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IPSOS REID, ON BEHALF OF 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 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.

“Since 1979, the RCGA has been a leader in Canadian golf industry research. The Ipsos Reid study provides very good news about the health of our sport in Canada and identifies areas where our industry must continue to work together and improve.” said Stephen Ross, RCGA Executive Director. “As the governing body of golf in Canada, the RCGA’s unifying mission is to promote participation in and a passion for the game while protecting its traditions and integrity. We are extremely proud of our 22 championships and various national programs and services. The new industry findings will help us benchmark those initiatives and develop future strategic direction to engage more Canadians to get involved in our great game.” continued Ross.

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 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 (0.812 million), and Alberta (0.754 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 instruction is listed as important factor in the take-up of the game of golf, particularly among junior aged golfers.

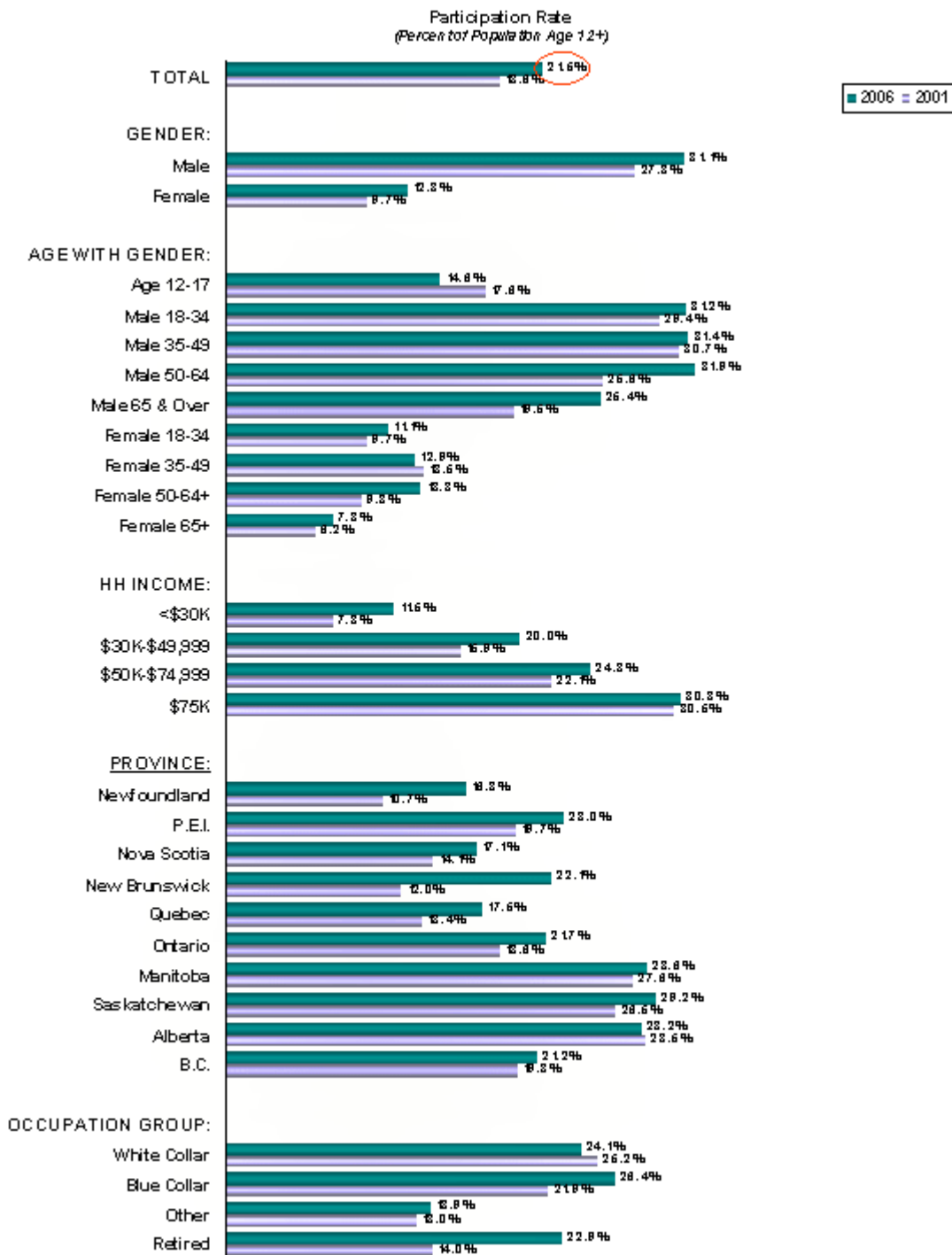
These are some of the findings of an Ipsos Reid poll conducted for The Royal Canadian Golf Association. Ipsos Reid fielded the research via an on-line survey format among Ipsos Reid's panel members. A representative sample of households was drawn by census-defined strata: by province, and within province 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	
	Participation Rate	# Golfers (000)	Participation Rate	# Golfers (000)	Participation Rate	# Golfers (000)
Newfoundland	7.6%	37	10.7%	50	16.3%	76
PEI	15.0%	18	19.7%	23	23.0%	28
Nova Scotia	14.4%	115	14.1%	115	17.1%	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	28.6%	282
Saskatchewan	31.8%	271	26.5%	227	29.2%	255
Alberta	29.7%	692	28.5%	723	28.2%	754
British Columbia	23.5%	771	19.8%	698	21.2%	812

Demographic Profile of All Canadian Golfers



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This is a very small sampling of data from the 2006 Golf Participation in Canada Survey, the RCGA's fourth independent effort to assess the golf market in Canada conducted by IPSOS Reid, one of Canada's most widely known and respected research firms. The data comes from a survey of 21,000 respondents in May of 2006. The data from the 2006 study is compared to that from earlier studies.

# Golfers & Rounds Played	1990	1996	1998	2001	2005
Total pop'n aged 12 or older:	21.2 million	24.7 million	25.2 million	26.3 million	27.7 million
# All golfers aged 12 or older:	3,868,000	4,785,000	5,172,000	4,895,000	5,952,000
Participation Rate:	18.4%	19.4%	20.5%	18.6%	21.5%
Average # rounds:	13.6	14.1	13.9	13.2	15.5
Total # rounds in Canada:	52,600,000	67,000,000	71,700,000	64,700,000	92,200,000
# Core golfers (8+ rounds/yr.)	1,388,000	1,818,000	2,111,000	1,855,000	2,737,000
# Occasional golfers (1-7 rds./yr.)	2,155,000	2,608,000	2,637,000	2,608,000	2,837,000
# Male golfers	2,789,000	3,478,000	3,703,000	3,596,000	4,226,000
# Female golfers	1,079,000	1,307,000	1,469,000	1,299,000	1,726,000
# Junior golfers	325,000	359,000	425,000	432,000	379,000
# Club members	650,000	588,000	596,000	583,000	756,000

Demographic Highlights

Sex:		Average Age:	
% Male	71%	Male	44
% Female	29%	Female	44
Household Income:		Occupation:	
Over 75,000	31%	White Collar:	46%
\$50,000 - 74,999	33%	Blue Collar:	18%
\$30,000-49,999	22%	Other:	36%
Under \$30,000	14%	Retired:	21%
Golfers by Region:			
Atlantic:	7%	Quebec:	19%
Ontario:	39%	Prairies:	22%
British Columbia:	14%		

To order the complete 2006 Golf Participation in Canada Survey Report contact the
Royal Canadian Golf Association at (905) 849-9700. © 2006 RCGA