



The Economic Impact of Golf to a Tourist Destination

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Introduction

Since Tiger Woods won his first Masters Championship in 1997, golfing has experienced tremendous growth in terms of courses (both numbers and quality), players, spectators (both in person and on television), and prize money for the players. It has also become a significant and successful niche tourism product on a truly global basis. This has led to intense and global competition for two types of golfing tourists: travellers who golf and, the more valuable, golfers who travel. There are literally hundreds of possible travel destinations for these two golf markets around the world. All potential golf destinations, both within and among regions and countries, wish to attract these golfing visitors given their demographic characteristics and spending patterns (Hinch and Higham, 2001, Higham and Hinch, 2006, National Golf Foundation, 2008).

Blundell (2003) suggests that while sports tourism, in general, would be considered a niche market, as of 2001, the economics of sport has been growing four times faster than the rest of the rest of the US economy. In addition, participation in sport while on vacation is a growing phenomenon (Glyptis and Jackson, 1993). As for golf, the international golf market consists of almost 59 million people with 28.6 million golfers in the US, 5.5 million in Europe, 14 million in Japan, and 5.95 million in Canada (Northern Ireland Tourist Board (NITB), 2005, RCGA Canadian Golf Survey, 2006, National Golf Foundation, 2008). A way to segment golfers is by golfing frequency. Both the US National Golf Foundation and the Royal Canadian Golf Association (RCGA, 2006) use the terms “core golfer” and “occasional golfer” to segment the market for golfers. Core golfers are those who play eight or more rounds annually; occasional golfers are those playing one to seven rounds annually.

The US and Canada are very mature golfing markets, with high levels of participation and a heavy concentration of courses. Well over half the world’s golfers and 60% of the golf courses are in North America; there are around 20,000 people per 18-hole course. However, over the past six years, the number of rounds played has stagnated with growth averaging less than 1% per year. The National Golf Foundation (2006) suggests that to increase golf frequency, that is have current golfers play more, golf courses must become more flexible in terms of pricing, player groups allowed on the course, and the number of holes played.

The Canadian Golfing Market

As noted above, in Canada 5.95 million people play golf. In terms of total numbers this is much lower than in the US. Surprisingly, however, at 21.5%, Canada’s golf participation rate is more than double that in the US and is the highest in the world. The same applies to spending with Canadian golfers spending \$12.9 billion per year on direct golf-expenditures. Canada leads the world in golfers per capita. Based on participation, golf is the number one recreational activity in Canada, played by more Canadians than hockey (RCGA, 2006).

Driving the increase in number of golfers is the “core golfers,” those who play at least eight rounds of golf per year. This group has grown by almost 50% since 2001 to 2.73 million people. The number of “occasional golfers,” those who play one to seven rounds of golf per year, has only increased by 8% to 2.83 million. On average, Canadian golfers played an average of 15.5 rounds per year.



In addition, Mintel International Group Ltd (2006) reports that over 40% of Canadian golfers are “core golfers,” 66% higher than in the US, and the highest in the world. Women golfers account for almost 30% of the market, compared to only around 10% in the US. From a tourism perspective, golfing is the main reason why Canadian travellers take more than 1 million trips of one night or more. On these trips they spend an estimated \$1.9 billion annually within Canada and a further \$1.7 billion on golf related travel outside of Canada. Golf is an activity for 1.7% of all international over-night visitors to Canada (461,200 visitors). Over the last two years, 8.2% (18,189,169) of adult Americans played golf in Canada while on a trip of one or more nights. About 33.4% (6,067,369) reported that golfing was the main reason for taking at least one trip to Canada (Strategic Networks Group, 2009).

Strategic Networks Group (2009) reports that golf adds an estimated \$11.3 billion to Canada’s Gross Domestic Product (GDP), and directly accounts for 341,794 jobs, \$7.6 billion in household income, \$1.2 billion in property and other indirect taxes, and, \$1.9 billion in income taxes. The total direct sales associated with the industry are estimated at \$13.6 billion. Of this total, the revenues generated directly by golf courses and their facilities and stand-alone driving and practice ranges (\$4.7 billion) rivals the revenues generated by all other participation sports and recreation facilities combined (\$4.8 billion) in Canada. Golf generates an estimated \$29.4 billion in total gross production through direct, indirect, and induced spending impacts.

