

APRIL 2023

THE CONTRIBUTIONS OF GOLF TO  
THE STATE OF NEW HAMPSHIRE

# 2022 IMPACT REPORT

ECONOMIC AND QUALITY OF LIFE

*prepared for:*



# GENERAL LIMITING CONDITIONS

This report is based on information collected from direct National Golf Foundation Consulting, Inc. (“NGF”) research completed for the State of New Hampshire in 2023 for the data year of 2022.

## GENERAL

Every reasonable effort has been exerted in order that the data contained in the written report reflects the most accurate and timely information possible, and is believed to be reliable. However, no responsibility will be assumed for inaccuracies in reporting by sources used to collect data from golf facilities, associations and other data sources used in preparing the report.

## CUSTOM NGF FACILITY SURVEY- 2023

NGF conducted a survey among golf facility operators in New Hampshire in an effort to gather inputs that would assist in the quantification of golf’s economic impact in the state. Key survey questions centered around operational data like rounds played, revenues and expenses, as well as capital expenditures, information on employment/staffing and charitable events.

With the support of the cooperative effort between the New Hampshire Golf Association (NHGA), and its affiliated umbrella organizations, data collection took place in the summer of 2023. Of the 97 golf facilities in New Hampshire, a total of 26 completed the survey for a response rate of 26.8%. Survey responses were reviewed and weighted by type (public/private, number of holes, etc.) to properly match and be representative of the mix of golf facilities in New Hampshire. Due to a limited response in some of the facility segments, additional data from NGF’s similar survey in neighboring Massachusetts and other data collected from golf facilities nationwide were used to augment the New Hampshire sample and add statistical confidence to the estimates.

## IMPLAN Economic Modeling

The IMPLAN economic modeling system was used to derive estimates of several direct and secondary economic impacts (including value added, employment, and labor income). The methodology and calculations were prepared and reviewed for soundness and accuracy by Dr. Terry L. Clower, the Northern Virginia Chair and Professor of Public Policy at George Mason University.

## ACKNOWLEDGMENTS

This report was prepared by National Golf Foundation Consulting, Inc. in agreement with the New Hampshire Golf Association (NHGA), and its affiliated umbrella organizations – First Tee New Hampshire, Golf Course Superintendents Association of New England, New England Golf Course Owner’s Association, and The PGA of America New England Chapter. The study was conducted by David Lorentz, Richard Singer, Clark Brown, Ed Getherall and Jodi Reilly at NGF, with support from Dr. Terry L. Clower the Northern Virginia Chair and Professor of Public Policy at George Mason University (also Director of GMU’s Center for Regional Analysis).

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## PRODUCED BY



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## RESEARCH & REPORTING



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# INTRODUCTION AND SUMMARY

If you were to play a different golf course every Saturday and Sunday, it would essentially take an entire year to experience the breadth of golf in the state of New Hampshire. If only the winter weather cooperated, that is.

With just over 100 courses at 97 facilities, golf is more than an enjoyable pastime in New Hampshire, it is a key industry that contributes to the overall economy and quality of life. While the state has never hosted a major professional golf championship or PGA Tour event, it's long been an appealing golf destination with temperate summers and glorious fall foliage, and natural beauty that includes rugged granite hills and thick forests of beech, elm, fir, hemlock, maple, oak, and pine trees.

Golf indirectly supports other New Hampshire businesses that serve and supply golf courses, drive tourist spending and support sales by retailers. Events held at the state's golf facilities serve as valuable fundraising vehicles for a wide array of charities and foundations.

Golf activity, tourism and real estate are the primary drivers of the golf economy in New Hampshire, which is generally relative to its size. The state is home to less than 1% of the golf holes in the U.S. (0.62%) and its total direct golf economy of just over \$400 million represents 0.4% of the game's broader \$102 billion annual U.S. impact. While golf's economic impact in New Hampshire can't rival that of the state's more popular outdoor pastimes such as recreational boating or skiing and its supporting industries, it is almost twice that of recreational fishing and contributes greatly to the economy while supporting an increasingly wide range of jobs.

At approximately 9,000 square miles, New Hampshire ranks 44th out of 50 U.S. states in size and is 41st in total population, with more than 140,000 residents who play traditional, on-course golf. Forty-one states have more golf courses in total than New Hampshire, but when casting a worldwide eye, there are only 32 countries with a richer golf supply. Among the hundreds that trail New Hampshire in golf supply is Vietnam, which is about 14 times the size of the Granite State and by far the most active nation in the world in new golf course development outside the U.S.

New Hampshire's rich golf history, meanwhile, dates to the 1880s, with several of the state's courses laying claim to being the oldest. The most senior in the National Golf Foundation's facility database is Exeter Country Club, which started out as the Exeter Gun Club and saw golf being played at its present location as early as 1889, at a course called Eddy's Links.

Almost 14% of current golf facilities in New Hampshire were founded in 1900 or earlier, compared to a national average of 2%. This disparity is likely not overly surprising given New Hampshire being one of the 13 original colonies. The majority of the state's oldest existing courses are located in the northernmost White Mountain region, which is known for its natural splendor, historical charm, active outdoor recreation and, perhaps most famously, the tallest peak in the Northeastern U.S. in Mount Washington. Many of the earliest New Hampshire golf courses were built around the grand resort hotels of the region from the 18th and 19th centuries, an era that saw the birth of modern American tourism.



Numbers include direct, indirect and induced impact

# NEW HAMPSHIRE GOLF IMPACT

New Hampshire's oldest courses look significantly different today than they did when golfers first walked their fairways more than a century ago, many having undergone major re-designs.

Today, many of the state's highest-ranked golf facilities – per national golf publications -- are located further south, with private clubs such as The Golf Club of New England, Manchester Country Club and Portsmouth Country Club located an hour or so north of Boston, Massachusetts.

Exeter, which was redesigned by New England architect Manny Francis in 1954, is among the public courses in the same area. It is also one of 35 nine-hole facilities in the state. With 36% of its golf facilities being of the nine-hole variety, New Hampshire has a higher proportion than the national average (26%). This has more to do with the state's history than compact size, as U.S. golf courses were more likely to be nine holes in length than 18 as recently as 1974 – prior to the industry's most recent building boom. Over the 20-year stretch from 1986 through 2005 during which the U.S. saw a net gain of more than 3,600 golf facilities nationwide, there were 23 openings in New Hampshire.

There haven't been any new ground-up golf facility openings within New Hampshire, beyond change-of-ownership rebrands and rebuilds on the footprint of previous courses, since 2005. Owl's Nest Resort in the White Mountains, which has the state's only Nicklaus Design course, is building a new 9-hole course and adding a second 18-hole layout after acquiring and redesigning a nearby public golf course that dates to the mid-1970s. When complete, the 45 holes at Owl's Nest would be more than any other facility in the state.

Only six facilities in New Hampshire have more than 18 holes open for play. Among them is the Omni Mount Washington Resort, also in the White Mountains, where renowned golf architect Donald Ross originally built the main course in 1915. A member of the World Golf Hall of Fame who is credited with around 400 course designs or redesigns from 1900 until his death in 1948, Ross is a prominent name in New Hampshire golf and was involved in many courses built 100 years ago or more that have since been renovated or re-designed.

Four of the other properties with 27-or-more holes, including Atkinson Resort & Country Club and Hidden Valley RV & Golf Park, are within about an hour of Boston in the southern part of the state.

New Hampshire is no exception when it comes to the way in which demand-for-land impacts golf supply. On a national level, golf courses are a frequent target of commercial and residential developers given their average spatial footprint of about 150 acres for 18 holes. In many cases, it's the perceived "higher-and-better use" for land that dictates the sale and closure of a golf course rather than decreased demand or dwindling interest in golf. In New Hampshire, this was evidenced by Target Corp. spending almost \$122 million in 2023 to acquire a popular 36-hole public facility and construct a distribution facility, permanently closing two courses that welcomed 80,000 golfers per season between them.

Among its active golfer population, New Hampshire over-indexes in the over-50 age groups – meaning the state has a higher proportion of golfers 50-and-older than the national average – but also boasts one of the most active junior golf programs in the nation. Approximately 27,000 students participate in one of the many youth programs at golf facilities, schools, and community centers throughout New Hampshire, providing a favorable outlook for the game's health and continued growth. A 2023 NGF survey showed at least two of every three (67%) New Hampshire golf facilities have active junior, women's, disabled, or military golf programs.

# EXECUTIVE SUMMARY

## ECONOMIC CONTRIBUTION HIGHLIGHTS

In 2022, the size of **New Hampshire's direct golf economy was approximately \$398.1 million**, while the NGF estimates that the industry **contributed just over \$641 million (direct, indirect and induced) to the wider New Hampshire economy in 2022**, which contributes greatly to other key recreational NH industries such as boating (\$1.4 billion<sup>1</sup>) skiing (\$1.3 billion<sup>2</sup>) and recreational fishing (\$215 million<sup>3</sup>). Golf supports more than 6,600 jobs with \$322 million of wage income and more than \$28.1 million in state and local taxes.



## Direct Impact

Golf Economy Total Direct Expenditures

# \$398.1M

## Total Contribution



Economic Output

# \$641.0M



Employment

# 6,652 JOBS



Wages and Benefits

# \$322.0M



State & Local Taxes

# \$28.1M

1) NMMA 2023 Economic Impact Study. 2) NMMA 2021 Recreational Boating Statistical Abstract. 3) United States Coast Guard 2018 National Recreational Boating Safety Survey.  
 2) Plymouth State University (2019, May). Economic Contribution of the Ski Industry in New Hampshire  
 3) University of New Hampshire (Downloaded February 2024). <https://extension.unh.edu/resource/nature-economy-fact-sheet-2-values-freshwater-recreation-nh>



**CORE INDUSTRIES**

A summary of the direct economic impact of golf on the State of New Hampshire is shown below:



**142,500**  
Individual Golfers



**97**  
Golf Facilities



**\$198.2M**  
Total Consumer Spending



**\$22.9M**  
Capital Investments

Golf is enjoyed by approximately 142,500 individual golfers over the age of 6, and these golfers played approximately 2.1 million rounds in 2022. The State hosted an additional 400,000+ rounds played by visitors to New Hampshire, many of whom come from large out-of-state cities that neighbor New Hampshire, like Boston, Providence, Portland and even Hartford and New York.

