TO: Members of Council
FROM: Ms. K. Power, City Clerk
DATE: Friday, December 4, 2020
SUBJECT: Additional Information
Committee of the Whole (Special Session – PSR) - December 9, 2020

COMMITTEE OF THE WHOLE

Additional Information

1. Additional information from Mr. J. O’Neill relative to his deputation (golf courses).
Municipal Golf

A public response to the Grant Thornton LLP Services Review and municipally owned golf courses in Thunder Bay Ontario

The City of Thunder Bay has ownership over two municipally run golf facilities: Strathcona Golf Course and Chapples Golf Course. The response below is intended to give a perspective on the history, importance and its benefit as a whole to the wellbeing of residents surrounding the district of Thunder Bay.
Index

Page 1 – 11  Executive Summary
Page 12-13  Letter from Bob Cummings
Page 14-16  History of Chapples Golf Course – Diane Imrie
Page 17-20  History of Strathcona Golf Course – Diane Imrie
Page 21  Letter from Golf Canada – Regional Director Ryan Logan
Page 22-25  We are Golf Summary – Economic Impact of Golf in Canada
Page 26  We are Golf – Full Report Economic Impact of Golf in Canada (26 pages)

Attachments

2021 – Whitewater Golf Course Structure and Fees Summary.
Executive Summary

As concerned residents we would like to address the Program Services Review presented by Grant Thornton recommending the Corporation City of Thunder Bay get out of the “golf business” and close both municipal golf courses.

Our committee has determined that it is important for council to know how some of the citizens of Thunder Bay stand with respect to the two beautiful public recreational facilities, Chapples and Strathcona Golf Courses. The impact that these venues have on the community is huge and quite diverse.

Grant Thornton seems to have done an extensive job on the financial side of things however they missed the mark, failing to consider the physical and mental health impact and the recreational needs of Thunder Bay citizens. They also have not fully considered another factor, like what makes a city great. If Thunder Bay wants to grow and attract people it needs to be seen as a place that you can do things with your family affordably.

We also do not believe the City of Thunder Bay is in the ”golf business” but believe we are in the recreation business. The Seymour Plan for Chapples Golf Course, in the early 40’s recognized that in the “stress of times, people require mental and physical relaxation and golf could provide this relaxation to a greater number of people than any other form of recreation”.

This has not been truer throughout the years but especially during the pandemic we are currently facing. It begs the question why do we not have the time and resources to make time for our mental and physical recreational health but have the time and resources when we are forced to make time to take care of our citizens for their illness.

Strathcona and Chapples are two facilities that have proven to be an important recreational service within urban proximity, providing a space for the sport of golf, walking, snow shoeing, and cross-country skiing in the summer and winter respectively.

Both courses provide for fun outings with friends as well as tournament opportunities to be held for competition including fundraising events.

History

Strathcona Golf Club originally opened September 7, 1925 as a 9-hole recreational facility and by the following year 18 holes were ready for play. Of interest Strathcona recreational facility supported ski jumpers and young downhill skiers learning their sport on the current hole #5.

The main focus has been and still is for the development and promotion of this recreational sport. In the early years the Men’s Club Junior Chairman assisted the Golf Professionals in Junior development and eventually took it over completely when the Golf Professionals had gone. In the Past 20 years a City-wide Junior Club was established and is still operating today. Some of the city Golf Professionals today continue to work with Junior’s at their club and some are active in the city-wide Junior Program as well.

In the spring of 1947, money was made available through a donation by Mr. C.E. Chapple and that donation was matched from the City of Fort William Parks Board, for the proposed Chapple’s recreational facility. The first major task in the development of the recreation area
was the golf course. Mr. Stanley Thompson, famous Canadian Golf Architect remitted plans and specifications for an 18-hole golf course. Due to a lack of funds the 18-hole proposal was curtailed to a 9-hole golf course with provisions for future expansion. On July 16, 1949, Chapples Golf Course, named to commemorate the contribution of the late Mr. C.E. Chapple, was opened. The contract to proceed to an 18-hole facility was completed in 1973.

**Member Associations**

*Thunder Bay District Golf Association (TBDGA):*

*Superior North Ladies Golf Association:*

First and foremost, our responsibility is to grow the game of golf, part of this entails running District Tournaments allowing Junior, Ladies, Men’s and Seniors categories to qualify for Provincial Championships.

The city golf courses play an integral part in growing the game of golf as the District Association have access to 18-hole facilities. Chapples includes a driving range that is key for practicing and providing lessons to junior golfers. The Golf Thunder Bay Junior Club is an organization that helps introduce kids to golf at a young age teaching competitive level golf.

Many of these junior golfers become members at Chapples and Strathcona and in many cases both city golf courses. This is an excellent recreational opportunity for young people instilling etiquette, and values of integrity, honesty, fair play, with the spirit of camaraderie. In our opinion having city golf courses close by for parents and kids to participate is key in growing the game. The convenience for parents to drop off kids is essential for more kids to participate.

The TBDGA supports the junior program by paying the entry fees into tournaments and provides money for travelling expenses for these young people to compete in the Provincial Championships.

As stated, district tournaments require 18-hole facilities to run of which both Strathcona and Chapples golf courses provide. Of the 5 tournaments, Strathcona and Chapples golf courses are host to 4 of the 5 and all Junior tournaments. Both 18-hole courses have been a huge benefit for our district in growing the game.

The TBDGA currently host The District Jr. Qualifier, Fountain Tire District Junior Championships, The Mallon’s Better Ball, Aon District Open and Teleco District Amateur tournaments.

The District Jr. Qualifier provides an opportunity for the winner of each division (outlined in the Jr. Golf demographics report) to play in the provincial Jr. championship. This is also the case for the Fountain Tire District Junior Championship which has been run since 1950. The TBDGA helps these young golfers with expenses to play in these events both at the local and provincial level.

The Mallon’s Better Ball Championships have been held at Chapples and Strathcona courses on Father’s Day since 1956. This 2-person tournament has competitors from a young age to senior age, with some teams being father and son teams, allowing for excellent family time.
The Aon District Open has been run since 1950 is open to all age groups from Jr. to Sr. participants, the most recent the winner of the tournament would have a spot to compete in the Staal Open.

The Teleco District Championships is a 3-day tournament sending two competitors to the all Ontario Championship in the Men’s and the Senior Division. This tournament has been held since 1926. This tournament is held on the long weekend in September with Chapples and Strathcona golf courses hosting the first 2 days of the tournament.

Losing these courses would make it almost impossible for the TBDGA to operate, and Thunder Bay could ultimately lose the association.

_Golf Canada – Golf Ontario_

Golf Canada also recognizes the important impact golf has on the livability of communities like Thunder Bay, especially considering the economic, health, social, recreational, tourism and charitable benefits that golf helps deliver to communities.

It is important to know Golf Canada partners with the TBDGA as well as Strathcona and Chapples Men’s clubs. They provide support to Thunder Bay schools providing $150.00 for PGA Professionals to attend and deliver Golf at the schools. They also provide $500.00 for a field trip grant, bringing the school participants to the facility. Historically (tough this year with COVID), Thunder Bay has been the recipient for upwards of 10 grants per year, one of the largest recipients of the grant program.

The health benefits of moderate-intense physical activity, burning 850 to 1,500 calories as well as muscle endurance, blood circulation, flexibility and mental alertness along with respiratory, metabolic and cardiovascular improvements can’t be discounted when playing this recreational game.

The successes of athletes such as Brooke Henderson, Adam Hadwin, Mackenzie Hughes, Corey Conners and so many others are helping inspire the next generation of Canadian golfers. Without municipal golf, there is simply one less pathway for people to take up the game and follow in the footsteps of their heroes.

As previously mentioned, golf as a recreational activity is also good for our children, instilling etiquette and values such as integrity, honesty, fair play and the spirit of camaraderie. Golf is a safe family sport that teaches the right values for success in life.

Golf Canada also believes there should be more municipally-run facilities to help sustain and foster the future growth of the game across the country, not less.

Affordable and accessible facilities including municipal golf courses and practice ranges—especially in major city centres, like Thunder Bay—play a crucial role in introducing the game of golf to communities across Canada.

Golf Canada strongly supports all Municipally-run golf facilities and as an organization, they are committed to providing resources and benefits to support and encourage more people to play golf and to play golf more often.
**Strathcona Men’s/Ladies Club**

Strathcona Men’s and Ladies clubs have been in existence for over 70 years.

One of the city’s major golf events each year is the annual Strathcona Invitational Tournament which will be celebrating its 91st Anniversary in 2021. This is a 4-day event catering to different divisions, regular men’s, senior, super senior and masters. The tournament includes a charity component with Revolution Belting (Ryan Martin) donating close to $4000 in the last 2 years to Pro Kids based on birdies being made during the qualifying rounds on both the Friday and Saturday of the tournament.

