found the economic impact of golf in Europe was €15.4B in 2006.

⁷ <http://wearegolf.org/wp-content/uploads/2019/01/US-Golf-EIS-Report-2016-TEconomy-RIMS-19Apr2018.pdf>

⁸ Ibid

⁹ <http://wearegolf.org/wp-content/uploads/2019/01/US-Golf-EIS-Report-2016-TEconomy-RIMS-19Apr2018.pdf>

¹⁰ 2010 US Census Data

¹¹ <https://www.pga.info/media/47830/13smssinceconomicimpacteuropefinal.pdf>

A summary of the economic impact of golf in Europe from the 2013 study is provided below:

Table 19: Contribution of Golf to the Economy of Europe 2011/2012

	Revenue (Millions)	% of Industry
DIRECT INDUSTRIES		
Facility Operations	€8,434.9	56%
<i>Great Britain & Ireland</i>	€3,620.6	24%
<i>Europe excl. GB & Ire.</i>	€959.4	32%
Capital Investment	€1,715.2	11%
<i>Great Britain & Ireland</i>	€755.7	5%
<i>Europe excl. GB & Ire.</i>	€959.4	6%
Golf and Equipment Supplies	€2,963.4	20%
<i>Great Britain & Ireland</i>	€1,420.2	9%
<i>Europe excl. GB & Ire.</i>	€1,543.2	10%
Events/Associations	€358.6	2%
<i>Great Britain & Ireland</i>	€133.9	1%
<i>Europe excl. GB & Ire.</i>	€224.7	1%
TOTAL DIRECT INDUSTRIES	€13,472.1	89%
<i>Great Britain & Ireland</i>	€5,930.3	39%
<i>Europe excl. GB & Ire.</i>	€7541.8	50%
ASSOCIATED INDUSTRIES		
Real Estate	€95.0	1%
<i>Great Britain & Ireland</i>	€10.0	0.07%
<i>Europe excl. GB & Ire.</i>	€85.0	1%
Tourism	€1,552.6	10%
<i>Great Britain & Ireland</i>	€229.3	2%
<i>Europe excl. GB & Ire.</i>	€1,408.3	9%
TOTAL ASSOCIATED INDUSTRIES	€1,647.6	11%
<i>Great Britain & Ireland</i>	€239.3	2%
<i>Europe excl. GB & Ire.</i>	€1,408.3	9%
ECONOMIC IMPACT OF GOLF ON THE ECONOMY OF EUROPE		
Total Economic Impact	€15,119.6	100%
<i>Great Britain & Ireland</i>	€6,169.6	41%
<i>Europe excl. GB & Ire.</i>	€8,950.1	59%

Source: [2013 PGA Study: Economic Impact of Golf in Europe](#)

Table 20: European Golf Industry Snapshot

European Golfer Numbers			
Registered Golfers	4,400,300	% of Total	56%
Of which are Males	2,873,300	% of Males	65.3%
Of which are Females	1,084,100	% of Females	24.6%
Of which are Juniors	443,000	% of Juniors	10.1%
Nomad Golfers	3,453,400	% of Total	44.0%
TOTAL GOLFERS	7,853,700		
Population	510,800,000	% of Population	1.54%
Golf Courses	6,757	Average registered golfers per course	651
		Average total golfers per course	1,162
Core Golfers (12+ times per annum)	3,201,300	% core golfers	40.8%

Source: [2013 PGA Study: Economic Impact of Golf in Europe](#)

6.1.3 Australia

According to a 2017 Australia Golf Industry Council (AGIC) Study, golf contributes \$3.6B annually to Australia's economy – comprising approximately \$3.5B in economic contribution and \$132M in physical and mental health contributions.¹²

The study also found that golf tourism generates \$477M per year through day and overnight visitation, food and beverage spending, accommodation, tourism, shopping, and related areas.

Golf in Australia is calculated to contribute \$126.6M in physical health benefits per year because of the prevention of heart disease, type-2 diabetes, stroke, and cancer.

