Oregon Golf Economic Impact Report

October 2025

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Oregon Golf Economic Impact Report

September 2025

Waverley Country Club in Portland, OR

Summary

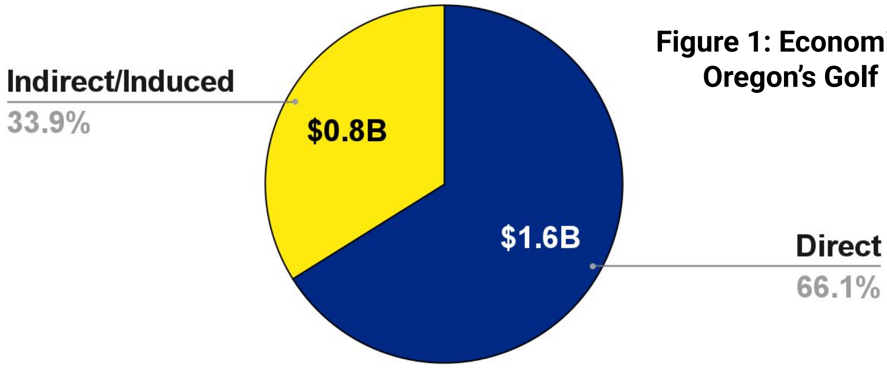
$2.4 Billion
Total Economic Impact

$1.6 Billion
Direct Economic Impact

18,000
Total Jobs Supported

$252 Million
Local Taxes

Figure 1: Economic Impact of Oregon's Golf Industry



Oregon's diverse landscapes, from the rugged Pacific coastline to the high desert plateaus of Central Oregon and the lush valleys of the Willamette, provide the perfect setting for one of the most dynamic golf industries in the United States. With a total economic impact of **$2.4 billion**, golf is a key driver in the state's outdoor recreation economy, surpassing many other activities and generating significant employment, tax revenue, and tourism spending. Of this total, $1.6 billion represents direct economic activity generated by courses, facilities, and golf-related businesses, demonstrating the industry's broad footprint across urban centers and rural communities alike.

Oregon's golf economy is supported by **172 golf facilities and nearly 2,950 holes** that collectively serve over **390,000 golfers** across the state, including nearby Vancouver, Washington. Within this base of participants are an impressive 85,000 avid golfers who each play 25 or more rounds annually, forming a stable core of year-round demand. These golfers

Summary

Continued

together with a vibrant visitor's market, sustain a wide variety of facilities ranging from municipal courses and community-oriented clubs to world-renowned destinations. Flagship properties such as Bandon Dunes Golf Resort on the southern coast and the resorts of Central Oregon, including Sunriver, Pronghorn, and Tetherow, are global attractions, breaking records for rounds played while drawing travelers from across the country and overseas.

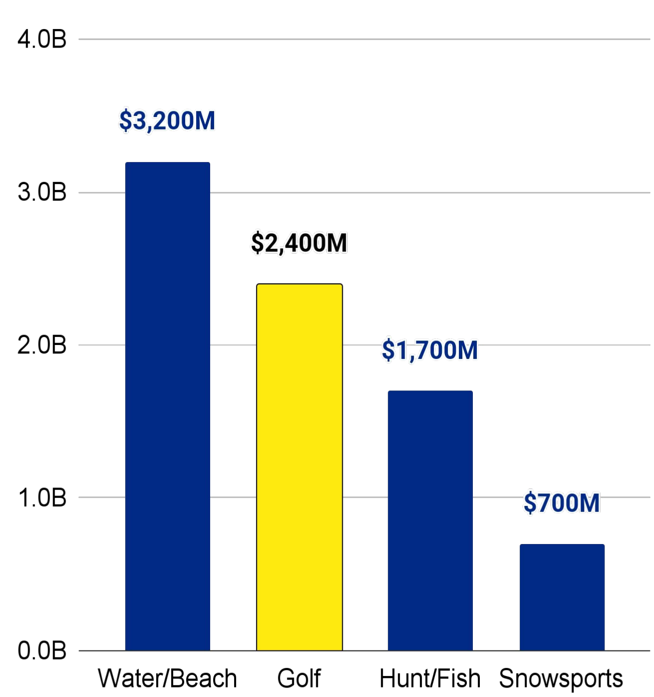
Environmental Stewardship: Oregon's superintendents and course operators are also leaders in environmental stewardship, embracing innovative practices in water conservation, habitat protection, and sustainable land management. Their work ensures that the 26,000 acres of land encompassing the state's golf courses not only deliver world-class playing conditions but also align with Oregon's broader culture of sustainability and respect for natural resources.

Job Growth & Tax Support: Oregon's golf industry supports 18,000 jobs across direct, indirect, and induced sectors, spanning facility operations, tourism, retail, manufacturing, and maintenance. These jobs generate significant household income and stable employment in both Portland and smaller communities reliant on recreational tourism. At the state and local level, golf contributes $252 million in annual tax revenue, underscoring its importance as a leading leisure activity and affirming its role as a vital component of public finance and community reinvestment.

Global Appeal & Local Spirit: The structure of Oregon's golf economy reflects destination appeal and strong local roots. Facilities account for 30% of total impact, with operating revenues and capital investments fueling growth. Tourism represents the largest share at 35%, showing how travel and golf intertwine. Visitors coming for a Bend day trip or an extended coastal stay significantly boost local economies, supporting hotels, restaurants, transportation, and retail in addition to green fees and equipment. Bandon Dunes is a bucket-list destination worldwide, while Central Oregon's high desert climate draws visitors from March through November.

This report provides a detailed analysis of Oregon's golf industry, measuring its impact across facilities, tourism, retail, and related business sectors. By capturing both the direct and ripple effects of spending, the study highlights golf's role as an anchor of the state's outdoor recreation economy, an industry that supports local communities, attracts national attention, and showcases Oregon as a world-class golf destination.

Figure 2: Economic Impact of Golf vs. Other Outdoor Industries in Oregon



Total Economic Impact

Oregon's golf economy is a dynamic network of interrelated sectors that together generate nearly $2.3 billion in total economic impact. This activity not only supports jobs and wages across the state but also contributes meaningful tax revenue for local and state governments, underscoring golf's role as both a recreational amenity and an economic driver.

Facilities, including traditional courses, resorts, public clubs, and newer entertainment-style venues, account for **$712 million** in total activity. **Golf tourism**, which reflects the state's strong reputation as a destination for traveling golfers, reached **$838 million** in total economic impact. The fact that golf tourism generates more than one-third of Oregon golf's $2.3 billion total economic impact affirms Oregon golf's superb reputation with both residents and visitors, and highlights its significant place among the state's outdoor recreational amenities.

Other segments add meaningful value as well. Golf-related **real estate** contributed **$221 million**, while **retail and wholesale** combined for nearly **$434 million**, spanning both consumer purchases and business-to-business distribution. Capital project investment in **renovations and new construction totaling $103 million** reinforced the stature of facilities.

Community and events also play a role. **Charitable events** generated **$34 million**, while **Championships** contributed **$26 million**, bringing visitors, exposure, and prestige to Oregon. Together, these segments show that golf in Oregon fuels tourism, commerce, housing and community engagement across the state.