It is one of the most popular tournaments and one of the longest running tournaments in the city. As an example, Jonny Henry was the crowned champion of the inaugural event played in 1930. His son Frank Henry played at Strathcona right up to the date he passed away at age 95.

Interesting to note this tournament has been played longer than the iconic major championship ‘The Masters’ at Augusta National (1934).

**Chapples Men’s/Ladies Club**

Chapples Men’s Club was started in 1951 and has had a strong following since that time. On average there are approximately 190 members with the club running Sunday tournaments (7) as well as Wednesday twilights, a social outing where players come to play with friends and socialize. Draw prizes are drawn and it is a really fun event. In addition, Chapples Men’s Club run 7 tournaments allowing for players to play in a competitive but fun event. The events are geared to social meetings as you can be paired up with three other random people to play with enhancing the social aspect of the recreational event.

Given this was a “covid” year the Men’s club had 114 members, a decline from previous years as we did not run twilights and reduced our tournaments to 5 in accordance with the restrictions outlined enabling golf to run.

In the 5 tournaments run this year at the Chapples Men’s club averaged about 75% participation half being senior players.

The Chapples Men’s and Strathcona Men’s clubs are also strong proponents of Junior Golf as they pay all the handicap fees for the Junior players allowing them all to have a registered handicap with Golf Canada.

Senior golfers make up a good portion of the Men’s club and for the most part are on fixed incomes and would not be able to afford to play at other private venues such as Fort William Country Club or Whitewater.

**Demographics**

A 2020 Golf Canada report outlines the importance of Municipally-run golf facilities cannot be understated. Golf is the #1 participated recreational sport in Canada.
These facilities are a crucial entry-point and conduit for more than 5 million golfers playing close to 60 million rounds annually—the most participated sport in Canada. These facilities are a critical element for the health and continued growth of golf across the country.

Golf is a significant economic driver generating more than $14.3 billion in economic impact and employing more than 300,000 jobs, nearly 40% of which are summer students. Direct revenues generated by golf courses and their facilities ($5.0 billion) rivals the revenues generated by all other participation sports and recreation facilities combined ($4.8 billion). Golf courses also steward essential greenspace in the community in addition to hosting more than 37,000 charity events that raise more than $533 million annually to support important causes.

Golf in Thunder Bay had a slightly shorter than normal season in 2020 due to the delay on opening golf facilities in the city because of the “covid 19” pandemic. We believe golf was the first sport that was able to open with social distancing guidelines in and around playing, registration and clubhouse restrictions.

In 2020, the total number of golfers booked at Chapples and Strathcona golf courses were over 56,000, at both courses combined. That means the clerks at both Strathcona and Chapples entered over 56,000 rounds during the months from May 22, 2020 to October 20, 2020. Both courses were used equally, where both courses hovered roughly at the 28,000 mark. With this amount of exposure, it is evident that municipal golf is viewed as a valuable asset to many of its constituents.

This is a 10% increase from its previous season.

**Junior Golf**

Social distancing is very easy once on the golf course itself. The Junior Club was able to conduct 7 tournaments over the summer starting with the Standard event on June 26th and concluded with the senior/junior windup tournament on August 11th.

They registered 55 youth aged 9 through 18 years in 4 age groups plus a girl’s division. They averaged 42 playing in each event. The wind up junior/senior fun tournament had 78 participants.

**Age Group Registered Club Member Numbers**

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Registered Club Member Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 - 18</td>
<td>7</td>
</tr>
<tr>
<td>14 - 15</td>
<td>18</td>
</tr>
<tr>
<td>12 - 13</td>
<td>9</td>
</tr>
<tr>
<td>11 and under</td>
<td>16</td>
</tr>
<tr>
<td>Girls</td>
<td>5</td>
</tr>
</tbody>
</table>
Several of the Strathcona and Chapples Junior golfers have had success in golf, some receiving college scholarships others have gone on to become Professional Golfers. All continue in a game you can play your whole life. Some of these golfers who were members at the city golf courses and have been successful. Golf Professionals from our city include Bill Gordon, Brian Hutton, Jim Szturm, Craig Morton, Frank Edmunds and Davidson Matyczuk.

One city employee’s son who was a member of Strathcona Junior Program and became a professional golfer is Mark Shushak. We also have a current employee, a local pro, who came from our municipal courses. Pat Berezowski (PGA of Canada Golf Professional), our Supervisor of Golf Operations originally grew up playing at Strathcona and Chapples golf courses. We do not think you could have a better person in place to carry his passion for the game into this recreational opportunity. Not only does he instill the passion to his staff but understands where we need to get to in the future with these courses.

Of the most prominent people Thunder Bay has graduated in this recreational opportunity is Teejay Alderice, The President of the Professional Golf Association of Canada. In the spring of 2019, he was interviewed by 91.5 CKPR and informed them, “he learned the game late, thanks to Municipal, Strathcona, and Chapples golf course”.

More recently Evan DeGrazia, Jamie Deperio, Robbie Untinen and Evan Littlefield grew up playing the game at the public facilities all who have had scholarships and or have turned professional.

Although there were no provincial Jr. tournaments this year due to “covid’ there are a number of Junior players learning and playing through the city golf courses, these include:

Jack Moro, Nathan Lapore, Dallas Burgess, Logan McBride (16-17):
Matthew Lysak, Easton Glousher, Lucas Bertolin, Nick Pavletic, Owen Voortman, Jordan Walford (14-15):
Austin Polonski, Josh Langevin, Jonah Lahtinen (12-13): 
Michael Figliomeni, Jace Voortman, Dylan Wilson (Under 11).

All of these kids and many more have potential to have scholarship opportunities in the future.

**Golf Event Contributions to City Charities**

As we all know charities are feeling the brunt of the economic times and many turn to golf outings for their fundraising. The city golf courses play an integral part in allowing these charities to raise money, which help so many people. In doing so, the city benefits by deriving income though collecting green fees and purchases through food and beverage.

Our two municipal golf courses are home to dozens of golf tournaments during the season. Tournaments are an integral part of municipal play and offer benefits to the city, charities and other organizations. The city website provided there were 65 days of tournament events in the 2019 season. These include charitable organized events put on both by private groups and through the city itself.

Due to Covid-19 the 2020 Mayor’s Mulligan was turned into a putting contest at Chapples golf course. Apart from these challenging times, the event raises an annual
average of $16,000 for PRO Kids—bringing the estimated total of $126,000 over a 16-year period.

Canadian Mental Health Association – Raised $34,000 in 2019 and overall, $84,000 in three years of the event.

Alzheimer Society Golf Classic fundraiser event raises nearly $20,000 annually and has raised $160,000 in 8 years of the event, thanks to the availability of our 18-hole municipal facilities.

The Fall Classic, supporting Shelter House has raised $100,000 in 20 years and averages about $4500 each year.

The Chapples Ladies 3-Gal tournament, supporting The Arthritis Society has raised $80,000 total and averages $7500 each year.

The Chapples Men’s Club Annual Invitational has also raised over $75,000 for our local Arthritis Society.

These are a few of the events that would be lost, resulting in tens of thousands of dollars lost for these charitable organizations.

A 2020 report, referenced below, concluded a total of 51,266 tournament and charitable golf events were hosted in 2019 nationwide, with a charitable impact estimated at $330 million. Thunder Bay is contributing to the charitable impact nationally, provincially, and locally.

**Competition**

Competition in business is:

“the contest or rivalry among the companies selling similar products and/or targeting the same target audience to get more sales, increase revenue, and gain more market share as compared to others.”

There are only 4 18-hole golf courses within the vicinity:

1. Chapples Golf Course
2. Strathcona Golf Course
3. Fort William Country Club (FWCC) (Semi Private)
4. Whitewater Golf Club (Semi-Private)

As noted on the City’s website, Strathcona and Chapples are structured to offer enjoyment for all levels of golfers as all courses are envisioned to be. This vision could be elaborated more in depth on three factors:

1. Affordability
2. Accessibility
3. Inclusion

The general population of golfers in Thunder Bay rely on a fixed rate in order to plan physical and mental recreational wellness around their lifestyle. Municipal golf in Thunder Bay offers a
variety of membership and fees directed at allowing as many opportunities as possible for people to take part in this recreational activity.

FWCC and Whitewater Golf Club have a mandate to work in the best interests of the shareholders and to abide to a strict set of guidelines, rules and regulations. These include initiation fees, mandatory food and beverage tabs, course improvement fees, dress code along with specific times for non-members to golf. As this type of play is for some, many of our constituents in Thunder Bay especially our Seniors cannot maintain the additional costs. These very barriers will remove ability of many people to play the game allowing them to maintain their physical and mental wellness.

Of interest there is no public transportation to either course, The FWCC and or Whitewater Golf Club and the only way there is to drive or be driven. In contrast the two city courses are in an urban setting with access by various modes of transportation, bus, cycling (by cycling lanes provided by the city), walking and driving.

Interesting to note, municipal golf is an introduction to the game of golf and the participation in municipal golf drives more interest in the game. This in itself brings more business to the other courses.

