

Golf Facilities in Canada | 2015

THE DEFINITIVE REPORT OF GOLF FACILITIES AND DEVELOPMENT IN CANADA

PRESENTED BY GOLF CANADA AND THE PGA OF CANADA



A COLLABORATIVE REPORT FROM GOLF CANADA, PGA OF CANADA
AND THE NATIONAL GOLF FOUNDATION





Golf Facilities in Canada 2015 Edition

INTRODUCTION

Golf Facilities in Canada is the result of a collaborative effort between Golf Canada, the PGA of Canada and the National Golf Foundation. These organizations have created the country's definitive report on golf facilities and golf projects, from which the information in this report is derived.

The report identifies all existing public and private facilities in the country, and defines that supply by province, type and number of holes. It also includes information on openings and closings, as well as the number and type of facilities that are currently in development.

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CANADIAN GOLF INDUSTRY RESEARCH

The "Golf Facilities in Canada 2015", produced by the National Golf Foundation in partnership with Golf Canada and the PGA of Canada, provides an important data snapshot of the Canadian golf industry.

If you are interested in additional Canadian Golf Industry research pieces, check out these two informative studies produced by the National Allied Golf Associations — NAGA (comprises Golf Canada, the PGA of Canada, the National Golf Course Owners Association Canada, the Canadian Golf Superintendents Association, the Canadian Society of Club Managers and the Canadian Golf Industry Association):

"Canadian Golf Economic Impact Study (2014)"

"Canadian Golf Consumer Behaviour Study (2012)"

Download both studies at www.canadagolfs.ca

GOLF CANADA: Golf Canada is the National Sport Federation (NSF) and governing body for golf in Canada and represents close to 310,000 golfers and more than 1,400 member clubs across the country.



A proud member of the Canadian Olympic Committee, Golf Canada's mission is to grow participation, excellence and passion in the sport while upholding the integrity and traditions of the game.

By investing in the growth of the sport and introducing more participants of all ages to the game, our goal is to be relevant to and respected by all Canadian golf enthusiasts from coast to coast. For more information about what Golf Canada is doing to support golf in your community, visit www.golfcanada.ca

THE PGA OF CANADA: The PGA of Canada was established in 1911, and is the second oldest and third largest professional golf association in the world. The PGA of Canada is a non-profit association that comprises 3,700 golf professionals across the country. The PGA of Canada develops, promotes and supports members in living a better life and earning a better living. The association consists of the National Office located in Acton, Ontario and nine Zone Offices across the country. For more information visit www.pgaofcanada.com



NATIONAL GOLF FOUNDATION: NGF is the preeminent knowledge leader for companies and organizations that rely on objective and accurate data, insightful guidance and marketing resources to support their business activities involving golf.



NGF has provided trusted research, analysis, databases and insights on consumer and commercial trends since 1936.

For more information visit: www.ngf.org

Definitions

18-HOLE EQUIVALENT (18HEQ): A measure of golf supply calculated by taking the total number of golf holes and dividing by 18. For example, one 18-hole golf course equals one 18-hole equivalent. Two 9-hole golf courses equal one 18-hole equivalent.

CHAMPIONSHIP GOLF COURSE: A golf course that meets the requirements to host a professional golf tournament or event.

GOLF COURSE: A tract of land containing at least 9, but not more than 18 holes.

REGULATION COURSE: A course with a variety of par 3, par 4 and par 5 holes with a par rating typically between 70 and 72.

EXECUTIVE COURSE: A shorter version of the regulation course with a par rating typically between 60 and 66 for 18 holes. An executive course is typically built on a more compact tract of land as compared to a regulation course.

PAR-3 COURSE: A course comprised solely of par-3 holes. An 18-hole par-3 golf course has a par rating of 54.

GOLF FACILITY: A business location where golf can be played on one or more golf courses.

DAILY FEE FACILITY: A privately owned golf facility that provides public access and may or may not offer memberships. Daily fee facilities that provide only limited public play are sometimes referred to as “semi-private” golf facilities.

MUNICIPAL FACILITY: A golf facility owned by a tax-supported entity such as a city or province and is open to the public all the time.

PRIVATE FACILITY: A golf facility where play is restricted to members and their guests.

PUBLIC FACILITY: A golf facility that is open to public play at least a portion of the time.

REAL ESTATE-RELATED FACILITY: A golf facility located in and considered an integral part of a real estate development.

RESORT FACILITY: A golf facility located in a setting that usually includes other amenities such as tennis, swimming, gym facilities, etc. and is situated in conjunction with a hotel or motel.

REAL ESTATE/RESORT FACILITY: A golf facility that combines the features of a real estate development facility and a resort.

PROJECT: A new golf facility or course, or an addition to an existing course, that is currently in one of the following states of development.

IN-PLANNING: Specifications are being written and key product decisions are being made. The project has been assigned to an architect or developer.

UNDER CONSTRUCTION: The general contract and subcontracts have been awarded. Work has started and ground has been broken.

COMPLETED/OPEN: The course is now open and ready for play.

PROVINCIAL SPORT ORGANIZATION (PSO): Provincial Sport Organizations are independent, not-for-profit organizations responsible for delivering programming province-wide and influencing participation, excellence, capacity and interaction in sport at provincial level. Every Provincial Sport Organization is affiliated to a National Sport Organization, and it is the responsibility of these two organizations to ensure the safe development and operation of every aspect of their sport.

STATISTICS CANADA: A member of the industry portfolio, Statistics Canada produces statistics that help Canadians better understand their country. Statistics Canada conducts a census every five years and is legislated to serve this function for the whole of Canada, and each of its provinces and territories.

Golf Facilities in Canada 2015 Edition



Scott Simmons
Chief Executive Officer, Golf Canada



Gary Bernard
Chief Executive Officer, PGA of Canada

The National Golf Foundation is a world leader in capturing research, analysis and database insight, and together with the PGA of Canada and Golf Canada, we are thrilled to deliver this informative data capture of golf facilities that comprise the Canadian golf community.

Canadians are passionate about the game of golf. Look no further than a participation base of 5.7 million Canadians who enjoy more than 60 million rounds annually. A snapshot of the Canadian golf landscape reveals an industry that is worth more than \$14.3 billion to the Canadian economy and represents more than 1% of our nation's total GDP. The \$5 billion in direct revenues generated by Canada's 2,346 golf courses as well as stand-alone practice ranges are more than the revenues generated by all other participation sports and recreational facilities combined (\$4.8 billion).

The numbers reinforce the massive financial, charitable, tourism and environmental impact our sport has in communities across Canada. Our industry impacts hundreds of thousands jobs, billions in taxes, and is a major tourism driver both domestic and international. Canadian golf facilities are a channel for major charitable giving with close to 37,000 events at Canadian courses raising more than \$533 million annually for worthwhile causes.

Canadian golf facilities are the foundation for major sport participation, big business and environmental stewardship, and the 2015 edition of "Golf Facilities in Canada" provides a comprehensive breakdown of the golf courses and projects that represent 7% of the world's 34,011 golf facilities.

The PGA of Canada, in partnership with Golf Canada, is excited to present this captivating study of golf facilities in Canada by one of the world's leading research firms, the National Golf Foundation.

As the second oldest and third largest professional golf association in the world, the PGA of Canada and its more than 3,700 members are proudly represented at golf facilities from St. Johns to Victoria and all points between.

This study, in addition to the recent Canadian Golf Behaviour Study conducted by NAVICOM, paints a very prosperous and bright picture about the current state of golf in Canada. According to the two studies, there are 2,346 golf facilities in Canada with more than 5.7 million people playing some 60 million rounds of golf annually across the country. Furthermore, the \$5 billion in direct revenues generated at the country's 2,346 golf facilities exceed revenues generated by all other participation sports and recreational facilities combined.