Table 1: Oregon's Golf Economy Impact in 2024 ($ millions)				
Industry Segment	**Direct Economic Impact**	**Indirect/ Induced Impact**	**Total Economic Impact**	**% of Total Golf Economy**
Facilities (including Private Clubs, Public/Daily Fee, Resorts, Topgolf, etc.)	$486	$226	**$712**	**30%**
Tourism	$506	$333	**$838**	**36%**
Wholesale (Apparel, Software, Hardware, Turf Products, etc.)	$217	$122	**$339**	**15%**
Real Estate	$184	$37	**$221**	**9%**
Golf Facility Capital Expenditures (Investments, New construction)	$70	$33	**$103**	**4%**
Retail (Shoes, Apparel, Equipment, Accessories)	$63	$32	**$95**	**4%**
Charitable Events	$23	$11	**$34**	**1%**
Championship Events	$16	$9	**$26**	**1%**
TOTAL GOLF ECONOMY	**$1,565**	**$803**	**$2,368**	**100%**

Total Economic Impact

Continued

Comparison to Previous Economic Impact Analysis

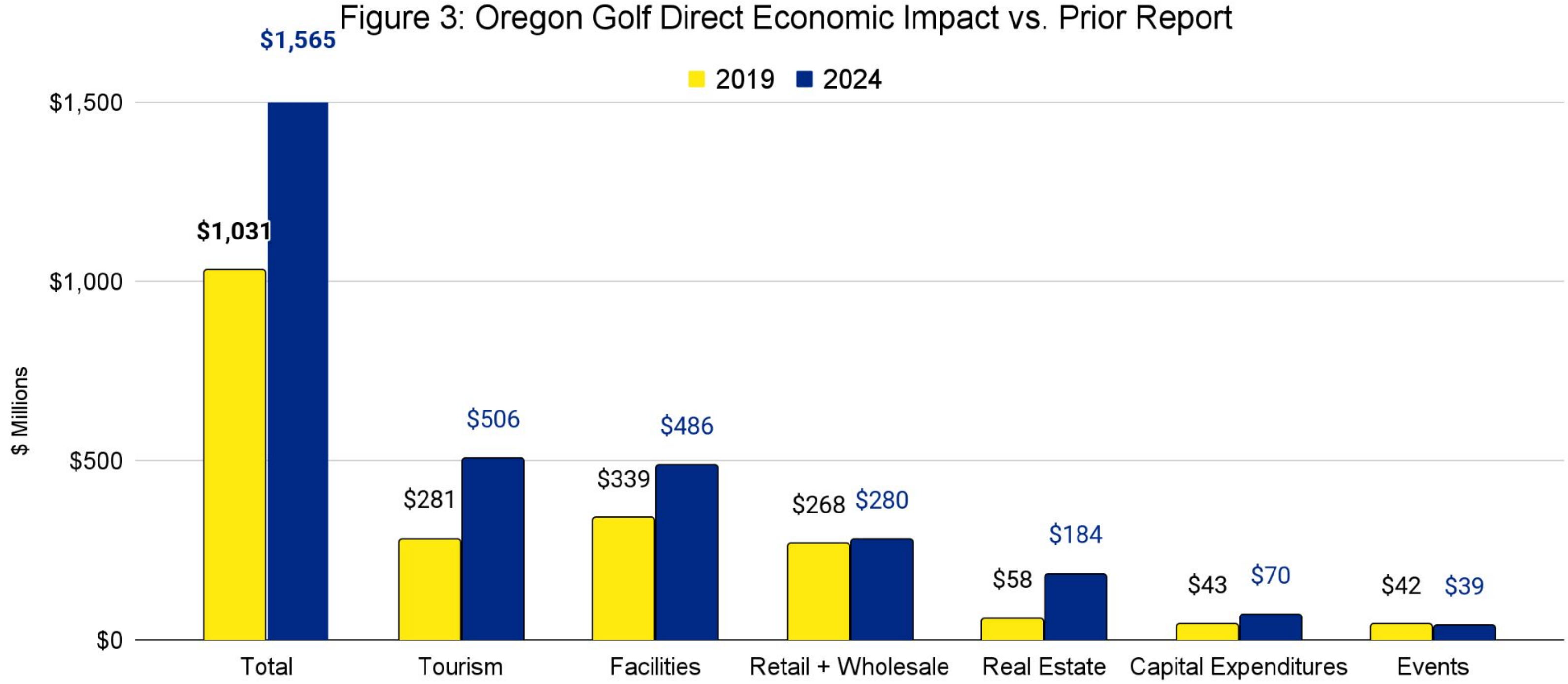
Oregon's golf economy has expanded since 2019, with progress evident across nearly every major category. As seen in Figure 3, growth was broad-based rather than concentrated, underscoring the sport's resilience and continued development in all facets.

Real estate tied to golf communities posted the sharpest gains, climbing from $58 million in 2019 to $184 million in 2024, a more than threefold increase. Golf facilities also rose strongly, from $339 million to $486 million, while tourism advanced from $281 million to $506 million, reinforcing golf's appeal to both resident players and traveling visitors. Other categories saw steadier performance: capital spending edged up from $43 million to $70 million, while retail and wholesale combined also increased slightly from $268 million to $280 million, reflecting supply chain shifts and an increase in the value of the Seed & Turf Science sector.

Taken together, Oregon's direct golf economy grew from just over $1.0 billion in 2019 to nearly $1.6 billion in 2024 - a 52% nominal increase. This represents a compound annual growth rate (CAGR) of 9% over the five-year span. Adjusted for inflation, real growth equates to roughly 24%, or 4.8% per year. This underscores steady golf sector expansion.

While methodology and data sources differ across studies, the consistent upward movement across most segments indicates golf in Oregon has significantly expanded its footprint over the past five years.

Figure 3: Oregon Golf Direct Economic Impact vs. Prior Report

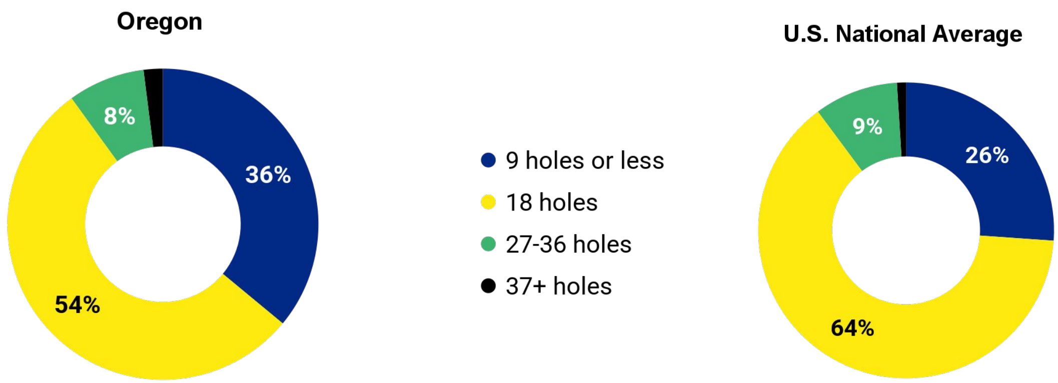


What Makes Oregon Golf Unique

Golf Courses

Figure 4: Public vs. Private

Figure 5: Number of Holes per Facility



Oregon's mix of public and private golf courses reflects a slightly different balance than seen nationally. Of the state's 172 facilities, just over three-quarters (76%) are open to the public, while roughly one-quarter (24%) are private clubs. This distribution gives Oregon golfers greater access to play than the national average, where only 70% of facilities are public. The higher share of public courses reinforces Oregon's offering of accessible opportunities.