All of the other courses do offer a variety green fees and membership opportunities; however, the city courses definitely take into consideration affordability.

- Full-Membership
- Blended-Membership
- Senior Membership
- Intermediate Adult
- Student
- Junior
- Child
- Green Fees
- 10-round punch cards
- Seasonal specials

City Councillor Cody Fraser explained best on the local Podcast ‘thamichaelated show’ in terms of investing in our future, when speaking on the new multimillion-dollar soccer facility:

_We are not going to make money. We are not in the business of making money besides TbayTel. Making these kinds of projects a reality, in my view, is that if you build it they will come. A lot of individuals coming to our city to study and work are coming here to enjoy themselves and make it a permanent home. You need to have these types of facilities—and provide access to sports. I am worried of the mental health of our kids._

Although the above comment was referenced toward a new multi turf facility, the golfing community should not be placed in an alternative light. This statement in itself sets the tone for the City of Thunder Bay. All recreational programs in our city are not in the business of competing with the private industry.
It is clear with the membership structure of each club and the proximity of the semi-private and private clubs that competition is not and should not be an issue for the city.

Municipal courses have purpose in their own right, all with the common goals relating to: accessibility, affordability, inclusion, and community growth, including its mental and physical benefits to the users of its service. Our focus and priority should be on maintaining the quality of life for all residents and keep our vision consistent with all recreational services.

**Economic Impact/Social Benefits**

The November 2020 report ‘Economic Impact of Golf in Canada (2019)’ was conducted by Group ATN Consulting Inc. and was sponsored by various golf partners and associations in Canada. A short list includes: Golf Canada, all provincial golf associations, PGA of Canada, the Mackenzie Tour and various other leading bodies. It is the first report since its predecessor from 2013.

In short, the golf industry in Canada for 2019 generated $278,878 jobs, $4.5 billion in government tax revenue, and $18.2 billion in Gross Domestic Product. $2.1 billion was provincial tax revenue, where Ontario accounted for 38% (1.7 billion).

Provincially, the game of golf contributed an estimated $6.5B to the GDP in Ontario in 2019 including:

- 85,503 jobs
- $3.8 billion in household income; and
- $1.7 billion in government tax revenue (up from $795.7 million in 2013)

The report showed that golf in Canada contributed $182 billion in economic activity; a 14 per cent increase from 2014, and with the boom of users due to the pandemic it is likely on the rise.

Municipally owned golf courses have social benefits. It links residents to each other and to the community of Thunder Bay—breaking down the traditional views on how a golf course could be utilized. As stated previously both golf courses have proven to be an important recreational service within urban proximity, providing space for the game of golf, snow shoeing, and cross-country skiing in the summer and winter respectively. Chapples golf course was host to the Special Olympics Canada Winter Games 2020. Venues like these contribute to the economic impact of our community, where local organizers estimated over $6-million was injected into the local economy.

**Advantages of Municipal Golf Courses – Thunder Bay**

- Nothing has helped more people from non-golfing backgrounds to learn the game than the Municipal Golf courses. Municipal Golf is the “lifeblood of the golf industry, the feeder system that must thrive for the game to really grow”.
- Municipal Golf is one of the best, affordable, and safest quality of life enhancing recreational activities out there, providing a physical and mental healthy recreational outlet for residents of all ages 5 to 95, enhancing our overall quality of life.
Both Municipal Golf courses are close to the majority of the city’s population, and are either on or very close to public transportation routes making them super accessible. They are also required venues to attract visitors and prospective residents to the city, providing a recreational outlet for both.

The accessibility, affordability and openness of municipal golf courses has allowed many of our local residents and golfers to have their first golf experience at one of our 2 18-hole courses vs the only other 18-hole courses Whitewater and Fort William Country Club. The later 2 clubs are virtually unaffordable to the average person and seniors on fixed incomes who spent their career working at the City of Thunder Bay.

Our municipal golf courses allow for almost unlimited golf with no tee time restrictions. It’s different from other individual activities and team sports as it can be played at any time. You can be paired up with three other random people to play with, regardless of gender, age, or skill promoting social interaction.

When you add in the fact that at the recreational level, there is no scheduled practice or game days like other sports, golf offers seven days a week access, which can’t be said for other sporting activities;

Municipal golf provides a good reflection on the image/brand of the city protecting green/open spaces and add to the beautification of our city;

The municipal courses also provide positive use of stormwater retention and effective use of green space.

Both courses are used in winter for XC Skiing, snowshoeing increasing the resident usage year-round making the two municipal courses true recreational facilities.

City courses provide a venue for school programs plus offer golf programs for junior golfers in the city, for which the Chapples and Strathcona Men’s Clubs, TBDGA, Superior North Ladies Golf Association, Golf Ontario and Golf Canada contribute to.

Preservation of the valued history of Strathcona and Chapples which is intertwined with the history of Thunder Bay

Pandemic relief - the city courses provided a safe return to recreational activity allowing for mental and physical well-being of all ages during this trying time.

City courses provided a much-needed diversion and considering the Pandemic may be with us through 2021 our residents need this proven safe outlet.

These views could be reflected on the current presence of municipal golf within our community. With an aging population in Thunder Bay, many senior citizens rely on municipal golf for recreational and social interaction. Especially when some of these individuals are of high risk during a global pandemic, municipal golf allows a safe place to socialize and maintain their physical and mental health.

The municipal courses also serve as an entry point for community integration with its newer residents. Numerous members of our clubs join after coming to the city for the first time. For many, friendships and connections arose due to municipal golf—and allow newer residents of the city to build and maintain relationships with the community at large.

Councillor Shelby Ch’ng referenced further on the Podcast ‘thamichaelated show’:

*Are people going to move here because our roads are the smoothest? No. It is going to be how they feel about this community, are they going to be included and feel connected? They need to be recognized and to feel a sense of community. Too often do we get into our private*
driveways, in our private cars, go to work in our private location. We do not actually interact with the parks and the spaces.

**Conclusion**

In conclusion, our committee feels that the golf courses are more than just golf. They are a recreation facility. They are a social hub. They are a place where families can enjoy an afternoon or a season together. They are a place to network with co-workers and friends. Golf courses are where nature, sport and exercise meet.

Golf as a sport in the community has not gone unrecognized – The Northwestern Ontario Sports Hall of Fame has inducted 5 golfers for their contribution as a player or builder. (Ray Cousineau, Stan Baluik, Cliff Barton, Brian Mallon, Linda Devine). The TBDGA has 15 individuals inducted into its Hall of Fame as well.

The courses offer an affordable alternative to the some of the private courses operating in the city. They allow for golfers, young and old, to participate in one of the best outdoor exercises there is. Whether it is the scenic marshlands of the Neebing-McIntyre flood plain or the forested rolling hills of the city’s Northend, golfers get to put their game to the test and enjoy the beauty of their surroundings.

The courses are home to many city employees for five or six months of the year. Both crews are hard-working men and women who are enthusiastic about the part they play in keeping the golf courses in top shape. In addition, the clubhouse and service staff are knowledgeable and personable people who enjoy what they do and contribute immensely to making golf a viable option for members, green fee payers and tourists to Thunder Bay.

The time and effort of city management and staff over the years has made Chapples and Strathcona golf courses one of the best recreational facilities in the city. The community needs these courses as stated previously for the mental and physical health of our juniors, seniors and all other participants.

If the courses are closed you will have removed two affordable recreational facilities for the physical and mental well being of all residents of Thunder Bay regardless of age. The biggest impact would be to the juniors and seniors on fixed incomes who rely on the affordability of the municipal courses. These people have been loyal to the municipal courses for years. They would not be able to afford the alternative.

As concerned citizens we ask council to take consideration the citizens of Thunder Bay who rely on these two historic recreational facilities. They have proven to be an important service within urban proximity, becoming an entry-point into the game, serving all ages and skill-levels.

Golf is a lifetime recreational activity; we have members today who have introduced the game to their children and they in return have continued to introduce the game to their children.

Let’s do something good that lasts forever by keeping these golf courses open.

Respectfully Submitted – Committee of Concerned Residents.
Hank. I would just like to add the following:

The city provides the only 2 - 18 hole golf courses in the area that are open to the public. All other 18 - hole courses are private (Whitewater and FWCC). The only other courses that are open to the public are 9 hole courses. They do not and cannot provide the same experience of the city 18 hole courses.

To make a comparison that maybe councillors can understand, the 9 hole courses are like 5 pin bowling which is fun, but does not provide the same experience and skill that is required in 10 pin bowling (the 18 hole courses).

To say Chapples and Strathcona should not be competing against other public courses, I can only say the city courses were here long before any others, and as noted above, they do not provide the same golf experience.

Chapples is a flatter more wide open course which makes it easier to walk and is more forgiving than Strathcona.

Strathcona is more tree-lined and hilly and is generally more challenging.