The State has a total of 97 golf facilities (75 public and 22 private), plus 12 stand-alone driving ranges and at least 14 other “golf entertainment” venues (mostly indoor simulators). There are 13 golf facilities connected to residential real estate (9) and/or resorts with real estate (4) in the state.

Total consumer spending at golf facilities for items including initiation fees, member/ passholder dues, green fees, cart fees, range fees, golf shop merchandise and food/ beverage sales, exceeded \$198 million in 2022, an amount that is about 25.9% higher than the estimate in 2010 (\$157.4 million), despite there being 16 fewer golf facilities (97 vs. 113 in the 2010 report). Golf facility operations supported more than 3,600 jobs (both part-time and full-time).

In 2022, New Hampshire golf facilities invested close to \$22.9 million in capital improvements for golf course renovations/ enhancements and improving or replacing structures, supporting close to 237 additional jobs. An estimated 51 % of New Hampshire golf facilities began or continued large-scale capital projects in 2022 that were not included in regular operating expenses.



# \$48.9M 74

Gross Retail Sales Golf-related Companies

New Hampshire retailers earned a \$21.3 million margin on \$48.9 million of gross retail sales of golf balls, bags, gloves, clubs, shoes, apparel and other equipment in 2022. Of this volume of gross sales, \$37.7 million came from off-course retail outlets (including online) supporting 179 jobs. The remaining \$11.1+/- million came from on-course pro shops (included in total golf consumer facility spending noted above).

New Hampshire is also home to 74 other companies who provide golf products and services including development, turf, golf cart distribution, manufacturing, and other general services. Some important brands in golf have significant operations in the State, including the headquarters for Ecco USA. The direct economic contribution attributable to golf from these companies totaled nearly \$44 million in 2022, supporting at least 303 jobs in the state.



# \$2.4M 14

Revenue Generated Golf Associations

New Hampshire is home to 14 separate golf associations, including the large New Hampshire Golf Association. The total revenue generated from these New Hampshire golf associations and foundations was \$2.4 million in 2022.



# \$15.5M

Raised for Charities

Charitable golf events hosted at golf facilities in New Hampshire serve as important fundraisers for many state and local charitable organizations. The most significant of these includes the more than \$150,000+ raised at charity events held at Owl's Nest, Concord CC, Windham CC, Nashua CC and Abenaqui CC in 2022. In total, NGF estimates that golf facilities in New Hampshire hosted approximately 781 separate charitable golf events to raise as much as \$15.5 million for various charities in New Hampshire.

### Total Direct Economic Contribution of the Golf Sector - State of New Hampshire (\$ Millions) in 2022 and 2010

	Direct Impact 2022	Direct Impact 2010*
Golf Facility Operations**	\$198.2	\$157.4
Capital Investments	\$22.9	\$9.7
Golf-Related Supplies***	\$44.3	\$26.8
Tournaments & Associations	\$2.4	\$1.5
Charitable Events	\$15.5	\$9.7
<b>TOTAL CORE INDUSTRIES</b>	<b>\$283.3</b>	<b>\$195.4</b>

\* From The New Hampshire Golf Economy by SRI International, 2010.

\*\*Revenue from golf facility operations including on-course merchandise sold.

\*\*\*Golf-Related Supplies includes total retail sales, but excludes merchandise sold at on-course pro shops (incl. in golf operations). SRI did not include Charitable Giving in the economic impact estimations because they stated it is a direct transfer of income.

## ENABLED INDUSTRIES

In addition to the above, there are other golf-related economic impacts, including:



# 23,000

Overnight Trips

NGF research indicates that about 23,000 overnight trips were made to New Hampshire in 2022 by visitors seeking to participate in golf, plus an additional 380,000 trips of more than 50 miles made to the State during the year. These visiting golfers are estimated to have contributed \$109.6 million to the New Hampshire economy (excluding direct spending at golf facilities – already counted). These visitors added almost 2,169 jobs from induced and indirect activity such as transportation, lodging, meals and other entertainment.



# \$5.2M

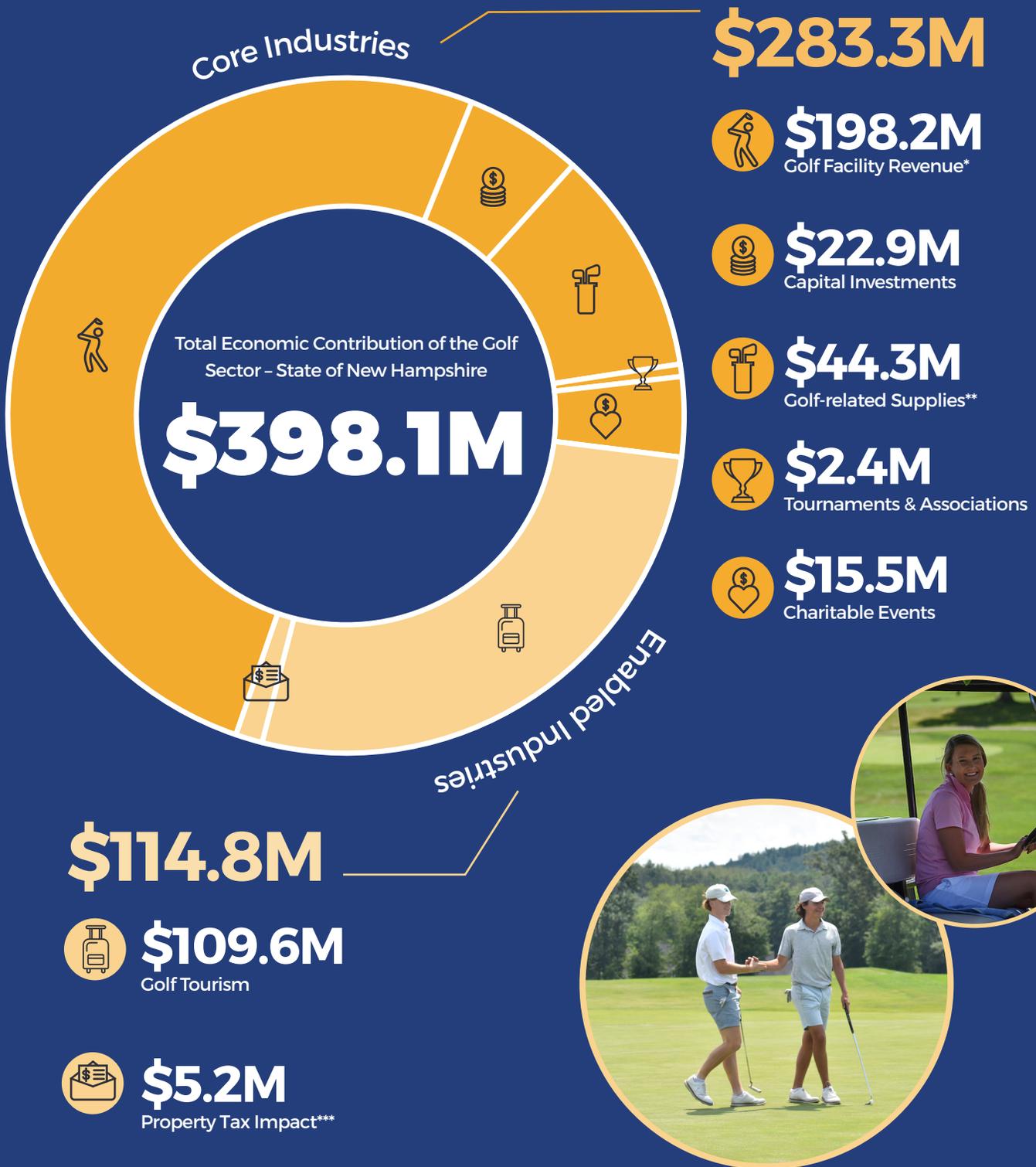
Property Tax

The presence of golf courses located within, or in immediate proximity to, residential communities adds value to real estate in New Hampshire. Since there was no active residential construction of homes inside golf communities in New Hampshire in 2022, the primary impact of golf real estate was the net gain to local tax jurisdictions from value premiums associated with golf course real estate:

- ➔ The presence of a golf course with direct frontage on, or in immediate proximity to, a residential unit will provide an added value to the residential property known as the “golf premium.” NGF estimated the “golf premium” associated with these developments to be upwards of \$280.3 million, with a 2022 property tax impact of \$5.2 million in net gain for local taxing authorities to be used for education and other local initiatives funded by property tax revenue.



# SUMMARY OF ECONOMIC CONTRIBUTION



\* Revenue from golf facility operations including on-course merchandise sold.  
 \*\*Total retail sales do not include on-course merchandise sold.  
 \*\*\* Property tax impact of \$11.4 million is the net gain for local taxing authorities

# NON-ECONOMIC CONTRIBUTION HIGHLIGHTS

Golf continues to be more than just an enjoyable pastime in New Hampshire, it is a key industry contributing to the overall economy and quality of life in New Hampshire. In addition to the economic contribution noted above, there are other impacts that golf has on the State of New Hampshire, including:

- ➔ Golf provides upwards of 12,000 acres of green space within the State, and provides affordable outdoor recreation to over 142,000 New Hampshire residents. The vast majority of golf facilities in New Hampshire surveyed by NGF in 2023 (82%) participated in at least one program for fostering the growth of the game in 2022, with 67% offering some type of formal junior golf program. New Hampshire golf courses also report a high level of programs for disabled golfers, military & veteran golfers and specialized beginner programs like WELCOME2GOLF or Get Golf Ready. An estimated 27,000+ school-age children participated in one or more golf programs hosted at a golf facility, community center or school in 2022.
- ➔ Golf courses can elevate the quality of life in communities in which they are present by helping to improve the health and well-being of citizens and by providing additional social, youth/family activities and programming. As traditional golf is not an option for some, golf facilities have introduced other amenities and activities to their offerings, such as driving ranges, practice facilities, golf simulators, bike/walking trails, fishing, bird watching, space for snow/winter sports and public and/or non-profit meeting space availability.

