

San Diego's Golf Economy

A Report by the National University System Institute for Policy Research

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EXECUTIVE SUMMARY

Few economic sectors in San Diego County have achieved more success than the golf industry. The region ranks among the top golf travel destinations in the world.¹ San Diego is home to 90 public and private golf courses, several of which rank in various “top 100” lists, and a number of the nation’s largest golf equipment manufacturers. San Diego’s Torrey Pines Golf Course annually hosts one of the PGA tour’s most popular events and was the site of the 2008 U.S. Open, the second highest attended in Open history.²

In 2008, golf-related activities in San Diego County generated more than \$2.6 billion in revenues and account for approximately 26,900 jobs. Average income for golf-related jobs in San Diego was \$39,700.

SAN DIEGO GOLF ECONOMY Summary of Golf Revenues

Core Industry	2008 millions
Equipment manufacturing	\$ 1,890.1
Course facility operations	407.2
Travel, tournaments, charitable events	247.1
Merchandise sales	35.4
Ancillary golf services*	29.2
TOTAL	\$ 2,609.0

*Consulting, management, advertising, instruction, travel/tour, publishing and rental services.

Source: National University System Institute for Policy Research.

THE SIZE OF SAN DIEGO’S GOLF ECONOMY³

During 2008 golf-related activities in San Diego generated more than \$2.6 billion in revenues. This makes golf larger than our legal services sector (\$2.3 billion), aerospace (\$1.8 billion), agriculture (\$1.6 billion), or software industry (\$1.6 billion).⁴

The average income from golf-related jobs is \$39,700.⁵ This number is significantly boosted by the 6,700 jobs directly tied to golf equipment manufacturing and distribution, which pay an average wage of \$62,100.⁶ Average annual income





for both golf course operations and related hospitality jobs is impacted by the fact that some of these jobs are seasonal and/or part time. In comparison, San Diego’s overall average wage is \$46,300.

San Diego’s golf industry is divided into five main segments: 1) golf equipment and related manufacturing, 2) operations of courses and driving ranges, 3) golf-related travel, tournaments and charitable giving, 4) merchandising and retailing, and 5) miscellaneous services such as instruction and consulting.

In this report we measure golf’s footprint on the San Diego economy in two closely related ways. We first examine the industry’s size by overall revenues and employment in the aforementioned five segments. In the second part of the report, we discuss golf’s economic impact on San Diego – identifying the “new dollars” the industry brings into the local economy and the associated indirect and induced impact as these dollars circulate. Readers should keep this distinction in mind as they examine the report.

SAN DIEGO’S GOLF MANUFACTURES: A COMPARATIVE NOTE

Primarily because of golf equipment manufacturing, San Diego is one of the nation’s largest centers for sporting and recreational goods equipment manufacturing.⁷ According to the 2007 County Business Patterns (the Census’ most recent year available), 94 sporting and athletic goods manufacturers (NAICS code 33992) in San Diego employed 3,843 workers.

LEADING METROPOLITAN AREAS FOR SPORTING AND ATHLETIC GOODS MANUFACTURING

Area Name	Em- ployees	Annual payroll (000s)	Pay per emp- loyee	Total Estab- lish- ments	Estabs by No. of Employees					
					1-9	10- 49	50- 249	250- 499	500- 999	1000 or more
SAN DIEGO-CARLSBAD-SAN MARCOS, CA	3,843	\$216,922	\$56,400	94	64	22	5	1	1	1
Los Angeles-Long Beach-Santa Ana, CA	2,718	123,424	45,400	132	82	42	5	3		
Providence-New Bedford-Fall River, RI-MA	2,500-4,999	D	D	15	7	2	2	2	1	1
Ogden-Clearfield, UT	2,285	67,040	29,300	9	3	2	2	1		1
Seattle-Tacoma-Bellevue, WA	1,100	59,527	54,100	35	25	6	3		1	
Minneapolis-St. Paul-Bloomington, MN-WI	1,011	48,662	48,100	44	36	5	1	2		
Phoenix-Mesa-Scottsdale, AZ	1,000-2,499	D	D	24	17	4	2		1	
Logan, UT-ID	1,000-2,499	D	D	8	5		2			1
Chicago-Naperville-Joliet, IL-IN-WI	928	45,614	49,200	41	24	14	2	1		
New York-Northern New Jersey-Long Island, NY-NJ-PA	894	29,014	32,500	51	35	11	4	1		
Dallas-Fort Worth-Arlington, TX	883	37,955	43,000	32	19	8	5			
Salt Lake City, UT	745	26,158	35,100	19	8	9	1	1		
Riverside-San Bernardino-Ontario, CA	583	18,456	31,700	23	11	9	3			
Boston-Cambridge-Quincy, MA-NH	580	28,888	49,800	21	13	5	3			
Milwaukee-Waukesha-West Allis, WI	556	20,861	37,500	18	8	8	2			
Atlanta-Sandy Springs-Marietta, GA	529	21,495	40,600	18	8	6	4			
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	504	21,434	42,500	20	15	2	3			
Denver-Aurora, CO	503	23,001	45,700	24	14	8	2			
Springfield, MA	500-998	D	D	7	4	2			1	
Brookings, SD Micropolitan	500-999	D	D	1					1	
Tulsa, OK	474	20,958	44,200	9	4	3	2			
Tucson, AZ	463	16,583	35,800	5	1	1	3			
Portland-Vancouver-Beaverton, OR-WA	427	14,864	34,800	31	19	11	1			