Chapples, at 71 years, and Strathcona at 95 years, have never been in better shape. Why would you want to close them now? They are not like Dease Pool which was in need of extensive repairs.

As past-chair of the Strathcona Invitational, which was to celebrate it’s 90th Anniversary this year, I ask councillors to go upstairs at the Clubhouse at Strathcona where the history of the Tournament is prominently showcased and pictures of every champion since 1930 is displayed.

The dedication, innovation and love of this tournament by so many volunteers and participants is something that should be appreciated and continue for years to come.

The tournament provides spirited and fun competition for Junior and Senior golfers with divisions up to 70 years and older.
A book on the history of the tournament and the golf course was printed on the 75th Anniversary in 2005. A copy has been provided for you. Golfers from the USA, throughout the district and southern Ontario have been returning to this tournament year after year. It is generally considered the premier golfing event in our district.

I do not think it is an exaggeration to say there is very few, if any, amateur tournaments in Canada, who have taken the care to document their tournament history.

Golf is one of the few sports that can be played and enjoyed from age 8 to 80. The pure joy, entertainment, fun and recreation these facilities have provided for up to 95 years cannot be measured in dollars and cents.

The city should be proud that it provides 2 diverse 18 hole golf courses to it’s citizens as well as for visiting tourists, and should do so for future generations; not consider closing them.

I believe Pat Berezowski has done a great job the past few years in maintaining these courses as well as trying to make it more affordable and open to junior golfers to get started in a “game of a lifetime.”

In summation, Strathcona & Chapples do not fall under the same category as Municipal Golf Course which was closed. One could have argued, other 9 hole public courses were providing the same service as Municipal. As noted, one cannot make the same argument for closing Strathcona and Chapples. There are no public 18 hole courses other than Strathcona and Chapples. No one else is providing this 18 hole service to the public. It is important that you understand this to make an informed decision.

Taxes are paid to provide services to citizens of Thunder Bay; this service should continue to be provided for generations to come.

Bob Cumming
History of Chapples Golf Course

Recently the City of Thunder Bay has been hosting public meetings asking for input into the recreational area known as Chapples Park. While the citizens and leaders of our fair city look ahead into the future of this popular multi-use area, I thought I would take a look back at its past.

The history of parks in our community can be traced back to the 1880s. In 1883 the Ontario Legislature introduced the Public Parks Act. In 1888 the Town of Port Arthur became the first municipality in Ontario to adopt the legislation and the first municipality in Canada to form a Board of Parks Management. One of their early accomplishments was overseeing the securing of land for Current River Park. The Town of Fort William appointed a Parks Committee in 1896 and worked on the clearing of donated land for what is now Vickers Park.

In 1907 when both communities incorporated as cities they soon established new Boards of Park Management. For the first half of the last century the responsibility to develop, maintain and coordinate parks, playing fields, arenas and aquatic facilities fell to the Parks Boards. Initially two out of the six members were appointed by city council and years later the public had their say with voters being responsible for the election of some of the Parks Board members.

By the late 1940s both communities had also established Civic Recreation Committees which were comprised of members of the Parks Board, Board of Education, City Engineering Department and community groups all working together. By the 1960s the roles had expanded with the Board of Parks and Recreation also being responsible for cultural and social activities.

With the amalgamation of the two cities into the City of Thunder Bay in 1970 came the creation of a Parks and Recreation Department which although taking over many of the duties previously undertaken by the Parks Boards and Recreation Committees,
continued to work in partnership with community groups and agencies to provide
recreational services to the community.

So how did the formation and naming of Chapples Park fit into this history? Fortunately,
from a research perspective, I found the answer in a summary that was included in the
minutes of the Aug. 15, 1960 Fort William Parks Board meeting. At that time there was
a great deal of expansion being made to the recreational area and there was some
confusion as to how the area came to be developed and named. In an effort to set
things straight the Parks and Recreation Committee researched the history and
reported back to the Parks Board.

According to the report it all began back in the early 1940s when the late Clem Chapple,
a prominent local businessman who was serving as Chairman of the Town Planning
Board at the time, came up with the idea for a civic recreation centre. After seeking the
advice of some noted city planners, the Town Planning Board recommended to Fort
William City Council in March of 1941 that they take ownership of 331 acres of land
around the Neebing River to develop into an area known as the Neebing Recreation
Centre.

Six years later, in an effort to get the project underway, Mr. Chapple offered to donate
$5,000 per year, for five years, with the understanding that the city would, at a
minimum, match it. The city agreed and the Neebing Recreation Centre Committee was
established, with Dr. Mac Spence appointed as its chairman. The committee remained
in place from 1947 to 1952 and during that time was responsible for the early
development of the area, including the construction of a nine-hole golf course. The
committee spent $50,000 on the project, and support was also provided by generous
citizens, organizations and firms.

Unfortunately Clem Chapple passed away in April of 1947, so he never had the chance
to see his dream become a reality. In February of 1949 a motion was passed by the
Neebing Recreation Centre Committee to officially designate the area as the Chapple
Memorial Recreation Centre as a tribute to his financial contribution and vision. On July
16, 1949 Clem’s wife, Annie, cut the ribbon to officially open the tennis courts and golf course.

Since that time a number of additions have been made to the recreation centre. In 1960 the Fort William Stadium was opened. In 1967 two separate projects were completed to mark Canada’s Centennial including the Conservatory and the International Friendship Gardens, which was an initiative of the Soroptimist Club. In 1969 Delaney Arena was added and in 1973 the golf course was expanded to 18 holes. In 1981 when Thunder Bay hosted the Canada Summer Games the facility benefited from a new track, tennis courts and soccer field and an updated baseball diamond, as well as serving as the site of both the opening and closing ceremonies for the national event.

It is because of people like Clem Chapple, who was able to look at an undeveloped piece of property and envision it alive with activity, that we are able to enjoy places like Chapple Memorial Recreation Centre. We don’t know what the future holds for this popular recreational facility, but something tells me that Mr. Chapple would be pleased with the progress that has taken place to date on the land that was named in his memory.

Another man that had a great sense of community spirit was the late Fred Bragnalo, who was one of the visionaries behind the establishment of the Northwestern Ontario Sports Hall of Fame. On Monday, July 25 the Fred Bragnalo Memorial Golf Tournament will be held at the Fort William Country Club. To find out more about this event, and register a team, give the Sports Hall of Fame a call at 622-2852.

Until next time, keep that sports history pride alive.

_Diane Imrie is the executive director of the Northwestern Ontario Sports Hall of Fame. Her column runs every second Thursday._
History of Strathcona Golf Course

This Monday will mark a very special anniversary. It was 90 years to the day, on Labour Day 1925 that the first nine holes of Strathcona Golf Course officially opened to the public.

To mark that special milestone I thought I would step back in time to take a look at how this community golf course came to be and how it has developed over the years.

When the City of Port Arthur purchased the 1,400-acre lot known as the Strathcona Property in 1906 its original purpose was not for a golf course, but rather for the provision of land grants for industrial development.

By 1913 the land remained undeveloped with a small portion of it being used by the Board of Parks Management for a nursery to supply plants and shrubs for the beautification of city parks, with other portions leased to citizens for garden lots and free cutting of firewood.

In 1917 Port Arthur City Council informed the parks board that 323 acres located in the northwest corner of the Strathcona property was being set aside for the eventual development of parkland which would be under the control of the Board. In 1923 Port Arthur Council member Dr. Herman Bryan, proposed that the land be turned into a municipal golf course.

The Parks Board of Management took up the cause and by the summer of 1924 work began on what would become known as Strathcona Links Port Arthur.

Although many courses at that time were designed by golf course architects, it was Port Arthur engineer Joachim Antonisen who laid out the course, with J. Smith, superintendent of parks and city staff helping to oversee its development.
In the spring of 1925 construction of the clubhouse began with Labour Day being targeted as the opening date. In August the parks board met to establish the rules that would govern the new course.

Nine holes would cost 25 cents and two rounds 40 cents. Club rentals were to be the same as green fees, with a set consisting of four clubs and a bag. The course would be open every day from sunrise to one hour after sunset.

The official opening was set for 1:30 p.m. on Monday, Sept. 7, 1925. Close to 200 citizens were on hand to hear Port Arthur mayor Crooks officially dedicate the course which was, in the estimation of many present that day, the first nine holes of what would in time be one of the finest 18-hole courses on the continent.

F.B. Allen, Chairman of the Port Arthur Board of Parks Management, officially opened Strathcona Links with what was described as a neat drive from the number one tee.

Following the speeches and ceremonial first shot about 500 people followed the foursome that was selected to play the first round with Mrs. W.S. Hunt and Adolph Pilon competing in a best ball match against Miss Jean McGregor and Johnny Henry. The final result was a draw with the women both recording scores of 58 and the men each carding a 48.

By 1927 seasonal rates were set at $12.50 for men and $10.00 for women with green fees a standard 40 cents for any number of holes up to 18. Lessons that season could be taken with club professional Robert Cunningham.