Implications for Communities

Based on this data, golfers are a sizeable niche market that presents a significant opportunity to grow and maintain visitation to a destination, and generate substantial revenues for the golf and tourism industries and government. With the very high fixed development costs associated with golf courses, golf marketers must understand visitors in order to improve profitability and competitiveness. As a niche product, golf’s ability to attract certain types of visitors may lead to higher returns for tourism destinations.

Tourists visit a destination for a variety of reasons, often personal in nature, and driven by a number of internal and external forces. Standeven and DeKnop (1999) define sport tourism as “all forms of active and passive involvement in sport activity that necessitate travel away from home.” Weed and Bull (2004) view sports tourism as a “unique interaction between activity, people and place,” whereas sport tourism is the all-encompassing field of sport as a social institution. Nogawa et al. (1996) suggest that destination marketers should be aware that sport tourists have the potential to become sightseers.

This is consistent with tourism demand models where the available attractions are a key factor in repeat visitation decisions (Costa and Manente, 1995). Therefore, sports visitors should be made aware of the notable features of the destination. This implies that the relationship between the numerous variables influencing behaviour must be researched in order to fully understand current and potential visitors to a destination. To be able to construct appropriate models and profiles of visitors, it is important to recognize the influences on the decisions made. This study provides a framework to gain a better understanding of golfing visitors and their economic benefits to a community.



Data and Methodology

Prince Edward Island (PEI) is Canada's smallest province, with a population of 140,000 living on 5,684 square kilometres of land. PEI is known for its pastoral settings and the combination of the red and green of the fields and the blue of the water makes for striking scenery. This is one of the reasons why tourism is PEI's second largest industry. In the mid-1990s, in an attempt to diversify the tourism product, the PEI Department of Tourism made golf a core part of its tourism product development strategy. In addition, to ensure high quality courses were available for visitors, the Province built and operated four championship level courses. Motivating this investment were indications that enhanced tourism development led to rising levels of income, immigration, literacy, and life expectancy and falling unemployment, fertility, and infant mortality. For small islands, a successful tourism strategy is an attractive alternative to migration, a reliance on transfer payments, and bureaucracy (McElroy, 2006).

Golf Prince Edward Island (Golf PEI) is an industry association devoted to the promotion and development of golf in PEI. In 2005, Golf PEI consisted of 25 members representing golf courses across the province. In addition, the provincial government provided financial support to the organization. The combination has resulted in PEI becoming a golfing destination for visitors from across the country and continent. To determine visitors' impressions of golfing in PEI, Golf PEI undertakes periodic surveys of golfers on their member courses.

From June through October 2005, Golf PEI implemented a golf experience survey. The survey was developed by Golf PEI and was distributed to golfers who played 24 of the 25 member golf courses. The survey was distributed by course employees to golfers after they finished their round. The distribution of the surveys was at the discretion of the course and, likely, the people working in the clubhouse. Participation in the survey was voluntary, but a small gift was provided to respondents who returned the completed surveys. The survey contained 69 questions and is available from the authors on request.

The population for the survey consisted of all golfers who played a round of golf at one of Golf PEI's courses. In 2005, there were 407,327 rounds of golf played at the Golf PEI member courses. Over the 2005 golfing season, 3,397 surveys were completed at one of the 24 participating courses. This data was made available to the authors and is the basis for this paper. The subset of survey data used in this paper is based on question 48 concerning the number of rounds of golf the respondent played anywhere in the last 12 months. In total, 2,302, or about 68%, of the respondents answered this survey question. There were seven options provided for the question: 1, 2-3, 4-5, 6-10, 11-20, 21-25, and over 25. For the purpose of this paper, the seven options were reduced to three: 5 or less, 6-25, and over 25. The first group consists of occasional or infrequent golfers, the second group moderate golfers, while the final group is heavy or dedicated golfers.