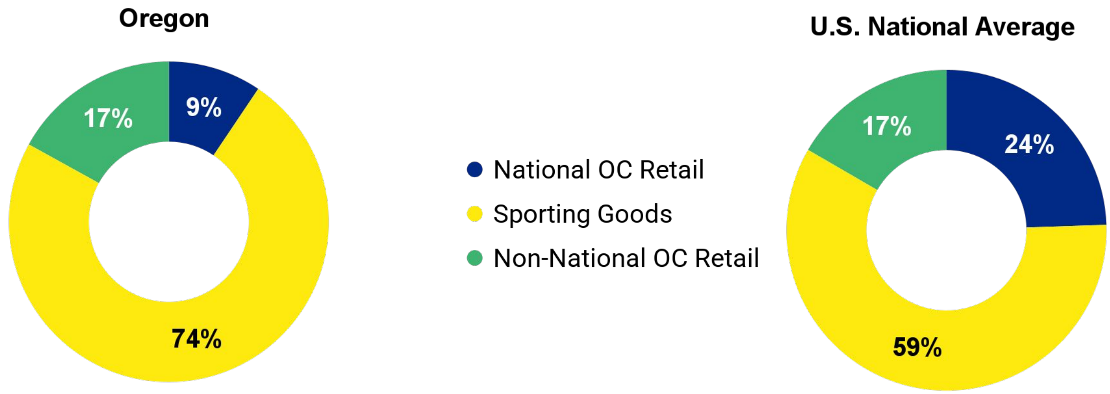
When examining hole configurations, Oregon again shows unique characteristics compared with the U.S. overall. Roughly 36% of courses in the state have 9 holes or fewer, notably higher than the 26% national rate. Standard 18-hole layouts account for 54% in Oregon, trailing the 64% seen nationwide. Courses with 27–36 holes are slightly less common in Oregon (7.6%) than nationally (9.2%). However, the state has a slightly larger percentage of courses with 37 or more holes (2.4%) than nationally, with Oregon's increased number of resorts. These numbers point to a golf environment that blends traditional layouts with a higher-than-average share of shorter courses, offering options appealing to both recreational and time-conscious players.

Complementing these outdoor venues, Oregon has 20 indoor golf centers and 28 miniature golf facilities. These reflect a culture that values variety and inclusivity in golf, ensuring that golf enthusiasts can engage with the game year-round and in family-friendly settings. Together, Oregon's mix of public access, diverse course layouts, and alternative golf formats makes the state's golf landscape welcoming to a wide spectrum of participants.

What Makes Oregon Golf Unique

Off Course Retail

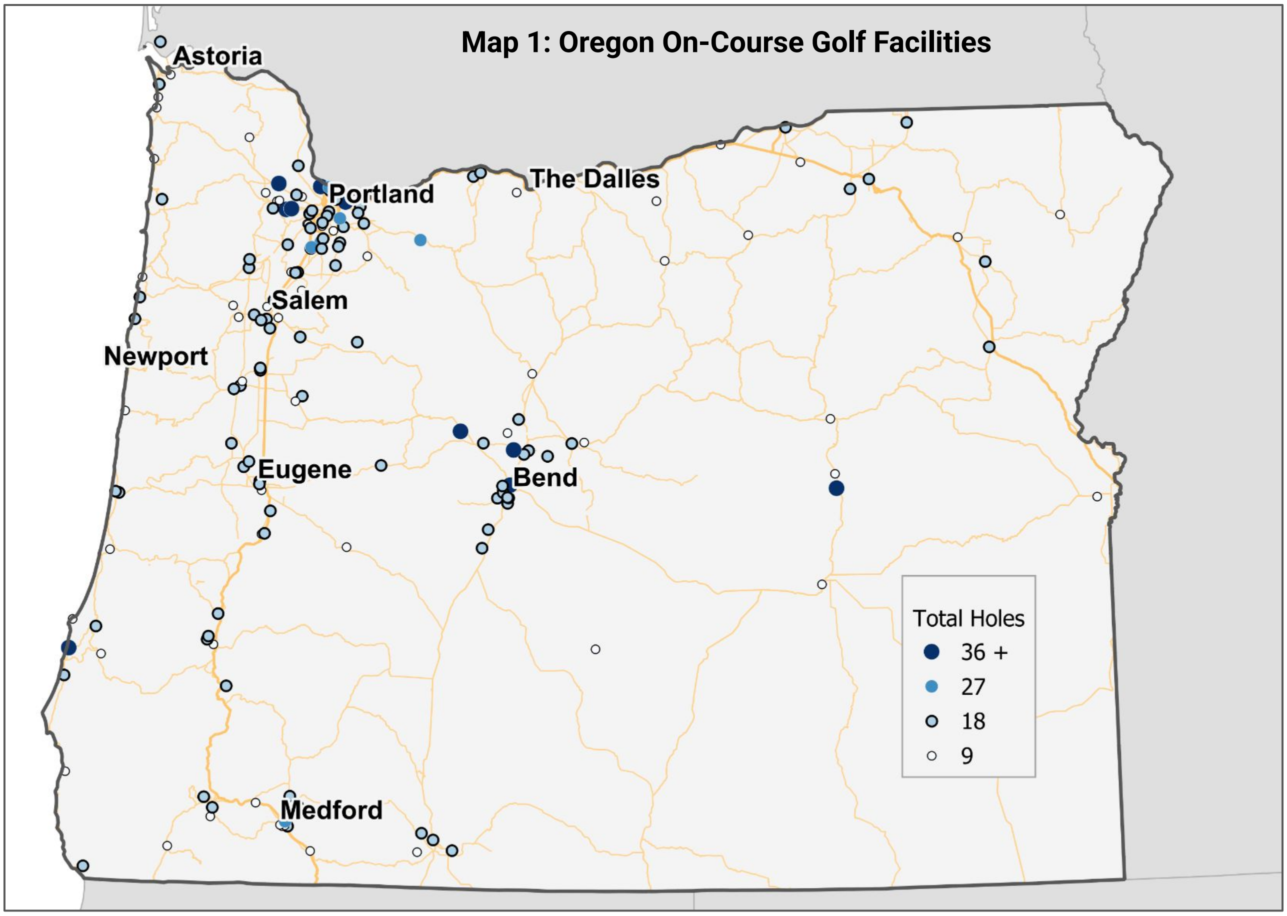
Figure 6: Off Course Retail Locations By Type



Oregon has a higher proportion of general sporting goods stores and lower proportion of national off course retailers than the national average. This is attributable to the “Pacific Cornucopia” effect: On any given weekend in the West/Pacific Northwest states recreation enthusiasts have an abundance of choices. Will they golf, or participate in one of the many outdoor activities available.

This dynamic causes national golf retailers to have a lighter presence in Oregon, while broad-based sporting goods outlets and local specialty shops capture a greater share of the market. The result is a higher proportion of local retailers supporting the state’s golf economy, keeping more spending and economic activity rooted in Oregon communities.

Meadow Lakes Golf Course in Prineville, Oregon, USA.



Golf On & Off Course Facilities

Oregon is home to 172 green grass golf facilities, of which approximately 75% are golf-only operations, while the remaining 25% include resort or real estate components. These facilities are generally distributed in alignment with the state's population, with concentrations in the Portland metropolitan area, along the I-5 corridor through the Willamette Valley, and a smaller cluster in Central Oregon. In addition to on-course locations, the state supports 18 off-course golf equipment retailers - 8 of which are retail-only, with the remaining 10 being entertainment venues, learning centers, or driving ranges that also include retail operations. Oregon also has 39 sporting goods stores that carry golf equipment. It is estimated that 47% of golf-related consumer spending on hard goods, soft goods, and accessories occurs through the green grass channel, 34% through off-course retail, and 19% through sporting goods stores.

Oregon is a premier destination for golf tourism, offering spectacular scenery and world-class courses across three distinct regions. On the rugged southern coast, Bandon Dunes, with five true links courses with towering dunes, ocean winds, and the purest form of "golf as it was meant to be." The creation of two par-3 courses to complement Bandon Dunes, Pacific Dunes, Old Macdonald, Bandon Trails and Sheep Ranch adds to the pleasure of a Bandon golf getaway. The Willamette Valley offers a gentler terrain dotted with lush vineyards and high-value public layouts such as Langdon Farms and The Reserve Vineyards, perfectly paired for wine tasting stops between rounds. Central Oregon's high desert around Bend and Redmond brings wide-open skies and layouts shaped by Central Oregon's elevation and terrain including Tetherow Resort, Pronghorn's Nicklaus course, and the famed Crosswater Club at Sunriver Resort.