I appeal to you to explore the data presented in the 2015 Golf Facilities in Canada report. This study is the country's definitive database of golf facilities and golf projects.

Golf Facilities in Canada 2015 Edition

LAND AREA: 9,093,507* KM²

POPULATION (2013): 35,158,300*

TOTAL NUMBER OF FACILITIES: 2,346

CANADA IS HOME to 2,346 public and private golf facilities (see “facility” definition on page 2), ranking it third in the world in total supply by country. Like the country’s population, 90% of which lives within 160 kilometers of the U.S. border, the majority of Canada’s facilities are located in the southern portion of the country.

Seventy-seven percent of the total golf supply is located in Canada’s four most populated provinces—Ontario, Québec, Alberta and British Columbia. Factor in Saskatchewan and Manitoba and the country’s six largest provinces are home to all but 190 of the country’s facilities. The Northwest and Yukon territories have five and six facilities, respectively.

While course construction has slowed during the past several years—a trend mirrored in many mature and developed golf nations including the United States and the United Kingdom—golf remains extremely accessible in Canada. A little more than 90% of the country’s supply is open to the public.



EAGLES NEST GOLF CLUB, MAPLE, ONTARIO

Of the 2,126 public facilities, half are located in Ontario and Québec, which together account for 61% of the country’s total population. Those two provinces are also home to 73% of Canada’s 220 private clubs.

That access contributes significantly to Canada’s golf participation rate of more than 20% of total population, representing nearly 5.7 million golfers, according to a recent study by NAVICOM (acting on behalf of the Canadian golf industry).

Interestingly, 9-hole golf accounts for almost 37% of Canada’s total supply, and actually outnumbers 18-hole supply in two provinces. In Saskatchewan, 18-hole courses are outnumbered by more than 3 to 1. Canada also features nine 12-hole facilities—six of which are in Ontario—and three 6-hole facilities.

Resort golf, though a small segment of Canada’s overall supply, is a significant contributor to tourism in several provinces. Countrywide, 167 facilities, or a little more than 7% of total supply, are connected to a resort or a resort/real estate operation. This is similar to the United States, where resort facilities

CANADA GOLF SUPPLY SUMMARY

Total Number of Facilities	2,346
6 Holes	3
9 Holes	868
12 Holes	9
18+ Holes	1,379
36+ Holes	87
Total Number of Golf Holes	37,587
Number of 18-Hole Equivalents	2,088
Number of Daily Fee Facilities	2,126
Number of Private Facilities	220
Number of Golf-Only Facilities	2,080
Number of Resort Facilities	147
Number of Real Estate Development Facilities	99
Number of Real Estate/Resort Facilities	20
Total Population Per 18 HEQs	16,838

*Statistics Canada

88%

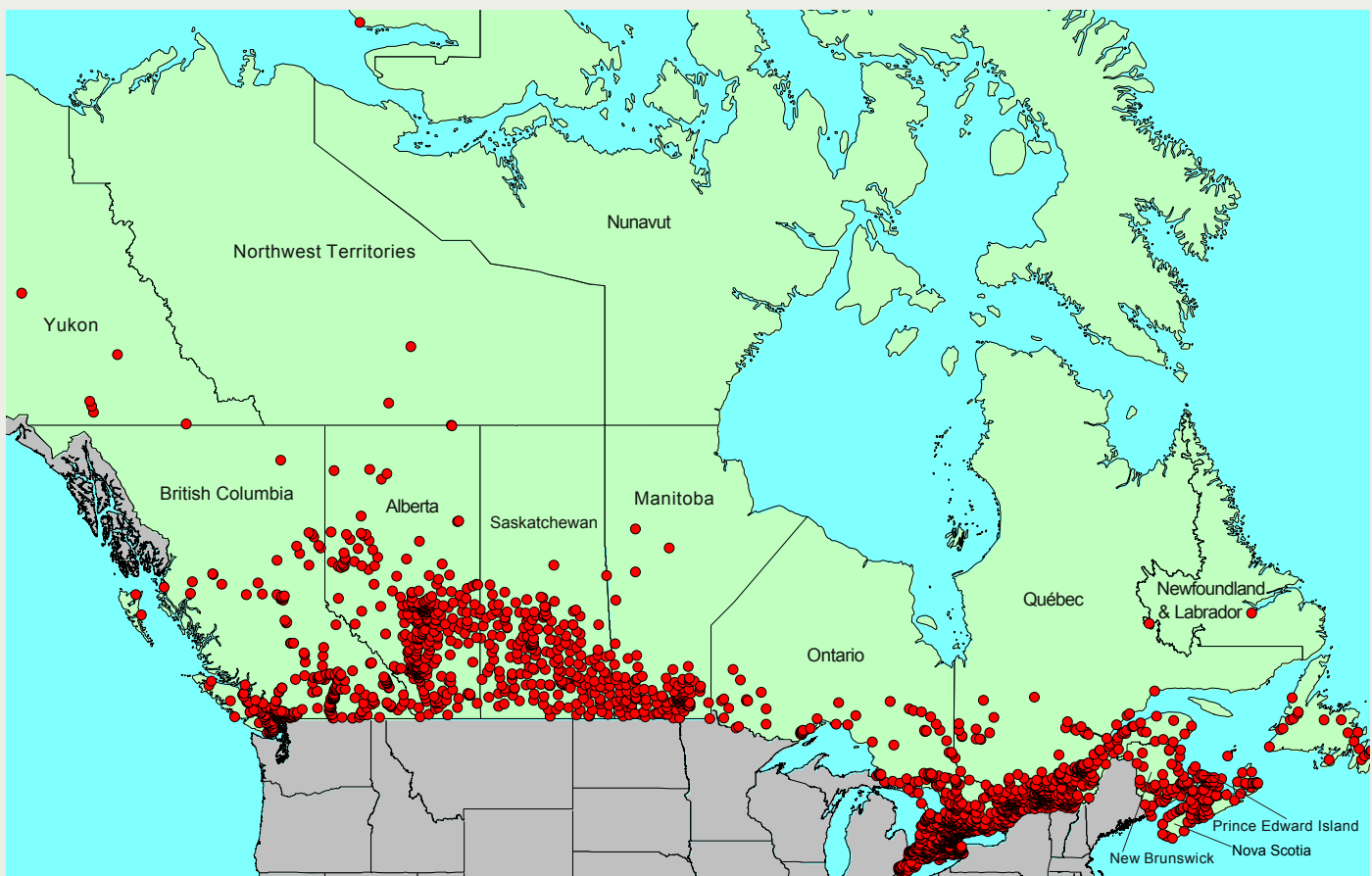
OF CANADIAN GOLF FACILITIES ARE GOLF ONLY
(NO RESORT OR RESIDENTIAL CONNECTION)



51%

OF CANADA'S GOLF FACILITIES ARE LOCATED IN ONTARIO AND QUEBEC





account for 7.6% of supply. Popular destinations Ontario and Québec have 40 and 31 facilities, respectively, that are tied to a resort or a resort/real estate development. In the west, British Columbia and Alberta have 30 and 25 such facilities, respectively.

Course construction hit its peak in the 1960s with the opening of more than 420 facilities. Just as in the United States, a second significant growth spurt occurred in the period between 1990 and 1999, when more than 310 courses — 13% of total supply — opened. The growth was highlighted by the opening of 257 facilities in the four largest provinces of Ontario, Québec, Alberta and British Columbia. Since 2010, 29 facilities have opened in

six different provinces. During the past several years, however, Canada has seen only moderate growth, and currently has 31 18-hole equivalents in various stages of development (NGF tracks openings in 18-hole increments rather than courses or facilities).