D-Not disclosed in order to not reveal individual operations.

Source: U.S. Census Bureau, 2007 County Business Patterns - NAICS Code 33992 Sporting and Athletic Goods Manufacturing.

U.S. Census Bureau data shows employment among the San Diego companies ranged from one company with 1,000 or more employees, one with 500-999 employees, one with 250-499, and three with 100-249 employees. No other area had as many large sporting equipment manufacturers. Total payroll among San Diego manufacturers is also significantly greater than the next highest area, the Los Angeles metro area.⁸ Average annual pay per employee in San Diego, at \$56,400 also was highest for any sporting/athletic goods manufacturing cluster.

I. EQUIPMENT MANUFACTURING

Thirty-two golf equipment and related product manufacturers are located in the San Diego region, locally employing 5,100 workers, and accounting for \$1.85 billion in revenues. Another 43 wholesalers of golf equipment also have a presence in San Diego, with sales totaling \$42 million and employing 303 workers.

To arrive at this number, we gathered sales and employment data from Manta.com, Dun & Bradstreet, corporate annual reports, and corporate websites.⁹ In cases where no sales data was available, we calculated an estimate using reported employment numbers and sales-per-employee for the industry. The final estimates were then compared against data from the U.S. Census Bureau and the California Employment Development Department (EDD).¹⁰

The three largest golf equipment makers in the region, TaylorMade-adidas Golf, Callaway Golf, and Acushnet, together employ four out of every five workers in San Diego's golf manufacturing cluster.

TaylorMade-adidas, based in the city of Carlsbad, specializes in high performance golf clubs. Founded in 1979 by Gary Adams, the company introduced the "Pittsburgh Persimmon" in the early 1980s, a metal wood based upon the traditional shape of wooden drivers. In 1982 the company began to assemble clubs in Carlsbad. By the mid-1980s the company's woods had become the most popular on the PGA and LPGA tours, helping TaylorMade reach sales in 1989 of \$150 million. The adidas group bought the company in 1997, and in 2006 TaylorMade-adidas Golf had its first \$1 billion revenue year, marking only the second time in industry history a golf equipment brand achieved that milestone. In 2008, TaylorMade acquired Ashworth Inc. in Carlsbad, a major producer of golf apparel. Our best estimate is that TaylorMade-adidas employs 850 people and Ashworth employs 360 in San Diego County.

Callaway Golf, the region's largest golf manufacturer, moved to Carlsbad in 1985 and in 1991 introduced the popular "Big Bertha" metal driver. In 1996 the company became the world's largest seller of golf clubs with sales of more than \$680 million. The company's 2008 worldwide revenues, derived

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from a diversified portfolio of golf clubs, balls, and accessories, were \$1.12 billion.¹¹ As of the end of 2008, the company and its subsidiaries had a worldwide workforce of approximately 2,700, with approximately 2,200 employed in San Diego County.

Aldila, headquartered in Poway, CA, is an original equipment manufacturer (OEM) of consumer golf club shafts, as well as other carbon fiber products. They manufacture the OEM shafts for many of the major golf club manufacturers, including Callaway, TaylorMade, and Ping, in addition to their own branded consumer shafts. Production of the shafts takes place in their facilities located in Tijuana, Vietnam, and China, while “prepreg”¹² and assembly production occurs in Poway.

Titleist and Cobra Golf, part of the Acushnet Company, an operating company of Fortune Brands, Inc., also have a major presence in San Diego. Horizon Sport Technologies (HST Inc.) and Legendary Holdings are other significant manufacturers of golf products.

II. FACILITY OPERATIONS

San Diego County is home to 90 golf courses. According to research by WeatherBill.com, between 350 and 357 “Golf Playable Days” are recorded per year in San Diego, the most among any of the nation’s “golfing communities.”¹³ Golf courses primarily derive revenues from greens fees, range fees, memberships, golf cart rentals, and spending on food and beverages. This revenue, in turn, supports a host of suppliers, including golf equipment manufacturers, food and beverage providers, and turf grass equipment and maintenance providers.

