

ECONOMIC IMPACT REPORT

TEXAS GOLF

In 2023, Texas’ golf industry generated a direct economic impact of \$7.7 billion, fueling a total economic output of \$14.2 billion when accounting for indirect and induced effects. This places golf among the state’s leading recreational industries, supporting more than 107,696 jobs, generating \$4.8 billion in wages, and contributing nearly \$1.3 billion in state and local taxes, making it a vital contributor to the Texas economic landscape.

Economic Impact of the Golf Sector for Texas

Direct Impact	Total Impact	
Golf Economy Total Direct Expenditures \$7.7 Billion	Economic Output	\$14.2 Billion
	Employment	107,696 Jobs
	Wages and Benefits	\$4.8 Billion
	State and Local Taxes	\$1.3 Billion

TEXAS ECONOMIC HIGHLIGHTS

Texas, the second-largest state by area and population, spans 261,263 square miles and is home to over 30 million residents. Its cities dominate national growth rankings, with Dallas-Fort Worth (7.71M) and Houston (7.12M) as the largest metro areas, followed by San Antonio and Austin. Long known for oil and agriculture, Texas has expanded into technology, aerospace, and increased tourism, attracting major headquarters to the area like Tesla, Oracle, and one of the world's largest sports organizations, the PGA of America. Texas currently ranks second in the nation with 52 Fortune 500 Companies.

Golf has flourished under these conditions, growing to a \$7.7 billion industry over the last decade, supporting nearly 108,000 jobs and contributing \$14.2 billion in total impact. Its economic output now surpasses the \$12.3 billion Texas horse industry, reinforcing its powerful role in the state's economy.

The Texas Golf Market

Texas golf courses showcase diverse landscapes, from rolling hills to coastal areas, while providing greenspaces that break up urban sprawl in major cities. With mild year-round weather, most courses remain open, making Texas a top destination for residents and visiting golfers.

Texas ranks fifth nationwide in total golf courses, with nine courses on prestigious Top 100 lists, including Whispering Pines and Dallas National, recognized in *Golf Digest's* 2023 ranking of America's 100 Greatest Golf Courses. The state boasts 1.89 million individual on-course golfers, which is 6.29% of the Texas population, ranking second nationally for on-course and total golf participation. This is akin to filling AT&T Stadium more than 23 times over.

Key Texas Golf Facts:

- ➔ 24.6 million rounds played in 2023, averaging one round every four weeks per golfer.
- ➔ 241,000 new golfers in 2023, a 4.5% growth rate versus prior year, surpassing the 3.1% national average.¹
- ➔ 821 golf courses, 706 facilities (69% public, 31% private), with municipal courses making up 38% of public facilities, higher than the national 25% average.²
- ➔ 55 stand-alone driving ranges, including 12 Topgolf locations and over 200 resort or real estate-connected facilities, ranking Texas third nationally.
- ➔ Affordable public golf: 58% of public courses charge under \$50, while 29% fall into the \$50-\$70 range and 13% exceed \$80.

^[1] National Golf Foundation. "Golf Participation Rates in the US" 2024.
^[2] National Golf Foundation. "Which Way is Municipal Golf Going?" March 28, 2024.

Texas’ deep golf heritage includes 25 World Golf Hall of Fame members and Texas golfers have captured 102 Major Championships. A great number of Texas golf facilities are affordable and accessible, welcoming golfers of all skill levels. Historic courses like Lions Municipal “Muny” in Austin, which is listed on the Registration of National Historical Places, and

Brackenridge Park in San Antonio, Texas’ oldest municipal course built in 1916, ensure broad, multi-generational access to the sport. In 2022, the Northern Texas PGA opened Ronny Golf Park - an Urban Golf Park at PGA Frisco. Free and open to all, it offers junior programs, family fun, and community connection. It’s the first of its kind, with more planned for the future.