Of those, 17 (18 HEQs) have actually broken ground, including seven in Alberta and four in Nova Scotia. Nearly 60% are tied to a real estate development of one type or another.

In the past five to 10 years, 158 facilities have closed. One in five of those were located in Ontario, but supply there remains by far the most plentiful. Three of Canada's 10 provinces have seen fewer than five closings during the past decade.

CANADA FROM A WORLDWIDE PERSPECTIVE — 7% OF THE WORLD'S GOLF FACILITIES ARE LOCATED IN CANADA

There are 34,011 golf facilities in the world. More than 18,600 of those facilities are located in 204 countries outside of the United States. Canada is home to 13% of that worldwide supply (excluding the U.S.), and is one of only seven countries with more than 500 golf facilities. Even when factoring in the United States, which has 15,372 facilities, Canada comprises 7% of the total world supply. While golf is certainly a worldwide game, supply remains largely concentrated among the most golf-developed nations. In fact, excluding the United States' supply, 70% of all golf facilities are located in only 10 countries, and 85% of all facilities worldwide are located in 20 nations.

Golf Facilities in Canada 2015 Edition

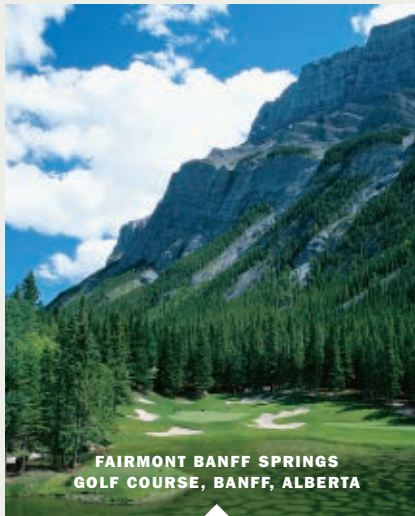
PROVINCIAL OVERVIEW

OF CANADA'S 2,346 golf facilities, all but 11 are found within the country's 10 provinces. The vast majority of these facilities are located in the five largest provinces—Ontario, Québec, Alberta, British Columbia and Saskatchewan. In fact, those provinces are home to more than 78% of the total supply in Canada.

Ontario, with its significant population and vast land area, has the highest density of facilities with 822, or 35% of the country's total supply. As is the case with many other provinces, Ontario's supply is largely populated by public access. Additionally, 9-hole facilities account for 29% of Ontario's total supply.

With 370 facilities, Québec sits atop the second tier of provinces that are home to the bulk of the golf supply in Canada. Included among Québec's facilities are 31 resort or resort/real estate operations, second most among all provinces.

While Ontario and Québec provide the majority of eastern and central Canada's golf facilities, Alberta and British Columbia comprise much of the western supply. Combined, the two neighboring



provinces are home to 623 facilities, or 27% of total supply. The golf inventory in the two provinces is essentially equal (Alberta has 312 facilities to British Columbia's 311).

Saskatchewan and Manitoba are the only other provinces with more than 100 golf facilities. With 208 facilities, Saskatchewan is the fifth largest in terms of supply but ranks second only to Ontario with 150 9-hole facilities. Manitoba has 133 facilities, half of which are 9 holes.

Nova Scotia is chief among the lesser-populated provinces with 75 facilities, followed by New Brunswick, which has 54. Despite its relatively small land area, Prince Edward Island is home to 27 facilities, all of which are open to the public. Canada's easternmost province, Newfoundland and Labrador, has the lightest golf supply with 24 facilities.

Canada's remaining 11 facilities are located in two of the country's three territories—the Yukon (6) and Northwest Territories (5). The Nunavut Territory does not have a golf course of record.

GOLF FACILITY SUPPLY BY TYPE AND PROVINCE

PROVINCE	DAILY FEE	PRIVATE	TOTAL	GOLF ONLY	RESORT	REAL ESTATE DEVELOPMENT	REAL ESTATE/ RESORT
Alberta	289	23	312	265	24	22	1
British Columbia	296	15	311	259	23	22	7
Manitoba	123	10	133	122	5	6	0
New Brunswick	51	3	54	49	3	2	0
Newfoundland	23	0	23	19	3	0	1
Nova Scotia	71	4	75	66	6	2	1
Ontario	702	120	822	750	34	32	6
Prince Edward Island	27	0	27	22	5	0	0
Québec	330	40	370	331	29	8	2
Saskatchewan	204	4	208	186	15	5	2
Totals*	2,116	219	2,335	2,069	147	99	20

*Course totals do not include 11 courses located in Northwest and Yukon territories

(PROVINCIAL OVERVIEW CONTINUED)

GOLF SUPPLY BY PROVINCE SUMMARY

PROVINCE	LAND AREA** (KM2)	POPULATION**	TOTAL FACILITIES	TOTAL HOLES	TOTAL 18-HOLE EQUIVALENTS	POPULATION PER 18-HOLE HEQ
Alberta	642,317	4,025,100	312	4,779	265.5	15,160
British Columbia	925,186	4,583,000	311	4,773	265	17,291
Manitoba	553,556	1,265,000	133	1,824	101	12,525
New Brunswick	71,450	756,100	54	846	47	16,087
Newfoundland	373,872	526,700	23	360	20	26,335
Nova Scotia	53,338	940,800	75	1,158	64	14,700
Ontario	917,741	13,538,000	822	14,196	788.5	17,169
Prince Edward Island	5,660	145,200	27	423	23.5	6,179
Québec	1,365,128	8,155,300	370	6,672	370.5	22,012
Saskatchewan	591,670	1,108,300	208	2,430	135	8,210
Totals*	5,499,918	35,043,500	2,335	37,461	2,080	

*Course totals do not include 11 facilities located in Northwest and Yukon territories

**Does not include territory land area or population figures

GOLF SUPPLY BY FACILITY SIZE AND PROVINCE

PROVINCE	6-HOLE	9-HOLE	12-HOLE	18+ HOLE	36+ HOLE	TOTAL
Alberta	0	127	0	181	4	312
British Columbia	0	120	1	181	9	311
Manitoba	1	67	0	65	0	133
New Brunswick	0	19	0	34	1	54
Newfoundland	0	10	0	12	1	23
Nova Scotia	1	26	0	48	0	75
Ontario	0	238	6	541	37	822
Prince Edward Island	0	10	0	16	1	27
Québec	0	93	1	243	33	370
Saskatchewan	1	150	1	55	1	208
Totals*	3	860	9	1,376	87	2,335

*Course totals do not include 11 facilities located in Northwest and Yukon territories


77%
OF CANADA'S FACILITIES
ARE LOCATED IN
ONTARIO, QUÉBEC,
ALBERTA AND BC



44%
OF CANADA'S TOTAL
9-HOLE SUPPLY
IS LOCATED IN ONTARIO
AND SASKATCHEWAN



81%
OF CANADA'S
36+ HOLE FACILITIES
ARE LOCATED IN
ONTARIO AND QUEBEC



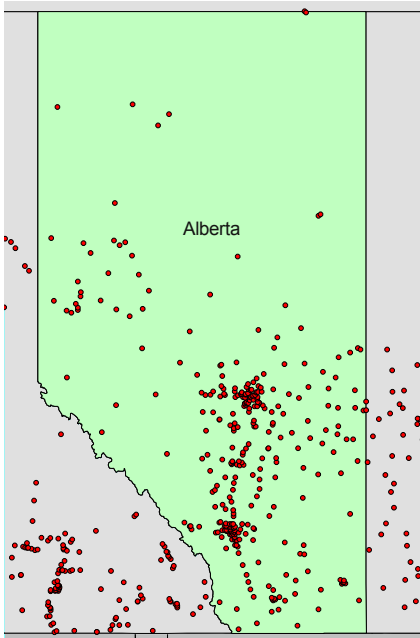
Alberta



LAND AREA: 642,317* KM²

POPULATION (2013): 4,025,000*

TOTAL NUMBER OF FACILITIES: 312



PARADISE CANYON GOLF RESORT, LETHBRIDGE, ALBERTA

Alberta is home to the third largest golf supply among Canada's provinces with 312 facilities, and has seen the most openings this decade with nine. That growth seems poised to continue as there are currently 10 18-hole equivalents in development, the most of any province.