Strathcona’s early history does not just involve golf. As the popularity of the golf course grew it was also becoming equally popular in the winter months.

In April of 1929 a group of local skiing enthusiasts formed The Port Arthur Ski Club and soon established a location for their club on the ridge running above the course, just off of Hodder Avenue.
Known as Strathcona Heights, the club members spent the summer clearing brush and building the log trestle jump which was located beside the fifth hole fairway. The PASC remained active at the site until the 1940s when they permanently moved to Mt. Baldy.

In 1930 another milestone took place with the hosting of what would come to be known as the Strathcona Invitational. Held on the August holiday long weekend eighty five years ago, the winner of the event was, somewhat fittingly, Johnny Henry, who had played in the inaugural round for the course’s 1925 opening.

In 1932 Charlie Nixon took over the reins as the club professional, remaining in the position for the next three decades. By the time the 1950s rolled around golf course fees had doubled with season’s tickets for 1955 costing $25 for men and $20 for women.

Sixty cents could get you nine holes and 90 cents a round of 18. Steve and Phyllis Stokaluk operated the concession during that time.

To celebrate the 40th anniversary of the course, a brand new clubhouse was opened on June 26th, 1965, which is the same one in use today. Pete Kuzmich was club pro at that time, having taken over from Charlie Nixon in 1962. In 1969 Ted Shaw became club pro, a position he held until 1987.

Since that first ceremonial drive back in 1925, Strathcona Golf Course has seen a number of changes and provided countless people of all ages and abilities the opportunity to take to the links.

I am happy to report that this coming Monday, the City of Thunder Bay is planning to mark the 90th anniversary of Strathcona in a variety of ways. Green fees for the day will be $19.25. Tee-off times can be reserved three days in advance.
Mayor Keith Hobbs will be on hand to recreate the ceremonial first drive and birthday cake and coffee will be served in the clubhouse which will feature a collection of historic photos and articles.

As a lady who likes to hit the links, I must say I was impressed to learn that two women were included amongst the first-ever foursome to play at Strathcona on that opening day. It is somewhat fitting that at the same time that the 90th anniversary celebrations will be taking place at Strathcona, the other municipally operated course will be full of women playing in the annual Chapples Ladies Invitational.

When the clock strikes 1:30 p.m., I will be sure to raise my club in honour of this special moment from our sporting past.

Until next time keep that sports history pride alive.

_Diane Imrie is the executive director of the Northwestern Ontario Sports Hall of Fame. Her column runs every second week._
The importance of Municipally-run golf facilities cannot be understated. These facilities are a crucial entry-point and conduit for more than 5 million golfers playing close to 60 million rounds annually—the most participated sport in Canada. These facilities are a critical element for the health and continued growth of golf across the country.

Golf is a significant economic driver generating more than $14.3 billion in economic impact and employing more than 300,000 jobs, nearly 40% of which are summer students. Direct revenues generated by golf courses and their facilities ($5.0 billion) rivals the revenues generated by all other participation sports and recreation facilities combined ($4.8 billion). Golf courses also steward essential greenspace in the community in addition to hosting more than 37,000 charity events that raise more than $533 million annually to support important causes.

We at Golf Canada also recognize the important impact golf has on the livability of communities like Thunder Bay, especially considering the economic, health, social, recreational, tourism and charitable benefits that golf helps deliver to those communities.

The health benefits of moderate-intensity physical activity, burning 850 to 1,500 calories as well as muscle endurance, blood circulation, flexibility and mental alertness along with respiratory, metabolic and cardiovascular improvements can't be discounted when playing the game either.

The successes of athletes such as Brooke Henderson, Adam Hadwin, Mackenzie Hughes, Corey Conners and so many others are helping inspire the next generation of golfers. Without municipal golf, there is simply one less pathway for people to take up the game and follow in the footsteps of their heroes.

Golf as a sport is also good for our children, instilling etiquette and values such as integrity, honesty, fair play and the spirit of camaraderie. Golf is a safe family sport that teaches the right values for success in life.

We at Golf Canada believe there should be more municipally-run facilities to help sustain and foster the future growth of the game across the country, not less. Affordable and accessible facilities including municipal golf courses and practice ranges—especially in major city centres—play a crucial role in introducing the game of golf to communities across Canada. We at Golf Canada strongly support all Municipally-run golf facilities and as an organization, we are committed to providing resources and benefits to support and encourage more people to play golf and to play golf more often.

Ryan Logan, PGA
Golf Canada, Regional Director
rlogan@golfcanada.ca
647-291-2457
WE ARE GOLF RELEASES ECONOMIC IMPACT OF GOLF IN CANADA (2019)

Golf continues to be incredibly healthy, safe and growing with a positive outlook for 2020 and beyond; Canadian golf industry generated $18.2B in economic activity (GDP); contribution to Canada’s GDP through direct, indirect, and induced impact grew by 14% between 2013 and 2019

Industry employment includes nearly 249,000 golf-related jobs;

4.8M trips by Canadians contributed to $8.6B in golf-related travel nationwide;

$330M in philanthropic dollars generated at more than 51,000 tournaments and charitable golf events;

(November 2, 2020) — The Canadian golf industry generated $18.2B in economic benefits across our nation in 2019, according to a recent economic analysis conducted by Group ATN Consulting Inc. on behalf of the National Allied Golf Associations (We Are Golf).

According to The Economic Impact of Golf in Canada (2019), the Canadian golf industry employs the equivalent of nearly 249,000 people through direct and spin-off effects and contributed to $10.6B in household income. The industry also contributed $4.5B in government tax revenue ($1.8B federal and $2.1B provincial) used to support a variety of programs for all Canadians.

Based on nationwide surveys completed by golfers and golf course operators in 10 provinces and three territories along with multiple industry data sources, The Economic Impact of Golf in Canada (2019) is a follow up to previous comprehensive and independent assessment studies (2014, 2009) of the economic impact of the golf industry in Canada. The $18.2B economic impact of golf represents a 14% increase in contribution to Canada’s GDP between 2013 and 2019.

“The Economic Impact of Golf in Canada (2019) further reinforces the enormous financial, employment, charitable, tourism and positive environmental impact that the sport and the business of golf are affecting across Canada,” said Laurence Applebaum, Chair of We Are Golf and CEO of Golf Canada. “This third iteration of the study provides the golf industry with a powerful snapshot of the scale and magnitude that our sport has on the Canadian economy and within the communities where we live, work and play.”

The study presents economic insights for each of the 10 provinces and three territories from coast to coast. Also captured in the report are comparisons to international economic insights from select countries and regions including the United States, European Union, and Australia.

The Economic Impact of Golf in Canada (2019) was conducted on behalf of We Are Golf by Group ATN Consulting Inc., a world leader in economic development and analysis for communities, regions, and industries. Group ATN previously conducted the 2014 and 2009 Canadian Golf Economic Impact Studies (based on 2013 and 2008 data respectively) which have allowed the Canadian golf industry to benchmark the game’s economic impact over five-year periods.
“Every industry has its own unique circumstances to allow for, and the ability to repeat the same application of our model for Canadian golf is a significant advantage,” said Tom McGuire, Principal with Group ATN Consulting. “Beyond consistency, we have also been able to further improve certain aspects based upon learnings from the prior studies we did for the National Allied Golf Associations (We Are Golf).”

HIGHLIGHTS OF THE ECONOMIC IMPACT OF GOLF IN CANADA (2019):

The game of golf accounts for an estimated $18.2B of Canada’s Gross Domestic Product (GDP), which is up 14% from the $15.9B reported in 2014*. Included within the 2019 economic impact:

- The golf industry directly employed nearly 150,000 full-time, full-year equivalent positions, representing many more individuals who are employed in the sector. This number grows to approximately 249,000 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, course operators invested $727M industry-wide on capital expenditures.

*Note that 2014 figures are adjusted by the consumer price index and reported as current dollars.

Additional Insights from The Economic Impact of Golf in Canada (2019):

- Employment – The golf industry is a significant job provider for youth with 48% of its workforce identified as students.

- Travel – Canadians along with international visitors contributed to $8.6B in golf-related travel nationwide. Canadians made approximately 4.8M trips involving golf, including 3.0M in their home province and 1.8M outside their home province and abroad.

- Golfer Spending – golfers in Canada spent approximately $19.3B on items such as green fees, memberships, lessons, equipment, travel, hospitality, events, and other golf-related expenditures.

- Canadian Course Operators – a total of 2,283 facilities were estimated to be operating in 2019, accounting for 2,043 courses (18-hole equivalent); course operators collectively spent approximately $3.8B in course expenditures.

- 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 through more than **51,000** tournaments and events.

• **Golf Participation** – Canadian golfers played an estimated **57.0M rounds** in 2019.

Although released in 2020, *The Economic Impact of Golf in Canada (2019)* does not factor in the significant impact of the COVID-19 pandemic on the Canadian golf industry.