Golf Facility Inventory – State of Texas

	Number of Facilities
9-Hole	194
18-Hole	432
27-Hole	80
Total	706
Stand-Alone Driving Ranges	43
TopGolf	12
Urban Golf Park	1



TEXAS GOLF INDUSTRY SUMMARY OF ECONOMIC IMPACT

The Texas golf industry generates a sizable \$14.2 billion in total economic impact, encompassing direct industry sales, indirect supply chain activity, and induced household spending by supported employees. This impact extends to jobs and wages, with total employment of 107,696 and labor income of nearly \$4.8 billion driven by industry roles and broader economic ripple effects. The industry’s total fiscal impact is upwards of \$1 billion toward local and state taxes.

2023 Economic Impact of the Golf Sector State of Texas (\$ Millions)

Core Segments	Direct Impact	Total Output	Total Jobs	Labor Income
Golf Facility Operations*	\$3,875.5	\$7,097.5	64,140	\$2,450.0
Capital Investments	\$710.6	\$1,410.2	6,863	\$480.0
Golf-Related Supplies**	\$704.3	\$1,414.8	8,371	\$451.2
Tournaments & Associations	\$300.8	\$566.7	3,715	\$192.1
Charitable Events	\$362.5	\$414.8	1,981	\$145.1
TOTAL CORE SEGMENTS	\$5,953.7	\$10,904.0	85,070	\$3,718.4
Enabled Segments	Direct Impact	Total Output	Total Jobs	Labor Income
Golf Tourism	\$1,471.0	\$2,740.0	20,312	\$910.6
Golf-Related Residential Construction	\$281.2	\$571.1	2,315	\$160.7
TOTAL ENABLED SEGMENTS	\$1,752.2	\$3,311.1	22,627	\$1,071.3
GOLF ECONOMIC IMPACT	\$7,705.9	\$14,215.2	107,696	\$4,789.7
LOCAL AND STATE TAXES	\$995.5	\$1,271.0		

* Revenue from golf facility operations including on-course merchandise sold.
**Total retail sales do not include on-course merchandise sold.
***Segment job totals may not sum precisely to 107,696 due to rounding.

GOLF INDUSTRY SEGMENTS



Direct Impact from Core Segments

Golf Related Supplies

- ➔ Texas golf retail generated \$354 million in retail margins from \$787.6 million in golf apparel, equipment, and shoe sales in 2023. Of this, \$475 million was driven by off-course retail outlets, supporting 6,079 total jobs statewide, while on-course golf shops accounted for the remaining \$313 million in sales (included in total consumer spending within facility operations).
- ➔ **239 golf-related manufacturers** and service providers were identified in Texas, including golf architects, construction companies, equipment and apparel manufacturers, event and golf course management companies, and more. Golf-related companies generated \$229.7 million in Texas economic impact in 2023 and supported 2,292 jobs.
- ➔ Prominent companies that call Texas home include Invited, the largest owner and operator of golf facilities in the US with over 200 clubs in 29 states, Arcis, operating nearly 70 private, resort, and public golf clubs across the country, and TopGolf, offering more than 100 off-course golf and entertainment venues worldwide.

Capital Investments

- ➔ Texas golf facilities invested more than **\$710.6 million in capital improvements** in 2023 including new facility construction, course renovations, and upgrades to existing structures. These investments supported nearly 7,000 total jobs.
- ➔ Overall, 55% of all Texas golf facilities launched or continued large-scale capital projects that were not included in regular operating expenses.