This expansion coincides with an increase in population in the western province. According to Statistics Canada, a little more than 4 million people lived in Alberta in 2013 compared to slightly less than 3.7 million in 2009.

While the majority of Alberta's facilities are daily fee, the province has 23 private clubs, third most among all provinces. Likewise, Alberta enjoys a vibrant tourism industry supported by 24 resort facilities, and currently has 22 that are tied to real estate developments—second most in Canada.

Did You Know? Alberta's Royal Mayfair Golf and Country Club remains the only facility in the region to host the Canadian Open, which took place there in 1958.

6
THE # OF GOLF COURSES LOCATED IN ALBERTA NATIONAL PARKS

312
AVERAGE # OF SUNNY DAYS; MOST OF ANY PROVINCE

GOLF SUPPLY SUMMARY

Total Number of Facilities	312
9-Hole Facilities	127
18+ Hole Facilities	181
36+ Hole Facilities	4
Number of Golf Holes	4,779
Number of 18-Hole Equivalents	265.5
Number of Daily Fee Facilities	289
Number of Private Facilities	23
Number of Resort Facilities	24
Number of Real Estate Development Facilities	22
Number of Real Estate/Resort Facilities	1
Total Population Per 18 HEQ	15,160

*Statistics Canada

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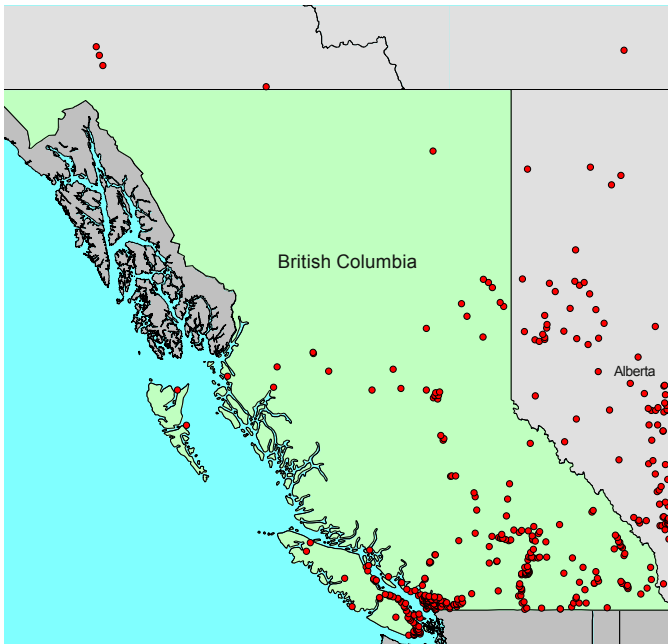


British Columbia

LAND AREA: 925,186* KM²

POPULATION (2013): 4,582,000*

TOTAL NUMBER OF FACILITIES: 311



NICKLAUS NORTH GOLF COURSE, WHISTLER, BRITISH COLUMBIA

British Columbia is the third most populated province in Canada and ranks fourth in total golf facilities with 311, only one fewer than its neighbor to the east, Alberta. Canada's westernmost province is home to the second highest number of golf course real estate developments with 22.

Dating back to 2000, 28 facilities have opened in the province, second only to Ontario during that same period. From 1990 to 1999, British Columbia's golf course supply grew by 61 courses, or 19% of total current supply.

That overall growth appears to be continuing as there are nine facilities in various stages of development, all of which are tied to real estate or resort developments.

British Columbia has hosted the Canadian Open four times, third most behind Ontario and Québec. Shaughnessy Golf and Country Club is the only facility outside of those two provinces to host the national championship more than once (1966, 2005 and 2011).

8
THE # OF 36-HOLE FACILITIES; 3RD MOST IN CANADA

84%
OF BRITISH COLUMBIA'S FACILITIES ARE GOLF ONLY

GOLF SUPPLY SUMMARY

Total Number of Facilities	311
9-Hole Facilities	120
12-Hole Facilities	1
18+ Hole Facilities	181
36+ Hole Facilities	9
Number of Golf Holes	4,773
Number of 18-Hole Equivalents	265
Number of Daily Fee Facilities	296
Number of Private Facilities	15
Number of Resort Facilities	23
Number of Real Estate Development Facilities	22
Number of Real Estate/Resort Facilities	7
Total Population Per 18-HEQs	17,291

*Statistics Canada

CONTACT BRITISH COLUMBIA GOLF

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CONTACT PGA OF BRITISH COLUMBIA

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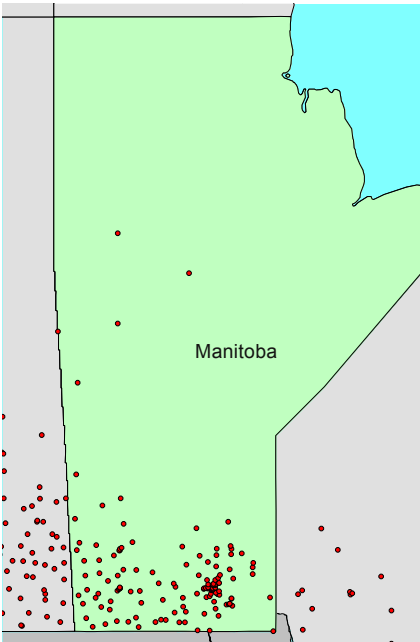
Manitoba



LAND AREA: 553,556* KM²

POPULATION (2013): 1,265,000*

TOTAL NUMBER OF FACILITIES: 133



Manitoba boasts 133 facilities, including one of only three 6-hole layouts found in Canada. Of its total supply, half are 9-hole facilities and all but 10 are open to the public.

The majority of the province's growth in supply took place in the second half of the 20th century. Since 2000, however, there have been only eight openings, and just one since 2010.

That said, Manitoba's golf supply has remained viable, as only 5.5 (18-HEQs) course closings are on record during that same period. Additionally, Manitoba has two courses in development, including one under construction. The province offers plenty of remarkable golfing options, highlighted by breathtaking prairie layouts that take full advantage of the region's rolling topography and untouched natural surroundings.

The Winnipeg-based St. Charles Country Club and Niakwa Country Club have both hosted the Canadian Open, the only two times the country's national championship has taken place in Manitoba.