In 2008 golf courses and driving ranges/practice facilities in San Diego County had total estimated revenues of \$407.2 million and employed approximately 4,600 full-time equivalent workers.¹⁴

To derive this estimate, we first gathered data from several national golf organizations, and business databases to determine the number of courses in the region. Sources included the National Golf Foundation (NGF), the PGA of America, Dun & Bradstreet, Manta.com, the U.S. Census Bureau, and the San

Diego Convention and Visitors Bureau. The full list of golf course and practice facilities in San Diego County is found in the Appendix.

Next we determined average 2008 per-course revenues. We began by categorizing courses into the principal categories used by the PGA of America: private, daily fee/semi-private, resort, municipal/military, and driving range/practice facilities. Given the small sample from the PGA Facility Operations Survey for San Diego County, we utilized their average revenue figures for Southern California, making a slight adjustment upward to account for findings that showed slightly better performance by San Diego operations in some segments.¹⁵ We also adjusted the estimates to reflect the verified number of holes at each golf course.

Based upon these estimates, golf course operations in San Diego generated \$402.4 million revenues. Another 13 stand-alone practice facilities and driving ranges had revenues of \$4.7 million.

III. VISITOR TRAVEL, TOURNAMENTS, AND CHARITABLE GIVING

Visitors who play golf during their trips to San Diego spent an estimated \$191 million in 2008 on goods and services, such as lodging, dining and non-golf entertainment. This is in addition to their direct spending at the region’s golf courses, which is estimated at \$64.1 million.¹⁶

In addition, there is another \$25.8 million in economic activity resulting from major golf tournaments.¹⁷ Approximately \$30.3 million flows to area charities as a result of events hosted at area golf courses.

GOLF AND THE RECESSION

Prior to the global economic downturn of 2008, golf was perceived as a largely recession-proof activity. More recently however, industry officials saw a marked decline in several measures, including the number of total rounds played, visitor travel, and sports equipment sales.

According to the National Golf Foundation, the number of new courses opened (80) across the U.S. in 2008 was at a 20-year low, and nearly 100 courses closed. "The golf construction boom of the 1990s – when about 2,500 new courses (mostly daily fee ones) were added to the 13,000 or so already extant in the U.S. – is not only over; it's stuck in reverse."¹⁸

The housing market collapse is hampering golf course developments, since a number of projects were tied to on site housing. Getting financing to build a new course is tougher than it has been in decades, and some projects that were to have started have been postponed.

There are, however, important regional variations for San Diego. While the number of rounds of golf played nationally decreased 1.8 percent in 2008 and dipped 0.2 percent in California, the number played in San Diego was actually up 3.8 percent in 2008.¹⁹ In 2009, national golf rounds decreased another 0.6 percent, but in San Diego increased 0.7 percent.

While the amount of play has held up, spending has fallen during the recession. Anecdotal evidence suggests the region's private clubs and high-end daily fee courses have borne the brunt of the recession as members put their names on resignation lists and golfers shifted play to courses with more affordable green fees.²⁰ Escondido Country Club, for example, opened its course to public play. The Golf Club of California in Fallbrook was closed for a period of time due to economic conditions.²¹

VISITOR TRAVEL

SAN DIEGO GOLF-RELATED VISITOR SPENDING

Category	2008 (millions)
Visitor spending at golf courses	\$64.1
Other golf-related travel spending	191.0
Major tournaments (visitors only)	15.6
TOTAL	\$270.7

Source: National University System Institute for Policy Research.