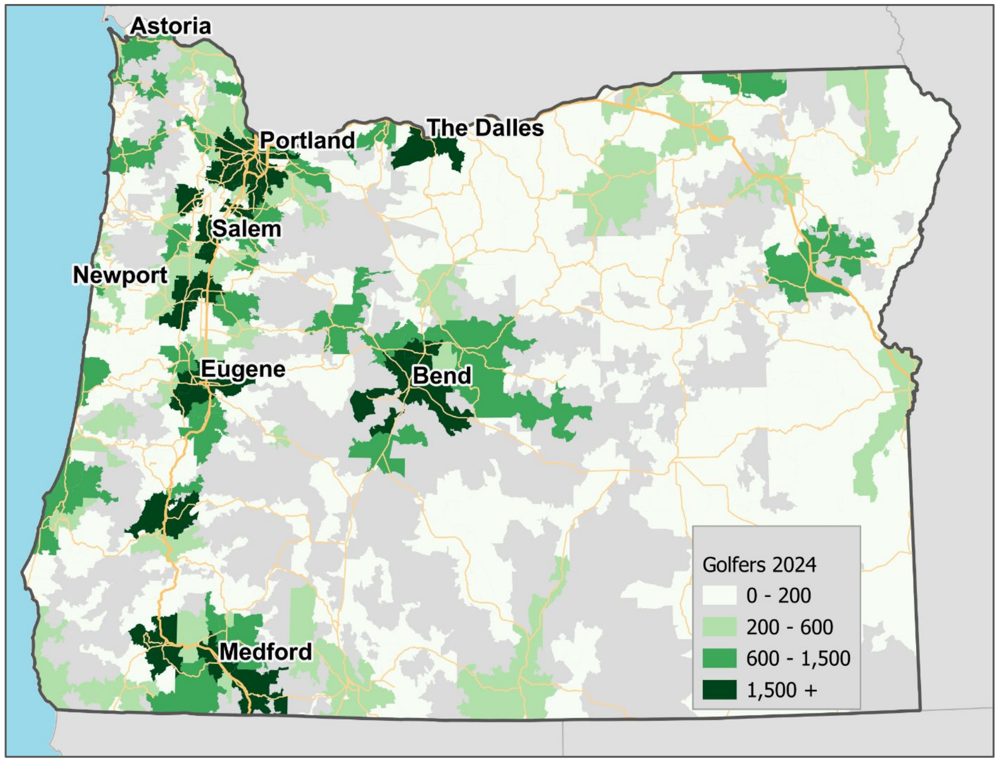
Golf On & Off Course Facilities

Continued

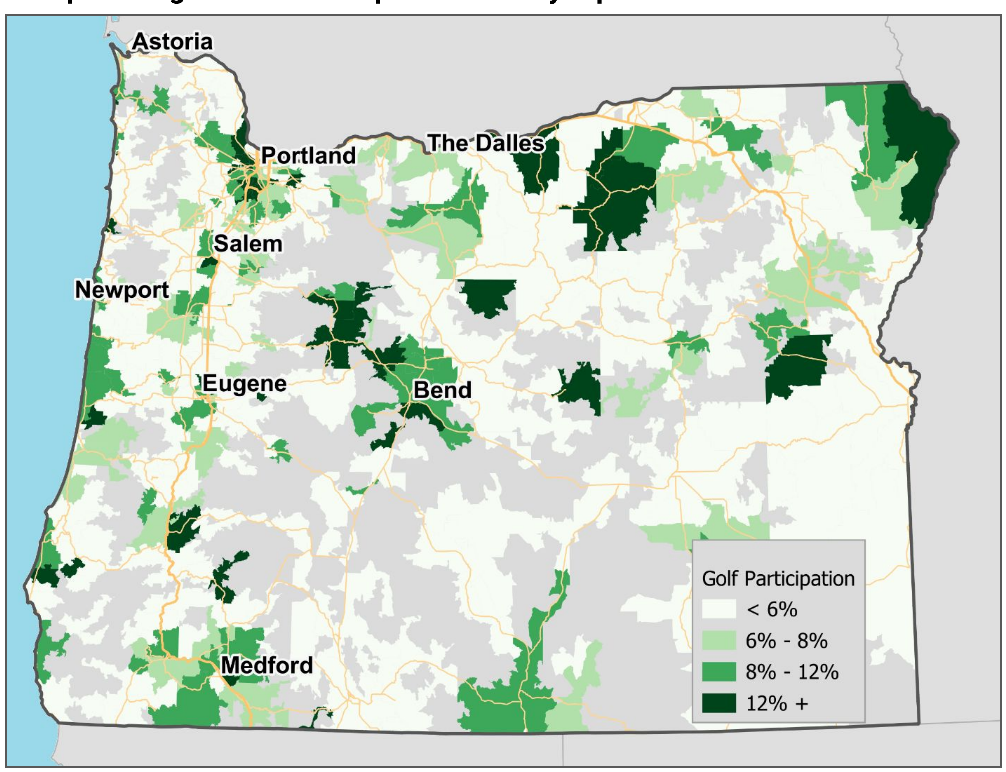
Oregon golf follows general state population trends, with the highest concentration of courses along the I-5 corridor within the Willamette Valley. Participation in Oregon stands out within the Pacific/Western states: with high participation in outdoor recreation, makes golf one of many sports people play. With a participation rate of 8.4%, the sport ranks among the more popular activities in the region.

With participation rates exceeding the U.S. average, Oregon's green grass facilities are experiencing higher levels of crowding as well. Oregon golfers per hole (total golfers divided by total holes of all facilities) is 106 while the national average is 92 golfers per hole. The lower participation rate leads to less of a need for green grass facilities. With most of Oregon's golfers in the Portland metro, this puts added pressure on fewer urban courses, 182 golfers per hole (includes Clark and Skamania, WA counties). Golf participation in Oregon has accelerated in recent years. In 2024, player participation reached 5.3 million rounds, up 19% from 4.5 million in 2019.