Certified Participants  
(Signed up through a green  
grass facility)

**897**



First Tee - NH School Program

**15,000**  
**participants ages K-6**  
**at 46 New Hampshire**  
**Schools**



First Tee H.S. Community Program

**11,700**  
**participants at 8**  
**NH Community**  
**Centers (Boys & Girls**  
**Clubs, YMCA, etc.)**



Reaching

**27,597**

# NEW HAMPSHIRE **GOLF MARKET**



New Hampshire is in the northeast United States, covers a land area of 9,350 square miles, and is home to an estimated population of 1.4 million people in 2022<sup>4</sup>. The largest City in the State is Manchester, but much of the southern portion of the State falls within the Greater Boston MSA that is home to more than 4.92 million residents (7th largest in U.S.). New Hampshire has had modest growth, with a 13% increase in population between the 2010 and 2022 U.S. Census, compared to 18.5% for the total U.S. .

Most of New Hampshire has a humid continental climate, with cold winters and warm summers. The climate of the southeastern portion is moderated by the Atlantic Ocean and averages relatively milder winters (for New Hampshire), while the northern and interior portions experience colder temperatures and lower humidity. Winters are cold and snowy throughout the state, and especially severe in the northern and mountainous areas. New Hampshire is generally a seasonal golf market, with a large portion of golf facilities closing entirely for the winter.

## NEW HAMPSHIRE ECONOMIC OVERVIEW

### Demographic Overview

Summary Demographics	New Hampshire	U.S.
Population 2000	1,235,769	281,398,967
Population 2010	1,316,464	308,745,560
Compound Annual Growth % (2000-2010)	0.63%	0.93%
Population 2022	1,397,830	333,609,568
Compound Annual Growth % (2010-2022)	0.50%	0.65%
Population 2027 Projected	1,417,458	342,845,536
Median Household Income (2022)	\$95,732	\$70,666
Median Age (2022)	42.1	37.9

Source: Applied Geographic Systems (AGS) / GbBIS<sup>4</sup>

### Economic Highlights

New Hampshire has a diverse economy with a gross state product of \$86 billion in 2020. The total number of employer establishments is estimated at around 38,000 with total statewide employment estimated to be just under 600,000. The state’s largest economic sectors in 2018, based on contribution to GDP, are: 15% real estate and rental and leasing; 13% professional business services; 12% manufacturing; 10% government and government services; and 9% health care and social services – all industries that tend to support higher-than-average participation in golf. In recent years tourism has played an ever-important role in the state’s economy, with the state welcoming 4.4 million visitors who spent more than \$2.1 billion, breaking previous records set pre-pandemic in Summer 2019. In 2021, New Hampshire had a record number of visitors at 12.8 million spending over \$5.5 billion, which equals \$322.6 million in state tax revenue (NH Division of Travel and Tourism Development<sup>5</sup>).

<sup>4</sup> United States Census (2022) Applied Geographic Systems (AGS) via GbBIS. “Demographics Profile output report”. April 2022, <https://hgfgolfmap.com>  
<sup>5</sup> New Hampshire Division of Travel and Tourism Development (January 25, 2022) New Hampshire Tourism Reports Record Breaking Summer Season.

# Golf in The State of New Hampshire

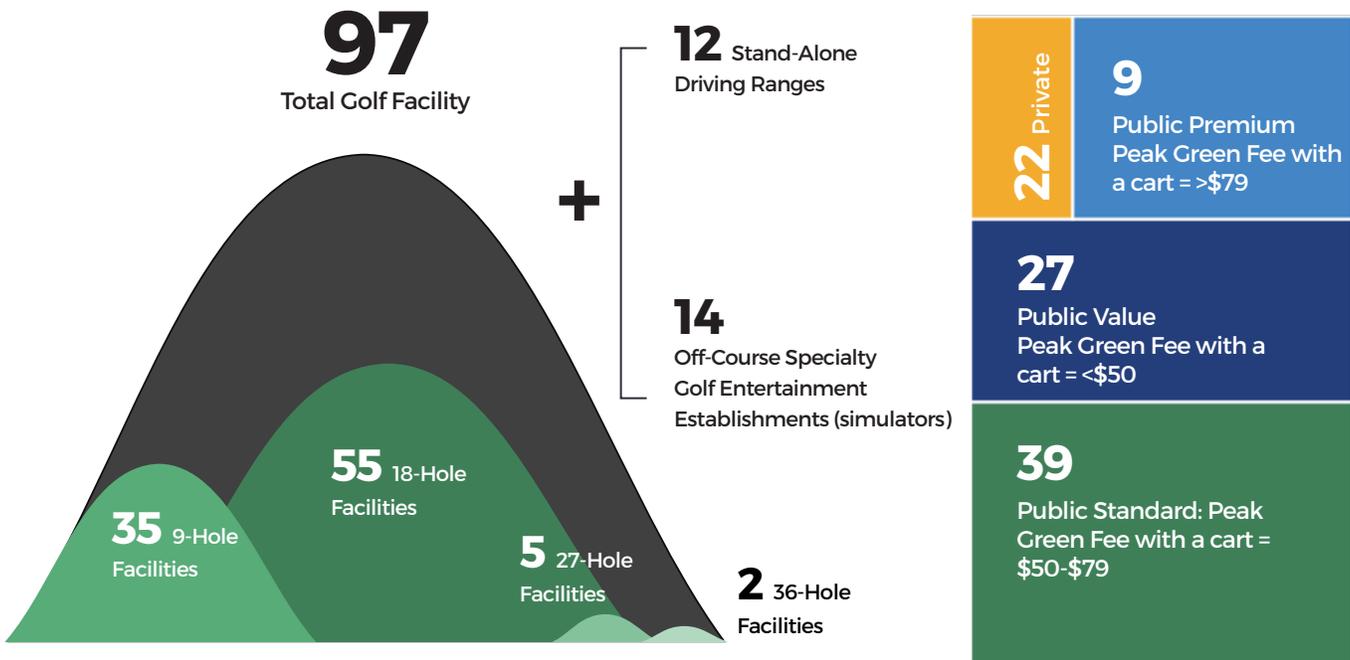
Golf is an important component to the overall New Hampshire experience, and the golf courses in the State are predominantly open and available to the public. Over 77% of all New Hampshire golf courses are public, compared to 74% for the total U.S. Although golf has become increasingly tied to residential and resort developments in recent years, New Hampshire has a tradition of golf real estate and golf resorts that goes back into the 1890's with the Mountain View Grand Resort & Spa in Whitefield, developed in 1896.

## New Hampshire Golf Market<sup>5\*</sup>

- ⊕ New Hampshire's public access golf courses (75 of the 97) represent a mix of affordability with roughly half of all NH golf facilities as either "Value" or "Standard" facilities, meaning peak season weekend green fees with cart are under \$80. For public courses, 66 of the 75 facilities open to the public (88.0%) are either "Value" or "Standard."
- ⊕ There are 13 golf facilities connected to residential real estate or residential resorts in the State, There are 18 golf facilities identified as having some form of resort component (4 facilities are resorts with also residential real estate – Granliden GC, Twin Lake Village GC, Hales Location GC and Owl's Nest). Golf's connection to real estate is a long-established phenomenon in New Hampshire, as seven of the 27 real estate and resort golf courses date back to before 1920 and 11 of the 27 were developed prior to 1960.