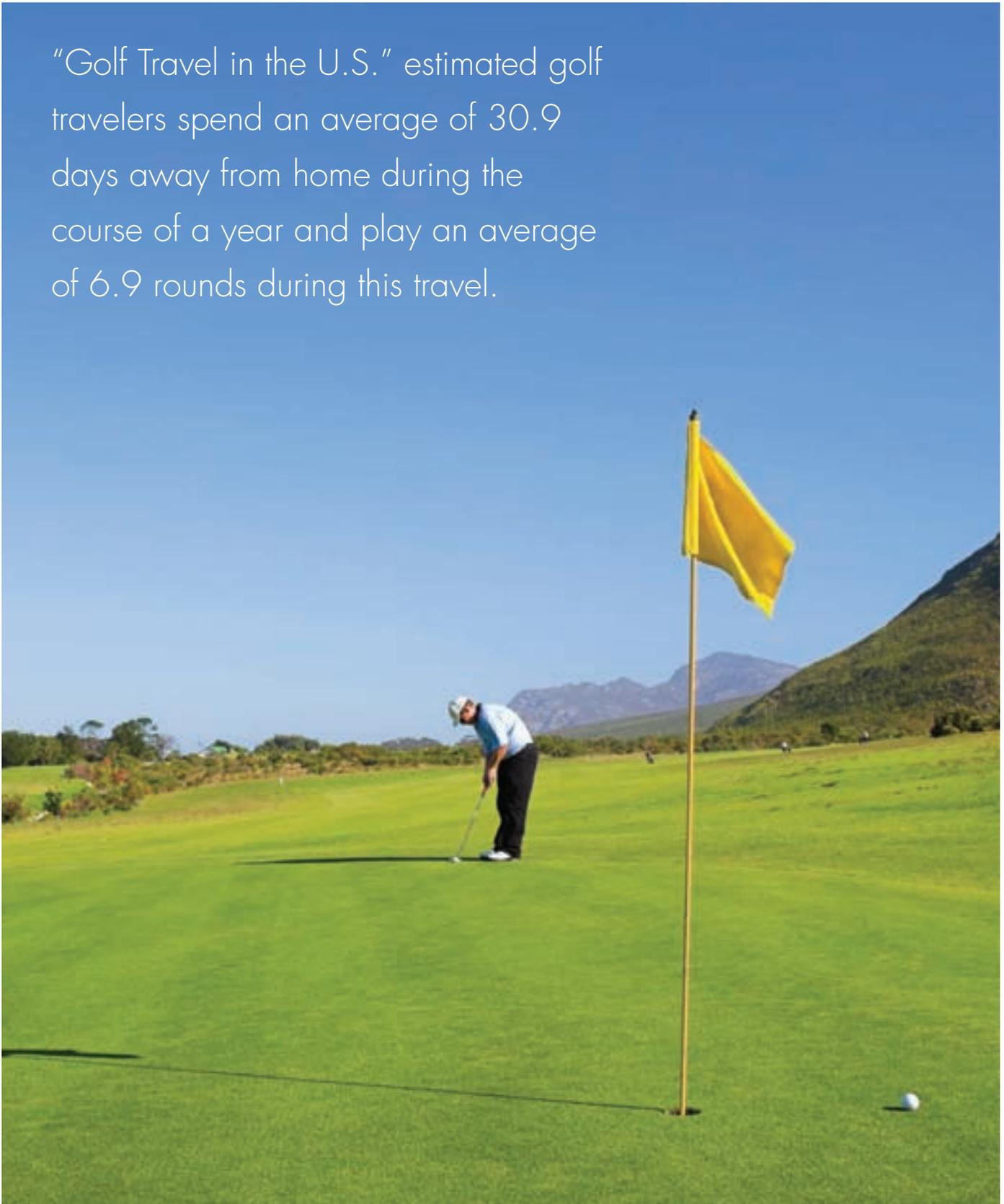
To arrive at our estimate that visitors who play golf in San Diego spend an estimated \$191 million on off-course goods and services and an additional \$64.1 million at area golf courses, we began with the visitor surveys conducted for the San Diego Convention and Visitors Bureau (ConVis). They found that in 2008 approximately 1.4 million visitors to San Diego participated in golf activities. Nearly all (96 percent) of these were overnight visitors, spending an average of \$816 per person during their trip and staying a median of four nights.²²

However, not all of this spending is attributable to the sport of golf. Some visitors are likely to engage in other leisure and/or business activities during the rest of their visit to San Diego. While economic estimates of the impact of tourism do not usually attempt to disaggregate spending, we felt that a conservative approach required us to separate out the spending that could be directly attributed to golf from the other spending done by these "multi-purpose" travelers.

To do this, we used the National Golf Foundation's "Golf Travel in the U.S.," which estimated golf travelers spend an average of 30.9 days away from home during the course of a year and play an average of 6.9 rounds during this travel.²³ Given this ratio, we allocated 22.3 percent of spending to golf-related purposes.

Finally, a portion of visitor expenditures are already captured in our estimates for golf facility operations. We used national figures for revenue per round and conservatively estimated that each of the 1.4 million visitors who engaged in golf play an average of one full round during their visit.²⁴

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TOURNAMENTS

San Diego facilities host numerous golf tournaments nearly every week of the year. Economic studies on the largest of these measure sales, attendance, and economic impact from the events.