Map 2: Oregon Golfers by Zip Code



Map 3: Oregon Golf Participation Rate by Zip Code



Golf On & Off Course Facilities

Continued

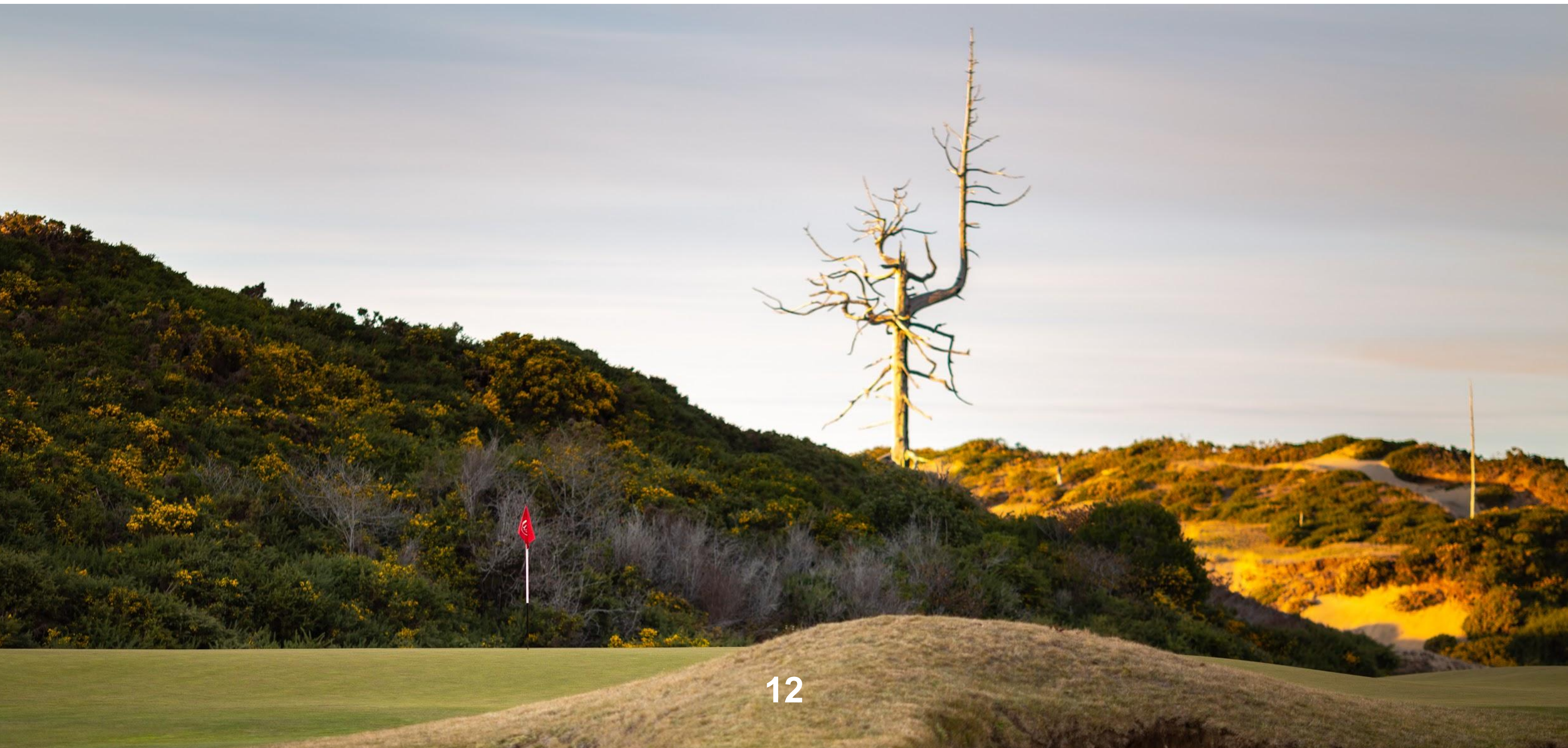
On average, this activity translates to roughly 31,000 rounds per course, or about 90 rounds per day on a standard 18-hole layout. The steady climb reflects both the popularity of traditional golf and the rise of new formats, such as indoor simulators and short-course options that have broadened the sport's reach statewide.

The state's golf economy is anchored by a diverse set of venues, ranging from public and private facilities to destination resorts, driving ranges, indoor centers, and miniature golf attractions. Combined, these businesses produced $486 million in direct revenue in 2024, sustaining 4,700 jobs and paying out $141 million in wages. Core sources of this revenue included memberships, greens fees, cart rentals, and food and beverage sales, while retail-specific activity is reported separately in the Retail section of this study.

The influence of golf facilities extends well beyond the clubhouse. Spending by suppliers and by employees in local communities generated an additional $226 million in indirect and induced impacts last year, supporting 1,200 more jobs and contributing $54 million in household income.

Altogether, Oregon's golf facilities accounted for $712 million in economic output in 2024, sustained nearly 6,000 jobs, and delivered $195 million in total labor income. They also generated about $93 million in state and local tax revenue, demonstrating that the golf sector is not only a recreational asset but also a reliable engine for jobs, income, and public revenue. Oregon's combination of elite destination courses and expanding off-course options ensures that the sport remains a powerful contributor to both the economy and the state's cultural identity.