Charitable Giving

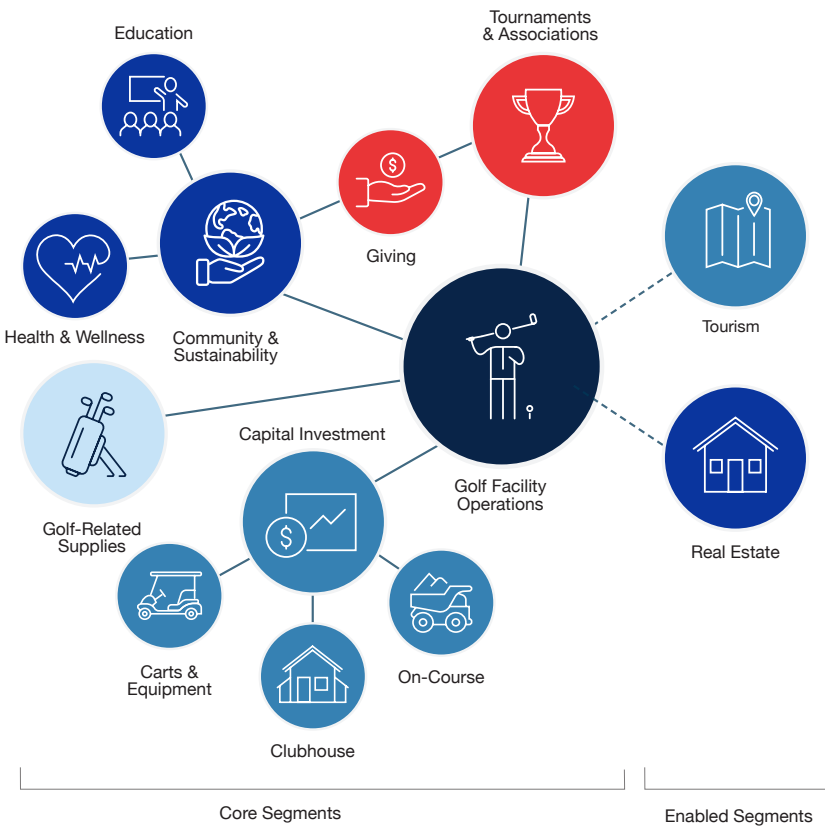
- ➔ Texas golf is committed to its communities. Every surveyed golf facility in Texas hosted at least one charitable event in 2023, contributing to an impressive 15,380 total events, both golf and non-golf, **raising \$362.5 million for Texas nonprofits**. Beneficiaries included the Communities Foundation of Texas, Folds of Honor (Texas Chapters), CAMP HOPE, Project Joy and Hope, and Texas Scottish Rite Hospital for Children, among many others.

Golf Facility Operations

- ➔ Total consumer spending at golf facilities for green fees, memberships, golf shop retail sales, driving range fees, lessons, restaurant (F&B) sales, and additional **activities totaled \$3.9 billion** in 2023, compared to \$2.3 billion in 2012 (\$3.2 billion inflation-adjusted), reflecting real growth of 22% over the eleven-year period.
- ➔ Golf facility operations supported 64,140 total jobs compared to 50,758 total jobs in 2012. (+26%)

Tournaments & Associations

- ➔ In 2023, Texas was host to the Senior PGA Championship, the first Major Championship to be played at PGA Frisco. Fields Ranch East at PGA Frisco will be home to 26 championships scheduled over an 11-year span, including two PGA Championships. PGA TOUR events included THE CJ CUP Byron Nelson, Dell Technologies Match Play, Charles Schwab Challenge, and Valero Texas Open. In addition there were two LPGA events and tournaments on the Korn Ferry and PGA TOUR Champions. **Direct impact from major tournaments was \$161.4 million** in 2023, generating nearly 2,500 total jobs.
- ➔ Texas is home to 265 golf-related associations that drive the sport's growth, health, and development, contributing \$139.4 million in economic impact and supporting 1,265 jobs in 2023. Major associations include the PGA of America, PGA of America REACH Foundation, Texas Golf Association, Northern and Southern Texas PGA Sections, Texas Junior Golf Alliance, Texas Turfgrass Association, six chapters of the Texas Golf Course Superintendents Association, and the Texas Golf Hall of Fame.
- ➔ Numerous First Tee chapters and grassroots organizations, such as I AM a Golfer Foundation (IAGF) and Lone Star Golf Association, are among ten Texas recipients of *Make Golf Your Thing* grassroots grants, promoting inclusion and growth in the game.
- ➔ The PGA of America relocated its headquarters to Frisco, Texas, in 2022, partnering with the city of Frisco, Omni Resorts, and Frisco ISD. Representing 30,000+ PGA Golf Professionals, the PGA of America drives participation nationwide and operates major championships for men, women, seniors, and the Ryder Cup, one of the world's premier sporting events.



