

GOLF IN CANADA

Economic Impact Study



2023

National Allied
Golf Associations

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Executive Summary



Study Overview

The **Golf in Canada Economic Impact Study 2023** measures the contribution of the sport of golf to the Canadian economy. Produced by [21FSP Advisory Inc.](#) on behalf of the **National Allied Golf Associations (NAGA)**, this study highlights golf's role as an economic driver, major employer, environmental steward, and promoter of physical, social, and mental wellbeing.

This iteration of the study explores golf as an economic driver, employer, environmental steward, and outlet for physical, social, and mental wellbeing.

This edition of the study builds on an extensive data set, capturing insights from over 12,000 observations of Canadian golfers and golf course owners. Data was collected through two comprehensive online surveys, promoted by NAGA partners' diverse communication channels:

The Golfer Survey: Generated over 12,000 responses from golfers across Canada.

The Operator Survey: Received 476 responses from golf course operators nationwide.

The 2024 study is the fourth iteration of the Golf in Canada Economic Impact Study, following previous editions released in [2009](#), [2014](#), [2019](#). This continuity enables a longitudinal and robust analysis of trends and developments in the golf industry over time, underscoring its evolving economic significance.

Key Highlights

In 2023, the Canadian golf industry demonstrated its significant economic influence by contributing an impressive **\$23.2 billion to the nation's GDP** (compared to \$18.2B in 2019, or \$20.9B in [2023 dollars](#)). This substantial contribution underscores golf's pivotal role in driving economic growth and fostering employment opportunities across the country.

The golf industry supported almost **237,000 person-years of employment in 2023** (compared to 248,878 in 2019), illustrating its importance as a vital source of livelihood for countless Canadians. Furthermore, golf-related activities generated over **\$14.2 billion in labour income in 2023** (compared to \$10.6B in 2019, or \$12.2B in 2023 dollars), emphasizing the financial benefits to employees within the sector. The golf industry also played a pivotal role in supporting public services and infrastructure by generating **\$4.7 billion in government tax revenues in 2023** (compared to \$4.5B in 2019, or \$5.2B in 2023 dollars).

Golfer engagement remains exceptionally robust, with over 12,000 participants in the survey, reflecting a vibrant and active golfing community. **Charity golf events raised an estimated \$382 million in 2023** (compared to \$330M in 2019, or \$378.5M in 2023 dollars), fully recovering to pre-pandemic levels, showcasing the sport's significant role in supporting various causes and community initiatives.

The industry's **resilience during the COVID-19 pandemic** is a noteworthy finding. Despite facing substantial challenges, including restrictions on gatherings, disruptions to traditional fundraising events, and limits to outside charitable golf events due to high individual consumer demand, the industry quickly adapted through innovative virtual fundraising initiatives and leveraged the inherent social distancing nature of golf to facilitate a swifter recovery compared to many other sports. This adaptability underscores the enduring appeal and robustness of the golf industry.



**\$23.2 billion
in GDP**

Emerging Trends

Off-course golf (i.e., simulators and virtual golf) is emerging as a transformative force within the industry, enhancing participation, particularly among younger demographics. The integration of advanced simulators and digital platforms has not only broadened the appeal of golf but also complemented traditional on-course play. This trend is expected to drive further engagement with golf, offering new and exciting opportunities for the industry to attract a diverse range of participants.

Environmental stewardship is increasingly taking center stage, with many golf courses and associations adopting sustainable practices to minimize their ecological footprint. This shift aligns with broader societal values of sustainability and demonstrates the industry's commitment to environmental responsibility. By integrating eco-friendly initiatives, the golf industry is positioning itself as a leader in sustainable sports and recreation.

The **health and wellness benefits** of golf are gaining widespread recognition, making the sport an attractive option for individuals seeking to enhance their physical and mental well-being. The therapeutic aspects of golf, combined with its physical and social health benefits, are drawing more players to the sport. Technological advancements, from GPS-enabled equipment to innovative training tools, are enhancing the playing experience and attracting a tech-savvy audience. These innovations are not only improving performance but also making the game more accessible and enjoyable for all players.

95% said golf enhances their mental health

Golf continues to play a crucial role in **fostering community engagement** through tournaments, charity events, and local fundraising initiatives. These activities strengthen the social fabric and underscore golf's positive impact on community development. The industry is also witnessing efforts to make the sport more inclusive and accessible, with programming and outreach to diverse and equity-deserving communities to promote a more equitable playing field and inclusive experience.

Despite economic fluctuations, the golf industry's ability to adapt and thrive showcases its resilience and long-term viability. The industry's robust response to challenges and its proactive approach to embracing new trends and technologies illustrate a promising trajectory for the future. These emerging trends highlight the dynamic and evolving nature of the golf industry in Canada, signaling a bright and prosperous future for this beloved sport.



Introduction



The Economic Impact Study

The *Golf in Canada Economic Impact Study 2023*, now in its fourth iteration by the National Allied Golf Associations (NAGA), builds upon the pioneering 2009 report, the first of its kind in Canada. This comprehensive examination of the Canadian golf economy delves into both the supply of golf and consumer demand. Data for the study was carefully gathered through two online surveys: *the Golfer Survey*, tailored for Canadian golfers, and *the Operator Survey*, circulated among Canadian golf course operators, as well as various golf industry and public benchmark resources.

Disseminated through NAGA partner channels, the *Operator Survey* focused on collecting financial and activity-based data associated with course operations, including expenditures by categories, rounds played, and the impact of weather events, among other data points. Similarly, the *Golfer Survey* elicited expenditure details from golfers, encompassing green fees, membership fees, equipment purchases, lessons, restaurant expenditures, and more, while also gauging frequency of play and golf-related travel.

Data collection for both surveys occurred during March and April of 2024, resulting in complete financial responses from nearly 476 Canadian golf course operators and over 12,000 Canadian golfers. Economic impacts were assessed through a proprietary economic impact model that maps the interprovincial industry and consumer transactions, enabling a national and provincial-level breakdown of the economic effects.