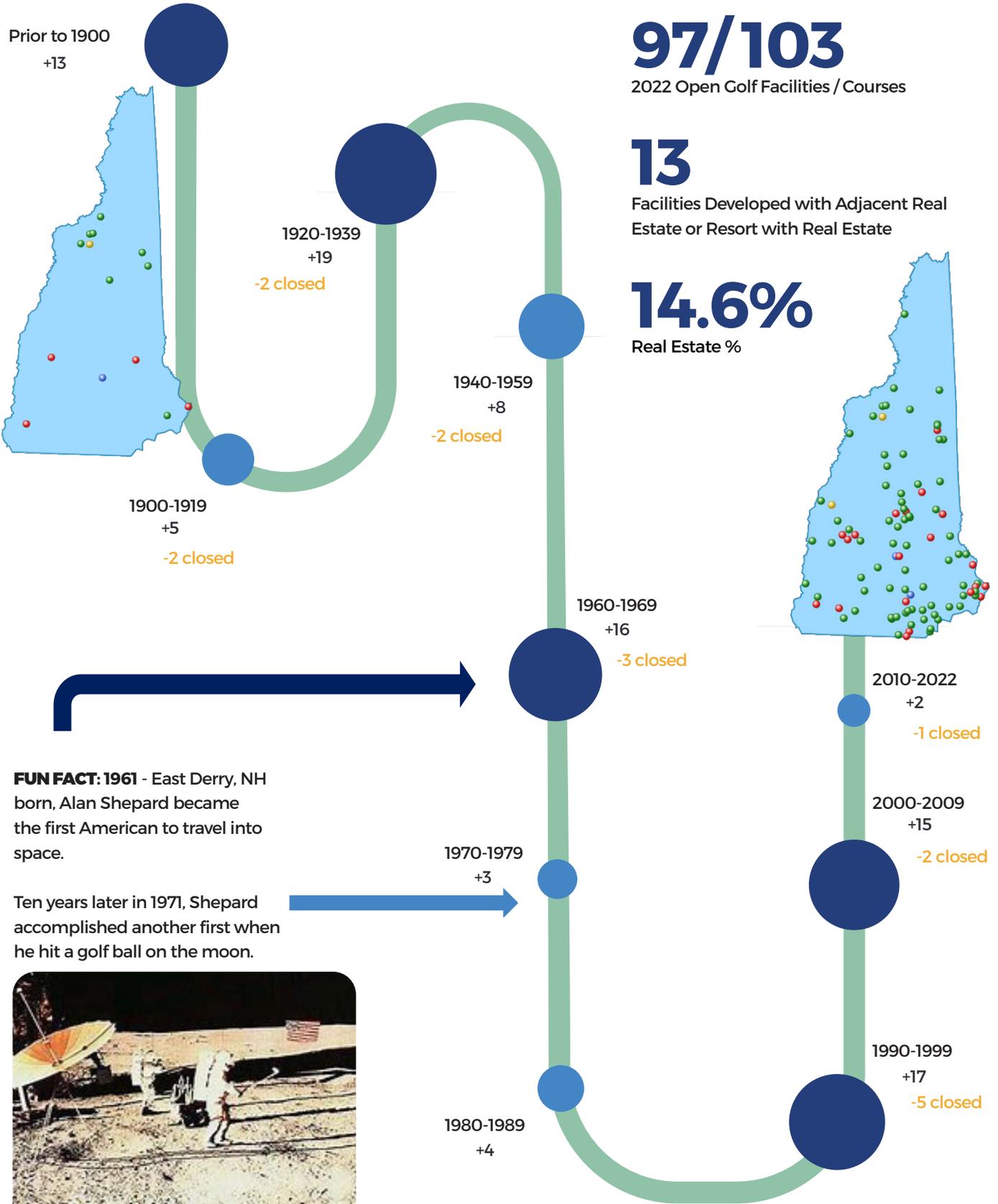
In 2022, there are 75 public golf facilities and 22 private golf clubs in operation in New Hampshire, for a total of 97 facilities. In addition, there were 12 stand-alone driving ranges in the State and an additional 14 off-course specialty golf entertainment establishment with some type of golf simulator technology, though most of these are smaller operations. New golf course construction has come in several "waves" of development in the State's history, with 41 facilities (42.3% of the total golf facility inventory in the state) developed before 1939, 17 developed in the 1960s and 1970s (17.5%), and 25 (25.7%) built after 1990 (compared to 26% for the total U.S. built after 1990). The last new golf courses added to New Hampshire were Granite Fields GC, Hidden Creek CC and LaBelle Winery Derry – all opened in 2005.

## GOLF FACILITY INVENTORY – STATE OF NEW HAMPSHIRE



\*Proprietary Research, National Golf Foundation 2023

# Golf Course Development by Decade - State of New Hampshire



# GOLF FACILITY OPERATIONS



## FINDING



# \$198.2M

Golf Facility Revenue\*

Direct NGF research into the actual performance at New Hampshire golf facilities in 2022 shows average revenue by type of facility as follows:

### Average Golf Facility Revenue by Type - New Hampshire (2022)

Facility Type	No. of Facilities	2022 Total Average Revenue*
9-Hole Courses	35	\$1,092,850
18-Hole Public (Value/Std.)	33	\$900,400
18-Hole Public (Premium)	6	\$2,204,400
Public 27+ Holes	7	\$3,784,500
18-Hole Private	16	\$5393,300**
Private 27+ Holes	0	
<b>Total No. of Facilities</b>	<b>97</b>	

\*Source: NGF survey of facilities 2023 (n=26 NH)<sup>6</sup>

\*\*An additional 5 surveys from NGF's similar survey in neighboring Massachusetts used to augment the New Hampshire sample and add statistical confidence to the estimates.

The NGF also estimates that 60 of the 97 golf facilities (61.9%) have a driving range with at least 10 tee stations, and New Hampshire also has 12 stand-alone driving range facilities that are a mix of large and small operations with an average of \$50,000 in revenue per location, and the 14 golf simulators with an average of \$25,000 per location. Utilizing these findings, the Statewide revenue from direct golf facility operations is estimated as follows:



**In New Hampshire and elsewhere, the golf facility is at the core of the overall golf economy.**

The golf facility economy includes all revenues generated from green fees, cart fees, membership fees and initiation fees, as well as ancillary golf course purchases such as merchandise, food and beverage, banquets and other revenue. The revenue collected from all of these sources is assumed to be the basis for all expenditures required to operate the facility.

6 Facility Operators. (2023, March). State of New Hampshire Golf Operations Survey. (National Golf Foundation, Interviewer)

## Total Golf Facility Revenue Summary – State of New Hampshire (2022)

Type of Revenue	Total (\$ Millions)	% of Total
Golf Playing Fees	\$65.2	32.9%
Membership Dues	\$68.3	34.5%
Retail Sales	\$10.6	5.3%
Restaurant	\$45.4	22.9%
Lessons	\$3.0	1.5%
Other (clubhouse, banquets, etc.)	\$1.6	0.8%
Driving Ranges*	\$4.1	2.1%
<b>TOTAL REVENUES</b>	<b>\$198.2</b>	<b>100.0%</b>

\*Includes revenue from stand-alone ranges and golf simulators.

### Notes:

- ➔ The \$198.2 million in total golf facility revenue in 2022 is higher than the \$157.4 million estimated in 2010 (25.9% increase).
- ➔ There were 113 golf facilities and 14 stand-alone ranges in 2010 – a decline of 14.2% in golf facilities and 14.3% fewer ranges.
- ➔ Total average revenue per golf facility is \$2.04 million in 2022 / compared to \$1.4 million estimated in 2010 (45.7% increase in revenue per facility).
- ➔ It seems as though the removal of 16 golf facilities in New Hampshire has helped the remaining courses improve economic performance and increase total revenue generated on a per-facility basis.
- ➔ The golf courses in New Hampshire hosted a total of 2.49 million rounds of golf, or approximately 29,700 rounds per 18 holes. This volume of golf activity is relatively strong for New Hampshire given the State’s climate and relatively short golf season. The total U.S. averages 29,500 rounds per 18 holes in 2022 across all climates. The facilities estimated that approximately 83.5% of these rounds emanated from inside New Hampshire, while the remaining 16.5% came from outside the State (tourists and visitors).
- ➔ The average revenue from green, cart and membership fees in the State was \$53.59 per round of golf, plus additional revenue from ancillary items such as driving range (\$1.67), total F&B (\$18.23, pro shop merchandise (\$4.25) and other items/lessons (\$1.21). New Hampshire golf facilities show stronger revenue per round than the total U.S., which showed \$49.45 per round in golf fees, \$5.78 retail, \$16.84 F&B, \$3.47 other and \$2.66 in ranges (includes golf entertainment / Topgolf like venues).

## APPROACH

### What is Measured

Golf Facility revenue includes all receipts generated from green fees, cart fees, membership fees and initiation fees, as well as ancillary purchases at the golf course facility such as merchandise, food and beverage, banquets and other items. The revenue collected from all of these sources is assumed to be the basis for all expenditures required to operate the facility.

### How it’s Measured

Golf facility revenue data comes from the 2023 New Hampshire golf facility survey conducted by NGF (and augmented with Massachusetts and total US surveys), which collected data on reported revenues by type for each of the six classes of golf facilities (n=31). The revenues generated from driving ranges was applied to only those golf facilities that had a driving range with at least 10 tee stations on site (60 of the 97 facilities), plus additional revenue assumed for 12 stand-alone ranges and 14 defined golf simulator locations in the State.

# GOLF FACILITY CAPITAL INVESTMENT



Owl's Nest Renovation of Hole #8 , Campton, NH



# \$22.9M

Capital improvements

In 2022, New Hampshire golf facilities invested nearly \$22.9 million in capital improvements for new facilities and renovations to greens, fairways, bunkers, infrastructure, equipment, and structures. This included several large-scale capital projects at New Hampshire golf facilities like the major \$5.7 million renovation at Manchester Country Club, the \$7.2 million clubhouse enhancement at Nashua Country Club, a nearly \$1.1 million renovation at Stonebridge Country Club and the new hotel added to Owl's Nest for about \$1.0 million. In all, NGF research found that 51% of New Hampshire golf facilities began or continued capital projects in 2022 (defined as new construction or major renovation to the course and/or related facilities) that were not funded directly from operating expenses.

The most significant golf facility capital expenditures undertaken in New Hampshire in 2022 and reported to NGF via survey (and additional research) were significant enough to review separately, and included:

- ➔ **Manchester Country Club** - Invested \$5.68 million in a major facility upgrade that included a par-3 renovation, new irrigation, and a complete cart path replacement.
- ➔ **Nashua Country Club** - spent \$7.2 on a comprehensive clubhouse renovation that included a new covered outdoor patio area and a deck overlooking the golf course.
- ➔ **Stonebridge Country Club** - reported completion of a major \$1.1 million enhancement to the golf course playing area (bunkers, tees, greens, etc.).
- ➔ **Owl's Nest** - reported a full \$1.0 million for the addition of a new hotel on the club's property in 2022.

## APPROACH

### What is Measured

Capital investments are major improvements outside of normal maintenance and operating expenditures by golf facilities for turf maintenance and grounds upkeep. Golf facilities periodically make major investments to improve greens and tees, renovate clubhouses and other buildings, and purchase turf maintenance equipment and irrigation systems. In addition to capital investments by existing facilities, construction of new golf courses constitutes the other major type of capital investment.