The most prominent of San Diego's annual golf tournaments is the Farmers Insurance Invitational (formerly Buick Open) held the last week of January at Torrey Pines Golf Course. San Diego State University's Center for Hospitality and Tourism Research found total spending for the event in 2008 was \$28.4 million, with 37 percent of the nearly 147,500 gate attendees coming from outside of the region. The researchers estimated that the attendees accounted for 24,491 hotel room nights.²⁵

In addition, the Callaway Golf Junior World Golf Championships brings thousands of youngsters and their families to compete at twelve San Diego area courses each year. Total attendance at the events range between 4,000 and 5,000 with a conservative estimate for direct economic impact of at least \$863,000. The Nationwide Tour Championship held at Barona Creek Golf Club is also reported to have an annual \$2.0 million impact.²⁶

Our estimate of total tournament revenue in 2008 only includes annual events for which there is specific data on attendance, spending, and the percentage of attendees that come from outside of the region. Thus it does not include, for example, the 2008 U.S. Open at Torrey Pines in 2008.²⁷ Also not included are the National Association of Intercollegiate Athletics (NAIA) Women's Golf National Championships held in 2007 and 2008 at the Lake San Marcos Resort & Country Club, the recently announced LPGA Classic to be held March 25-28, 2010, at the La Costa Resort and Spa, or the 2009 LPGA Samsung Invitational. Based upon data for other LPGA events, we estimate the LPGA Classic in Carlsbad will have an approximate \$5 million impact.

CHARITABLE EVENTS

Numerous charities hold golf tournament events throughout the year, and many derive a substantial amount of their revenue from the difference between the green fees charged by hosting golf courses and gross event income.

The National Golf Foundation and SRI calculated that the economic value of the charitable fundraising done at golf courses

The U.S. Census Bureau's 2007 Economic Census showed nearly \$3.4 billion was spent on golf equipment throughout the nation. Additional spending for golf related purposes include sales of apparel, shoes, and media (books, magazines and video/ DVDs). Golf cart sales and rentals constitute another important segment.



throughout California was \$324.3 million in 2006.²⁸ They derived this figure from national studies examining the number of charitable golf outings and events held; discounted fees, services, and staff time for the events; as well as actual charitable giving associated with professional golf tournaments.²⁹

Based upon the ratio of golf rounds played in San Diego to the statewide total, we estimate the charitable giving generated from golf events is \$30.3 million.

IV. RETAIL MERCHANDISING

The U.S. Census Bureau's 2007 Economic Census showed nearly \$3.4 billion was spent on golf equipment throughout the nation. Additional spending for golf-related purposes include sales of apparel, shoes, and media (books, magazines, and video/DVDs). Golf cart sales and rentals constitute another important segment.

To calculate this figure, we allocated a share of golf equipment and apparel sales reported for the state of California from SRI International's "The California Golf Economy Report." This report estimated merchandise sales in California to be \$385.6 million.³⁰ To calculate San Diego's portion of these purchases, we took the ratio of annual rounds of golf played in San Diego compared to the annual number of rounds played statewide.³¹

Using that methodology we estimate off-course golf equipment and apparel sales in San Diego are \$35.4 million.

For the calculation of the economic impact (see below) of merchandising, we want to understand the value added by San Diego retailers to the goods which they sell. Using SRI's estimate of retail margin on final sales of golf equipment, we estimate that approximately \$14.2 million in golf-related retail sales were retained in the San Diego economy.

It should be noted that sporting goods sales in San Diego have stood up relatively well through 2008. While taxable retail sales overall in San Diego decreased 1.7 percent in 2007 and another 6.8 percent in 2008, sales among sporting goods stores in the County increased 3.6 percent between 2006 and 2008. Although not all sporting goods sales are golf related, it is reasonable to assume golf-related merchandise did not vary significantly from overall sporting goods sales recorded between 2006 and 2008 (after adjusting for inflation).

V. OTHER GOLF-BASED BUSINESSES IN SAN DIEGO

A number of ancillary businesses are directly connected to the golf industry in San Diego, including companies involved in training, management and consulting services, event planning, construction, design, and architectural firms.

Using data from Dun & Bradstreet and Manta.com, we estimate the economic impact from these firms to be \$29.2 million.³²

GOLF AND NEW DOLLARS TO THE REGION

Golf's economic impact in San Diego is a combination of both discretionary spending by existing residents (that in the absence of golf would arguably shift to other forms of consumption) and activities which bring "new" dollars into the economy.

DIRECT IMPACT

To estimate the size of the parts of the golf industry bringing new dollars into the region we first calculated the value-added by golf manufacturers as total value for shipments less their cost of materials. In 2008 this indicates \$1.23 billion in economic impact to San Diego.

As noted above, spending by golf-related visitors is conservatively estimated at \$191 million, plus an allocation of another \$64.1 million of spending by visitors at area golf courses. Estimated visitor spending for the region's major tournaments also generated \$15.6 million.³³ This does not include the estimated \$73.6 million that came into the region as a result of hosting the 2008 U.S. Open.

All told, "new" dollars brought into the region in 2008 from golf-related spending totaled \$1.5 billion, about 0.9 percent of San Diego's 2008 \$169.3 billion Gross Domestic Product (GDP).