Led by the same team who designed Canada's first nationwide study of the economic impact of golf for NAGA in 2009 (and all iterations since), this report leverages a similar, albeit updated, inter-provincial economic impact model. Drawing from the lessons learned in survey research from [2009](#), [2014](#), [2019](#), and throughout the current study, the data analysis team has access to tens of thousands of data points on Canadian golfers and course operations combined.

To profile trends and assess changes over time, the findings from this study were contrasted with benchmarks provided in earlier reports. Additionally, data collected in previous studies was CPI-adjusted to account for inflation using the *Bank of Canada Inflation Calculator*.

Post-Pandemic Context

In the post-pandemic context, the Canadian golf industry—and the sports sector as a whole—experienced seismic shifts. For a long period, sporting events either had no-to-few spectators to comply with social distancing guidelines—with serious economic ramifications for participants and venues. Despite these restrictions on sports more broadly, golf experienced a surge of activity during the pandemic. Because it's played outdoors, often individually, with limited physical contact, the sport lent itself well to physical distancing and was among the first activities in Canada to be permitted under the prevailing health restrictions at the time.

Golf courses reopened well ahead of other venues and recreational activities. In some Canadian provinces, courses reopened as early as May 2020, just two months after lockdowns began. The golf industry experienced a boost in popularity and economic growth due to this relatively quick return. Increased rounds played, new players, higher equipment sales, and demographic shifts in players all contributed to the surge in golf's appeal.

Keeping these factors in mind was an important interpretive consideration in analyzing the data from this iteration of the study.

About NAGA

The National Allied Golf Associations is a Canadian organization made up of five member agencies: the Canadian Golf Superintendents Association, the Professional Golfers' Association of Canada, the Club Management Association of Canada, the National Golf Course Owners Association of Canada, and Golf Canada.

NAGA's member associations work collaboratively to promote the sport of golf in Canada, ensuring that it thrives in the future. NAGA is committed to promoting golf as an economic driver, environmental steward, and important component of Canadians wellbeing.



Acknowledgments

On behalf of NAGA and each golf association partner, we would like to thank the hundreds of golf course operators and thousands of golfers who participated in the necessary economic impact surveys.

In addition, a big thank you to those industry leading sponsors who stepped up to support this important initiative, and to 21FSP Advisory Inc. for their diligent efforts executing the entire Study.

The economic data generated will benefit all stakeholders in Canadian golf. Each of these contributors deserve our greatest appreciation for their critical support.

Jeff Calderwood, NAGA Chair.

Sponsors

Champion Sponsor



Partner Sponsors



Supporting Sponsors



About 21FSP Advisory

21FSP Advisory is a dynamic team of consultants known for its innovative approach to economic development, social enterprise, entrepreneurship, community development, inclusion, and governance. The firm is responsive to the unique, evolving challenges of the 21st century, using a proprietary future scoping tool to navigate contemporary issues. This approach aims to help clients manage disruptive forces while optimizing financial, environmental, and social sustainability.

The team has extensive experience in economic impact studies, having designed and executed Canada's first nation-wide study on the economic impact of golf in 2009 on behalf of NAGA. The 2023 study utilizes a refined and updated I/O model, building on lessons from previous surveys conducted in 2009, 2014, and 2019. This comprehensive approach ensures an up-to-date analysis, reflecting 21FSP's ongoing commitment to addressing complex challenges in economic development and sustainability.



Economic Impact of Golf in Canada



The Growing Impact of Golf in Canada

Total direct expenditure from all golf activity in 2023, including both golfer spending and golf course operational expenditures in Canada, amounted to \$21.5B in 2023.

The game of golf contributed an estimated total economic impact of **\$23.2B to the GDP in Canada** in 2023 (compared to \$18.2B in 2019, or \$20.9B in [2023 dollars](#)). The game of golf contributed:

- **237,913 person-years of employment** (compared to 248,878 in 2019)
- **\$14.2B in labour income** (compared to \$10.6B in 2019, or \$12.2B in 2023 dollars)
- **\$4.7B in government tax revenue** (compared to \$4.5B in 2019, or \$5.2B in 2023 dollars)

The following table shows the economic contributions from **all golf activity for 2023**. Economic contributions are categorized into [direct](#), [indirect](#), and [induced](#) effects, which together provide a comprehensive picture of the overall impact.

Table 1: Economic Impact from Golf Activity in Canada, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	138,627	\$9.3B	\$5.9B	\$1.8B
Indirect / Indirect	57,407	\$7.7B	\$4.5B	\$1.4B
Induced / Induit	40,878	\$6.2B	\$3.7B	\$1.6B
Total / Total	236,913	\$23.2B	\$14.2B	\$4.7B

Employment (Person-Years)

- All golf activities directly generated 138,627 person-years of employment.
- An additional 57,407 person-years of employment were generated indirectly through related business activities and supply chains.
- Consumer spending resulting from golf-related employment (induced impact) provided a further 40,878 person-years of employment.
- In total, all golf activities supported 236,913 person-years of employment.

Gross Domestic Product (GDP)

- The direct impact on GDP from all golf activities was \$9.3B.
- Indirect contributions to GDP from golf activities amounted to \$7.7B.
- Induced effects from golf-related spending contributed \$6.2B to the GDP.
- The total contribution to GDP from all golf activities was \$23.2B.

Labour Income

- Labour income directly generated by all golf activities was \$5.9B.
- Indirectly, golf activities resulted in \$4.5B in labour income.
- Induced labour income from golf-related activities reached \$3.7B.
- The total labour income impact from all golf activities was \$14.2B.

Government Tax Revenues

- Government tax revenues directly resulting from all golf activities were \$1.8B.
- Indirect tax revenues from golf activities amounted to \$1.4B.
- Induced tax revenues from golf-related spending added \$1.6B.
- The total government tax revenues generated by all golf activities in 2023 were \$4.7B.

Impact from Golfer Spending

Total direct expenditure by golfers in Canada amounted to \$14.1B in 2023.

Golfer spending includes membership dues, green fees, and other on course spending, as well as travel to and from the course, equipment and clothing purchases, meals and related expenditures that occur off course, but are related to golf.