### How it's Measured

Golf facility capital investment data comes from the 2023 New Hampshire golf facility survey conducted by NGF (and augmented with Massachusetts and total US surveys), which included a question about specific large-scale capital projects undertaken in 2022 outside of normal operating expense (n=31). For this study, NGF used reported average capital investment by facility type, with outliers removed, and applied the appropriate averages to the total golf facility census for the State. The unique outliers were then added back in as they represented significant individual projects as noted above.

# ECONOMIC IMPACT ESTIMATE CALCULATION

## New Hampshire Golf Facility Capital Investment

Facility Type	No.	On-Course Capital	Unique Projects	CH/Structures Capital	Unique Projects	Carts/ Equipment
9-Hole Courses	35	\$530,000	\$0	\$700,000	\$0	\$610,000
18H Pub (V/S)*	33	\$1,180,000	\$0	\$470,000	\$0	\$290,000
18H Pub (Premium)*	6	\$80,000	\$1,100,000	\$30,000	\$1,000,000	\$30,000
Pub 27+	7	\$150,000	\$0	\$100,000	\$0	\$60,000
18H Private **	16	\$2,250,000	\$5,680,000	\$7,200,000	\$7,200,000	\$640,000
<b>Total</b>	<b>97</b>	<b>\$4,210,000</b>	<b>\$6,780,000</b>	<b>\$2,060,000</b>	<b>\$8,200,000</b>	<b>\$1,630,000</b>

\* Stonebridge Country Club had a major \$1.1 million facility upgrade. Owl's Nest built a new hotel (\$1.0 million in 2022).

\*\*Manchester Country Club completed a \$5.68 million par-3 renovation plus new irrigation and cart paths. Nashua Country Club added a new clubhouse and deck for \$7.2 MM.

V=Value, S=Standard - peak green fee with cart <\$80; Premium - peak green fee with cart >\$79.

## Summary of New Hampshire Golf Facility Capital Investment

Type	Expenses
 Total On-Course Capital Expenditures (Incl Irrigation)	\$10,990,000
 Total Clubhouse + Structures	\$10,260,000
 Total Carts & Equipment	\$1,630,000
<b>Total Capital Expenditures in NH - 2022</b>	<b>\$22,880,000</b>

# GOLF RELATED SUPPLIES



Golf retail sales comprises golf balls, bags, gloves, clubs, shoes, apparel and other equipment. NGF estimates that golfers spent \$48.85 million on consumer purchases used primarily for golf in New Hampshire in 2022. These items were purchased at golf courses and other golf retail outlets, including specialty stores, sporting goods stores, mass merchants and online. An estimated 23% of these purchases are presumed to be made at on-course retail outlets (pro shops) that were counted previously in the economic estimate from golf course operations.

The economic value created by golfer supplies consists of three components: (1) manufacturing cost of materials; (2) manufacturing value added; and (3) retailer's net revenue from sales. New Hampshire includes significant manufacturers of golf-related supplies in the State, leading to important contributions from items #1 and #2 above.

## GOLF RETAIL IMPACT

Consumer purchases of golf apparel, equipment, and shoes drive significant economic activity. New Hampshire off-course retailers earned a \$16.68 million margin on \$38.26 million of off-course gross retail sales of golf retail in 2022 (NGF previously estimated \$10.6 million in on-course retail).

Total Retail Sales*	Total U.S. Sales Volume (\$ Millions)	Value Attributed to New Hampshire (\$ Millions)
Clubs	\$2,993.30	\$19.05
Balls	\$1,250.70	\$7.96
Bags/Gloves/Shoes	\$1,369.50	\$8.72
Other Equipment	\$561.30	\$3.57
Apparel	\$1,500.00	\$9.55
<b>Total</b>	<b>\$7,674.80</b>	<b>\$48.85</b>
% Attributed to On-Course Retail	45%	22%
<b>Net Total Off-Course Retail</b>	<b>\$4,213.47</b>	<b>\$38.26</b>
Retail Sales Margin %**	43.6%	43.6%
Off-Course Retail Sales Total (Margin) Manufacturing Out of State Shipments (Value Added)	\$1,837.07	\$16.68

\*National Sporting Goods Association – 2019 Report<sup>7</sup>

\*\*US Census Annual Retail Trade Survey<sup>8</sup>

7 Irwin Broh Research. The Sporting Goods Market: 2019 Edition. NSA – National Sporting Association. 2019

8 <https://www.census.gov/programs-surveys/arts.html>

## APPROACH

### What is Measured

This segment captures the net revenue (known as retail margin) that accrues to New Hampshire retailers from spending by golfers on golf equipment, golf shoes, and golf apparel. Like golfers, golf facilities also make purchases of goods to facilitate the game and facility operations.

### How it's Measured

Data to calculate on-course and off-course retail spending on golf equipment, golf shoes, and golf apparel comes from the National Sporting Goods Association. The NSGA conducts an annual survey of 100,000 households. NSGA has collected this data since 2002. Sales for different categories of purchases are broken down by geographic region, and NGF estimated state-level sales to be 0.64% of the national total, based on New Hampshire's share of total golf holes in the U.S. ( $1,509 / 237,084 = 0.64\%$ ).

The estimation of economic impact is based upon the retail margin that accrues to New Hampshire companies that sell golf equipment and apparel. The U.S. Census Bureau's Annual Retail Trade Survey reports the retail margin for different industry sectors. NGF used the most recent retail margin available for sporting goods stores (43.6% in 2021) to estimate the retail margin accruing to New Hampshire companies. The retail margin is the net revenue accruing to the business after paying for the cost of goods from the wholesaler or manufacturer.

# SERVICES AND MANUFACTURING IMPACT



# \$44.3M

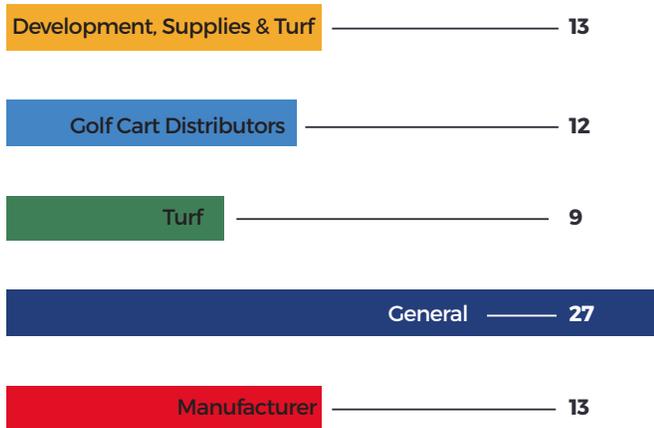
Total Golf Related Supplies Revenue

The second type of activity captured is golf-related service and manufacturing activity—companies that produce golf equipment, apparel, golf cars, turf or grass seed, and golf accessories, as well as those companies that provide direct golf-related services like golf car distribution, construction and/or other consulting services.

To identify golf-related manufacturers and service providers, NGF utilized our proprietary database of golf businesses in New Hampshire along with input from NAICS codes, the Internal Revenue Service and the U.S. Census. The NGF counted 74 companies that identified themselves as being providers of golf products and services with considerable activity in New Hampshire. Londonderry-based Ecco USA is a leading manufacturer of golf (and other) shoes that employs close to 400 workers in three separate locations within the State. In addition, there are a significant number of smaller “mom and pop” companies that produce a wide assortment of golf accessories and services. In all, New Hampshire golf companies are divided by category as noted below:

# 74

Total Golf-Related Manufacturers & Service Providers in New Hampshire



Annual revenue and employment numbers for these companies come from data axle – reference solutions (formerly Reference USA) information and data accessible through local public libraries. The IMPLAN data and modeling software calculates economic impact based on the value added for manufacturing, i.e., the company's wholesale revenue minus the cost of production inputs.

**TOTAL COMBINED GOLF-RELATED SUPPLIES IMPACT**

Revenue Source	Revenue (\$Millions)
Total Off-Course Golf Retail (on-course counted in operations)	\$16.7
Manufacturing & Services	\$27.6
<b>Total Golf Related Supplies</b>	<b>\$44.3</b>



9 Data axle reference solutions. "Reference Solutions (formerly Reference USA) U.S. Business Database/ Advanced Search". February 2023. (2022 Data) <<http://referencesolutions.data-axle.com/>>

**APPROACH**

**What is Measured**

This segment captures the business-to-business spending related to the manufacture of these goods by New Hampshire companies. In addition to the manufacture of golf-related consumer goods, this segment captures all good and services in support of the manufacture and distribution of golf cars, golf course accessories, and turf maintenance equipment, as well as professional services provided to golf courses and other golf-related companies (legal, accounting, architect, engineers, travel, etc.). Like golfers, golf facilities also make purchases of goods to facilitate the game and facility operations.

**How it's Measured**

Data to calculate on-course and off-course retail spending on golf equipment, golf shoes, and golf apparel comes from the National Sporting Goods Association. The NSGA conducts an annual survey of 100,000 households. NSGA has collected this data since 2002. Sales for different categories of purchases are broken down by geographic region, and NGF estimated state-level sales to be 1.96% of the national total, based on New Hampshire's share of 18-hole equivalent facilities for the Pacific Region (Pacific Region = 14.5% / % of region courses in New Hampshire = 13.5%).

# TOURNAMENTS AND ASSOCIATIONS



120th New Hampshire  
Amateur Championship  
Manchester CC  
Champion

Photo provided by the New Hampshire Golf Association

New Hampshire has several member-driven golf associations that support a variety of educational and training opportunities, tournaments, meetings, and workshops. In addition, the State has hosted various golf tournaments, the largest of which is the New Hampshire Open, a Pro-Am event held at Breakfast Hill GC in Greenland, NH in June 2022 that hosted 156 players (119 professionals) and had a purse of \$40,000. The major state golf associations include the New Hampshire Golf Association, the First Tee of New Hampshire, New Hampshire Senior Golf Association, New Hampshire Women's Golf Association, Even Par Social Club and the G Woody Foss Jr Golf Scholarship Trust. Also active are many smaller statewide golf associations and several women's and seniors golf associations active at courses and country clubs throughout the State.

