

# **IPSOS REID, ON BEHALF OF THE RCGA, PRESENTS: THE 2006 GOLF PARTICIPATION IN CANADA REPORT**

*Landmark National Study About The Game Of Golf In Canada  
Measures Canada's Golfing Population At 5.95 Million –  
Projected Market Size Of Nearly \$13 Billion For Greens  
Fees/Club Membership, Equipment, Apparel And Travel*



## **Ipsos Reid**

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## **IPSOS REID, ON BEHALF OF THE RCGA, PRESENTS: *THE 2006 GOLF PARTICIPATION IN CANADA REPORT***

***Landmark National Study About The Game Of Golf In Canada Measures Canada's Golfing Population At 5.95 Million –Projected Market Size Of Nearly \$13 Billion For Greens Fees/Club Membership, Equipment, Apparel And Travel***

**Toronto, On** – According to a new landmark golf industry study conducted by Ipsos Reid on behalf of The Royal Canadian Golf Association (RCGA), 5.95 million<sup>1</sup> Canadians currently play golf --representing a national golf participation rate of 21.5%, among the highest golf participation rate of any country in the world. Overall, this community spends a projected \$12.9 Billion dollars per calendar year on direct golf-expenditures such as greens fees/membership (\$7.25 Billion), golf equipment (\$2.25 Billion), apparel (\$1.73 Billion) and golf travel (\$1.62 Billion).

The study, which involved interviews with over 20,000 Canadians nationally, offers a range of research initiatives from basic measurements of golf participation, practice facility use, annual rounds played, and consumer spending habits, to barriers and influencers to the take-up of the game of golf and golfer-segmentation analysis.

Specific highlights of the study include:

- Golf participation rate in Canada of 21.5% - among the highest rate in the world, representing a national golfing population of 5.95 million. This represents a 21.6% increase in the total golfing population from 2001 (when it was measured at 4.89

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<sup>1</sup> Population projections for this study are based upon December 2005 updated Census Canada projections.



million) and a 15.6% increase in the proportion of Canadians who golf (18.6% golf participation rate in 2001).

- The strong majority of golfers in Canada continue to be males age 18-64 (comprises 61% of the total golf population), but the participation rate among women has climbed from 9.7% in 2001 to 12.3% in 2006.
- Junior golfer (ages 12-17) participation rates are down slightly from 17.6% in 2001 to 14.6% today, a decrease of 12.3% in the total junior golfer population (432K to 379K). This is largely the result of drop-off among boys (29.4% in 2001 to 20.8% today) – meanwhile, golf participation rates among junior age girls has risen slightly (5.0% to 8.1%).
- The increase in overall golf participation rates is largely driven by a rise in the population of “core golfers” (those that play at least eight rounds of golf/year or more) – this population has grown by nearly half (+47.5%) since 2001 from 1.85 million to 2.73 million. The “occasional golfer” population (those who play one to seven rounds of golf/year) has also increase modestly from 2.60 million in 2001 to 2.83 million today (an increase of 8.0% overall).
- Saskatchewan (29.2%), Manitoba (28.6%), and Alberta (28.2%) lead the country in terms of overall golfer participation rates, while Quebec (17.5%), Nova Scotia (17.1%), and Newfoundland (16.3%) rank at the bottom.
- Ontario has the largest golfing population (2.31 million), followed by Quebec (1.14 million), British Columbia (8.12 million), and Alberta (7.54 million).
- Affordability is rated as the top barrier to take-up of the game of golf among adults, and lack of playing partners and lack of free time rate also rate highly. Access to



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instruction is listed as important factor in the take-up of the game of golf, particularly among junior aged golfers.

*These are some of the findings of an Ipsos Reid poll conducted for The Royal Canadian Golf Association. Ipsos Reid fielded the research via an on-line survey format among Ipsos Reid's panel members. A representative sample of households was drawn by census-defined strata: by province, and within province by region, age, household income, education and by language. Booster samples were implemented in the Atlantic and Prairie provinces to increase data reliability within these sub-populations. With a sample of 20,934 nationally, results can be considered accurate to within +/- 0.7% 19 times out of 20, of what they would be had the entire population been polled.*

*Because the survey was conducted before the availability of 2006 census data, population projections are based upon updated Census Canada estimates from December 2005.*