In 2023, golfer spending contributed an estimated total economic impact of **\$14.2B** to the GDP in Canada, in addition to:

- **128,984 person-years of employment**
- **\$8.3B in labour income**
- **\$2.9B in government tax revenue**

The following table shows the direct, indirect, and induced economic impact from **golfer spending for 2023**.

Table 2: Economic Impact from Golfer Spending in Canada, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	67,611	\$5.4B	\$3.2B	\$1.2B
Indirect / Indirect	37,756	\$5.2B	\$2.9B	\$850M
Induced / Induit	23,617	\$3.5B	\$2.2B	\$846M
Total / Total	128,984	\$14.2B	\$8.3B	\$2.9B

Employment (Person-Years)

- Golfer spending directly generated 67,611 person-years of employment.
- An additional 37,756 person-years of employment were generated indirectly through related business activities and supply chains.
- Consumer spending resulting from employment provided a further 23,617 person-years of employment.
- In total, golfer spending supported 128,984 person-years of employment.

Gross Domestic Product (GDP)

- The direct impact on GDP was \$5.4 billion.
- Indirect contributions to GDP amounted to \$5.2 billion.
- Induced effects contributed \$3.5 billion to the GDP.
- The overall contribution to GDP from golfer spending was \$14.2 billion.

Labour Income

- Labour income directly generated by golfer spending was \$3.2 billion.
- Indirectly, this spending resulted in \$2.9 billion in labour income.
- Induced labour income reached \$2.2 billion.
- The total labour income impact was \$8.3 billion.

Government Tax Revenues

- Government tax revenues directly resulting from golfer spending were \$1.2 billion.
- Indirect tax revenues amounted to \$850 million.
- Induced tax revenues added \$846 million.
- The total government tax revenues generated by golfer spending were \$2.9 billion.

Impact from Golf Course Operational Expenditure

Total direct expenditure by **golf course operators in Canada in 2023** amounted to \$6.3B in 2023.

Golf course operational expenditure contributed an estimated total **\$8.1B to the GDP in Canada** in 2023, in addition to:

- **101,376 person-years of employment**
- **\$5.3B in labour income**
- **\$1.6B in government tax revenue**

The following table shows the direct, indirect, and induced economic impact from **operational expenditure on golf courses for 2023**.

Table 3: Economic Impact from Operational Expenditure on Golf Courses, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	68,259	\$3.5B	\$2.4B	\$523M
Indirect / Indirect	17,240	\$2.2B	\$1.4B	\$433M
Induced / Induit	15,878	\$2.4B	\$1.5B	\$666M
Total / Total	101,376	\$8.1B	\$5.3B	\$1.6B

Employment (Person-Years)

- Golf course operations directly generated 68,259 person-years of employment.
- An additional 17,240 person-years of employment were generated indirectly through related business activities and supply chains.
- Consumer spending resulting from employment provided a further 15,878 person-years of employment.
- In total, operational expenditures from golf course operators supported 101,376 person-years of employment.

Gross Domestic Product (GDP)

- The direct impact on GDP was \$3.5B.
- Indirect contributions to GDP amounted to \$2.2B.
- Induced effects contributed \$2.4B to the GDP.
- The overall contribution to GDP from operational expenditures by golf course operators was \$8.1B.

Labour Income

- Labour income directly generated by these operational expenditures was \$2.4B.
- Indirectly, these expenditures resulted in \$1.4B in labour income.
- Induced labour income reached \$1.5B.
- The total labour income impact was \$5.3B.

Government Tax Revenues

- Government tax revenues directly resulting from these expenditures were \$523M.
- Indirect tax revenues amounted to \$433M.
- Induced tax revenues added \$666M.
- The total government tax revenues generated by operational expenditures from golf course operators were \$1.6B.

Impact from Capital Expenditure

Total direct capital expenditure by golf course operators in Canada amounted to \$6.0B in 2023.

Golf course capital expenditure contributed an estimated total **\$907M to the GDP in Canada** in 2023, in addition to:

- **6,552 person-years of employment**
- **\$608M in labour income**
- **\$223M in government tax revenue**

The following table shows the direct, indirect, and induced economic impact from **capital expenditure on golf courses for 2023**.

Table 4: Economic Impact from Capital Expenditure on Golf Courses in Canada, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	2,757	\$361M	\$266M	\$95M
Indirect / Indirect	2,412	\$337M	\$216M	\$70M
Induced / Induit	1,383	\$209M	\$126M	\$58M
Total / Total	6,552	\$907M	\$608M	\$223M

Employment (Person-Years)

- Capital expenditure directly contributed to the creation of 2,757 person-years of employment.
- An additional 2,412 person-years of employment were generated indirectly through supply chain and related business activities.
- Consumer spending resulting from employment generated a further 1,383 person-years of employment.
- In total, capital expenditures on golf courses supported 6,552 person-years of employment.

Gross Domestic Product (GDP)

- The direct impact on GDP was \$361M.
- Indirect contributions to GDP amounted to \$337M.
- Induced effects contributed \$208M to the GDP.
- The overall contribution to GDP from capital expenditures on golf courses was \$907M.