¹² <https://www.golfindustrycentral.com.au/golf-industry-news/australian-golf-industry-council-release-golf-impact-findings/>

6.2 The Global Context: A Growing Game

According to a 2017 National Golf Foundation study, golf is played in more than 200 countries around the world and is projected to continue its global expansion¹³. The World Golf Foundation reports that golf is experiencing a level of growth in many countries similar to the U.S. golf boom in the 1960s. Countries cited as experiencing high growth include locations in Asia such as Vietnam, Eastern European countries such as Croatia, and West African countries such as Nigeria¹⁴

The 2019 World Golf Report, conducted by Golf Datatech and Yano Research Institute, also shows the state of the game is strong globally, with golf equipment business growing by 4.1% in 2018 over 2017, reaching \$8.4B in sales, and golf apparel reaching \$5.0B in sales globally – an increase of 1.3% over 2018¹⁵. This study also indicated that the top golf equipment and apparel markets in the world grew in 2018 compared to 2017, as detailed in the table below:

Table 21: Golf Industry Growth Rate 2017/2018

Golf Equipment Market	2018 Growth Rate
U.S.	5.4% increase over 2017
Japan	5.1% increase over 2017
South Korea	4.3% increase over 2017
UK	4.5% increase over 2017

Source: [World Golf Report, 2019](#)

Overall, the golf industry has seen steady growth over the past several years around the world and is expected to continue to grow as the game continues to expand beyond traditional golf countries.

¹³ <https://www.thengfg.com/2017/05/golfs-impact-on-worldwide-development-and-the-global-economy/>

¹⁴ Ibid

¹⁵ <https://www.golfdigest.com/story/golf-retail-sales-reach-13-billion-dollars-worldwide-in-2018-up-from-2017-according-to-annual-report>

GLOSSARY OF TERMS

Types of Impacts

Direct impacts - The cash operating expenditures and gross profit before taxes and depreciation of golf courses and driving ranges.

Indirect impacts - The cash operating expenditures and gross profit before taxes and depreciation of all industries that supply goods and services to golf courses and driving ranges and to industries that produce goods and services for golf courses and driving ranges.

Induced impact - The purchases of households when they re-spend the income they earn working directly for golf courses and driving ranges and industries that produce the indirect impacts.

The Total Economic Impact - The sum of the direct, indirect, and induced impacts.

Employment – The three impacts on employment are measured in person years (where a person year is equal to 2,000 hours and defined as a full-time equivalent position - FTE). FTEs are calculated based on annual wages and salaries and on an industry-by-industry basis.

Impact Categories

Gross Domestic Product (GDP) – One of the more important outputs from the I/O model, changes in GDP at market prices are an important consideration. Being the monetary value of all goods and services generated within the golf operations and the associated spending, GDP is the most direct and readily evident economic impact. Note that, by definition, GDP includes household income as well as taxes on products; subsidies on products; subsidies on production; taxes on production, wages and salaries, employers' social contributions, gross mixed income, and gross operating surplus.

Household Income – The impact on wages and salaries associated with person years of employment (FTEs). In this model, Household Income is comprised of wages and salaries, employers' social contributions, and gross mixed income.

Tax Effects/Impacts – These are the estimated changes in federal and provincial taxation arising from economic activity relating to the spending. Federal tax includes federal income tax, GST and other indirect taxes, and tax on profits. Provincial Income Tax includes PST (the provincial portion of HST) and other indirect taxes, as well as provincial tax on profits.

Readers of this report may also be familiar with the term **Gross Production (Total Sales)**. This is the total value of all economic transactions associated with all components of the spending. By definition, 'gross production' inherently *double* counts sales because it is the sum of all direct, indirect, and induced sales. The use and interpretation of Gross Production requires a high degree of caution and is subject to misinterpretation. For this reason, the statistic is not provided.

SPONSORS & SUPPORTERS

The Economic Impact of Golf in Canada (2019) would not be possible without the generous contributions and support of many industry partners and associations from across the Canadian golf community.

The National Allied Golf Associations (*We Are Golf*) would also like to extend its sincere appreciation to the many golfers, facilities, course operators and industry stakeholders who shared their insights and economic data through the Golfer and/or Operator Surveys.

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Golf PEI



Lethbridge Country Club



Morgan Creek Golf Club



New Brunswick Golf



PEI Golf Association



Savannah Golf Links



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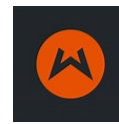
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