INDIRECT/INDUCED (MULTIPLIER) IMPACT

Companies and facilities involved in the golf industry purchase goods and services from other companies. These purchases are considered the "indirect" impacts of the golf sector. Furthermore, workers directly employed in the golf sector spend a percentage of their income within the region, creating additional economic activity and employment. These effects are considered "induced" impacts.

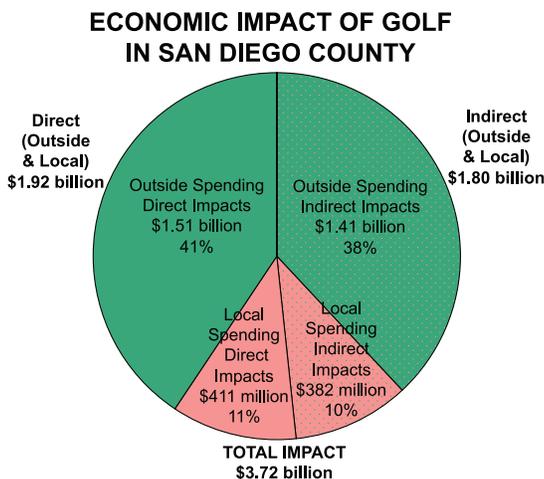
Together, the indirect and induced impacts comprise the multiplier impact from the golf economy. Multiplier values vary based on the unique characteristics of San Diego's economy and by the nature of the industry. Industries with more extensive linkages with other industries in the local economy have a greater multiplier effect on final economic activity relative to the initial or direct effect. Conversely, economies and industry sectors dependent on a large share of imported supply have smaller multiplier effects.

Using Regional Input-Output Multipliers (RIMS II) for San Diego derived by the U.S. Bureau of Economic Analysis, we calculate that the various aspects of the golf industry in San Diego have final demand multipliers ranging between 1.91 and 2.06. **Cumulatively, the new dollars golf activities bring in had an indirect and induced impact in 2008 of \$1.41 billion. Thus the total direct, indirect, and induced impact in 2008 of the new dollars golf brings into the San Diego economy was \$2.93 billion, 1.7 percent of GDP, and nearly 18,300 jobs tied to golf spending.**

We can use the same approach to calculate the direct, indirect and induced impact of the golf-related activities engaged in by San Diego residents. As noted above, there is good reason to believe that, in the absence of golf, this spending would shift to other forms of consumption. The direct impact of this spending is \$410.8 million. Using RIMS II, we calculate the indirect and induced impact to be \$382.3 million.

The total direct, indirect, and induced economic impact of golf in San Diego County during 2008 therefore is \$3.7 billion, accounting for 26,900 jobs in total, and 2.2 percent of the region's 2008 GDP.