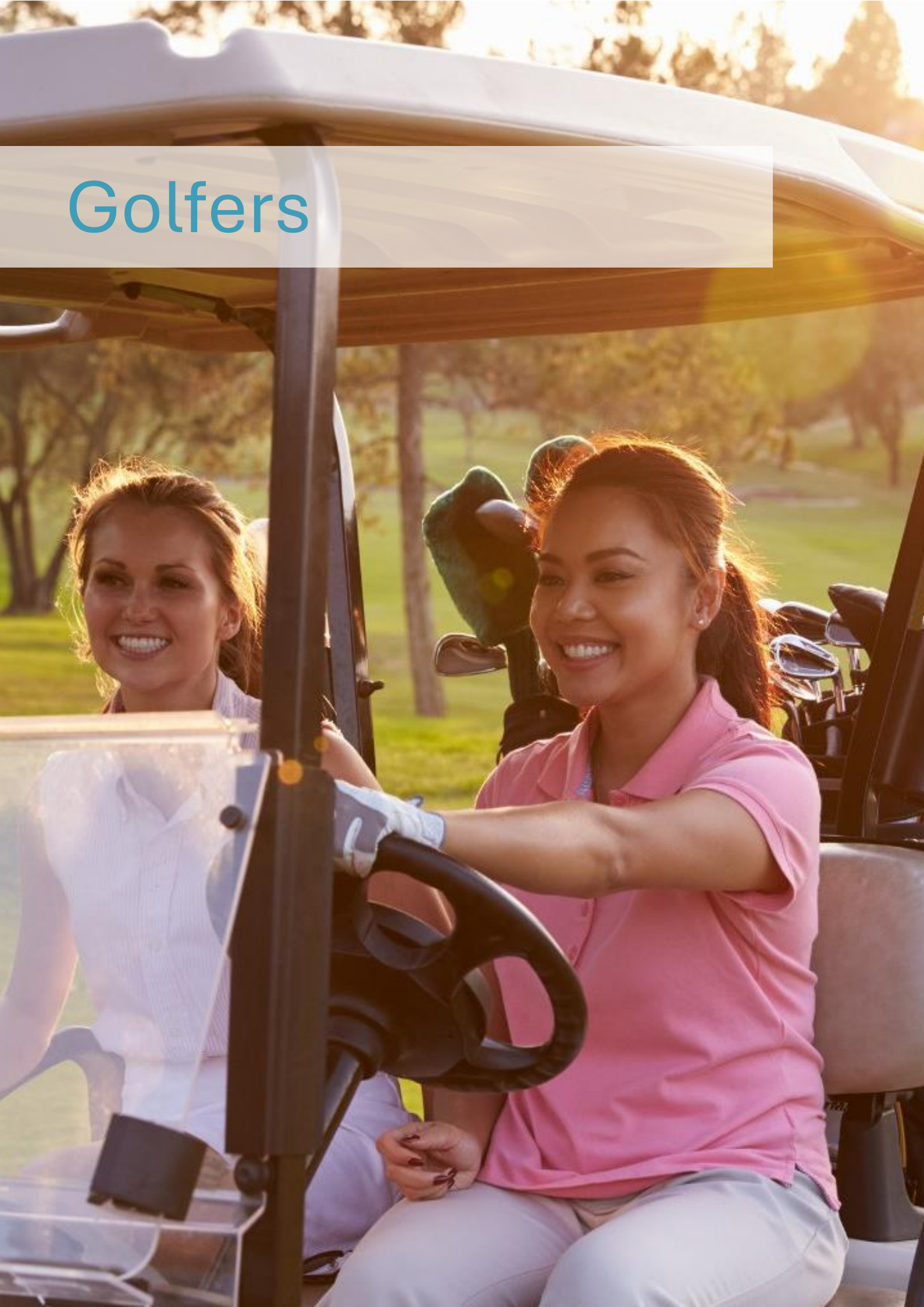
Labour Income

- Labour income directly generated by capital expenditures was \$266M.
- Indirectly, these expenditures resulted in \$216M in labour income.
- Induced labour income reached \$126M.
- The total labour income impact was \$608M.

Government Tax Revenues

- Government tax revenues directly resulting from these expenditures were \$95M.
- Indirect tax revenues amounted to \$70M.
- Induced tax revenues added \$58M.
- The total government tax revenues generated by capital expenditures on golf courses were \$223M.

Golfers



Who We Heard From

The golfer survey sought to capture a comprehensive picture of golf habits and spending among golfers across Canada to better understand the broader economic impact of golf in Canada.

The golfer survey sample, comprised of over 12,000 responses, reflects a relatively diverse geographic representation of golfers in Canada compared to the regional dispersion of the total population. **In 2023, Canadians played an estimated 74 million rounds of golf** (compared to 57 million rounds in 2019). Golf Canada estimates that there were 6 million golfers in Canada in 2023, compared to 5.7 million in 2019.

Frequency of Golf

To better understand the survey sample, the analysis categorized golfers based on their frequency of play. The following categories were used:

- **Avid golfer:** Plays more than 50 rounds per year
- **Frequent golfer:** Plays 21 to 50 rounds per year
- **Occasional golfer:** Plays 11 to 20 rounds per year
- **Infrequent golfer:** Plays 10 or less rounds per year

The survey sample indicates a higher proportion of avid golfers than might be representative of the full population of golfers. This trend suggests that our respondents are more engaged in the sport, skewing the data towards those who play more frequently. Survey results pertaining to spending and economic impacts have been weighted to ensure that the findings accurately reflect the spending habits of the broader golfing population in Canada, which is the focus of this research.

Figure 1: Golfers in Study Sample

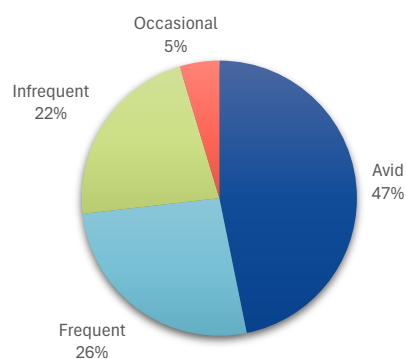
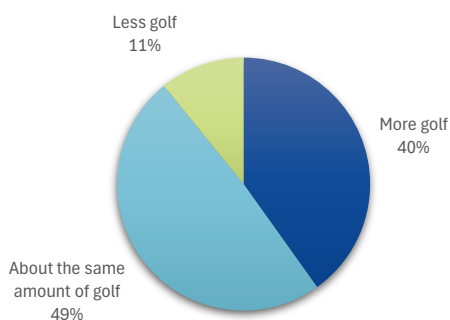


Figure 2: Golf Play Over Past Three Years



Trend in Golf Play

The survey revealed stability and growth in golf participation. Nearly half (49%) of respondents have maintained their level of play over the past three years, while 40% reported an increase in their golf activity.

Commute to Golf

On average, respondents travel 19 kilometers and spend 20 minutes commuting to their usual golf course. Most (90%) drive their own vehicles, highlighting the importance of accessibility and convenience in golfers' routines.