## IMPACT

New Hampshire was host to as many as 112 professional or amateur golf events through the New England PGA (NEPGA), hosting over 11,000. Most of these events came in the form of USGA qualifiers, county events, City championships, etc. that NGF has assumed would already be counted golf facility operations (thus no additional economic impact). There were also 16 separate important amateur golf qualifiers and four other important amateur events held in the state in 2022.



## ASSOCIATIONS

New Hampshire is home to 14 separate golf associations that are large enough to file tax information with the Internal Revenue Service (IRS), the largest including the New Hampshire Golf Association, the First Tee of New Hampshire, New Hampshire Senior Golf Association and the New Hampshire Women's Golf Association. NGF research from IRS documents<sup>10</sup> shows the total revenue generated from these New Hampshire golf associations and foundations was \$2.44 million in 2022.

<sup>10</sup> <https://apps.irs.gov/app/eos/>

## APPROACH

### What is Measured

The New Hampshire Golf Association organizes amateur events for men and women of all ages, including juniors, seniors, and open events. The PGA Section organizes a series of events for juniors, as well as professional events for their members.

### How it's Measured

The Associations estimate is the sum of major state golf association revenues. These are reported on profit and loss (P&L) statements provided by the state golf associations to NCF and/or via tax filings.

# CHARITABLE GIVING



Photo provided by the New Hampshire Golf Association



# \$15.5M

In charitable proceeds

Charitable golf events hosted at golf facilities in New Hampshire serve as important fundraisers for many state and local charitable organizations. A national study by NGF in 2022 showed the average amount raised at a charitable golf event was around \$15,000, and as high as \$26,000 at premium golf facilities. Based on our survey of golf facilities in New Hampshire (2023) and Massachusetts (2022), the NGF has estimated that golf facilities in this state hosted 781 charitable golf events (89% of facilities reported hosting events), with an average of \$19,887 raised for charity at each event.

Among the more newsworthy events in New Hampshire in 2022:

- ⊕ **Owl's Nest** - estimated that combined they raised over \$50,000 for charity in 2022 from events. Beneficiaries include the Special Olympics of New Hampshire, Diecenzo Fund, breast cancer, meals for vets and local firefighters.
- ⊕ **Windham Country Club** - estimated they raised over \$150,000, benefiting the Boys and Girls Club of Salem, Salem Animal Rescue League, Windham Schools, NEPGA Foundation, Drive Against Child Abuse, Play Among the Stars, St. Judes Salem, and the Salem Police Department (and others).
- ⊕ **Omni Mount Washington Hotel & Resort** - estimated they raised over \$45,000 for the Littleton Regional Hospital, plus other events.
- ⊕ **Nashua Country Club** - estimated they raised over \$150,000 benefiting the McDonough Foundation, Folds of Honor, Family Promise and Autism Awareness.
- ⊕ **Abenaqui Country Club** - estimated they raised over \$150,000 for Veterans Count, Cancer Awareness and The Food Bank of New Hampshire.
- ⊕ **Concord Country Club** - estimated they raised over \$250,000 for charity in 2022 from events. Beneficiaries include Concord Hospital and breast cancer research.

## IMPACT

The estimated 781 charitable golf events held at golf course facilities in New Hampshire has raised an estimated \$15.5 million in charitable proceeds for beneficiary organizations.

## APPROACH

### What is Measured

Charitable giving captures both the in-kind contributions and the net proceeds resulting from charitable golf events that are hosted by New Hampshire golf facilities.

### How it's Measured

The charitable giving estimate draws on the National Golf Foundation's direct survey of New Hampshire golf facilities in 2023, with assistance from the 2022 survey in Massachusetts. These surveys provided detailed information on the number of golf facilities that hold charitable golf events, the average number of events held by each facility, and the net proceeds raised. Applying the survey results to golf facilities in New Hampshire, we estimate that approximately 89% of New Hampshire golf facilities hosted a charitable golf event in 2022, and the average number of charitable events held each year was 10 events. A national study by NGF in 2022 showed the average amount raised at a charitable golf event was around \$15,000 in net proceeds per event for charitable and nonprofit organizations for private and premium public facilities, with NGF estimating New Hampshire golf facilities generating an average of \$19,887 raised per event in 2022.

# GOLF TOURISM



# GOLF TOURISM

Golf is a popular outdoor recreational activity that helps enhance New Hampshire's tourism industry through day and business trips, as well as extended vacations. NGF has identified a significant golf-travel industry – those people traveling to the state with the intention that golf will be a major part of the trip in New Hampshire. This finding was not at all surprising, as several locations in New Hampshire are known for attracting tourist / seasonal golfers. New Hampshire does offer a few top-quality golf resorts, including well-known facilities like Atkinson Resort & CC, Omni Mt. Washington Hotel & Resort, and the Lake Sunapee Country Club. In addition, New Hampshire attracts a significant share of golfers who live in nearby metro areas and travel to this state for golf activity. The key out-of-state metro areas that NGF identified as feeding golf activity include Boston, Providence, Hartford and even the New York and Toronto metro areas.



**\$109.6M**  
Golf Tourism

## IMPACT

Tourism is one of the strongest economic drivers of New Hampshire, providing a valuable source of revenue and jobs. In its 2021 Annual Report, the New Hampshire Division of Travel and Tourism Development (DTTD) estimated New Hampshire had a record number of visitors at 12.8 million spending over \$5.5 billion, which equals \$322.6 million in state tax revenue. Of these visitors, facts presented by DTTD indicate the vast majority of these visitors came to New Hampshire during the spring and summer, or during the peak of the golf season. The DTTD annual report indicated a significant blow to New Hampshire tourism in the wake of the Covid-19 pandemic in 2020, with travel estimates falling dramatically, with recovery in 2021 and 2022. As 2022 showed clear recovery for golf facilities in New Hampshire, the NGF team has determined that the 2021 tourism estimation was appropriate to estimate golf tourism activity in New Hampshire for 2022.<sup>11</sup>

According to NGF, traveling golfers spent \$209 per trip for day-trippers and \$1,313 per trip for overnight visitors (excluding golf fees – already counted in golf facility revenue). For 2022, NGF estimates that tourism expenditures stemming from travelers who traveled to New Hampshire specifically to play golf generated \$109.6 million.



<sup>11</sup> New Hampshire Office of Travel and Tourism (2021 Annual Report)

## New Hampshire Golf-Related Tourism Expenditures – 2022

	Day Trips	Overnight	Total
Total Visitors	7,680,000	5,120,000	12,800,000
Golf Trip %	15%	3%	
Total Golf Trips	380,000	23,000	403,000
Average Spending per Trip (less Golf Fees)*	\$209	\$1,313	
<b>Total Impact (\$Millions)</b>	<b>\$79.4</b>	<b>\$30.2</b>	<b>\$109.6</b>

\*Average spending excluding \$142 for golf spending (to avoid double counting).

### Average spending per golf trip

The NGF provided estimates of total spending per trip by golfers of \$209 for day trips and \$1,313 for overnight trips. The NGF has assumed that these amounts exclude spending at the golf facilities (green fees, cart fees, F&B, etc.) that has already been counted in golf facility operations. The intent was to include spending on accommodation, local transportation, food and beverage, entertainment, gifts, and so on.

Day trips

\$209

Overnight trips

\$1,313

## APPROACH

### What is Measured

The golf tourism industry segment estimates the golf-related travel expenditures in which a person travels 50-plus miles and plays golf as a key recreational activity while on business or leisure travel. Golf-related trips include both overnight and day trips. This figure includes trips to New Hampshire golf destinations, golf outings while on vacation or business travel, visits to New Hampshire golf courses from golfers residing outside the state, as well as trips by New Hampshire residents to play golf at courses in other parts of the state.

### How it's Measured

Data for this calculation comes from surveys and studies of visitors and visitor spending conducted or commissioned by the State of New Hampshire and the NGF. The 2021 Annual Report (New Hampshire Division of Travel and Tourism Development) was a key resource and detailed total visitors counts (by length of trip), activities undertaken while in New Hampshire and average spending per trip.