Three groups were selected to allow for a finer analysis of the results to see if significant differences exist among golfers. In some work (RCGA, 2006), only two golf segments are used with those playing eight or more rounds classified as "core." This is a very low threshold and it may not allow for a clean distinction between the "real" segments of golfers. For this paper, 25 rounds is used as a threshold. This much higher number may be a better indication of the level of "devotion" a player has to the game.



Of the 2,302 respondents who answered Question 48, 574 were residents of PEI and were excluded from the study. For the study, visitors were deemed to include seasonal residents. As shown in Table 1, the final sample consists of 1,651 completed surveys. Table 1 also provides data on repeat visitation and the point of origin of the respondent. The very high incidence of repeat visitation and the very high numbers of golfers from two geographic markets should be noted. These issues are discussed in more detail below. Finally, in the results that follow, the responses to many of the survey questions do not total 1,651 as some respondents did not answer all of the survey questions.

Table 2 provides the framework for studying the impact of golf tourism on a community for the three golf segments created based on golfing frequency, plus for all golfers in total. Column 1 in the Table provides a listing of the 24 questions from the Golf PEI survey used in this study. Columns 2 to 4 provide the results for each of the golfer segments, while column 5 provides the results for all golfers. Note that questions 36 to 39 asked for a rating on a four-point scale and in Table 2, the mean response is provided. The final column shows the statistic that tests whether the responses across the three golf segments is statistically significant.

Demographic and Environmental Influences

In terms of demographic and environmental influences, the differences across the three golfer categories are significant for all of the variables considered, except gender. Most of the people who completed the survey were males. But in terms of age, income, residence location, golfographics, source of information about golfing, and repeat visitor status, major and significant differences based on golf frequency are evident.¹

This is particularly the case for dedicated golfers who are significantly more likely to be members of golf courses, have low golf handicaps, and who are older, wealthier, more interested in golf packages, and are more likely to be first time visitors to PEI. The household income level across the three categories of golfers is surprisingly high, much higher than the income level reported in the 2004 PEI Tourism Impact Study.

For the sample, 55.8% of respondents reported incomes greater than \$100,000. Only 11.4% reported incomes less than \$50,000. This implies that the median income of this sample was about \$110,000.² For the dedicated golfers, almost 36% reported income greater than \$150,000. This is the group of visitors that PEI wishes to attract. They have much higher disposable incomes, and likely golf, stay, and eat at the more expensive locations. The average amount they spend should also be much higher than the amount spent by the average tourist.

¹ Across the three categories of golfers, almost 71% are repeat visitors. This is a very high rate of repeat visitors and suggests that this large sample of golfers is satisfied with their visitor experience in PEI. This is further reinforced when this result is compared to the rate reported in the 2004 PEI Tourism Impact Study, where 37% of visitors reported that they visited PEI in the previous year; 25% said they had visited PEI at some point in the previous five years.

² Again, this data is much different than the result reported in the 2004 PEI Tourism Impact Study. There only 68% of visitors reported income greater than \$50,000, while 23% reported income of between \$35,000 and \$50,000. Visitors who come to golf have much higher incomes than the average visitor to PEI.



Golfographic Influences

Again, the differences across the three golfer categories are significant for most of the golfographic variables; those items associated with the respondents golfing practices. While fewer dedicated golfers reserved their tee times directly with the course, many more used travel agents and the Internet. This may imply that these bookings were made before travelling to PEI. It seems clear that these visitors are committed to golfing prior to coming to PEI given that they played or planned on playing 4,275 rounds while in PEI, an average of 2.6 rounds per visitor. The dedicated golfers accounted for almost half of these rounds at 1,919, or 3 per visitor. Not surprisingly, dedicated golfers are much more likely to be a member of a golf club and to have a lower handicap than the other two categories of golfers. Once they play, however, the majority of the golfers in each category had trouble playing to their handicap. This may attest to the high quality of the golfing product available in PEI.