Ghost Tree on Old Macdonald at Bandon Dunes Golf Resort



Golf On & Off Course Facilities

On Course Movement Data - Cell Phone Tracking

154
Facilities with Movement Data

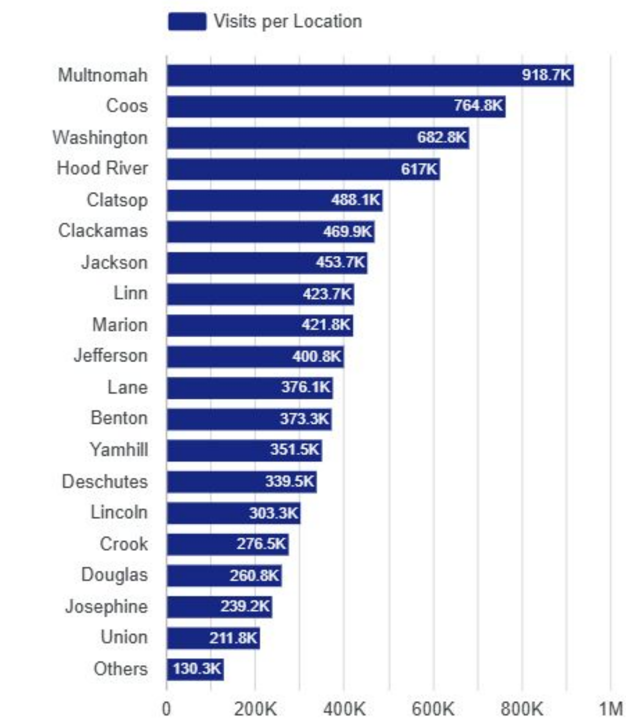
7.9 Million
Total Visits

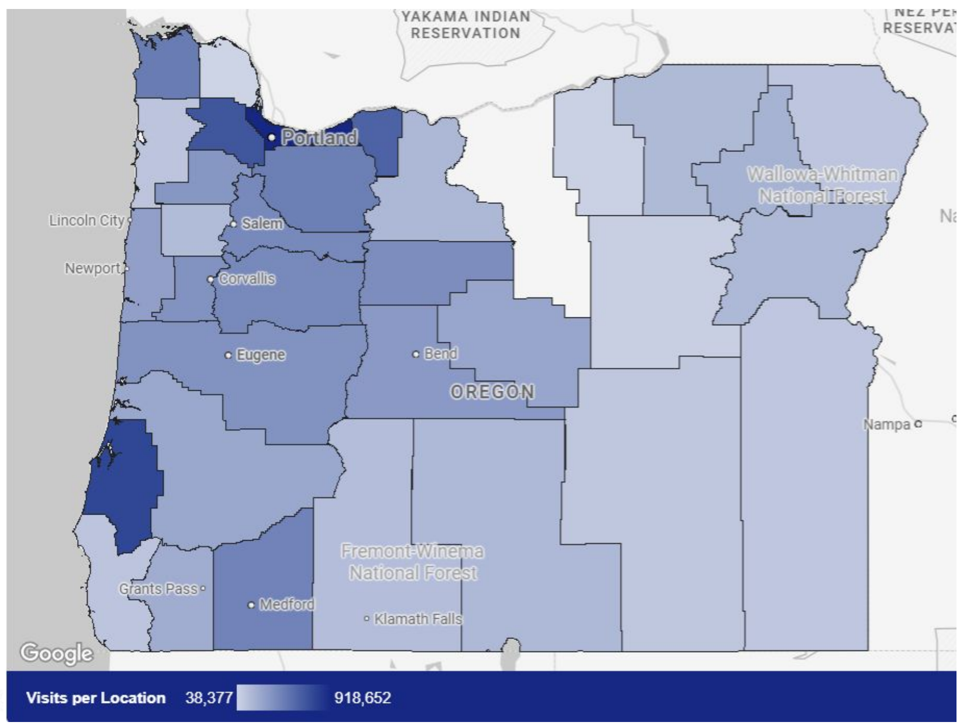
51,000
Visits per Location

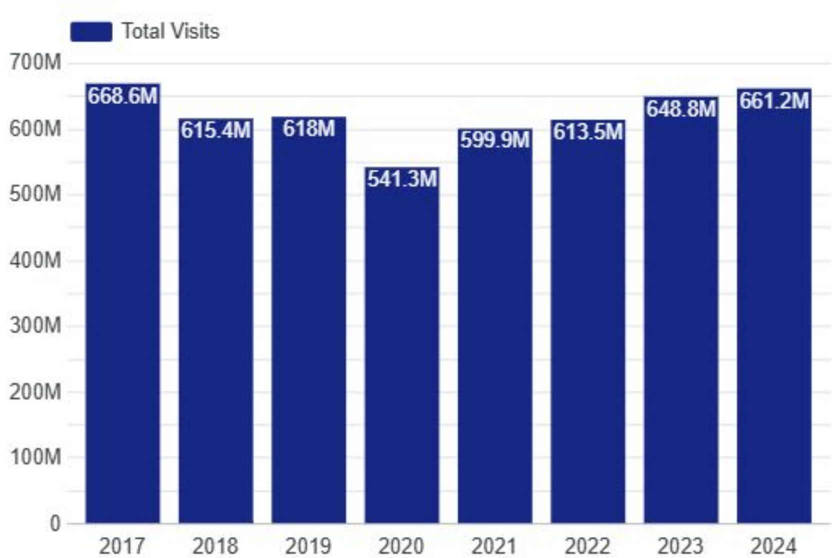
+ 3.0%
YoY Visits vs. 2023

365,000
Facility Visitors/Month

+ 3.2%
YoY Facility Visitors/Month vs. 2023







* Powered by Placer.ai - Visits and Visitors modeled by a sample of cell phones crossing into on-course golf facility geofence. See page 27 for more information on Placer methodology.

Tourism

Golf tourism is a central and expanding driver of Oregon's outdoor recreation and hospitality economy. In 2024, golf-related travel generated a total economic impact of $838.4 million, including $505.6 million in direct spending by visitors and another $332.8 million through indirect and induced effects. Altogether, golf tourism supported 6,853 jobs, delivered $252.4 million in wages, and contributed $96.6 million in state and local tax revenue, underscoring its value as a high-yield sector within Oregon's overall tourism economy.

Much of this strength comes from the composition of Oregon's golf travelers. Of the nearly 2.9 million golf-related trips recorded in 2024, almost two-thirds (1.9 million) were overnight visits, while roughly one-third (975,000) were day trips. Oregon's reputation as a "bucket-list" golf destination draws heavily from outside the state: 1.8 million trips originated from out-of-state visitors compared to 1.1 million from Oregonians themselves. The single largest segment - 1.3 million out-of-state overnight visitors - reflects the national and international pull of the state's marquee golf experiences, where extended stays translate into higher spending on lodging, dining, and recreation.

The affluence of the golf groups and individual travelers has a bigger footprint than just golf resorts. These travelers spend disproportionately on lodging, dining, and recreation, often extending trips to explore wine country, the coast, or Central Oregon. Their higher discretionary outlays amplify the impact across hotels, restaurants, and small businesses, helping golf tourism generate $838 million and cement its role as a premier driver of Oregon's visitor economy.

Figure 8: Visiting Golfers By Day Trip vs Overnight

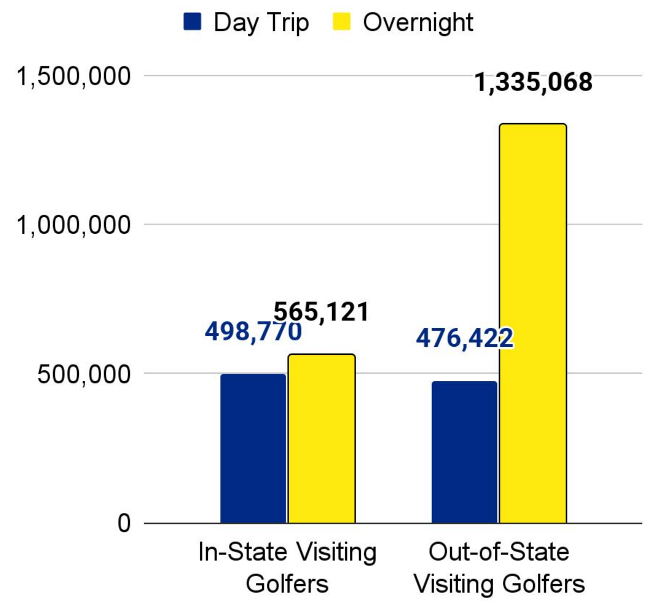
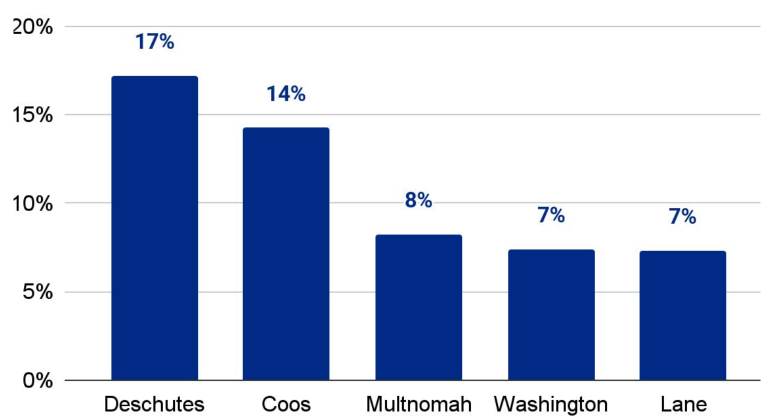


Table 2: Oregon Tourism and Golf		
Metric	**2024 Value**	**%**
Total Visitors to Oregon	151.8M	
Total Participated in Golf Activities (Day & Overnight)	2.9M	1.9%**
TOTAL TOURISM+GOLF IMPACT	**$838.4M**	
TOTAL DIRECT SPENDING*	$505.6M	60.3%
INDIRECT/INDUCED SPENDING	$332.9M	39.7%

* In order to avoid double counting, Total Direct Spending included a deduction of $83 per traveler for golf-related expenditures.
** Percent of total annual tourism to Oregon.
Sources: Dean Runyan Associates prepared for Travel Oregon

Figure 9: Golf Visitor Spending - Top 5 Counties



Pronghorn Club, Jack Nicklaus Signature Course in Bend, OR

Tourism

Continued

This multiplier effect amplifies golf's role within the state's broader visitor economy.

Central Oregon adds another dimension to the state's profile, with Bend and surrounding communities emerging as a golf hub featuring high-altitude courses framed by mountain views. Facilities such as Pronghorn, Crosswater at Sunriver, and Tetherow have helped the region develop into a year-round golf destination, while generating spillover benefits for local hospitality and retail sectors.

Oregon's competitive edge lies in this combination of world-class course design, spectacular landscapes, and a growing global reputation. Travelers are drawn by the unique experience of links-style coastal golf, high-desert mountain layouts, and accessible resort amenities, all within one state. This diversity ensures broad appeal across different segments of golf travelers, from elite enthusiasts seeking top-ranked courses to families blending golf with wider vacation activities.

The ripple effects are substantial: in 2024, golf tourism supported 6,853 jobs across resorts, restaurants, retail shops, and transportation services, while providing $252.4 million in labor income. Statewide, golf tourists contributed $96.6 million in state and local tax revenue, helping to fund public services and community infrastructure.