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FOOTNOTES

- 1 “2009 Golf World Readers’ Choice Awards,” *Golf Digest*, October 16, 2008.
- 2 “2008 U.S. Open Economic Impact Analysis,” San Diego State University’s Center for Hospitality and Tourism Research.
- 3 In compiling this report we conservatively estimated golf’s economic footprint, focusing only where there is a clear nexus to golf activities and where there is available data. For example, some firms, such as landscape architects or general retailers derive a small portion of their revenues from golf. Rather than try to estimate their golf-related activities, in most cases we exclude them from the analysis.
- 4 Based upon the U.S. Census Bureau’s “2002 Economic Census for San Diego County.” The California GDP implicit price deflator is used to inflate 2002 industry revenue data to 2008 dollars.
- 5 All figures are expressed in 2008 dollars, unless otherwise noted.
- 6 Annual 2008 wage of San Diego County “Sporting & Athletic Goods Manufacturing” (NAICS code 33992), calculated from California Employment Development Department Quarterly Census of Employment and Wages (ES202).
- 7 *2007 County Business Patterns*, U.S. Census Bureau.
- 8 The largest sporting goods manufacturer in Providence-New Bedford-Falls River, RI-MA metropolitan area is Acushnet, which also has a significant presence in Carlsbad, CA. It is likely that San Diego and Providence compete for the regions with the largest number of workers employed by sporting goods equipment manufacturers.
- 9 TaylorMade-adidas Golf, Callaway, Aldila, Ashworth, Acushnet, Titleist, and Cobra Golf annual reports.
- 10 Both these entities report employment for the broader category of Sporting and Recreational Good Manufacturing thus requiring the use of sources such as Dun & Bradstreet.
- 11 Sales were allocated to the San Diego area based upon sales-per-employee and number of employees reported in San Diego County.
- 12 Prepreg refers to “pre-impregnated” composite fibers, an important step in the shaft’s composite material production.
- 13 “Impact of Climate Change on Golf Playable Days in the United States,” WeatherBill, Inc., February 22, 2007.
- 14 Employment among golf course facilities is somewhat seasonal and/or part-time. The estimate for golf course employment therefore is the number of jobs equivalent to full-time work.
- 15 Average revenues for golf resorts was not available for the southern California area, so the average for all of California was used to adjust for San Diego’s average, with a premium added by San Diego’s overall average compared to the California average.
- 16 We needed to distinguish between on-course and off-course spending to avoid double counting revenues that golf course operations derive from visitors to San Diego County.
- 17 In regard to tournaments, we examine the impact of the Buick Invitational/Farmers Insurance Open and the Callaway Junior World Championships. There are a number of other tournaments in San Diego (including the LPGA and Nationwide tour events). We have not included these, as they were either not hosted in 2008 and/or their economic impact was minimal.
- 18 “Golf industry gets hit hard,” MSNBC.com, December 3, 2008.
- 19 “Golf Datatech,” National Golf Foundation, December 2009.
- 20 “Golf industry gets hit hard,” *ibid*.
- 21 “Fallbrook club’s closing is one sad story,” *San Diego Union-Tribune*, November 11, 2008.
- 22 “Profile of Golf Visitors 2009: San Diego County Visitor Profile Study,” San Diego Convention and Visitors Bureau.
- 23 “Golf Travel in the U.S.,” National Golf Foundation, pg. 5.
- 24 PGA of America and NGCOA, “PGA PerformanceTrak News,” December 2008 and Year End Results. If these visitors on average play more than one round during their visit, it would impact our estimate for the new dollars brought into the region. However, it would not impact our estimate for the overall size of the golf industry in San Diego County.
- 25 “2008 Buick Invitational Economic Impact Analysis,” SDSU Center for Hospitality and Tourism Research.
- 26 “Championship Golf in San Diego,” Century Club of San Diego, at <http://centuryclubofsandiego.org>. This impact was not disaggregated between spending by area residents and out-of-town visitors. We classified all \$2 million as spending by San Diegans.
- 27 This event was estimated to have a total economic impact of \$142.1 million. SDSU’s Center for Hospitality and Tourism Research report, “2008 U.S. Open Economic Impact Analysis.
- 28 “The California Golf Economy Report,” SRI International, 2006.
- 29 “The Charitable Impact Report,” National Golf Foundation, November 2002, as cited by “The California Golf Economy Report,” SRI International, 2006.
- 30 “The California Golf Economy Report,” SRI International, 2006.
- 31 PGA PerformanceTrak.
- 32 This analysis only reflects the businesses that specialize or focus upon the golf industry, and does not include many other companies that serve the golf community as a segment of their overall business activity. This should therefore be viewed as a conservative estimate for these golf related businesses.
- 33 In addition, sales by area retailers of golf-related products generated an estimated \$14.2 million in value, a figure which we include in this part of the analysis.

PRACTICE FACILITIES/DRIVING RANGES:**TOTAL****NUMBER OF COURSES: 90****HOLES: 1,728**

COURSE NAME	LOCATION	TYPE	HOLES
Admiral Baker Golf Course	San Diego	Military	36
Arrowwood Golf Course	Oceanside	Public	18
Aviara Golf Course	Carlsbad	Public	18
Balboa Park 9-Hole Golf Course	San Diego	Public/Muni/Par3	9
Balboa Park Golf Course	San Diego	Public/Municipal	18
Barona Creek Golf Club	Lakeside	Public	18
Bernardo Heights Country Club	San Diego	Private	18
Bonita Golf Club	Bonita	Public	18
Borrego Springs Resort & Country Club	Borrego Springs	Public	18
Carlton Oaks Golf Course	Santee	Public/Resort	18
Carmel Mountain Ranch Golf Course	San Diego	Public	18
Castle Creek Country Club	Escondido	Public	18
Center City Golf Course	Oceanside	Par3	18
Chula Vista Municipal Golf Course	Bonita	Public/Municipal	18
Colina Park Golf Course	San Diego	Par3	18
Coronado Municipal Golf Course	Coronado	Public/Municipal	18
Cottonwood - Rancho San Diego	El Cajon	Public	36
Crosby National Golf Club	Rancho Santa Fe	Private	18
De Anza Country Club	Borrego Springs	Private	18
Del Mar Country Club	Rancho Santa Fe	Private	18
Doubletree Golf Resort	San Diego	Public	18
Eagle Crest Golf Course	Escondido	Public	18
Eastlake Country Club	Chula Vista	Public	18
El Camino Country Club	Oceanside	Private	18
Emerald Isle Golf Course	Oceanside	Par3	18
Encinitas Ranch Golf Course	Encinitas	Public	18
Escondido Country Club	Escondido	Private	18
Fairbanks Ranch Country Club	Rancho Santa Fe	Private	27
Fallbrook Golf Club	Fallbrook	Public	18
Farms Golf Club	Rancho Santa Fe	Private	18
La Costa Resort	Carlsbad	Public/Resort	54
La Jolla Country Club	La Jolla	Private	18
Lake San Marcos Country Club	San Marcos	Par3/Exec	9
Lake San Marcos Resort	San Marcos	Public/Private	36
Lawrence Welk Resort Village	Escondido	Par3	36
Lomas Santa Fe Country Club	Solana Beach	Private	27
Lomas Santa Fe Executive	Solana Beach	Par3/Exec	18
Maderas Golf Club	Poway	Public	18
MCAS Miramar Memorial Golf Course	San Diego	Military	18
Meadow Lake Country Club	Escondido	Public	18
Mission Bay Golf Course	San Diego	Public/Muni/Par3	18
Mission Trails Golf Course	San Diego	Public	18
Morgan Run Resort & Club	Rancho Santa Fe	Private	9
Motesoro Golf Club	Borrego Springs	Public	18
Mt. Woodson Golf Course	Ramona	Public	18
National City Golf Course	National City	Par3	18
Oaks North Golf Course	San Diego	Par3	27
Ocean Hills Country Club	Oceanside	Par3	18
Oceanside Municipal Golf Course	Oceanside	Public	18
Pala Mesa Golf Resort	Fallbrook	Public	18
Pauma Valley Country Club	Pauma Valley	Private	18
Pendleton Marine Memorial Golf Course	Camp Pendleton	Military	18