90%
OF MANITOBA'S
TOTAL SUPPLY ARE
STAND-ALONE GOLF
FACILITIES

16
THE NUMBER OF
DAYLIGHT HOURS
GOLFERS ENJOY DURING
SUMMER MONTHS

GOLF SUPPLY SUMMARY

Total Number of Facilities	133
6-Hole Facilities	1
9+ Hole Facilities	67
18+ Hole Facilities	65
Number of Golf Holes	1,824
Number of 18-Hole Equivalents	101
Number of Daily Fee Facilities	123
Number of Private Facilities	10
Number of Resort Facilities	5
Number of Real Estate Development Facilities	6
Number of Real Estate/Resort Facilities	0
Total Population Per 18-HEQs	12,525

*Statistics Canada

CONTACT GOLF MANITOBA

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CONTACT PGA OF MANITOBA

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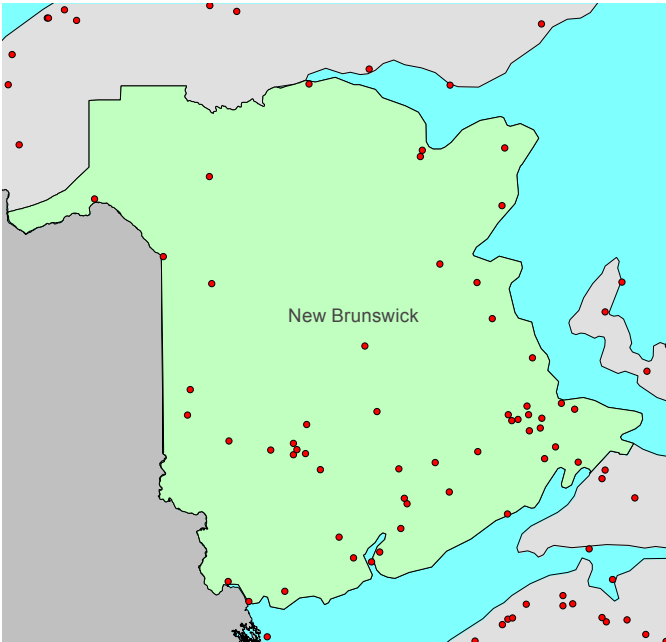
New Brunswick



LAND AREA: 71,450* KM²

POPULATION (2013): 756,100*

TOTAL NUMBER OF FACILITIES: 54



KINGSWOOD GOLF COURSE, FREDERICTON, NEW BRUNSWICK

While New Brunswick is home to only 54 golf courses, access to quality golf has never been an issue in the eastern province. All but three of the province's facilities are open to public play, and 65% of them feature 18 holes or more. The result is a healthy supply, especially considering that New Brunswick's population is only slightly more than 756,000.

While there's been little to no growth in facilities this decade. There are three courses in development, two of which are expected to be private. New Brunswick has witnessed only two recorded closings during that same time.

New Brunswick is the only province in the country's Atlantic region to have hosted the RBC Canadian Open, which came to Riverside Golf and Country Club back in 1939.

Did You Know? Aroostook Valley Country Club is a golf course in New Brunswick that is also in the United States. You can literally hit a golf ball out of the country and not need a passport to go play it again.

95%
OF NEW BRUNSWICK'S
GOLF FACILITIES
ARE OPEN
TO THE PUBLIC

65%
NEW BRUNSWICK
FACILITIES WITH
18 HOLES OR MORE

GOLF SUPPLY SUMMARY

Total Number of Facilities	54
9-Hole Facilities	19
18+-Hole Facilities	34
36+-Hole Facilities	1
Number of Golf Holes	846
Number of 18-Hole Equivalents	47
Number of Daily Fee Facilities	51
Number of Private Facilities	3
Number of Resort Facilities	3
Number of Real Estate Development Facilities	2
Number of Real Estate/Resort Facilities	0
Total Population Per 18-HEQs	16,087

*Statistics Canada

CONTACT GOLF NEW BRUNSWICK

NEW BRUNSWICK GOLF ASSOCIATION (PSO) CONTACT: Tyson Flinn, Executive Director **ADDRESS:** 500 Beaverbrook Court, Suite 440, Fredericton, NB, Canada E3B 5X4 **PHONE:** 1.877.833.4662 **EMAIL:** info@golfnb.ca **WEBSITE:** www.golfnb.ca

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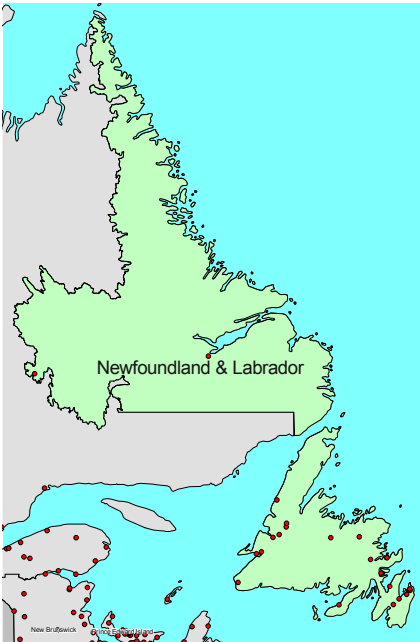
Newfoundland & Labrador



LAND AREA: 373,872* KM²

POPULATION (2013): 526,700*

TOTAL NUMBER OF FACILITIES: 23



HUMBER VALLEY GOLF CLUB, CORNER BROOK, NEWFOUNDLAND

Newfoundland and Labrador has the smallest number of golf facilities in the country, not surprising given its northeastern location and population base, which is the second smallest in Canada.

Yet, all of its 23 facilities are open to public play, and there are a relatively equal number of 9- and 18-hole facilities.

What Newfoundland lacks in quantity, it more than makes up for in quality. Many of the province's courses are built along rugged coastlines that offer breathtaking views of the surrounding area. Chief among Newfoundland/Labrador's respected layouts is the River Course at the Humber Valley Resort. Carved along the shores of the Humber River, the River Course is a hidden gem located in the northwestern part of the province.

Crafted by famed Canadian architect Doug Carrick, the River Course was named the Best New Course in 2007 by SCOREGolf and was recognized as the 10th Best Canadian Modern Course by Golfweek in 2013.

There has been only one facility closing on record in Newfoundland and Labrador, and no new projects are in development.

2
OF GOLF FACILITIES
LOCATED IN LABRADOR;
REMAINDER ARE ON
NEWFOUNDLAND

94%
OF THE PROVINCE
POPULATION LIVES ON
THE ISLAND OF
NEWFOUNDLAND

GOLF SUPPLY SUMMARY	
Total Number of Facilities	23
9-Hole Facilities	10
18+ Hole Facilities	12
36+ Hole Facilities	1
Number of Golf Holes	360
Number of 18-Hole Equivalents	20
Number of Daily Fee Facilities	23
Number of Private Facilities	0
Number of Resort Facilities	3
Number of Real Estate Development Facilities	0
Number of Real Estate/Resort Facilities	1
Total Population Per 18-HEQs	26,335

*Statistics Canada

CONTACT GOLF NEWFOUNDLAND & LABRADOR
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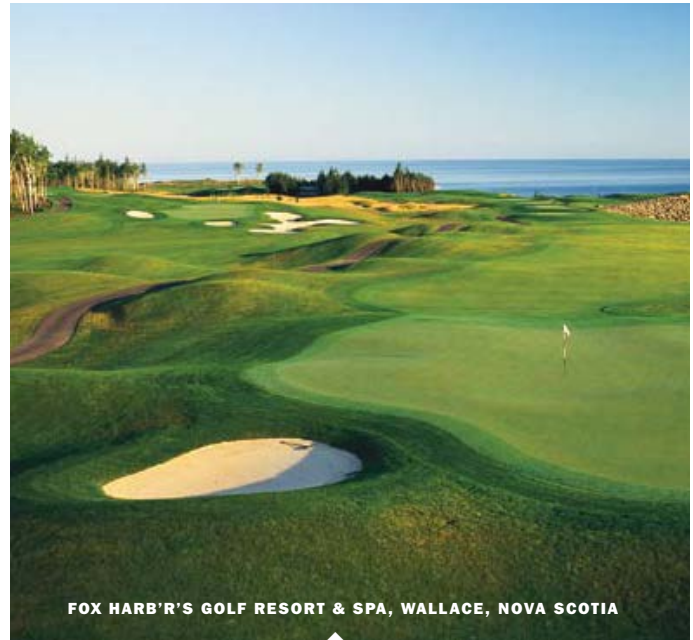
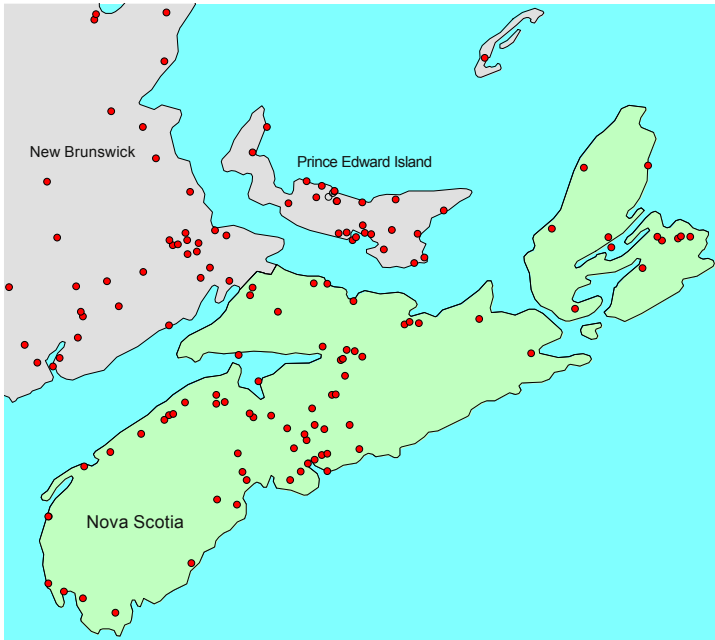
Nova Scotia



