

GOLF IN CANADA

Economic Impact Study

Manitoba



2023

National Allied
Golf Associations

Economic Impact of Golf in Canada

Study Overview

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

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

This edition of the study builds on an extensive data set, capturing insights from over 12,000 observations of Canadian golfers and golf course owners. Data was collected in early 2024 through two comprehensive online surveys, promoted by NAGA partners' diverse communication channels:

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

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

In addition to the primary data collected through the two surveys and interviews with industry stakeholders, data from various national sources, as well as extensive information provided by the NAGA partners, was also considered in the analysis. The exceptionally high number of responses for the golfer survey, combined with detailed information from the operator survey and other sources, significantly enhances the robustness of the study.

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

Key Highlights

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

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

**\$23.2 billion
in GDP**

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

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

Emerging Trends

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

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

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

95% said golf enhances their mental health

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

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



Total Regional Economic Impact: *Manitoba*

Total direct expenditure on golf in **Manitoba** amounted to \$749M in 2023.

The game of golf contributed an estimated total (including indirect and induced effects) of **\$769M to the GDP in Manitoba** in 2023 (compared to \$528M in 2019, or \$607M in 2023 dollars), in addition to:

- 10,004 person-years of employment (compared to 8,735 in 2019)
- \$457M in labour income (compared to \$308M in 2019, or \$354M in 2023 dollars)
- \$168M in government tax revenue (compared to \$128M in 2019, or \$147M in 2023 dollars)

Direct, Indirect, and Induced Impacts

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

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

| | Employment (Person-Years) | Gross Domestic Product | Labour Income | Government Tax Revenues |
|---------------------|------------------------------|---------------------------|---------------|----------------------------|
| Direct / Direct | 6,317 | \$305M | \$203M | \$74M |
| Indirect / Indirect | 2,230 | \$264M | \$139M | \$44M |
| Induced / Induit | 1,457 | \$200M | \$116M | \$50M |
| Total / Total | 10,004 | \$769M | \$457M | \$168M |

Rounds Played

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

In 2023, golfers played an estimated 3 million rounds of golf in Manitoba.

Tournaments and Charities

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

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

Charity events in Manitoba generated an estimated \$2.8M in 2023.

About NAGA

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

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



Acknowledgments

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

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

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

Jeff Calderwood, NAGA Chair.

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