These results, particularly for dedicated golfers, are consistent with other golf studies. It has been reported (NITB, 2005) that while vacationing, golfers tour around and play an average of three courses per trip. In addition, first time visitors want to play the better known courses and will likely buy a golf package. Repeat visitors tend to make their own arrangements and play less well-known courses. Finally, this study also suggests that booking habits are changing and that the Internet will become the most important marketing and booking tool for golf holidays. As is clear from Table 2 each of these results apply, to some degree, for this sample.

Returning to the results, dedicated golfers stay in PEI for a slightly longer period of time, and a much higher percentage stay in hotels and resorts, which, on a daily basis, are more expensive. This combination implies higher revenues from this segment. This hypothesis is clearly supported in Table 2. The biggest difference across the three segments is for expenditures. Dedicated golfers spend much more in total, across more golfers, so their total golf expenditure, at \$892, is 177% more than infrequent golfers and 71% more than moderates. Furthermore, based on the response to Question 66 in Table 2, dedicated golfers are much more likely to golf as couples, less so with children. Clearly, this is a segment the tourism industry wishes to target. These are the golfers who want a golfing holiday “with the luxury trimmings” (Priestley, 1995).

Motivation Influences

Based on the 2004 PEI Tourism Impact Study, visiting friends and relatives and to vacation are the key motivations why 53% of visitors travelled to PEI. This seems to apply to this sample of golf visitors as well, with 37.1% indicating this was the main reason for the visit. However, overall for this sample, golf, at 38.2%, was the primary reason for this trip to PEI. In comparison, the 2004 Tourism Impact Study indicated that only 14% of visitors golfed while in PEI. In addition, the differences in responses between the infrequent and dedicated golfers for this question is striking. At over a ratio of 2.3 to 1, infrequent golfers' main reason to visit was to vacation and visit friends and relatives. The reverse holds for dedicated golfers. About half of the dedicated golfers come to PEI specifically for the golfing experience, and less so to visit friends and relatives, or for a family vacation.

One very interesting result is the importance word-of-mouth has in the process of gathering information about golf in PEI or on particular golf courses. Almost half of the respondents relied on friends, relatives, or co-workers for this type of information. Less than 7% of respondents



relied on TV ads and the visitor information package to gather information regarding golfing in PEI. This relatively low number is consistent across the three golfer types. While this result may be surprising, it is well-documented that word-of-mouth dominates other forms of advertising (Gilly et al., 1998; Fodness & Murray, 1999).

Word-of-mouth is a more important information source than marketer-dominated sources of mass media advertising (Money & Crotts, 2003). Buyers search for external information to help make purchase decisions, and word-of-mouth search is used by consumers to decrease risk (Rosen & Olshavsky, 1987). Finally, these findings suggest there are various ways to reach the dedicated golfer through information sources that will trigger a visit to the destination. It is important to ensure that information concerning PEI is available when needed either pre-trip or during the trip. Golf packages appear to be valued for visitors who come to PEI primarily to golf.

Getting information into visitor's hands is important. Visitors who are high information users tend to participate more in activities, spend more money daily, are positive about their experiences, and are more intent to return compared to low and nonusers of information (Woodside et al., 1997). However, some information sources just contribute to the process of making travel decisions, others are "decisive." For example, external information, such as a destinations own literature, is useful, but insufficient to invoke the final purchase decision. But, independent external sources such as word-of-mouth and published travel guides help cement the travel decision (Fodness & Murray, 1999).

Outcomes: Value and Satisfaction

Overall, the golfers responding to this survey enjoyed their golfing experience in PEI. For the key measure of value received for the green fees paid, about 90% of the respondents felt the course met or exceeded expectations. In terms of the likelihood of either playing the course again, or recommending the course to others, about 62% of respondents said they were very likely while a further 30% were likely.

Regarding the overall level of satisfaction with the golf experience, 95% of respondents said it met or exceeded expectations. These high levels are reflected in the mean ratings provided in Table 2 where the scale used was 1 to 4. It is interesting to note that while the dedicated golfers rated the value of the golf experience for the fees paid significantly lower than other golfers, they also indicated they were more likely to play the course again. The three golfer categories were equally likely to recommend the golf facility and were equally satisfied with their golf experience. In addition, the overall rating of these questions for the three golfer categories was quite high at the 3.5 out of 4 level.