As awareness grows and Oregon continues to attract high-spending overnight and out-of-state travelers, golf tourism will remain a powerful engine for rural revitalization, small business growth, and sustainable tax revenue. With its unmatched scenery and destination experiences, Oregon is not just a great place to play, it is increasingly recognized as a top-of-mind golf travel destination.

Retail and Wholesale Activity

In 2024, Oregon's golf economy was strongly supported by retail and wholesale activity, ranging from national specialty stores to locally owned shops and on-course sales. Altogether, golf-related retail and manufacturing generated $280 million in direct output, with the broader impact - including supplier networks and household spending - bringing the statewide total to $434 million. These operations sustained roughly 2,800 jobs and provided more than $129 million in wages.

Local and independent retailers such as Matchstick Golf, PARx Golf and Fiddlers Green played a particularly important role, reinvesting a significant portion of their revenues back into their communities and magnifying their economic reach. Alongside them, national brands like Golf Galaxy, GOLFTEC, and Club Champion, operating five locations across Oregon, employed residents, partnered with regional suppliers, and helped draw traffic to neighboring businesses.

Sales generated directly at golf facilities also represented a major contribution. In 2024, the typical "green grass" facility averaged over $320,000 in retail revenue, illustrating the strength of on-course transactions as part of the overall retail mix. Among Oregon's golf facilities, Bandon Dunes and RedTail Golf Center, especially, stand out as major contributors to the state's golf retail sector, driving significant merchandise sales and supporting local economic activity through their high-traffic pro shops and resort operations. Combined, these outlets - national chains, specialty stores, and golf course shops - were responsible for $63 million in direct activity, supporting 1,240 jobs and delivering $20 million in wages.

When ripple effects are taken into account, another $32 million in output was added, along with 187 more jobs and $8.4 million in additional wages. In total, Oregon's golf retail sector produced $95 million in statewide economic activity, supported 1,430 jobs, paid out $28 million in labor income, and generated $3.2 million in state and local tax revenue, a clear reflection of its value within the broader golf industry.

$434 Million
Total Retail and Wholesale Economic Contribution (Including direct, indirect, and induced)

$18 Million
State and Local Tax Revenue

2,800 Jobs
Contributed by Golf Retail and Wholesale Activity

Retail and Wholesale Activity

Continued

Oregon is home to a wide range of golf-related global manufacturers, wholesalers, and service providers that add distinct value to the industry, including:

- Nike Golf, Columbia Sportswear, Adidas, and Payntr Golf Shoes anchor Oregon's role in performance golf apparel and footwear, while Jones Golf Bags, Seamus Golf, MacKenzie Golf Bags, Fore Ewe Headcovers, Matchstick Golf, and L.A.B. Golf Putters highlight the state's craftsmanship in premium bags, headcovers, ball markers, and precision putters. Together, these companies generated an estimated **$119 million in direct revenue** in 2024, with Oregon benefiting through design, manufacturing, and marketing jobs, along with local payroll, operating expenditures, and reinvested profits that strengthen the state's golf economy.
- **Retail Support & Events:**ProActive Sports, Key Event Services, 2Hemispheres, Buffalo Groupe Research, and the Etzel Agency provide distribution, consulting, marketing, and event services. These businesses combined for **$9.8 million in direct revenue**, with Oregon-based employees and vendor relationships ensuring much of that impact remains in-state.
- **Golf Carts & Turf Equipment:** Pacific Golf & Turf, Guild Golf Carts, J&S Golf Car Rentals, Foursom Golf Cars, and Cart Nation supply fleets, rentals and service for courses statewide. Altogether, this sector generated **$7.8 million in direct revenue**, supported by local dealerships, technicians, and service operations.
- **Seed & Turf Science:** Mountain View Seeds, DLF, Barenbrug USA, Pure Seed, Burlingham Seed, Turf Merchants, Lebanon Seed, BoardSight One, Tee-2-Green, and the Oregon Seed Association, supported by the OSU Turfgrass Program, make Oregon a global leader in turfgrass production. Combined, these entities accounted for **$73.5 million in direct revenue,** via research, payroll, and production capacity to the state's economy.
- **Associations & Player Development:** The OGA, and the Oregon Junior Golf Fund promote the game and support access at all levels. Together, they produced **$4.1 million in direct revenue**, primarily through membership dues, events, and programming supported by staff and volunteers.

Taken together, these manufacturers, wholesalers, and golf nonprofits contributed **$217 million in direct output** to Oregon's golf economy in 2024, supporting **573 jobs and $61 million in wages**. Indirect and induced impacts through supply chains and household spending added $122 million, sustaining 773 jobs and $40 million in labor income. In total, wholesale and manufacturing activity in Oregon's golf sector produced $339 million in output, supported 1,300 jobs, generated over $101 million in earnings, and returned $14.7 million in state and local tax revenue, underscoring the industry's importance to Oregon's broader economy.

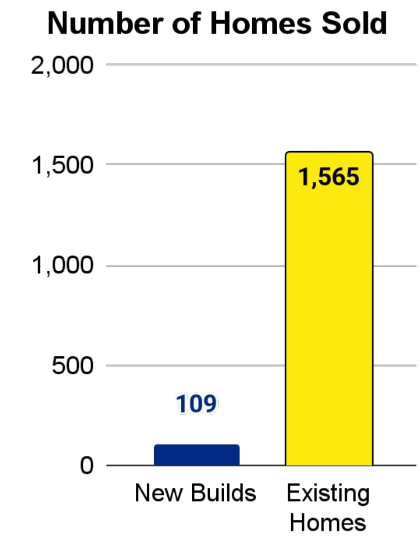
Real Estate

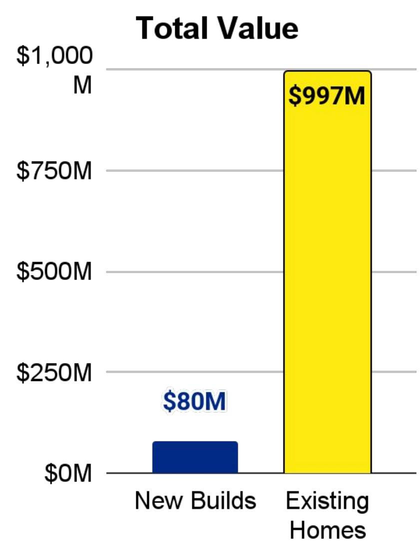
Golf courses in Oregon strengthen not only community amenities, but nearby property values, too. Properties located within golf communities or within a mile of a course command higher values due to what is referred to as the "golf premium." This premium, attributed to the scenic and lifestyle benefits of living close to green space, is estimated to account for 17% of a home's value.

To quantify the real estate impact of golf in 2024, this premium was applied to both new home construction and resales in proximity to courses. 109 new homes were constructed on or near Oregon golf courses, with an average sale price of $909,000. These transactions amounted to approximately $80 million in value, including $51 million directly tied to construction activity.

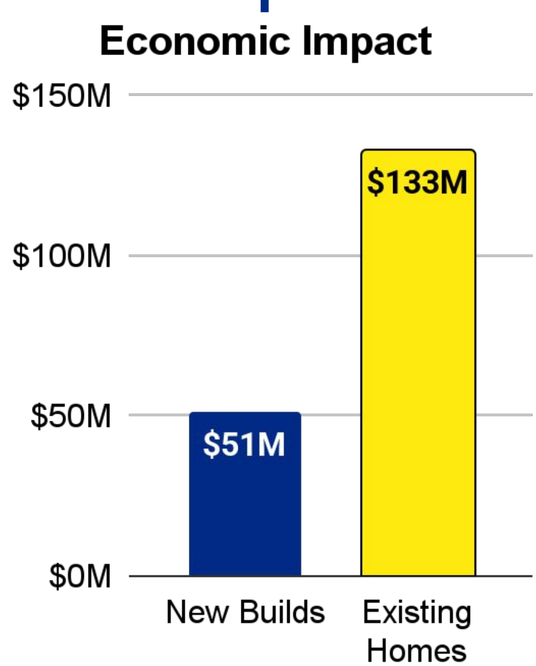
Resale activity was also strong, with 1,565 existing homes in golf-related communities changing hands, producing nearly $997 million in sales volume. Based on National Association of Realtors estimates, each home sale generates about $176,500 in economic impact for Oregon. Applying the 17% golf premium, resales accounted for an added $133 million in value.