Presidio Hills Golf Course	San Diego	Par3	18
Rancho Bernardo Country Club	San Diego	Private	18
Rancho Bernardo Inn Golf Resort	San Diego	Public	18
Rancho Carlsbad Country Club	Carlsbad	Par3	18
Rancho Monserate Country Club	Fallbrook	Par3	9
Rancho Santa Fe Golf Club	Rancho Santa Fe	Private	18
Reidy Creek Golf Course	Escondido	Par3/Exec	18
Riverwalk Golf Course	San Diego	Public/Resort	27
Roadrunner Golf Club	Borrego Springs	Par3	18
Sail Ho Golf Course	San Diego	Par3	9
Salt Creek Golf Club	Chula Vista	Public	18
San Diego Country Club	Chula Vista	Private	18
San Luis Rey Downs	Bonsall	Public	18
San Vicente Golf	Ramona	Public	18
Santaluz Club	San Diego	Private/Resort	36
Sea n' Air Golf Course	San Diego	Military	18
Shadowridge Country Club	Vista	Private	18
Sheraton Four Points	San Diego	Par3	9
Skyline Ranch Country Club	Valley Center	Par3	9
Spindrift Golf Course	La Jolla	Par3	9
Springs At Borrego Resort	Borrego Springs	Public	9
Steele Canyon Golf Club	Jamul	Public	27
Stoneridge Country Club	Poway	Private	18
Sun Valley Golf Course	La Mesa	Par3	9
Sycuan Golf Resort	El Cajon	Public	36
Sycuan-Pine Glen Executive	El Cajon	Par3/Exec	18
Tecolote Canyon Golf Course	San Diego	Par5	18
The Bridges Rancho Santa Fe	Rancho Santa Fe	Private	18
The Crossings at Carlsbad	Carlsbad	Public	18
The Grand Golf Club	San Diego	Public/Resort	18
The Vineyard Golf Course	Escondido	Public	18
Torrey Pines Golf Course	La Jolla	Public/Muni	36
Twin Oaks Golf Course	San Marcos	Public	18
University City Village Golf Course	San Diego	Par3	9
Vista Valley Country Club	Vista	Private	18
Warner Springs Ranch	Warner Springs	Public	18
Willowbrook Country Club	Lakeside	Public	18
Woods Valley Golf Club	Valley Center	Public	18

PRACTICE FACILITIES/DRIVING RANGES:**TOTAL****NUMBER OF FACILITIES: 13**

COURSE NAME	LOCATION	TYPE
Bonita Driving Range	Bonita	Public
Cabo San Lucas Country Club & Golf Resort	Escondido	Public
Carlsbad Golf Center	Carlsbad	Public
Del Mar Golf Center	Del Mar	Public
Fletcher Hills	El Cajon	Public
Golf Course Hotel	Carlsbad	Public
Hodges Golf Learning Center	Escondido	Public
Markshame's Golf Fit Studio	San Diego	Public
Naval Base Golf Practice & Learning Center	San Diego	Military
Sorrento Canyon Golf Center	San Diego	Public
South San Diego Family Golf Center	San Diego	Public
Stadium Golf Center	San Diego	Public
Thunderbird Driving Range	Escondido	Public

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