Golf in the Household

Golf is a shared activity for many households. Just over half (53%) of respondents have other household members who golf. Of those who have other household members that golf, just over three-quarters (76%) indicated that there is 1 other person in the household who golfs.

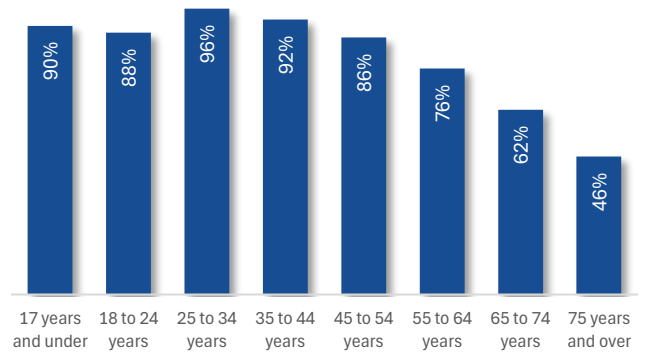
The Rise of Off-Course Golf

This study marks NAGA's first in-depth exploration into the growing influence of off-course golf, specifically through simulators and other virtual golf experiences. Off-course golf has seen a remarkable rise in popularity across Canada (and globally), appealing to a broad spectrum of participants. Study findings show that two-thirds of survey respondents have tried off-course or virtual golf, highlighting its widespread acceptance and enjoyment. On average, respondents participated in seven off-course sessions per year, underscoring the regular engagement and enthusiasm for this growing sector of participation.

Off-course golf attracts players of all ages. Notably, there is a significant prevalence among younger age groups. A noteworthy 96% of survey respondents aged 25 to 34 who golf reported having tried off-course or virtual golf, underscoring its appeal to this tech-savvy demographic. In contrast, 46% of those aged 75 and older who golf have experienced off-course or virtual golf, indicating a growing interest among older players.

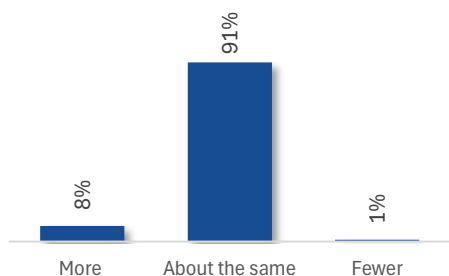
Regarding payment methods used for off-course golf, the majority of these players (84%) prefer to pay on a per session basis, reflecting a flexible and casual approach to participation. A smaller segment, 5%, opts for monthly or annual membership, indicating a commitment to regular play. Additionally, 11% of respondents access off-course golf through alternative means, such as at-home golf simulators, highlighting the diverse ways Canadians engage with this modern adaptation of the sport. Many respondents volunteered that they have purchased a golf simulator for their home within the past couple of years.

Figure 3: Share of Respondents Who Have Tried Off-Course or Virtual Golf, by Age



Further research is necessary to monitor the impact of off-course or virtual golf and understand how it complements traditional green grass golf. Off-course golf replicates the core aspects of the sport in a digital environment, catering to various purposes such as entertainment, lessons, skill development, and immersive social experiences. In these social contexts, off-course golf presents a unique opportunity to introduce the game to individuals who might not have otherwise picked up a club.

Figure 4: Games Played on Traditional Golf Courses as a Result of Virtual Golf



Notably, the study findings indicate that **off-course or virtual golf has not reduced the amount of traditional outdoor golf played.**

According to the survey, 91% of respondents indicated that their participation in off-course or virtual golf has not changed the frequency of their traditional golf play, with them playing about the same amount on traditional courses. Interestingly, 8% reported that they now play more games on traditional courses as a result of off-course or virtual golf, while only 1% said they play fewer games.

Off-course golf’s growing popularity across demographics and regions, together with its convenience and accessibility, highlights its potential to become a staple in Canada’s golf landscape.

Golf’s Impact on Health and Wellness

Golf is more than just a sport; it is a catalyst for holistic health and wellness, contributing positively to physical, mental, and social well-being. This multifaceted impact underscores the broader economic significance of golf in Canada, where the sport's influence extends beyond the course and into the fabric of everyday life.

When asked about the role of golf in their physical fitness and exercise regimen, **77% of respondents reported that golf is either very important or important to their physical fitness goals.** This highlights golf's critical role in promoting physical health, encouraging an active lifestyle, and reducing healthcare costs through preventative health measures.

Study findings show that golf’s benefits extend into the realm of mental health.

Table 5: Perception of the Importance of Golf for Physical Fitness and Exercise Goals



A notable 95% of respondents stated that golf enhances their overall wellness and mental health.

This strong correlation between golf and mental well-being points to the sport's potential as a therapeutic activity, providing stress relief, relaxation, social connection, and a sense of accomplishment. The mental health benefits of golf can contribute to a more productive workforce and can lead to decreased healthcare expenses related to mental health issues.

The social dimension of golf also plays a significant role in its overall impact. An impressive **83% of respondents indicated that the social aspect of golf is either very important or important to them** in pursuing the sport. Golf courses serve as social hubs, foster a sense of community, and increase opportunities for outdoor social interaction, which collectively are vital for mental and emotional health. Golf as a social activity helps to build stronger community bonds and create networking opportunities that drive local economies.

Golf During the COVID Pandemic

The golfer survey asked respondents to describe what golf during the COVID-19 pandemic meant to them. Survey findings indicate that the game of golf was highly meaningful to golfers during the pandemic, significantly contributing to their physical and mental health and wellness in various ways. The most frequently cited reasons include:

- **Outdoor enjoyment, freedom, and exercise:** Many people valued the opportunity to be outdoors, engage in physical activity, and experience a sense of freedom despite pandemic restrictions.
- **Mental health, sense of normalcy, and relaxation:** Golf provided a crucial mental health boost, helping individuals maintain a sense of normalcy and relaxation amid the uncertainties of the pandemic.
- **Social connection:** For many, golf was an important way to sustain social connections in a safe and physically distanced manner.