“Establishing a baseline for the economic impact of our sport measured against pre-2020 Covid-19 spending is an important benchmark consideration for the integrity and continuity of the study,” added Applebaum. “Based on what we learned through the 2020 season, the safety of golf through this pandemic and the potential for a lift in participation and spending on the game, we are optimistic in looking ahead.”

An executive summary along with a complete report outlining the results of *The Economic Impact of Golf in Canada (2019)* is available by clicking here or by visiting any of the We Are Golf partner websites.

**ABOUT THE RESEARCH**

The Economic Impact of Golf in Canada (2019) was conducted by Group ATN Consulting Inc. on behalf of the National Allied Golf Associations (We Are Golf). Economic data included in the present study was collected through two online surveys promoted through We Are Golf partner channels: A Golfer Survey which collected complete financial responses from 955 Canadian golfers between July 2019 and February 2020; and A Operator Survey which collected complete financial responses from 143 Canadian golf course operators between January 2020 and March 2020.

**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. *We Are Golf* is comprised of Golf Canada, the National Golf Course Owners Association Canada (NGCOA), the PGA of Canada, the Canadian Golf Superintendents Association (CGSA), and the Canadian Society of Club Managers (CSCM). Find out more at [www.canadagolfs.ca](http://www.canadagolfs.ca).

**ABOUT GROUP ATN CONSULTING INC.**

Team lead and the co-founder of Group ATN Consulting Inc. (GATN), Thomas McGuire, has led a series of economic impact studies (EIS) and analysis for We Are Golf, including the most recent 2019 assessment. As a leading Canadian economist, Thomas brings decades of experience in economic impact analysis with a recognized specialization in sectoral studies. Find out more at [www.groupatn.ca](http://www.groupatn.ca)

**MEDIA CONTACT:**
Dan Pino | Senior Director, Communications | Golf Canada | 416-434-5525 | dpino@golfcanada.ca
WE ARE GOLF – INDUSTRY CONTACTS:

Laurence Applebaum | Chair, We Are Golf & CEO, Golf Canada | laplbaum@golfcanada.ca
Jeff Calderwood | CEO, National Golf Course Owners Association Canada | jcalderwood@ngcoa.ca
Kathryn Wood | COO, Canadian Golf Course Superintendents Association | kwood@golfsupers.com
Suzanne Godbehere | CEO, Canadian Society of Club Managers | sgodbehere@cscm.org
Kevin Thistle | CEO, PGA of Canada | kevin@pgaofcanada.com
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 $18.2B (2019$).
- 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$):

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2013</th>
<th>2019</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>GDP Contribution</td>
<td>$15.9B</td>
<td>$18.2B</td>
<td>14%</td>
</tr>
<tr>
<td>Federal and Provincial Tax Revenue</td>
<td>$2.4B</td>
<td>$3.9B</td>
<td>63%</td>
</tr>
<tr>
<td>Household Income</td>
<td>$9.3B</td>
<td>$10.6B</td>
<td>14%</td>
</tr>
<tr>
<td>Share of Student Employment</td>
<td>37%</td>
<td>48%</td>
<td>30%</td>
</tr>
</tbody>
</table>
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.
# Contents

<table>
<thead>
<tr>
<th>Summary Findings</th>
<th>Introduction</th>
<th>Methodology</th>
<th>Economic Impact of Golf in Canada</th>
<th>Canadian Golfer and Course Operator</th>
<th>Provincial Summaries</th>
<th>Background &amp; Past Studies</th>
<th>Glossary of Terms</th>
<th>Sponsors &amp; Supporters</th>
</tr>
</thead>
<tbody>
<tr>
<td>i</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
</tr>
</tbody>
</table>

- 1. Introduction
- 2. Methodology
- 3. Economic Impact of Golf in Canada
  - 3.1 Estimated Direct Expenditure
  - 3.2 Estimated Economic Impact
- 4. Canadian Golfer and Course Operator
- 5. Provincial Summaries
  - 5.1 British Columbia
  - 5.2 Alberta
  - 5.3 Saskatchewan
  - 5.4 Manitoba
  - 5.5 Ontario
  - 5.6 Quebec
  - 5.7 Atlantic Canada
  - 5.8 Yukon, Northwest Territories and Nunavut
- 6. Background & Past Studies
  - 6.1 The State of Golf in the US, Europe & Australia
  - 6.2 The Global Context: A Growing Game
- 7. Glossary of Terms
- 8. Sponsors & Supporters
TABLES

Table 1: 2019 Canadian Residents Golf Related Expenditure by Location .......................................................... 5
Table 2: 2019 Canadian Resident and Foreign Travel Golf Related Expenditure ......................................................... 5
Table 3: 2019 Operator Revenue by Location ............................................................................................................. 6
Table 4: 2019 Operation Revenue by Source ............................................................................................................... 6
Table 5: 2019 Operator Expenditure by Location ....................................................................................................... 7
Table 6: 2019 Operator Expenditure by Source ........................................................................................................... 7
Table 7: Economic Impact of Golf in British Columbia .............................................................................................. 14
Table 8: Economic Impact of Golf in Alberta ............................................................................................................... 14
Table 9: Economic Impact of Golf in Saskatchewan .................................................................................................. 15
Table 10: Economic Impact of Golf in Manitoba ......................................................................................................... 15
Table 11: Economic Impact of Golf in Ontario ............................................................................................................ 16
Table 12: Economic Impact of Golf in Quebec ........................................................................................................... 16
Table 13: Economic Impact of Golf in Atlantic Canada ............................................................................................. 17
Table 14: Economic Impact of Golf in Yukon, Northwest Territories and Nunavut .................................................... 17
Table 15: Summary of Golf Facilities in Canada by Province ..................................................................................... 19
Table 16: Economic Impact of Golf in the US .............................................................................................................. 20
Table 17: Summary of the 2016 WGF study of Economic Impact of Golf in USA ....................................................... 21
Table 18: Demographics of US Golfers & Economic Impact by Segment (2016) .............................................................. 21
Table 19: Contribution of Golf to the Economy of Europe 2011/2012 ........................................................................ 22
Table 20: European Golf Industry Snapshot .............................................................................................................. 23
Table 21: Golf Industry Growth Rate 2017/2018 ........................................................................................................ 24
FIGURES

Figure 1: Initial Expenditure (Millions) ................................................................. 3
Figure 2: Initial Expenditure per Capita (100,000) (Millions) ....................................................... 4
Figure 3: 2019 Total Employment in Persons Years ................................................................. 8
Figure 4: Household Impact (Millions) ........................................................................ 9
Figure 5: Government Tax Revenue (Millions) ................................................................. 10
Figure 6: Federal Tax Revenue (Millions) .................................................................. 10
Figure 7: Provincial Tax Revenue (Millions) ................................................................. 11
Figure 8: Gross Domestic Product (Millions) ................................................................. 11
Figure 9: Golf Facilities Worldwide ........................................................................ 18
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.
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.
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

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

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

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

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

**Table 4: 2019 Operation Revenue by Source**

<table>
<thead>
<tr>
<th>Source</th>
<th>Per Course (Thousands)</th>
<th>Total (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Operation</td>
<td>$1,335.6</td>
<td>$2,728.3</td>
</tr>
<tr>
<td>Pro-shop Purchases</td>
<td>$163.0</td>
<td>$332.9</td>
</tr>
<tr>
<td>Food and Beverages</td>
<td>$528.8</td>
<td>$1,080.2</td>
</tr>
<tr>
<td>Investment and Interest Income</td>
<td>$13.8</td>
<td>$28.2</td>
</tr>
<tr>
<td>Other</td>
<td>$49.6</td>
<td>$101.2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,090.8</strong></td>
<td><strong>$4,270.8</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Per Course (Millions)</th>
<th>Total (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Columbia</td>
<td>$2.9</td>
<td>$752.7</td>
</tr>
<tr>
<td>Alberta</td>
<td>$2.2</td>
<td>$570.8</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>$1.6</td>
<td>$192.8</td>
</tr>
<tr>
<td>Manitoba</td>
<td>$1.6</td>
<td>$142.1</td>
</tr>
<tr>
<td>Ontario</td>
<td>$1.6</td>
<td>$1,355.2</td>
</tr>
<tr>
<td>Quebec</td>
<td>$1.9</td>
<td>$605.5</td>
</tr>
<tr>
<td>Atlantic</td>
<td>$1.2</td>
<td>$192.0</td>
</tr>
<tr>
<td>YK-NWT-NU</td>
<td>$1.2</td>
<td>$7.8</td>
</tr>
<tr>
<td>Canada</td>
<td>$1.9</td>
<td>$3,818.9</td>
</tr>
</tbody>
</table>

Table 6: 2019 Operator Expenditure by Source

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

![Graph showing 2019 total employment in persons years by province or territory, with BC, AB, SK, MB, ON, QC, ATL, YK-NWT-NU indicated. The graph shows the breakdown of direct, indirect, induced, and total employment for each region.]
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)**

