March, 2017

2016 BC Golf Market Report
Summary of Key Findings

- The size of the golf market increased slightly in 2016 to 680,000 golfers, continuing its upward trend. The participation rate also increased, both of which are positive news for the BC golf industry.
- However, all of the increase in both measures was due to an increase in the number of Infrequent golfers. This is positive in introducing new golfers to the game, but the decline in Core golfer participation is troubling.
- Core golfers are by far the most important segment in generating rounds for the industry. This has been evident in all previous years. The decline in the number of Core golfers in 2016 was not significant but needs to be tracked.
- Almost all of the increase in Infrequent golfers was due to the increase in female participation. Again, this is very positive in introducing more women into the game and reverses a trend seen through most of the past 10 years. The number of Core female golfers also increased in 2016 which would seem to indicate that females introduced to the game in earlier years have increased their engagement with the game.
- Among the two key ethnic markets – Chinese and South Asian – the participation rate is still at a reasonable level in comparison to the overall participation rate but has the potential to increase.
- Age appears to be the most important factor in determining golf participation. 31% of all golfers are over the age of 65 and more importantly, as this segment is most likely to be Core golfers, they represent (at least) 70% of all rounds played in BC.
- The number of golfers in the 3 youngest age segments (12 – 35) declined in 2016, continuing at the low levels seen in previous data. The number of Junior golfers picked up in this survey data is at a level where it might not be reportable in future data if it does not increase. The data is already at a level where it is too small for reliability.
- For the first time, data on the three "generations" is available and should be used to a greater extent in future reports. Baby Boomers are the key market for the golf industry in the short term.
- Household income and education are also influential in determining participation Golfers are better educated and live in higher household incomes than average.
- Family formation or status is probably as important a factor as income and education and also reflects age. Although most BC residents live in families with children at home, most golfers don't have children in the household.
- The estimates for the number of rounds played is largely influenced by the estimate provided for the average number of rounds played by Core golfers. Research that has been conducted in the past may provide a better answer than that used in this report (of an average of 15 rounds played annually).

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