Economic Impact of the Golf Sector

State of Texas (\$ Millions)

Core Impact	2023 Impact
Golf Facility Operations*	\$3,875.5
Capital Investments	\$710.6
Golf-Related Supplies**	\$704.3
Tournaments & Associations	\$300.8
Charitable Events	\$362.5
Total Core Segments	\$5,953.7

* Revenue from golf facility operations including on-course merchandise sold.
 ** Total retail sales do not include on-course merchandise sold.

Enabled Impact	2023 Impact
Golf Tourism	\$1,471.0
Golf-Related Residential Construction	\$281.2
Total Enabled Segments	\$1,752.2

Golf Economy Total Direct Expenditures	\$7,705.9
Local and State Taxes - Direct	\$995.5
Total Output of the Texas Golf Sector	\$14,215.2
Total Jobs	107,696
Labor Income	\$4,789.7
Local and State Taxes - Total	\$1,271.0

Direct Impact from Enabled Segments

Golf Tourism

- ➔ Texas golf tourism generated 2.14 million overnight trips, plus 2.23 million day-trips of more than 50 miles within the state in 2023. Visiting golfers contributed nearly **\$1.5 billion in direct impact** to the Texas economy while the sector supported 20,312 jobs from direct, induced, and indirect activities such as transportation, lodging, meals, and other entertainment. Golf tourism also generated approximately \$188 million in local and state tax revenues.

Golf Real Estate

- ➔ Golf courses within, or in immediate proximity to, residential communities enhance real estate value in Texas, driving significant direct economic and fiscal **contributions totaling \$541 million**. This impact is driven by two key factors:

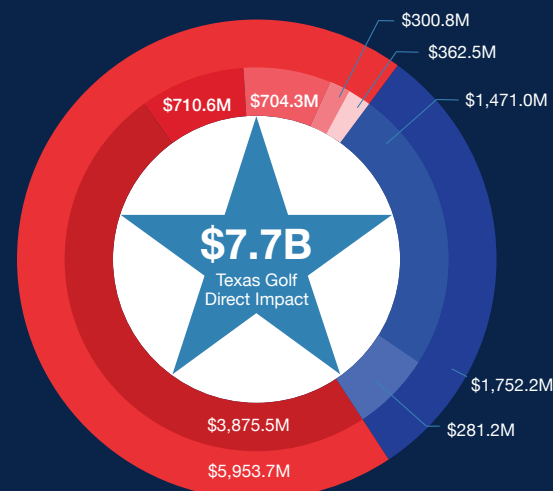
Golf-related residential construction. New golf-associated residential construction added over \$404 million in new real estate value, generating \$281.2 million in direct spending within the construction industry.

- ★ This investment directly supported 1,013 jobs and created an additional 1,302 jobs through indirect and induced spending.
- ★ In total, golf construction-related jobs contributed over \$160 million in labor income to the Texas economy.

Net gain to local tax jurisdictions from value premiums. Golf-adjacent residential homes contribute significantly to property values and provide a premium or net-gain for local taxing authorities.

- ★ Homes in golf course communities command a price premium, adding an estimated \$14.3 billion in total property value.
- ★ This premium generated a fiscal contribution of \$259.5 million in local property tax revenue in 2023, helping to fund municipal services, city and county streets, schools, and law enforcement for local Texas communities.