While some respondents noted challenges such as increased restrictions and reduced tee times, the overall positive impacts on health and wellness were prominently highlighted in the survey responses.

The wellness benefits of golf translate into economic advantages for Canada, ranging from reduced healthcare costs to enhanced community engagement and productivity. By investing in and promoting golf, Canada not only nurtures a healthier population but also strengthens its economic resilience.

Golf Tournaments and Charity Events

Golfers demonstrate a significant level of participation and involvement in both charity events and tournaments, highlighting the sport's role in fostering community engagement and supporting various causes.

Charitable Events

Half of respondents indicated that they participated in charitable golf events in 2023. When asked about their motivation to participate, the most frequently cited reasons were:

- Belief in the cause
- Local community fundraising
- Fun / enjoyment
- Corporate sponsorship
- Social influence

Golf Tournaments

Approximately 14% of respondents attended at least one professional golf tournament in 2023. Of these attendees, 57% were spectators, 21% were volunteers, 12% were players, and 1% were employees.

One-quarter of respondents attended at least one amateur golf tournament in 2023. Among them, 10% attended one tournament, 5% attended two tournaments, and 10% attended three or more tournaments. Of those who attended amateur tournaments, 67% were players, 16% were spectators, 11% were volunteers, and 1% were employees.

Golf events, whether charitable, professional, or amateur, attract a diverse range of participants and supporters, underscoring the sport's widespread appeal and its positive impact on community and charitable initiatives.

Golf Course Operators



Landscape of Golf Course Operations in Canada

The operator survey provided a comprehensive view of the diverse landscape of golf course operations, highlighting key features of golf course management, ownership, and regional distribution.

Course Management

Nearly 86% of operators manage just one golf course, underscoring the prevalence of single-course operations in the industry. Just under 10% of operators manage two courses, and the remaining ~4% oversee three or more courses, indicating a smaller segment of operators managing multiple facilities. Among those managing multiple courses, 24% operate under a multi-course ownership structure.

Golf Play During 2023

Starts / Rounds

The total number of golf play starts for 18-hole equivalents across Canada in 2023 reached approximately 74 million (compared to 57 million rounds in 2019). This survey responses indicates 2023 was a recovery year from a small dip in 2022, which was preceded by an increase in rounds played from 2019 to the 2021 season.

**74 million
rounds played**

Operators reported that their overall optimum capacity for golf play starts across Canadian courses annually is approximately 80.5 million rounds, with a maximum capacity of 95.7 million rounds. These figures highlight that while closures presented challenges, the overall participation in golf remained strong, with courses accommodating a significant number of players throughout the year and, generally, operating close to optimal capacity.

Tournaments and Charities

In 2023, golf course operators hosted a significant number of tournaments, highlighting the sport's active community and role in charitable fundraising. Most operators (61%) reported hosting more than 10 tournaments, with an average of 11 tournaments per course, translating to an estimated total of almost 26,000 tournaments held across Canada in 2023.

A substantial portion of these tournaments served charitable purposes. Approximately 38% of courses hosted 1 to 5 charity events, 32% hosted 6 to 10 charity events, and 19% hosted more than 10 charity events. The average amount raised at a single charity golf event, among those courses who tracked this information, was around \$27,000, indicating that **charity golf events generated an estimated \$382M across Canada in 2023.**

Though this contribution is impressive and marks a return to pre-pandemic levels with a slight increase from 2019 (where charity golf events contributed \$330M, or \$378.5M in 2023 dollars), it is important to note the challenges charities faced during the COVID-19 pandemic. Many fundraising events, including golf tournaments, were canceled, or scaled back due to restrictions on gatherings, resulting in financial strain for organizations heavily reliant on these events. Some charities adapted by moving to virtual platforms, organizing online auctions, and virtual golf tournaments, though this presented its own challenges, such as reduced participation and donor fatigue.

As restrictions eased and vaccination rates increased, the inherent social distancing nature of golf led to a surge in demand. This created challenges for charities attempting to host events due to limited availability and new golf course policies. The return to pre-pandemic levels of charity events varied, with some charities resuming quickly while others faced delays due to high demand and operational changes at courses. Despite challenges over the past few years, golf courses continue to play an important role in supporting charitable causes.

Employment on Golf Courses

In 2023, golf courses across Canada provided substantial employment opportunities, with operators reporting an average of 65 employees per course. This employment level results in an estimated total of just over 150,000 individuals working at golf courses nationwide. These figures represent 'jobs' rather than full-time equivalent (FTE) positions or person-years noted in the summary of economic impacts above, reflecting a high seasonal component. The economic model used to generate total economic impact converts these employment numbers into person-years using average wages and salaries associated with these jobs, resulting in a lower absolute value (i.e., a part-time position is less a fraction of a 2,000-hour person year of employment). Nevertheless, the golf industry is a vital source of seasonal and contract employment across the country. In particular, golf courses in Canada employed an estimated 45,000 students in 2023.

Climate Change and Golf

Golf course operators are increasingly recognizing the importance of sustainability, including climate change adaptation and mitigation in their long-term planning. When asked whether these considerations are part of their strategic outlook, **47% of operators affirmed that they have already integrated climate change strategies into their long-term plans**, demonstrating a commitment to environmental stewardship and sustainability within the industry.

In terms of the operational impacts attributed to climate change and sustainability, 34% of golf course operators reported experiencing noticeable effects. This growing recognition of climate-related challenges underscores the need for proactive sustainability measures within the industry and the industry is actively taking steps to address this.

When asked if they have been making climate change adaptation efforts for their courses, 40% of operators confirmed that they are actively working on adaptation strategies. Among those focusing on adaptation, key areas include drought management (72%), flood prevention (52%), infrastructure hardening (28%), and addressing wildfires (20%).

Additionally, operators are implementing various climate change mitigation efforts. Water management is a priority for 96% of those surveyed, followed by the management of chemical fertilizers and pesticides (81%), increasing energy efficiency (50%), and habitat conservation (42%). A small percentage (4%) specified other mitigation efforts, reflecting a broad commitment to sustainable golf course operations.



Regional Economic Impact



British Columbia¹

Total direct expenditure on golf in **British Columbia** amounted to \$4.9B in 2023.