![Government Tax Revenue Chart]

**Figure 6: Federal Tax Revenue (Millions)**

![Federal Tax Revenue Chart]
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:
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>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>Household Income (Millions)</th>
<th>Government Tax Revenue (Millions)</th>
<th>GDP (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>31,912</td>
<td>$1,061.3</td>
<td>$438.1</td>
<td>$1,814.9</td>
</tr>
<tr>
<td>Indirect</td>
<td>10,376</td>
<td>$515.6</td>
<td>$156.9</td>
<td>$805.0</td>
</tr>
<tr>
<td>Induced</td>
<td>9,895</td>
<td>$694.2</td>
<td>$263.1</td>
<td>$1,078.6</td>
</tr>
<tr>
<td>Total</td>
<td>52,183</td>
<td>$2,271.2</td>
<td>$858.0</td>
<td>$3,698.5</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>Household Income (Millions)</th>
<th>Government Tax Revenue (Millions)</th>
<th>GDP (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>20,102</td>
<td>$691.5</td>
<td>$261.9</td>
<td>$1,250.5</td>
</tr>
<tr>
<td>Indirect</td>
<td>7,765</td>
<td>$445.2</td>
<td>$135.8</td>
<td>$788.5</td>
</tr>
<tr>
<td>Induced</td>
<td>6,261</td>
<td>$442.8</td>
<td>$164.6</td>
<td>$730.2</td>
</tr>
<tr>
<td>Total</td>
<td>34,128</td>
<td>$1,579.4</td>
<td>$562.3</td>
<td>$2,769.2</td>
</tr>
</tbody>
</table>
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>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>Household Income (Millions)</th>
<th>Government Tax Revenue (Millions)</th>
<th>GDP (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>5,743</td>
<td>$129.2</td>
<td>$42.2</td>
<td>$223.9</td>
</tr>
<tr>
<td>Indirect</td>
<td>1,534</td>
<td>$77.4</td>
<td>$23.8</td>
<td>$165.0</td>
</tr>
<tr>
<td>Induced</td>
<td>1,102</td>
<td>$73.2</td>
<td>$30.8</td>
<td>$129.9</td>
</tr>
<tr>
<td>Total</td>
<td>8,379</td>
<td>$279.8</td>
<td>$96.7</td>
<td>$518.9</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>Household Income (Millions)</th>
<th>Government Tax Revenue (Millions)</th>
<th>GDP (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>5,566</td>
<td>$137.0</td>
<td>$60.9</td>
<td>$239.6</td>
</tr>
<tr>
<td>Indirect</td>
<td>1,745</td>
<td>$82.8</td>
<td>$26.4</td>
<td>$139.2</td>
</tr>
<tr>
<td>Induced</td>
<td>1,423</td>
<td>$88.0</td>
<td>$40.5</td>
<td>$149.3</td>
</tr>
<tr>
<td>Total</td>
<td>8,735</td>
<td>$307.8</td>
<td>$127.8</td>
<td>$528.2</td>
</tr>
</tbody>
</table>
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>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>Household Income ( Millions)</th>
<th>Government Tax Revenue ( Millions)</th>
<th>GDP ( Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>49,672</td>
<td>$1,624.4</td>
<td>$821.7</td>
<td>$2,956.7</td>
</tr>
<tr>
<td>Indirect</td>
<td>18,403</td>
<td>$1,006.4</td>
<td>$343.3</td>
<td>$1,617.7</td>
</tr>
<tr>
<td>Induced</td>
<td>17,428</td>
<td>$1,138.2</td>
<td>$558.2</td>
<td>$1,941.5</td>
</tr>
<tr>
<td>Total</td>
<td>85,503</td>
<td>$3,769.1</td>
<td>$1,723.2</td>
<td>$6,515.9</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th></th>
<th>Employment</th>
<th>Household Income ( Millions)</th>
<th>Government Tax Revenue ( Millions)</th>
<th>GDP ( Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>27,231</td>
<td>$843.4</td>
<td>$433.6</td>
<td>$1,538.6</td>
</tr>
<tr>
<td>Indirect</td>
<td>9,908</td>
<td>$516.8</td>
<td>$164.8</td>
<td>$822.5</td>
</tr>
<tr>
<td>Induced</td>
<td>8,433</td>
<td>$490.0</td>
<td>$256.6</td>
<td>$857.3</td>
</tr>
<tr>
<td>Total</td>
<td>45,571</td>
<td>$1,850.2</td>
<td>$855.0</td>
<td>$3,218.4</td>
</tr>
</tbody>
</table>
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**

<table>
<thead>
<tr>
<th>Employment</th>
<th>Household Income (Millions)</th>
<th>Government Tax Revenue (Millions)</th>
<th>GDP (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>9,254</td>
<td>$252.9</td>
<td>$154.7</td>
</tr>
<tr>
<td>Indirect</td>
<td></td>
<td>$117.7</td>
<td>$39.0</td>
</tr>
<tr>
<td>Induced</td>
<td></td>
<td>$135.2</td>
<td>$70.0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>$505.8</td>
<td>$263.6</td>
</tr>
</tbody>
</table>

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**

<table>
<thead>
<tr>
<th>Employment</th>
<th>Household Income (Millions)</th>
<th>Government Tax Revenue (Millions)</th>
<th>GDP (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>364</td>
<td>$15.6</td>
<td>$3.7</td>
</tr>
<tr>
<td>Indirect</td>
<td></td>
<td>$7.6</td>
<td>$1.8</td>
</tr>
<tr>
<td>Induced</td>
<td></td>
<td>$7.4</td>
<td>$2.1</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>$30.6</td>
<td>$7.5</td>
</tr>
</tbody>
</table>
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 taxes\textsuperscript{12}. These studies also found that golf generates significant charitable donations through events held at golf courses throughout the country\textsuperscript{3}. 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 2013\textsuperscript{4}

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)

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

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. 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

<table>
<thead>
<tr>
<th>Total Output ($M)</th>
<th>Employment</th>
<th>Compensation ($M)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CORE INDUSTRIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Golf Facility Operations</td>
<td>$94,094</td>
<td>1,016,787</td>
</tr>
<tr>
<td>Golf Course Construction</td>
<td>$604</td>
<td>4,040</td>
</tr>
<tr>
<td>Tournaments, Associations and Player Endorsements</td>
<td>$6,568</td>
<td>64,846</td>
</tr>
<tr>
<td><strong>TOTAL CORE INDUSTRIES</strong></td>
<td>$107,701</td>
<td>1,146,565</td>
</tr>
<tr>
<td><strong>ENABLED INDUSTRIES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Golf Residential Construction</td>
<td>$21,058</td>
<td>739,109</td>
</tr>
<tr>
<td>Golf Tourism</td>
<td>$63,151</td>
<td>598,349</td>
</tr>
<tr>
<td><strong>TOTAL ENABLED INDUSTRIES</strong></td>
<td>$191,911</td>
<td>1,885,674</td>
</tr>
</tbody>
</table>


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

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jobs</td>
<td>1,885,674</td>
</tr>
<tr>
<td>Wages and Benefits</td>
<td>$58.7B</td>
</tr>
<tr>
<td>Economic Activity</td>
<td>$84.1B</td>
</tr>
<tr>
<td>Total Economic Output</td>
<td>$191.9B</td>
</tr>
</tbody>
</table>


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

<table>
<thead>
<tr>
<th>Segment</th>
<th>All participants</th>
<th>Women</th>
<th>Non Caucasian</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Golfers (M)</td>
<td>23.8</td>
<td>5.8 (24%)</td>
<td>4.6 (19%)</td>
</tr>
<tr>
<td>Percentage of Total US Population (308.7 M)</td>
<td>7.7 %</td>
<td>1.9%</td>
<td>1.5%</td>
</tr>
<tr>
<td>Direct Core Golf Economy ($M)</td>
<td>$48,998</td>
<td>$11,759</td>
<td>$9,309</td>
</tr>
</tbody>
</table>


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.