Finally, at a very high 80%, the three categories of golfers were equally likely to return to PEI to golf in the future. Overall, the choices these golfers made pre-trip and during the trip seemed to result in positive outcomes in terms of their golf experience.

Discussion and Conclusion

The objective of this study was to determine whether there are differences among visitors to Prince Edward Island, based on frequency of golf played. Golfers were divided into three



categories based on golfing frequency, infrequent, moderate, and dedicated, and corresponding profiles were developed. Golfers were profiled based on the following variables:

1. Demographic, behavioural, and environmental (variables that are already existing for the golfer before they plan or take their trip).
2. Golfographics (variables that relate directly to golfing such as handicap, years of play, golf trips taken, golf membership, length of stay, and party size).
3. Motivation to visit (issues such as family vacation, golf, visiting family/friends).
4. Value and satisfaction with the golf experience (variables such as will return, will recommend, will play again, value of golf visit).

The results indicate that there are significant differences in these variables based on golfing frequency. Dedicated golfers are very different from infrequent and moderate golfers on three of the four variables. In particular, dedicated golfers are much more likely to be older, wealthier, from outside the Maritime Provinces, first time visitors to PEI, be visiting to golf, golf in couples, and to have made golf bookings prior to coming to PEI. In addition, since they golf more, their expenditures on golf-related items is \$483 per golfer, significantly more than the other two categories of golfers.

Although not directly covered in this study, it is almost certain that dedicated golfers would also spend much more in total on their trip to PEI. Martins and Correia (2004) report that for golf related travel, only about 25% of spending is actually on golf. The other 75% is spent on items such as accommodation, food and beverage, and transport. Since the dedicated golfers in this study spend more on golf, it is reasonable to conclude that these visitors would stay in more expensive hotels and resorts and would more likely frequent restaurants and other tourist establishments. Based on the spending levels reported in this study, it is clear that dedicated golfers can provide a tremendous boost to all stakeholders in a community's tourism industry.

While the infrequent and moderate golfers in the sample may be the ones seeking the economic golfing holiday where selection is motivated by the best price, the dedicated golfers seem to want a golfing holiday where cost is not the major issue (Priestley, 1995). This may be surprising since in economic models of tourism, it is suggested that price is the most important variable (Nicolau and Más, 2005). For dedicated golfers, this does not seem to be the case. Finally, it seems safe to conclude that golfers can provide tremendous economic benefits to a community. This perhaps explains the significant increase in the golf product available around the world, and the corresponding increase in competition.



Table 1
Summary of the Data Used in the Study: By Golfing Frequency*

	Golfer Type			Overall	χ^2 value / F-value
	<u>Infrequent</u>	<u>Moderate</u>	<u>Dedicated</u>		
Q. 48: Golfing Frequency	566	867	869	2,302	
Percentage of sample	24.6%	37.7%	37.7%	100.0%	
<u>Q. 55: Residency Status</u>					68.12***
Visitors	280	590	560	1,430	
Permanent Resident	211	167	196	574	
Summer Resident	57	84	80	221	
Number that are Tourists	337	674	640	1,651	
Percentage that are Tourists	61.5%	80.1%	76.6%	74.2%	
Q. 56: Number that are: First Time Visitors	73	150	196	419	14.03***
Repeat Visitors	208	435	364	1,007	
Percentage that are Repeat Visitors	74.0%	74.4%	65.0%	70.6%	
<u>Q. 69: Point of Origin</u>					69.55***
Maritimes (NS and NB)	102	207	144	453	
Quebec	24	52	59	135	
Ontario	98	221	207	526	
Other Canada	38	73	50	161	
US	28	58	124	210	
Other Countries	4	7	7	18	
Total Responses	294	618	591	1,503	
Percentage that are from Ontario	33.3%	35.8%	35.0%	35.0%	
Percentage from Ontario, Maritimes, US, Quebec	85.7%	87.1%	90.4%	88.1%	

* This Table provides summary data for the 2005 Golf Experience Survey implemented by Golf PEI. The Table indicates the number of respondents to the indicated question. Only golfers who answered the question regarding golfing frequency, and who provided residency status were included in the analysis completed in this paper. The final sample consists of 1,651 completed surveys.