Total Regional Economic Impact

The game of golf contributed an estimated total (including indirect and induced effects) of **\$5.3B to the GDP in British Columbia** in 2023 (compared to \$3.7B in 2019, or \$4.3B in 2023 dollars), in addition to:

- 51,708 person-years of employment (compared to 52,183 in 2019)
- \$3.3B in labour income (compared to \$2.3B in 2019, or \$2.6B in 2023 dollars)
- \$1.1B in government tax revenue (compared to \$858M in 2019, or \$987M in 2023 dollars)

Direct, Indirect, and Induced Impacts

A detailed summary of the economic impact from the annual golf activity (including from golfers and golf operators) in the region in 2023 is provided in the table below:

Table 6: Economic Impact from Golf Activity in British Columbia, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	31,411	\$2.5B	\$1.5B	\$513M
Indirect / Indirect	11,655	\$1.4B	\$891M	\$273M
Induced / Induit	8,642	\$1.4B	\$891M	\$327M
Total / Total	51,708	\$5.3B	\$3.3B	\$1.1B

Alberta

Total direct expenditure on golf in the **Alberta** amounted to \$2.3B in 2023.

Total Regional Economic Impact

The game of golf contributed an estimated total (including indirect and induced effects) of **\$3.3 to the GDP in Alberta** in 2023 (compared to \$2.8B in 2019, or \$3.2B in 2023 dollars), in addition to:

- 26,974 person-years of employment (compared to 34,128 in 2019)
- \$1.8B in labour income (compared to \$1.6B in 2019, or \$1.8M in 2023 dollars)
- \$559M in government tax revenue (compared to \$562M in 2019, or \$646M in 2023 dollars)

Direct, Indirect, and Induced Impacts

A detailed summary of the economic impact from the annual golf activity (including from golfers and golf operators) in the region in 2023 is provided in the table below:

Table 7: Economic Impact from Golf Activity in Alberta, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	14,389	\$940M	\$612M	\$170M
Indirect / Indirect	7,732	\$1.5B	\$746M	\$217M
Induced / Induit	4,853	\$822M	\$484M	\$172M
Total / Total	26,974	\$3.3B	\$1.8B	\$559M

¹ Confidence levels associated with the regional summaries are wide relative to the Canadian summary due to sample limitations provincial levels

Prairies

Total direct expenditure on golf in the **Prairies (Saskatchewan and Manitoba)** amounted to \$1.8B in 2023.

Total Regional Economic Impact

The game of golf contributed an estimated total (including indirect and induced effects) of **\$1.9B to the GDP in the Prairies** in 2023 (compared to \$1B in 2019, or \$1.2B in 2023 dollars), in addition to:

- 22,172 person-years of employment (compared to 17,114 in 2019)
- \$1.1B in labour income (compared to \$588M in 2019, or \$642 in 2023 dollars)
- \$384M in government tax revenue (compared to \$225M in 2019, or \$259M in 2023 dollars)

Direct, Indirect, and Induced Impacts

A detailed summary of the economic impact from the annual golf activity (including from golfers and golf operators) in the region in 2023 is provided in the table below:

Table 8: Economic Impact from Golf Activity in the Prairies, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	15,117	\$820M	\$521M	\$177M
Indirect / Indirect	4,273	\$661M	\$299M	\$97M
Induced / Induit	2,782	\$444M	\$248M	\$110M
Total / Total	22,172	\$1.9B	\$1.1B	\$384M

Ontario

Total direct expenditure on golf in Ontario amounted to \$7.6B in 2023.

Total Regional Economic Impact

The game of golf contributed an estimated total (including indirect and induced effects) of **\$8.0B to the GDP in Ontario** in 2023 (compared to \$6.5B in 2019, or \$7.5B in 2023 dollars), in addition to:

- 80,521 person-years of employment (compared to 85,503 in 2019)
- \$5.0B in labour income (compared to \$3.8B in 2019, or \$4.4B in 2023 dollars)
- \$1.7B in government tax revenue (compared to \$1.7B in 2019, or \$2B in 2023 dollars)

Direct, Indirect, and Induced Impacts

A detailed summary of the economic impact from the annual golf activity (including from golfers and golf operators) in the region in 2023 is provided in the table below:

Table 9: Economic Impact from Golf Activity in Ontario, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	45,298	\$3.1B	\$2.0B	\$604M
Indirect / Indirect	19,635	\$2.5B	\$1.6B	\$491M
Induced / Induit	15,588	\$2.3B	\$1.4B	\$625M
Total / Total	80,521	\$8.0B	\$5.0B	\$1.7B

Quebec

Total direct expenditure on golf in **Quebec** amounted to \$3.5B in 2023.

Total Regional Economic Impact

The game of golf contributed an estimated total (including indirect and induced effects) of **\$3.6B to the GDP in the Quebec** in 2023 (compared to \$3.2B in 2019, or \$3.7B in 2023 dollars), in addition to:

- 41,630 person-years of employment (compared to 45,571 in 2019)
- \$2.3B in labour income (compared to \$1.9B in 2019, or \$2.2B in 2023 dollars)
- \$756M in government tax revenue (compared to \$855M in 2019, or \$983M in 2023 dollars)

Direct, Indirect, and Induced Impacts

A detailed summary of the economic impact from the annual golf activity (including from golfers and golf operators) in the region in 2023 is provided in the table below:

Table 10: Economic Impact from Golf Activity in the Quebec, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	23,891	\$1.4B	\$993M	\$275M
Indirect / Indirect	10,720	\$1.3B	\$794M	\$218M
Induced / Induit	7,020	\$954M	\$555B	\$263M
Total / Total	41,630	\$3.6B	\$2.3B	\$756M

Atlantic

Total direct expenditure on golf in **Atlantic Canada** amounted to \$1.2B in 2023.