LAND AREA: 53,338* KM²

POPULATION (2013): 940,800*

TOTAL NUMBER OF FACILITIES: 75



While Nova Scotia is the second smallest province in total land mass, it's home to 75 golf facilities. All but four of those facilities are open to the public, and eight have been added since the turn of the century.

Of the total supply, 34% are 9-hole facilities, and only three have more than 18 holes. The province is also home to a facility with a 6-hole layout.

Nova Scotia currently has four courses under construction, second most of any province. It also features the recently opened Cabot Links, which has gained worldwide praise for its 18-hole design located along the rugged coast of Cape Breton in Inverness County.

The links-style course, which opened in 2012, ranks 42nd on Golf Digest's list of the "Top 100 Greatest Courses." A second course—Cabot Cliffs—is currently under construction at the resort.

Did You Know? Golf was brought to the province from Walter Crowe, Sydney Mayor 189.

10%
NOVA SCOTIA'S FACILITIES ARE CONNECTED TO A RESORT, REAL ESTATE DEVELOPMENT OR BOTH

27%
OF CANADIAN FACILITIES CURRENTLY UNDER CONSTRUCTION ARE LOCATED IN NOVA SCOTIA

GOLF SUPPLY SUMMARY

Total Number of Facilities	75
6-Hole Facilities	1
9-Hole Facilities	26
18+ Hole Facilities	48
Number of Golf Holes	1,158
Number of 18-Hole Equivalents	64
Number of Daily Fee Facilities	71
Number of Private Facilities	4
Number of Resort Facilities	6
Number of Real Estate Development Facilities	2
Number of Real Estate/Resort Facilities	1
Total Population Per 18-HEQs	14,700

*Statistics Canada

CONTACT INFORMATION

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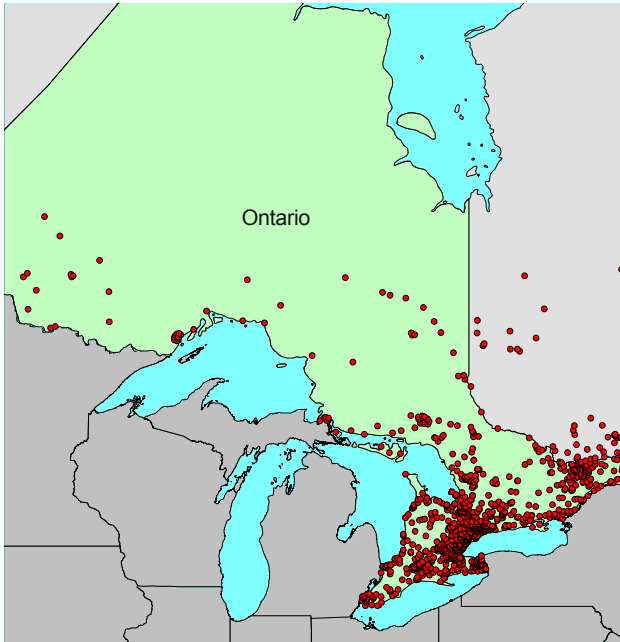
Ontario



LAND AREA: 917,471* KM²

POPULATION (2013): 13,538,000*

TOTAL NUMBER OF FACILITIES: 822



MUSKOKA BAY CLUB, GRAVENHURST, ONTARIO

Ontario's 822 golf facilities account for nearly 35% of Canada's total supply—a percentage that closely mirrors its share of the country's total population (39% in 2013).

With more than double the amount of facilities than any other territory, it's not surprising that the province has the most diverse collection of golf facilities. That supply includes the largest number of 36-hole facilities and six of the country's nine 12-hole layouts.

Ontario's St. George Golf and Country Club is one of only two Canadian courses on Golf Magazine's latest "Top 100 Golf Courses in the World," (87th).

More than two thirds of Ontario's facilities feature 18 holes or more, and no other province has seen real estate development and resorts tied so closely to golf. Of the province's total supply, roughly 9% are part of a resort, real estate development or both.

Did you know? Niagara-on-the-Lake is the oldest golf course in the province. It opened in 1875.

38%
OF ALL GOLF HOLES
IN CANADA ARE
FOUND IN ONTARIO

50
OF ONTARIO'S COURSES
ARE LISTED ON
SCOREGolf's TOP 100
IN CANADA LIST

GOLF SUPPLY SUMMARY

Total Number of Facilities	822
9-Hole Facilities	238
12-Hole Facilities	6
18+ Hole Facilities	541
36+ Hole Facilities	37
Number of Golf Holes	14,196
Number of 18-Hole Equivalents	788.5
Number of Daily Fee Facilities	702
Number of Private Facilities	120
Number of Resort Facilities	34
Number of Real Estate Development Facilities	32
Number of Real Estate/Resort Facilities	6
Total Population Per 18-HEQs	17,169

*Statistics Canada

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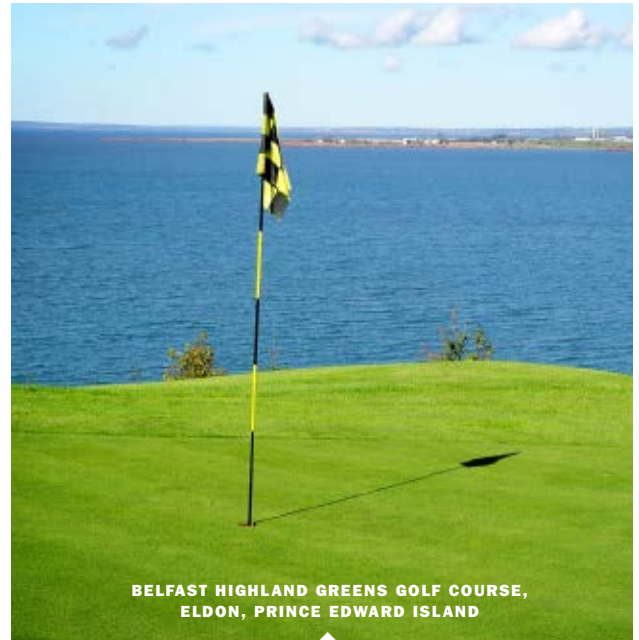
Prince Edward Island



LAND AREA: 5,660* KM²

POPULATION (2013): 145,200*

TOTAL NUMBER OF FACILITIES: 27



BELFAST HIGHLAND GREENS GOLF COURSE, ELDON, PRINCE EDWARD ISLAND

Albeit Canada's smallest province in both size and population, Prince Edward Island (PEI) maintains a solid supply of 27 golf facilities, all of which are open to public play. While that number represents the second-smallest supply of all provinces, at least a third of PEI's facilities were built after 1990, and the island boasts a strong supply relative to its full-time residents.