Direct Impact



TEXAS GOLF'S COMMUNITY & SUSTAINABILITY IMPACTS

Community Impact & Youth Development

- Texas golf courses are committed to building foundational skills with 89.17% offering junior programs and 46.5% providing scholastic golf teams or beginner programs like Get Golf Ready.
 - PGA Junior Golf served nearly 4,500 juniors in Southern Texas and 5,000 in Northern Texas across 200 facilities in 2023, promoting fun, health, and sportsmanship. Youth on Course, supported by the Texas Golf Association, grew 47.5% year-over-year, providing \$5-or-less rounds for youth statewide.
 - Texas hosts nine First Tee chapters from Houston to West Texas, engaging thousands of youth annually, alongside dozens of LPGA-USGA Girls Golf programs developing leadership skills through golf.
 - PGA of America REACH Foundation, PGA REACH Southern Texas, and Northern Texas PGA Foundation advance inclusion, workforce diversity, women's leadership, and Veteran programs, ensuring age, background, or cost never limit access to the sport.
 - Nearly half of Texas courses offer senior golf programs, and 36.94% support Veterans and military through initiatives like PGA HOPE.
 - STEAM education programs, including The First Green, provide experiential learning at Texas courses, integrating science, math, art, and environmental studies.
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- The 2023 Texas golf facility survey revealed that 34% of golf facilities offer racquet amenities and 39% provide aquatic amenities, underscoring golf's role in multi-sport recreation. Across these facilities, there were 2,215 racquet courts and 555 pools, significantly enhancing community engagement and activity options.
 - ★ The daily attendance at these amenities was substantial, with aquatic facilities averaging 20,150 visitors per day and racquet facilities drawing 17,413 daily attendees across the state.
 - ★ This equates to approximately 7.36 million visits to aquatic facilities and 6.35 million visits to racquet facilities annually, further reinforcing the year-round recreational value and family activities that Texas golf facilities provide beyond the sport itself.

Golf in Texas is more than a sport—it fosters health, wellness, and environmental stewardship while strengthening communities. Walking 18 holes covers 5 miles, while cart use spans 3 miles, boosting immunity, reducing disease risk, and improving cognition and mood. Beyond individual health, golf's influence extends to youth engagement, inclusion, sustainability, and conservation.

Sustainability & Environmental Leadership

- 100 Texas courses are Audubon International members, with over a third fully certified, and six courses hold Signature Sanctuary designation, representing 6.3% of all U.S. Signature Sanctuary courses, indicating excellence in water conservation, habitat protection, and sustainable land management.
- Texas golf preserves approximately 150,000 acres of open greenspace, supporting wildlife habitats, air quality, water filtration, flood mitigation, and urban cooling.
- Best Management Practices (BMPs) guide Texas courses in water conservation, habitat protection, and responsible land use, ensuring long-term environmental sustainability.



- 72%** facilities use three or more water conservation measures
- 51%** courses irrigate with recycled water
- 42%** facilities use five or more reduction strategies



- 81%** facilities use at least two energy-saving measures
- 35%** facilities implement five or more, including solar power, LED lighting, and electric carts



- 68%** facilities adopt two or more waste reduction practices
- 30%** facilities use four or more, such as composting tree trimmings, leaves, grass clippings, and food waste, plus golf ball recycling.

Texas golf serves as a model for community engagement and sustainability, ensuring broad access to the game while driving conservation and environmental responsibility.

TEXAS DEMOGRAPHIC INSIGHTS

Texas’ population growth significantly outpaced the national average, highlighting the state’s economic momentum and attractiveness as a place to live and work.

	Texas	U.S.
Population Estimate 2012	25,945,561	248,584,652
Population Estimate 2023	30,503,301	334,914,895
Compound Annual Growth Rate (2012-2023)	1.46%	.6%
Employment	23,857,262	271,122,729
Income and Benefits	\$11,260,645	\$131,332,360
Median Household Income 2023	\$75,780	\$77,719
Median Age 2023	35.2	38.2

Source: US Census Bureau | 2023 American Community Survey 1-Year Estimates

- Texas’ population is growing at over twice the national rate, driven by strong economic opportunities and business relocations.
- Texas accounted for a significant share of U.S. population growth, reinforcing its position as a top destination for new residents.
- Texas is a major driver of the U.S. economy, contributing nearly 1 in every 11 jobs.
- Income per employee in Texas is slightly lower than the U.S. average, but factors like Texas’ lower tax burden and cost of living may counterbalance this.