Total Regional Economic Impact

The game of golf contributed an estimated total (including indirect and induced effects) of **\$1.1B to the GDP in Atlantic Canada** in 2023 (compared to \$889M in 2019, or \$1B in 2023 dollars), in addition to:

- 13,419 person-years of employment (compared to 13,794 in 2019)
- \$632M in labour income (compared to \$506M in 2019, or \$582M in 2023 dollars)
- \$207M in government tax revenue (compared to \$264M in 2019, or \$304M in 2023 dollars)

Direct, Indirect, and Induced Impacts

A detailed summary of the economic impact from the annual golf activity (including from golfers and golf operators) in the region in 2023 is provided in the table below:

Table 11: Economic Impact from Golf Activity in Atlantic Canada, 2023

	Employment (Person-Years)	Gross Domestic Product	Labour Income	Government Tax Revenues
Direct / Direct	8,239	\$452M	\$284M	\$82M
Indirect / Indirect	3,261	\$325M	\$195M	\$54M
Induced / Induit	1,919	\$261M	\$153M	\$71M
Total / Total	13,419	\$1.1B	\$632M	\$207M

Looking Forward



The Future of Golf in Canada

The future of golf in Canada looks promising, marked by numerous emerging trends and opportunities for growth.

Golf continues to be a significant **economic driver** in Canada, contributing billions to the national GDP and supporting hundreds of thousands of jobs. The combined impact of golfer spending and golf course operational expenditures underscores the sport's vital role in the national economy. With a **total economic impact of \$23.2 billion in GDP and supporting almost 237,000 person-years of employment in 2023**, the sport's economic footprint is substantial and poised for future growth.

The COVID-19 pandemic presented substantial challenges to the golf industry, with restrictions on gatherings and disruptions to regular operations. Despite these obstacles, the **industry demonstrated remarkable resilience**. Early in the pandemic the collective industry was able to demonstrate the inherent social distancing nature of golf and that allowed courses to reopen relatively quickly. As a result, the sport experienced a surge in demand as other recreational activities remained restricted.

Post-Covid, the Canadian golf industry has been able to sustain increased golfer demand and financial impact. The increased interest in golf created both opportunities and challenges, with courses needing to manage high demand while ensuring a safe and enjoyable experience for all participants. Simultaneously, courses also had to deal with the same labour market shortages and price inflation pressures being faced by other industries. Looking ahead, the industry's ability to maintain this balance will be crucial in sustaining its growth and appeal.

One of the most notable trends in the future of golf is the **rise of off-course or virtual golf**. With two-thirds of golfers having experienced this evolving phenomenon, off-course golf appeals to a broad demographic and offers a flexible, year-round alternative to traditional play. This technology not only complements traditional golf but also attracts new participants to the sport. As technological advancements continue to enhance the virtual golf experience, its popularity and integration into the golfing landscape are expected to grow.

As climate change and environmental concerns become increasingly challenging, the Canadian golf industry must **continue to assert its already impressive leadership role in considering environmental sustainability and adaptive resilience**. To this end, golf courses are adopting and innovating water conservation practices, reducing pesticide use, and implementing environmentally friendly maintenance procedures. Many are opting to leave more of their total acreage in a more natural and wild state. By embracing sustainable practices, the Canadian golf industry can continue to serve as a model for effective environmental stewardship.

Golf's role in **fostering community engagement and supporting charitable causes** remains significant. With substantial funds raised through charity golf events, the sport plays an important role in supporting various causes across the country. Enhancing the collaboration between golf courses and charitable organizations will be essential for maximizing social impact in the future. These partnerships not only benefit charities but also strengthen the ties between golf courses and their communities.

Furthermore, the demographic landscape of golf is evolving, with increasing participation from diverse age groups and communities. **Promoting inclusivity and accessibility** through programs and marketing remain critical for the sport's growth. Golf's continued **initiatives aimed at engaging youth, women, and equity-deserving groups** in golf have been and will continue to be effective in broadening the sport's appeal and ensuring a vibrant future.

The future of golf in Canada is bright, with numerous opportunities for growth and innovation. By leveraging technological advancements, prioritizing environmental sustainability, and fostering community engagement, the golf industry can continue to thrive. As the sport adapts to changing demographics and post-pandemic realities, it will remain a vital part of Canada's economic and social fabric, contributing positively to the well-being of individuals and communities nationwide. The resilience and adaptability demonstrated by the industry during challenging times will serve as a foundation for its continued success and evolution in the years to come.

Glossary

Direct impact refers to the immediate economic contributions generated by the initial spending within an industry or sector. In the context of golf course expenditures, it includes the economic activity and employment created directly by the capital and operational expenditures of the golf courses themselves.

Gross Domestic Product (GDP) is the total monetary value of all goods and services produced within a specific area (such as a country) over a specific time period. It includes the value added at each stage of production and is used as a broad measure of overall economic activity and health.

Indirect impact encompasses the secondary economic contributions that occur as a result of the direct spending. This includes the economic activities generated in the supply chain, such as businesses that supply goods and services to the golf courses, leading to additional employment and income in those supporting industries.

Induced impact refers to the tertiary economic contributions resulting from the increased income and spending by employees who benefit from the direct and indirect impacts. When employees of golf courses and their suppliers spend their earnings on goods and services, it further stimulates economic activity and employment in various other sectors of the economy.

Labour income refers to the total earnings received by workers, including wages, salaries, and benefits. It represents the income generated by employment within a particular industry or sector and is an important indicator of the economic benefits accruing to employees as a result of economic activities.

Operators refers to golf course operators, or the entities responsible for the management, maintenance, and overall functioning of golf courses. These operators can include a variety of organizational types such as private companies, public agencies, non-profit organizations, or individual proprietors.

Person-years is a unit of measurement that represents the amount of work performed by an individual working full-time for one year. It is used to quantify employment impacts, indicating how many full-time equivalent jobs are supported by the economic activity over a specified period.

Rounds played refers to the total number of complete games of golf played on a golf course. In the context of this report, it quantifies the usage and activity level of golf courses, reflecting the number of times players have participated in a full game of golf.

Off-course, or virtual golf refers to a simulated golf experience that allows players to play golf using technology. This can include indoor golf simulators, which use advanced software and hardware to recreate the experience of playing on real golf courses through digital projections and sensors.



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