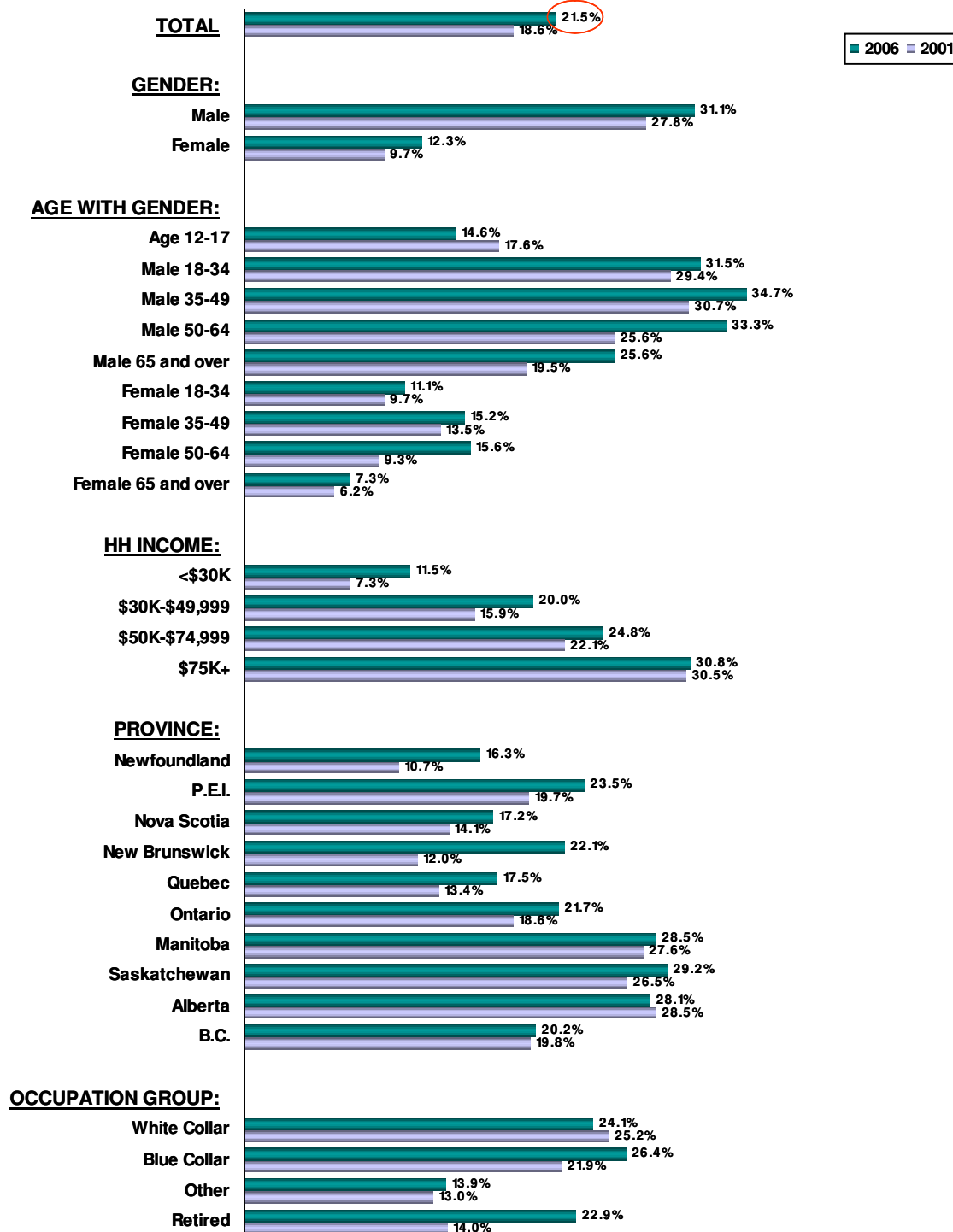
## Highlight Figures...

	1998		2001		2006	
	<i>PARTICIPATION RATE</i>	<i># GOLFERS (000)</i>	<i>PARTICIPATION RATE</i>	<i># GOLFERS (000)</i>	<i>PARTICIPATION RATE</i>	<i># GOLFERS (000)</i>
Newfoundland	7.6%	37	10.7%	50	16.3%	76
PEI	15.0%	18	19.7%	23	23.5%	28
Nova Scotia	14.4%	115	14.1%	115	17.2%	142
New Brunswick	12.8%	84	12.0%	79	22.1%	147
Quebec	13.8%	870	13.4%	851	17.5%	1141
Ontario	21.8%	2052	18.6%	1862	21.7%	2316
Manitoba	27.1%	262	27.6%	266	28.5%	282
Saskatchewan	31.8%	271	26.5%	227	29.2%	255
Alberta	29.7%	692	28.5%	723	28.1%	754
British Columbia	23.5%	771	19.8%	698	20.2%	812



## Demographic Profile of All Canadian Golfers

Participation Rate  
(Percent of Population Age 12+)





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