Golf Industry Insights

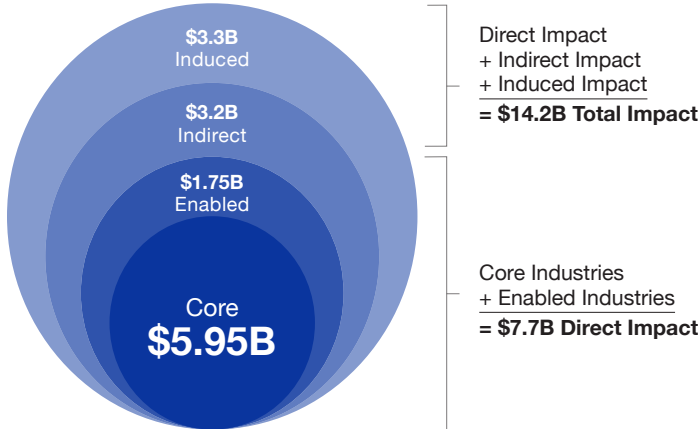
The Golf Industry’s Income Per Job Outpaces Texas’ Economy

- The average labor income per golf-related job is \$44,470, which is nearly double the average across all Texas jobs (\$472 per week or ~\$24,544 per year) in terms of wages alone (excluding benefits).
- Golf-related jobs offer strong income opportunities relative to many other service-sector roles in Texas, making the industry a high-value employment contributor.

Golf Packs a Powerful Economic Punch in Texas

- Golf generates \$4.79 billion in labor income - an outsized impact for its workforce size. Golf-related jobs contribute disproportionately high economic value, meaning they pay well and sustain local economies.
- The industry’s influence also drives real estate, tourism, and hospitality revenues which are beneficial for the state.

TOTAL IMPACT SUMMARY



Impact of the Golf Sector on the Texas Economy 2012 and 2023 (\$ Millions)

Impact Type	2012	2012*	2023	Var**
Direct Impact	\$ 4,211.6	\$5,526.0	\$7,705.9	+39%
Total Impact	\$6,228.6	\$8,172.5	\$14,215.2	+74%
Total Jobs	80,968	80,968	107,696	+33%
Labor Income	\$2,011.0	\$2,638.6	\$4,789.7	+82%

*2012-dollar values have been adjusted to 2023 dollars using the U.S. Bureau of Labor Statistics (BLS) Consumer Price Index, which reflects a cumulative inflation rate of 37.46% from 2012 to 2023.

**Variance from inflation-adjusted 2012 golf industry dollars as compared to 2023 figures.

The Texas golf industry experienced substantial economic growth from 2012 to 2023, with total impact rising 74% to \$14.2 billion and direct impact increasing 39% to \$7.7 billion. Employment in the sector expanded 33%, adding over 26,700 jobs, bringing total industry employment to 107,696 workers. Labor income nearly doubled, surging 82% from an inflation-adjusted \$2.64 billion in 2012 to \$4.79 billion in 2023, highlighting golf’s significant contribution to Texas’ workforce. These gains underscore golf’s economic influence, benefiting not only the industry itself but also tourism, real estate, and hospitality sectors across the state.

Golf’s impact in Texas extends far beyond the numbers. While past performance doesn’t guarantee the future, the industry’s \$14.2 billion economic impact in 2023 highlights its profound influence on jobs, tourism, real estate, and community programs. As Texas continues to grow, golf is poised to remain a driving force, shaping industries, enriching communities, and leaving a lasting legacy for generations to come.



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