PEI is home to five resort facilities, while the remaining 22 are golf only, meaning there are no real estate developments with a golf facility in the province.

Given that much of the island is sparsely developed, many of the province's courses offer breathtaking views of the ocean and rolling hillsides.

In 2011, PEI was named the Undiscovered Golf Destination of the Year by the International Association of Golf Travel Operators.

Did you know? Stanley Thompson's only course on PEI is Green Gables.

343
THE POPULATION PER GOLF HOLE ON PRINCE EDWARD ISLAND

2
THE # OF COURSES RANKED IN GOLF DIGEST'S "TOP 30 COURSES IN CANADA"

GOLF SUPPLY SUMMARY

Total Number of Facilities	27
9-Hole Facilities	10
18+ -Hole Facilities	16
36+ -Hole Facilities	1
Number of Golf Holes	423
Number of 18-Hole Equivalents	23.5
Number of Daily Fee Facilities	27
Number of Private Facilities	0
Number of Resort Facilities	5
Number of Real Estate Development Facilities	0
Number of Real Estate/Resort Facilities	0
Total Population Per 18-HEQs	6,179

*Statistics Canada

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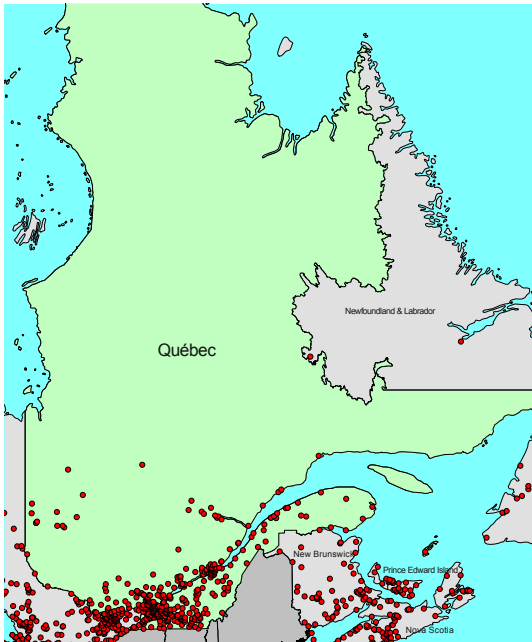
Québec



LAND AREA: 1.365* KM²

POPULATION (2013): 8,155,300*

TOTAL NUMBER OF FACILITIES: 370



LE DIABLE GOLF COURSE, MONT TREMBLANT, QUÉBEC

Québec, the largest Canadian province by land mass, features the second greatest density of golf supply with 370 facilities. The province is also among the most popular destinations in Canada, offering 29 golf resorts and 33 facilities with 36 holes or more.

Of its total supply, the vast majority are daily fee operations. Only 11% of Québec's courses are private.

As with most provinces, Québec has seen a slowdown in course development. Since 2010, only three facilities have opened, and two are currently in development.

Did You Know? Québec is home to The Royal Montreal Golf Club, which was founded in 1873. The famed course has also hosted the Canadian Open 10 times, including the inaugural tournament in 1904. Québec has hosted Canada's national championship more times than all but one province.

75%
OF QUÉBEC
FACILITIES HAVE 18
HOLES OR MORE

26
THE # OF TIMES THE
CANADIAN OPEN HAS
BEEN PLAYED
IN QUÉBEC

GOLF SUPPLY SUMMARY

Total Number of Facilities	370
9-Hole Facilities	93
12-Hole Facilities	1
18+-Hole Facilities	243
36+-Hole Facilities	33
Number of Golf Holes	6,672
Number of 18-Hole Equivalents	370.5
Number of Daily Fee Facilities	330
Number of Private Facilities	40
Number of Resort Facilities	29
Number of Real Estate Development Facilities	8
Number of Real Estate/Resort Facilities	2
Total Population Per 18-HEQs	22,012

*Statistics Canada

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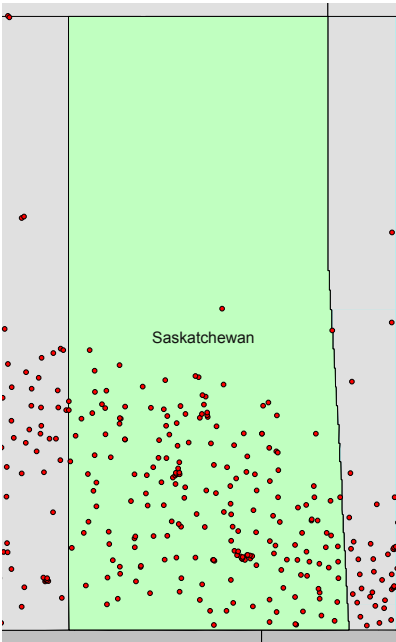
Saskatchewan



LAND AREA: 591,670* KM²

POPULATION (2013): 1,108,300*

TOTAL NUMBER OF FACILITIES: 208



Although it ranks fifth among Canada's provinces in total golf supply, Saskatchewan has 208 facilities serving a population of just over 1.1 million, making it the Canadian leader in golf facilities per capita. Additionally, Saskatchewan's 150 9-hole facilities ranks second among all Canadian provinces.

When factoring in one 6-hole course and another 12-hole facility, 73% of Saskatchewan's facilities have fewer than 18 holes, a percentage far and away larger than any other province.

That profile is in line with what we see in similar agricultural-based regions in the United States, including the West North Central area, where 9-hole golf makes up 53% of the total supply in the region. Iowa, for example, has 260 9-hole courses, accounting for 66% of its total supply.

The majority of Saskatchewan's growth took place in the second half of the 19th century, when 125 facilities—60% of total current supply—were added between 1960 and 2000.

Did You Know? Saskatchewan has the distinction of leading the world in sand-greens courses.

25%
OF PEOPLE
12 YEARS OR OLDER
IN SASKATCHEWAN
PLAY AT LEAST
5 ROUNDS OF GOLF
ANNUALLY

17%
OF CANADA'S
TOTAL 9-HOLE SUPPLY
IS LOCATED IN
SASKATCHEWAN



GOLF SUPPLY SUMMARY

Total Number of Facilities	208
6-Hole Facilities	1
12-Hole Facilities	1
9-Hole Facilities	150
18+ -Hole Facilities	55
36+ -Hole Facilities	1
Number of Golf Holes	2,430
Number of 18-Hole Equivalents	135
Number of Daily Fee Facilities	204
Number of Private Facilities	4
Number of Resort Facilities	15
Number of Real Estate Development Facilities	5
Number of Real Estate/Resort Facilities	2
Total Population Per 18-HEQs	8,210

*Statistics Canada

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Golf Facilities in Canada 2015 Edition



CANADA GOLF DEVELOPMENT SCORECARD

GOLF'S GROWTH has slowed during the past several years in Canada, much as it has in the majority of highly developed nations around the world. There have been 22 (18-HEQs*) documented openings since 2010, or just slightly more than 1% of overall supply. The majority of those openings have occurred in Alberta (7) and Ontario (6.5), two of the most populated golf centers in Canada. British Columbia saw an addition of five facilities during that period.

The trend appears to be continuing given the number of golf facility projects that are currently in various stages of development (in planning or under construction). Of the 31 (18 HEQs) courses in development projects, slightly more than half are located in Alberta and Ontario. British Columbia has five projects under development.