# GOLF REAL ESTATE

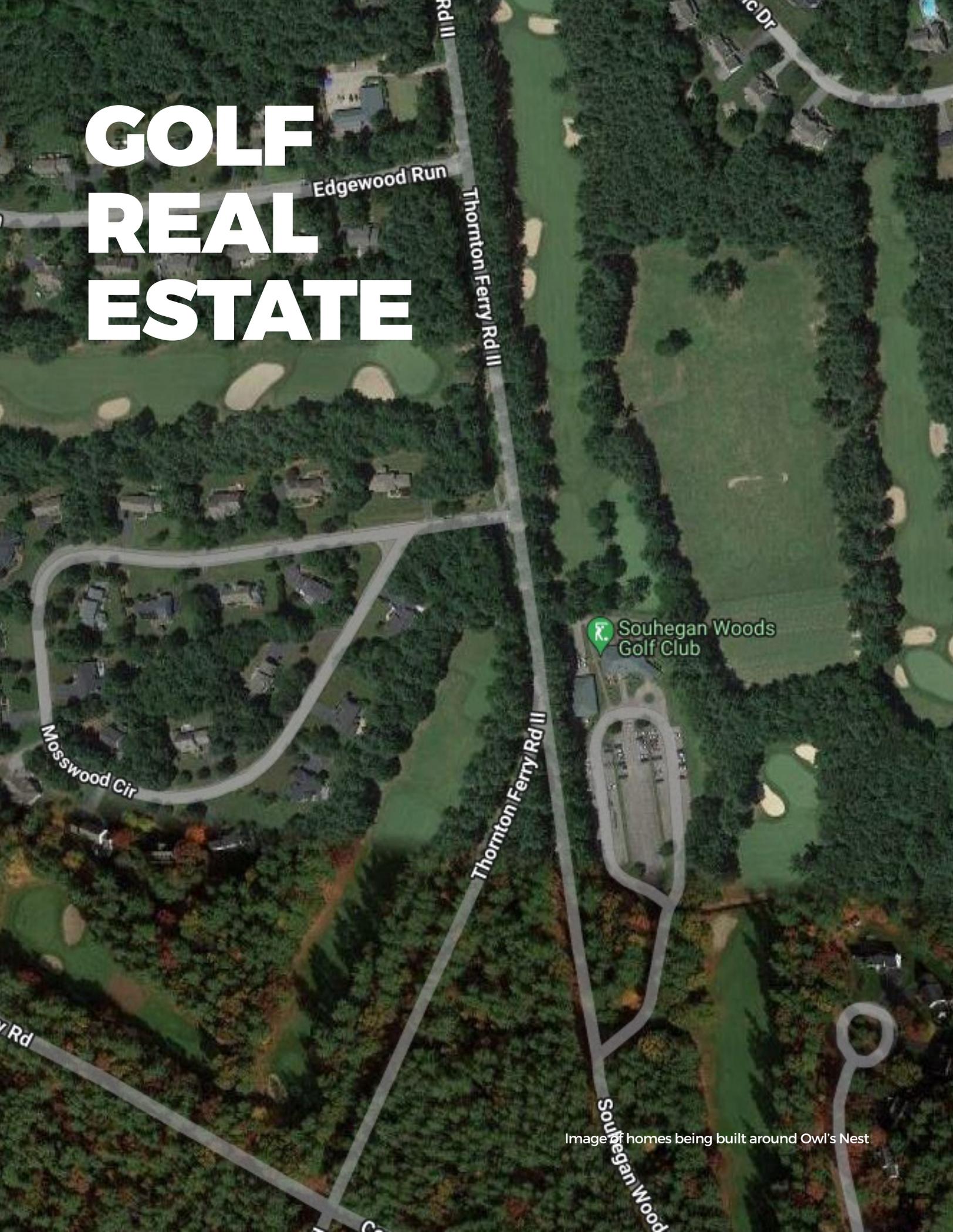


Image of homes being built around Owl's Nest

The walkable open spaces and recreational opportunities provided by golf courses make them a key amenity in many residential communities. There are 13 golf facilities in New Hampshire that are connected to residential real estate and have some residential component associated with them, such as apartments, villas, lodges or resorts. In total, the NGF estimates upwards of 4,000 total residential units in New Hampshire that are part of master-planned golf communities, or are immediately adjacent to golf courses, including over 800+ units with a prime golf course view. It was determined that there were no additional units added to golf residential communities in New Hampshire in 2022

# \$5.2M

New Hampshire Golf Real Estate

## IMPACT

The economic impact of golf real estate in New Hampshire is derived from the net gain to local tax jurisdictions from value premiums associated with golf course real estate.

The presence of a golf course with direct frontage on, or in immediate proximity to, a residential unit will provide an added value to the residential property known as the “golf premium” (estimated previously by NGF to be 15%). This golf premium is manifested by the extra value a homeowner can expect to receive on the sale of a housing unit located on a golf course, or within a defined golf community. As this sale is considered a transfer of assets rather than economic output, this is not included in the economic output analysis. However, the enhanced value of golf residential real estate does impact the total amount of property taxes collected by local authorities. NGF estimated the “golf premium” associated with these developments to be upwards of \$280.3 million, with a property tax impact of \$5.2 million in net gain for local taxing authorities to be used for education and other local initiatives funded by property tax revenue.



# \$0M

New Golf Home Construction in 2022\*



# \$5.2M

Net Gain on Local Property Tax from Golf Premium\*\*

\*Assumes -0- new homes added to golf communities in 2022.

\*\*Assumes a 15% “golf premium” on residential values of 4,001 golf residential units in New Hampshire multiplied by the 1.86% average effective property tax rate of market value in New Hampshire (source: Wall St. 24/7 + Tax-Rates.org/New Hampshire).

## APPROACH

### What is Measured

New golf home construction generates significant regional economic activity and impact. For this segment, NGF measures expenditures related to new golf home construction, as well as economic activity associated with the property tax assessment valuation of golf homes and the premium associated with these homes. The “golf premium” is the extra amount of property taxes collected by local authorities.

### How it’s Measured

NGF conducted online research to identify new golf community developments and new phases of development at existing golf communities. NGF then contacted real estate developers, builders, and real estate agents to identify the number of new homes under construction in the base year and the average construction cost of these homes.

The calculation of the golf premium impact on local property taxes involves two parts: (1) the “premium” associated with proximity to a golf course was estimated based on previous NGF research on golf-residential communities at 15% premium; and (2) Identified the total inventory of residential units (by type) inside golf communities in the State multiplied by the average sale value (by type) of these units and then applying the 15% golf premium and the estimated 1.86% statewide effective property tax to market value estimate (source: Tax-Rates.org/New Hampshire). The calculation is summarized below:

#### Estimated Impact of Golf Value Premium of Local Property Taxes – New Hampshire 2022

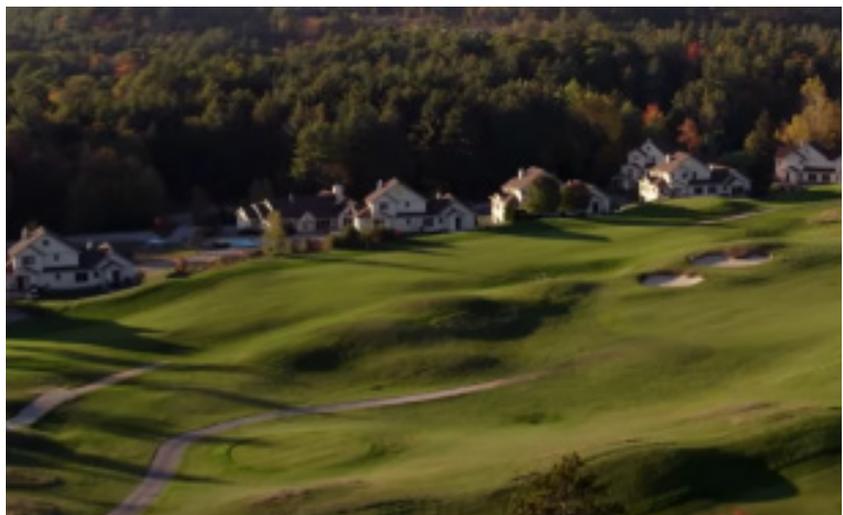
	No. of Residential Units in Golf Communities	Avg. \$ Value Residential Units in Golf Communities	Total (\$ Millions)
Base	4,001 total Units (2,895 SF + 1,106 TH)	\$467,058*	\$7,861
“Golf Premium”			15%**
Total Golf Premium			\$280.3
New Hampshire Effective Property Tax Rate			0.0168***
<b>Net Gain for Local Tax Jurisdictions</b>			<b>\$5.21</b>

\*From New Hampshire Realtors Assoc.

\*\*Source NGF Analysis – 2022.

\*\*\* Tax-Rates.org/New Hampshire.

SF=Single Family; TH=Townhouse; CC=Golf Communities



# NON-ECONOMIC BENEFITS



Within the scope of considering golf's impact on the State of New Hampshire, the NGF has provided a summary review of the impact golf has on facets of New Hampshire society that cannot be measured in terms of dollars and cents. Specifically, our team wanted to provide a summary of key impacts this game has on the State's quality of life.

## GOLF'S IMPACT ON THE QUALITY OF LIFE IN NEW HAMPSHIRE

Golf is not only good for a state economy, but also good for the physical and social health of its residents by providing an outlet for youth and family activities and programming. A total of 75 of the State's 97 golf facilities are open to the public and provide affordable outdoor recreation as well as additional non-golf activities to more than 142,000 New Hampshire residents. Traditional golf is not always an option for some. Over time, facilities have introduced other amenities/activities that add to an individual's quality of life and provide other enjoyments besides traditional golf. New Hampshire golf facilities reported that in addition to on-course golf play they also offer driving ranges (72%), practice facilities (72%), golf simulator use (28%) and 50% reported offering other non-golf sport activities, such as, cornhole, lawn bowling, bocce ball, shuffleboard, swimming, gym access, tennis/pickleball courts, curling, etc.). Golf facilities also mentioned they offer public access to their property for public and/or non-profit meeting space events (44%), snow/winter sports (38%) biking/walking trails (17%), bird watching (14%), fishing (11%), and yoga, exercise activities (8%).



### Fostering the Game

The vast majority of golf facilities in New Hampshire surveyed by NGF in 2023 (82%) participated in at least one program for fostering the growth of the game in 2022. Results estimated that 67% of New Hampshire golf facilities offer a junior golf program, while 67% offer a women's golf program. Other offerings included PGA Junior League (47%), scholastic golf teams (44%), specialized beginner programs such as Get Ready Golf or WELCOME2GOLF (33%), military and veteran programs (33%), Youth on Course (25%), and The First Tee (22%). Facilities also mentioned offering free golf to kids on the weekends and hosting Drive, Chip & Putt qualifying events.



### Living

While golf is an industry with economic importance, the game also supports the health and well-being of roughly one in thirteen Americans. A study released in June of 2019 concluded that spending 120 minutes or more per week in nature is positively correlated with well-being<sup>12</sup>. Walking 18 holes of golf also burns between 531-2467 calories. Golf provides an activity for the improved physical and mental well-being of the more than 142,000 NH residents who participate.