*** p < 0.001.



Table 2
A Framework of Golfers by Golfing Frequency

	Golfer Type			Overall	χ^2 value /
	Infrequent	Moderate	Dedicated		F-value
<u>Demographics</u>					
Q64: Gender - Male	73.4%	76.5%	0.78	76.3%	2.22
Q65: Age					186.72***
Percentage that were between 35 and 49	43.3%	40.5%	27.3%	35.9%	
Percentage that were 55 or older	17.6%	24.0%	46.9%	31.7%	
Q67: 2004 Household Income Before Taxes?					40.14***
Percentage that said less than \$75,000	37.2%	25.2%	23.2%	27.0%	
Percentage that said more than \$150,000	24.2%	30.0%	35.7%	30.9%	
<u>Golfographics</u>					
Q5: How Did you Make Your Golf Reservation?					55.29***
Percentage that said direct with course.	59.4%	53.0%	44.2%	50.9%	
Percentage that used travel agent or Internet.	7.3%	11.1%	19.7%	13.6%	
Q40: Number of other Courses Played on PEI ^a	497	1,139	1,283	2,919	
Q41: Number of other Courses Plan on PEI ^a	221	499	636	1,356	
Q43: Are You a Member of a Golf Club?					393.71***
Percentage that are a member	11.0%	31.6%	71.9%	43.1%	
Q44: What is Your Handicap?					215.16***
Percentage that are under 15.	14.2%	23.7%	47.7%	32.0%	
Q45: Did You Play Your Handicap Today?					1.10
Percentage that did	45.0%	47.4%	49.0%	47.5%	
Q49: Where Are You Staying on This Trip to PEI?					42.28***
Percentage that stayed in hotel/resort.	17.5%	23.3%	32.0%	25.6%	
Q54: How Many Nights Did You Stay on PEI?	6.480	7.084	7.021	6.938	0.76
Q58: Total Golf Related Expenditures This Trip	\$321.80	\$522.38	\$891.69	\$628.03	11.85***
Q60: Number of People Included in the Estimates	1.737	1.998	2.086	1.983	3.60*
Q60a: Average Expenditure per Golfer	\$197.79	\$314.28	\$483.24	\$357.96	34.84***
Q66: Your Golfing Party's Consists of (percentage)?					29.04***
Single golfer or golf with children	29.1%	28.7%	21.3%	25.9%	
1 or 2 couples	38.7%	37.9%	48.6%	42.2%	
<u>Motivation to Visit ^a</u>					
Q57: What is the Primary Reason For Your Trip to PEI?					
Percentage that said to golf	21.3%	35.1%	50.1%	38.2%	
Vist friends and relatives, Family vacation	48.8%	39.3%	28.8%	37.1%	
Q63: How Find Out About Golfing on PEI/this course?					
Percentage that said friends, relatives	54.1%	48.5%	43.0%	47.4%	
Golf package	1.6%	5.8%	11.0%	7.1%	
TV ad or PEI information package	5.5%	7.0%	7.5%	6.9%	
<u>Value/Satisfaction</u>					
Q36: Value of Golf Experience for the Green Fees Paid	3.523	3.447	3.409	3.448	2.92^
Q37: Likelihood of Playing Course Again	3.402	3.489	3.528	3.486	3.36*
Q38: Likelihood of Recommending This Golf Facility	3.459	3.506	3.502	3.495	0.59
Q39: Satisfaction With Today's Golf Experience	3.485	3.429	3.399	3.429	1.97
Q61: When Will You Return to this Area to Golf?					5.85
Percentage that said one year or later	80.8%	80.7%	78.5%	79.8%	

Note: ^a multiple responses; ^ $p < 1.0$, * $p < .05$, ** $p < .01$, *** $p < .001$



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