---


8 Ibid


10 2010 US Census Data

11 [https://www.pga.info/media/47830/13smsinceconomicimpacteuropefinal.pdf](https://www.pga.info/media/47830/13smsinceconomicimpacteuropefinal.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

<table>
<thead>
<tr>
<th>DIRECT INDUSTRIES</th>
<th>Revenue (Millions)</th>
<th>% of Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Operations</td>
<td>€8,434.9</td>
<td>56%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€3,620.6</td>
<td>24%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€959.4</td>
<td>32%</td>
</tr>
<tr>
<td>Capital Investment</td>
<td>€1,715.2</td>
<td>11%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€755.7</td>
<td>5%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€959.4</td>
<td>6%</td>
</tr>
<tr>
<td>Golf and Equipment Supplies</td>
<td>€2,963.4</td>
<td>20%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€1,420.2</td>
<td>9%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€1,543.2</td>
<td>10%</td>
</tr>
<tr>
<td>Events/Associations</td>
<td>€358.6</td>
<td>2%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€133.9</td>
<td>1%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€224.7</td>
<td>1%</td>
</tr>
<tr>
<td>TOTAL DIRECT INDUSTRIES</td>
<td>€13,472.1</td>
<td>89%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€5,930.3</td>
<td>39%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€7,541.8</td>
<td>50%</td>
</tr>
<tr>
<td>ASSOCIATED INDUSTRIES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Real Estate</td>
<td>€95.0</td>
<td>1%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€10.0</td>
<td>0.07%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€85.0</td>
<td>1%</td>
</tr>
<tr>
<td>Tourism</td>
<td>€1,552.6</td>
<td>10%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€229.3</td>
<td>2%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€1,408.3</td>
<td>9%</td>
</tr>
<tr>
<td>TOTAL ASSOCIATED INDUSTRIES</td>
<td>€1,647.6</td>
<td>11%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€239.3</td>
<td>2%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€1,408.3</td>
<td>9%</td>
</tr>
<tr>
<td>ECONOMIC IMPACT OF GOLF ON THE ECONOMY OF EUROPE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Economic Impact</td>
<td>€15,119.6</td>
<td>100%</td>
</tr>
<tr>
<td>Great Britain &amp; Ireland</td>
<td>€6,169.6</td>
<td>41%</td>
</tr>
<tr>
<td>Europe excl. GB &amp; Ire.</td>
<td>€8,950.1</td>
<td>59%</td>
</tr>
</tbody>
</table>

Source: 2013 PGA Study: Economic Impact of Golf in Europe
### European Golf Industry Snapshot

<table>
<thead>
<tr>
<th>European Golfer Numbers</th>
<th></th>
<th>% of Total</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Registered Golfers</strong></td>
<td>4,400,300</td>
<td>% of Total</td>
<td>56%</td>
</tr>
<tr>
<td>Of which are Males</td>
<td>2,873,300</td>
<td>% of Males</td>
<td>65.3%</td>
</tr>
<tr>
<td>Of which are Females</td>
<td>1,084,100</td>
<td>% of Females</td>
<td>24.6%</td>
</tr>
<tr>
<td>Of which are Juniors</td>
<td>443,000</td>
<td>% of Juniors</td>
<td>10.1%</td>
</tr>
<tr>
<td><strong>Nomad Golfers</strong></td>
<td>3,453,400</td>
<td>% of Total</td>
<td>44.0%</td>
</tr>
<tr>
<td><strong>TOTAL GOLFER</strong></td>
<td>7,853,700</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 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**        | 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.

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 expansion\textsuperscript{13}. 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 Nigeria\textsuperscript{14}

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 2018\textsuperscript{15}. 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>
<thead>
<tr>
<th>Golf Equipment Market</th>
<th>2018 Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S.</td>
<td>5.4% increase over 2017</td>
</tr>
<tr>
<td>Japan</td>
<td>5.1% increase over 2017</td>
</tr>
<tr>
<td>South Korea</td>
<td>4.3% increase over 2017</td>
</tr>
<tr>
<td>UK</td>
<td>4.5% increase over 2017</td>
</tr>
</tbody>
</table>

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.

\textsuperscript{13} https://www.thengfq.com/2017/05/golfs-impact-on-worldwide-development-and-the-global-economy/
\textsuperscript{14} Ibid
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.

Premier Sponsors

Canadian Golf Superintendents Association

The Canadian Society of Club Managers

Golf Canada

GolfTown Canada Inc.

National Golf Course Owners Association Canada

Professional Golfers’ Association of Canada
Gold Level Sponsors

Alberta Golf

BC Golf

Cabot

CCMC Sports

Club Car LLC

ClubLink Corporation

Golf Ontario

Golf Quebec

Golf BC Holdings

Mackenzie Tour - PGA TOUR Canada

Ping Canada

Toro
Silver Level Sponsors

Alberta Golf Superintendents Association
Atlantic Golf Superintendents Association
ClubProcure (Foodbuy.ca)
Copetown Woods Golf Club
Entegra Canada

GGA Partners
Golf Manitoba
Golf Newfoundland Labrador
Golf Nova Scotia
Golf Saskatchewan

Golf PEI
Lethbridge Country Club
Morgan Creek Golf Club
New Brunswick Golf
PEI Golf Association

Savannah Golf Links
Signature Risk Partners
TaylorMade Golf Canada
BFL Canada

The Vancouver Golf Club
Wasserman Canada

National Allied Golf Associations (We Are Golf)
Whitewater Golf Course Structure and Fee Summary

The 27-page Members Handbook with course rules and regulations can be found here:


Membership Information and Privileges: Summary

a. Initiation fees
   • The principal initiation fee is $8500.00 for a new member to enter the club.
   • This fee is currently waived until further notice.
   • There is a food and beverage minimum of $600.00 per season.
   • Membership will be terminated in the result of death. Initiation fees ($8500.00) are non refundable. Membership cannot be gifted, granted, or bequeathed by will.

b. Membership privileges and restrictions
   • Males must be off the course by 5:30 pm on Mondays.
   • Females must be off the full course by 1:45 pm Wednesdays.
   • Junior Members: must be sponsored by a member of the club or have a parent or grandparent with full dues in order to obtain membership.
   • Student Members: must be sponsored by a member of the club or have a parent or grandparent with full dues in order to obtain membership.
   • Intermediate Members (19-24): must be sponsored by a member of the club or have a parent or grandparent with full dues in order to obtain membership.
   • Juniors and students are restricted to golf before 12 noon on weekends and holidays.
   • Seniors are restricted to golf before 11:00 am on weekends and holidays.

c. Costs (per season)
   • Principal (Adult): $3195.00
   • Spousal (with purchase of Adult): $2165.00
   • Seniors 65+: $2800.00
   • Senior spousal (with purchase of Senior): $1875.00
   • Young Adult: $2390.00
   • Junior (where grandparent or parent is a member): $225.00
   • Sponsored Junior (where junior is sponsored by a member): $735.00
   • Student (where grandparent or parent is a member): $1200.00
   • Sponsored Student (where student is sponsored by a member): $1420.00
   • Intermediate (where grandparent or parent is a member): $1595.00
   • Sponsored Intermediate (where sponsored by a member): $1820.00

Note: these prices do not include the $8500.00 initiation fee, or the $600.00 - $900.00 mandatory minimum food and beverage account.
d. Dress code (based on your age or gender)

Men and boys
- Turtleneck, mock, or collared golf shirts.
- Denim, rugby, sweats, jogging, or sloppy cargo shorts are prohibited.
- The club does not permit shorts that fall below the knee.

Women and girls:
- Sleeveless tops are acceptable if they have a collar. Conversely, any top without a collar must have sleeves.
- Halter-tops, tube tops, and tank tops are not acceptable.
- Bermuda-length shorts and skirts are appropriate, however the club does not permit short skirts or shorts.
- Denim, rugby, sweat, jogging, cargo, stirrup pants or tights are not acceptable.
Fort William Country Club Structure and Fees Summary

In order to be eligible to be a 2021 Member, you must complete the application form (found here):


Membership and Information Privileges: Summary

a. Initiation fees
   - Initiation fees are in force however the amount is not disclosed publically.
   - All members will be required to support a House account with a defined Food and Beverage (F&B) minimum charge amount pending membership type.
   - The minimum Food and Beverage minimum charge amount ranges from:
     o $175.00 (Intermediate, 22-39)
     o $225.00 (Senior, 65+)
     o $325.00 (General)
     o Any deficit at end of year to your account will be billed to your House account.
   - House account credit limits are required:
     o $500.00 - $750.00 (Intermediate)
     o $750.00 (Seniors); $1000.00 couple.
     o $750.00 (General); $1000.00 couple.
   - Full paying members (Intermediate, Senior, General) are required to support a Capital Improvement Fee of $175.00/season.

b. Membership privileges and restrictions
   - Young adults (18-21) must play after 2pm on weekends and holidays.
   - Juniors (17 and under) must play weekdays between 1-4 pm, weekends and holidays after 2pm.
   - Men cannot tee off between 08:30 am – 1:00 am or between 3:00 pm – 5:30 pm on Tuesdays.
   - Ladies cannot tee off between 12:00 noon – 6 pm on Wednesdays.

c. Costs
   - General (Single): $2,625.00
   - General (Couple): $4,810.00
   - Seniors 65+ (Single): $2,360.00
   - Seniors 65+ (Couple): $4,285.00
   - Intermediate (22-39 y/o): $800-$2500 (pending review from club)
   - Young Adult (18-21 y/o): $525.00
   - Junior (13-17 y/o): $250.00
   - Junior (12 and under): $150.00

* Memberships are subjected to approval by the club.
d. **Dress code**
   - Proper attire of appropriate golf wear is required.
   - Denim is prohibited.
   - Cut-off shorts are prohibited.
   - Ripped or torn clothing are prohibited.
   - Soiled or stained clothing are prohibited.