Overall, there are 17 courses actually under construction in five provinces, seven of which are taking place in Alberta. Interestingly, Nova Scotia, currently a lesser-supplied province, has the second most courses under construction with four, the same number as Ontario.

All 31 (18 HEQs) courses being developed are public, keeping in line with Canada's current supply.

Yet in contrast to existing supply, 73% of those projects are linked to real estate developments, resorts or both. (Slightly less than 10% of existing courses are tied to a real estate development or resort).

Provided all of these projects come to fruition

over the next four or five years, Canada's overall golf supply would increase by a little more than 1%.

CLOSURES

According to records, a total of 158 facilities in Canada have closed over the years. While the actual dates of many of the closures are not available, the majority have ceased operations in the past decade or so.

Forty-one of the closings, or 26%, took place in Ontario. Alberta and Quebec

had the next most with 26 and 25, respectively. While those three provinces combined to account for 62% of the closures, they continue to account for roughly two-thirds of the country's current supply.

The vast majority of the total closures were public, stand-alone courses. Only five private courses have closed during the past decade. Nine-hole facilities were by far the largest casualty, outpacing 18-hole closures by more than 2 to 1.



DEVELOPMENT HAS SLOWED, BUT NEW COURSES ARE ON THE WAY IN CANADA'S MOST-POPULATED PROVINCES.

* Historically, NGF tracks openings and closures in 18 HEQs (see definition page).

Golf Facilities in Canada 2015 Edition



CANADA GOLF DEVELOPMENT SCORECARD

COURSE DEVELOPMENT BY STATUS (18-HEQS)

PROVINCE	IN PLANNING	UNDER CONSTRUCTION	TOTAL
AB	3	7	10
BC	4	1	5
MB	1	.5	1.5
NB	1.5	.5	2
NS	1	4	5
ON	2	4	6
QC	1.5	0	1.5
Total	14	17	31

FACILITY CLOSURES BY GOLF COURSE SIZE

PROVINCE	9 HOLES	18+ HOLES	TOTAL
Alberta	20	6	26
British Columbia	17	4	21
Manitoba	9	1	10
New Brunswick	2	0	2
Newfoundland	1	0	1
Nova Scotia	12	1	13
Ontario	20	21	41
Prince Edward Island	2	1	3
Québec	19	6	25
Saskatchewan	15	0	15
Nunavut (Territory)	0	1	1
Total	117	41	158

FACILITY CLOSURES BY TYPE

PROVINCE	JUST GOLF	REAL ESTATE DEVELOPMENT	RESORT	TOTAL
Alberta	22	1	3	26
British Columbia	20	1	0	21
Manitoba	8	0	2	10
New Brunswick	2	0	0	2
Newfoundland	1	0	0	1
Nova Scotia	12	1	0	13
Ontario	37	2	2	41
Prince Edward Island	3	0	0	3
Québec	24	1	0	25
Saskatchewan	15	0	0	15
Nunavut (Territory)	1	0	0	1
Total	145	6	7	158

*Closures estimated within past five to ten years

CASE STUDIES

“The opening of Cabot Links will be a boon for golf in Nova Scotia,” wrote *GolfWorld* magazine following its opening.

The Cabot Links Success Story

OF THE 29 facilities known to have opened in Canada this decade, not one has come close to the fanfare and anticipation generated by Cabot Links, an 18-hole championship course that debuted along the shores of Nova Scotia in June 2012.

Funded in large part by Bandon Dunes owner Mike Keiser, Cabot Links was so grand in scope and vision that it took more than a decade to become a reality. Yet by all accounts, the end result is the most significant addition to the Canadian golf landscape in decades.

The only true links-style layout in Canada (per www.cabotlinks.com), the course was built on an abandoned coal field on Cape Breton in Inverness County, and is the centerpiece of a growing resort that also includes the 48-room Cabot Links Lodge.

The Rod Whitman-designed course was carved from the rugged Nova Scotia coastline overlooking the Gulf of St. Lawrence, and provides all the views and challenges that one would expect from links golf.

In fact, five holes—Nos. 12 through 16—play directly alongside the beach, providing gorgeous water views and sometimes daunting conditions that are reminiscent of golf in the Old World.

“The opening of Cabot Links will be a boon for golf in Nova Scotia,” wrote *GolfWorld* magazine following its opening.

Despite its youth, Cabot Links has already been named to *Golf Digest’s*

“World’s 100 Greatest Courses” (42nd) and *Golf Magazine’s* exclusive “Top 100 Courses in the World” (82nd), and has received praise from dozens of other publications both inside and outside of Canada.

course—Cabot Cliffs. The course is being crafted by the heralded tandem of Bill Coore and Ben Crenshaw along an equally impressive stretch of coastal land just north of the original course.

The resort already employs more



CABOT LINKS, INVERNESS, NOVA SCOTIA

At the same time, the course has drastically raised Nova Scotia’s profile as a golf destination, and brought new energy to the once struggling county of Inverness.

And now, only two years after Cabot Links opened, work is underway on the resort’s second championship golf

than 120 people from the region, and with the addition of a second course, even more jobs are being created.

It’s a reminder that a well-planned and managed golf development project can not only benefit golfers, but also be a blessing for the people who live around it.

CASE STUDIES

“Golfers play 12 holes here during the week and then get their 18-hole rounds in on the weekends when they have more time,” Holmes said. “It really has worked out well.”

Derrydale Golf Club Goes 12 Holes

“Nine holes weren’t enough and 18 were too much. Twelve holes, however, is absolutely perfect.”— Jim Holmes, owner of Derrydale Golf Club.

With those words, Holmes summed up the success story that is his family-owned,

followed suit. Food and beverage sales also took a dip as golfers weren’t on the course long enough to work up much of an appetite for either.

Then with one simple suggestion, and ultimately the resolve to follow

“We should consider the possibility of making 12 holes the standard round.... Eventually it would be accepted because it makes sense in people’s lives.” — Jack Nicklaus

Holmes added the three holes in the fall of 2012 to test the response. The change proved to be so positive that he made it permanent prior to reopening for the 2013 spring season. The result: golfers returned to Derrydale in droves. Golf cart revenues rebounded, as did the food and beverage business.

That momentum has continued. The course was on track to do 30,000-plus rounds in 2014, and is busy Monday through Friday with golfers taking advantage of the 2 ½-hour rounds on the challenging layout.

“Golfers play 12 holes here during the week and then get their 18-hole rounds in on the weekends when they have more time,” Holmes said. “It really has worked out well.”

As of Spring 2015, Derrydale charges \$37 a round Friday through Sunday and \$35 Monday through Thursday. Senior golfers, which are a big part of Derrydale’s clientele, pay \$24 a round, and juniors are \$20 for 12 holes. Carts are an extra \$10.

It may be a little much to say the addition of three holes saved the Derrydale Golf Club, but there’s no denying that the popular course is evidence that the concept of 12-hole golf has its merits as operators strive to grow participation in the game.



12-hole facility. At one time a popular 18-hole executive course in Mississauga, Derrydale Golf Club was trimmed to nine holes following the 2010 sale of 33 acres to a real estate developer.

While the land sale was profitable, the reaction to the new 9-hole layout from loyal customers was underwhelming at best. Rounds fell in 2011, and with the majority of golfers now walking the course, golf cart revenues

through on it, everything changed at Derrydale. Heeding the advice of a staff member, Holmes took advantage of some remaining but unused portions of the former golf course to resurrect three holes, turning Derrydale into the 12-hole facility it is today. The idea was born from comments made by golf legend Jack Nicklaus, who has recently championed the concept of 12-hole golf as a way to boost participation.

**GOLF FACILITIES
IN CANADA
2015 EDITION**

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