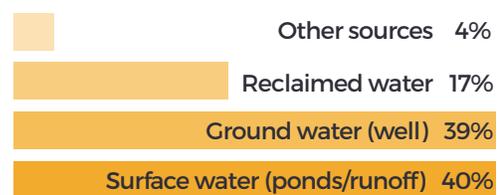
<sup>12</sup> Mathew P. White, I. A. (June 13 2019). Spending at least 120 minutes a week in nature is associated with good health and wellbeing. Scientific Reports.



### Environmental

The NGF review shows that New Hampshire golf courses provide the following key environmental takeaways:

**897** approx. acres of open space.



Water Sources

**11%** replaced some turfgrass in the past 5 years using native vegetation trees and shrubs and/or other turfgrass varieties.

- ➔ As a result of reading the NH BMP GC Planning Guide (GCSAA's Best Management Practices - BMP) NH golf courses reported having adopted (or plan to adopt in the next year) the following top four practices: Irrigation (28%), golf turf fertilization and nutrient (33%), cultural practices (28%), and pesticide management (28%).
- ➔ Top four environmental impact programs implemented sprinkler head upgrades to reduce water use (44%), installation of bat boxes, bird houses, etc. (25%), provide natural areas with dead trees, undisturbed brush piles and "no-mow" areas (42%), and adding annual and perennial garden beds designed to provide food for wildlife and attract butterflies and bees (42%).
- ➔ Of the facilities who took the 2023 survey - the following have done an irrigation or energy audit:

**50 %** completed an **Irrigation Audit**

**28%** made adjustments/corrections

Saving on average **10%** of water per year

**15%** completed an **Energy Audit**

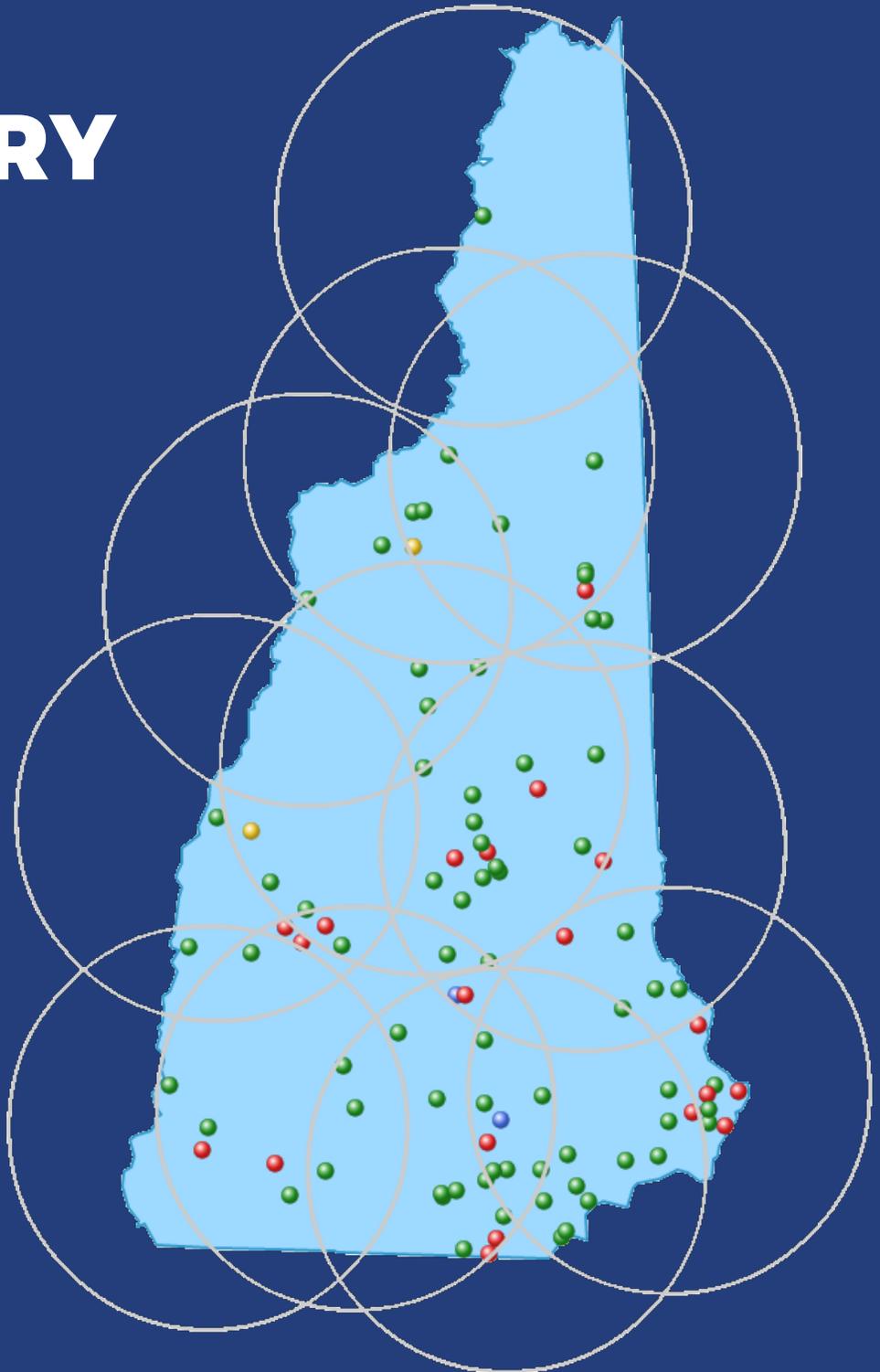
**75%** adopting energy saving practices

Saving on average **10%** of energy per year

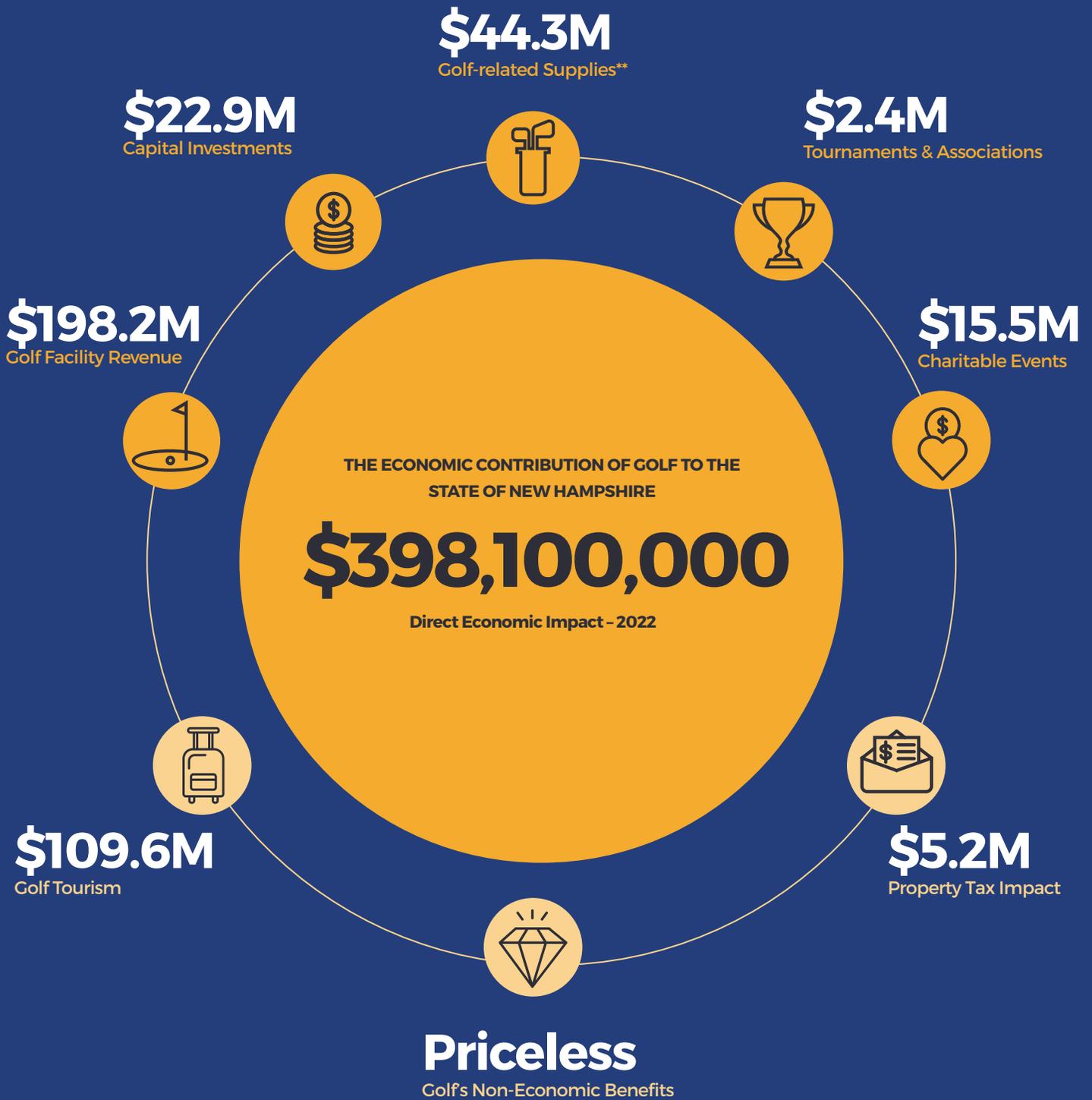
# SUMMARY

Public golf nearly covers all areas of New Hampshire. Rings represent a 20-mile ring around public golf courses in NH.

- Daily Fee
- Municipal
- Private
- Private Limited



Map produced by NCF's Licensed Mapping Platform  
[www.MapBusinessOnline.com](http://www.MapBusinessOnline.com)





THE CONTRIBUTIONS OF GOLF TO THE STATE OF NEW HAMPSHIRE  
**2022 IMPACT REPORT**