Altogether, the combination of new construction and resale premiums produced a direct economic impact of $184 million in 2024. This activity sustained around 467 jobs and contributed $6.4 million in wages. When ripple effects through supply chains and household spending are included, the total impact of golf-related real estate rose to more than $221 million, supporting 674 jobs and generating $24 million in state and local tax revenue, providing meaningful support to public services throughout Oregon.





Premium and Construction



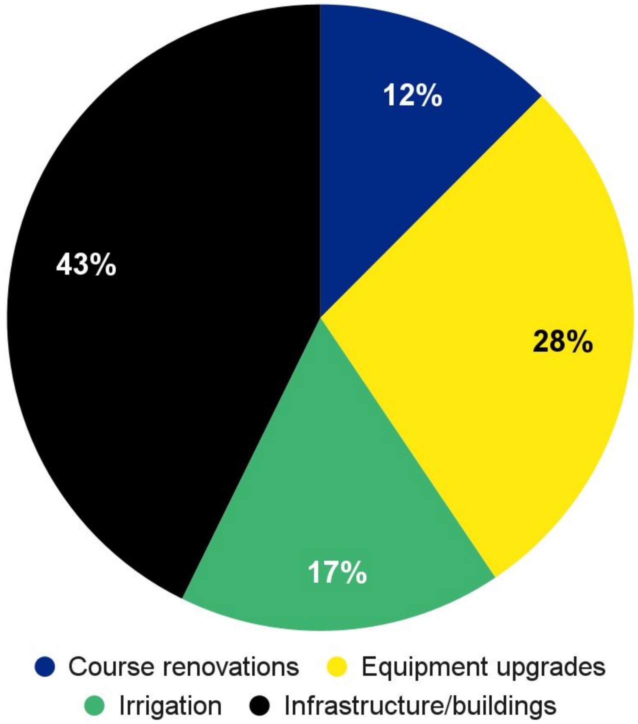
Highlands Golf Club in Gearhart, OR

Capital Expenditures

In 2024, capital expenditures on golf courses remained an essential driver of Oregon's golf economy, combining both facility improvements and new course construction to produce a total **direct impact of $70 million.** These investments supported 732 jobs and $21 million in wages, with indirect and induced effects adding another $33 million in economic activity, 177 jobs, and $8 million in earnings. Altogether, **capital expenditures generated $103 million** for the state's economy and approximately $13 million in tax revenue.

The majority of this spending was directed toward existing courses. Nearly three-quarters of golf facilities (73%) invested in upgrades, which fell into four major categories: irrigation improvements, infrastructure upgrades, course renovations, and equipment replacement. As seen in Figure 7, infrastructure projects represented the largest share of investment - 43% of total spending - with an average of more than $89,000 per course, highlighting the need to support facilities to meet growing demand. This illustrates how golf facilities expand their value proposition, reaching a broader audience and setting themselves apart through amenities and services beyond traditional play. This was also propelled forward by large infrastructure projects, including the Columbia Edgewater Country Club clubhouse renovation and the Quail Ridge Golf Club and OGA Golf Course major irrigation system replacements, improving both off course and on course offerings, respectively.

Figure 7: Golf Course Capital Investment by Category



Capital Expenditures

Continued

New construction also contributed positively in 2024, with a number of projects either active or completed. New facility construction shows the motivation to offer even more golf offerings to the growing number of golfers in the state. Many of the offerings also strayed from the traditional 18-hole offerings, highlighting a need for variety in the golfing landscape. These new construction projects included:

- **Shortland Golf Club:** A unique 19-hole par-3 course in West Linn featuring synthetic turf tees, bunkers, and greens, with construction beginning in summer 2024. Its companion layout, The Nest, a 19-hole chip-and-putt course opened in 2025.
- **Bandon Dunes Golf Resort:** Introduced Shorty's, a 19-hole par-3 course, in 2024. Looking ahead, the resort is considering New River Dunes, a proposed project located 10 miles south of the main property, currently awaiting county approval.
- **Bar Run Golf Course:** Opened in 2024 in Roseburg as a reclamation project on a former mining site. Designed by Oregon-based Dan Hixson, the course sits along the South Umpqua River and has already earned recognition among Golf.com's Best Public Courses (Bronze Medal) for 2024–2025, noted for its creative design, riverfront setting, nods to golf history such as a tribute to Hogan Bridge, and its striking scenery.
- **Wonderwood Springs Mini-Golf:** Debuted in early 2024 in North Portland as an immersive 9-hole, art-inspired mini-golf experience. It is celebrated for its whimsical, interactive design.

Continued capital investment strengthens Oregon's golf industry by elevating facility quality, growing employment, and generating ripple effects beyond the sport. Renovations and construction enhance the golfer experience while positioning the industry to meet future demand and sustain long-term economic growth statewide.

Shortland Golf Club in West Linn, OR

Charitable Impact

Oregon's golf community played a vital role in supporting charitable causes throughout 2024, generating **$34 million in total economic activity**. Including both direct and indirect effects, these contributions supported 308 jobs, yielded more than $9.6 million in labor income, and resulted in nearly $5 million in state and local tax revenue. This demonstrates the significant economic and social impact of charitable giving within Oregon's golf industry, highlighting both the financial and human benefits that these contributions make possible.

Most facilities across the state contributed financially, with roughly 60% of facilities engaged in charitable giving. Top contributors provided millions in support, while the average facility donated $279,000. Tournament fundraising and individual facility donations, both large and small, combined to generate a total direct economic impact of $23 million.

Beyond direct revenue, charitable golf activities supported 249 jobs generating $7 million in labor income. Additionally, the broader economic ripple effects stemming from businesses and households connected to these events added $11 million to the state economy, creating 58 more jobs and $2.7 million in wages.

A wide variety of organizations benefited from these contributions. Prominent recipients included Ronald McDonald House Charities, which provides housing and support for families with seriously ill children; TreeHouse, supporting teens in foster care; and the Family House in Grants Pass, offering affordable lodging for patients traveling for medical treatment. Other beneficiaries included the Oregon Wheat Foundation, which funds agricultural education and community programs, and Everyone Village, which assists individuals experiencing homelessness. The Central Oregon Open raised over $112,000 for Ronald McDonald House Charities in Oregon and SW Washington an annual event.

Golf organizations in the state do their part in supporting the community, as well. The OGA's official Golf Oregon license plate (seen below) supports the broader golf community by funding Oregon Junior Golf programs that provide youth with access, playing opportunities, and competitions across Oregon and southwest Washington.

Lastly, The Bandon Dunes Charitable Foundation alone contributed an additional $2.5 million in 2024, supporting vital initiatives ranging from healthy fish habitats and sustainable tourism to childcare, education, workforce housing, scholarships, and local golf programs. These investments underscore how golf in Oregon extends its impact well beyond the course, strengthening communities and the environment across the state.

The Standard Portland Classic at Columbia Edgewater Country Club

Championship Events

Oregon's championship golf tournaments in 2024, highlighted by the Wildhorse Ladies Golf Classic and The Standard Portland Classic, collectively **delivered a $26 million boost** to the state economy, creating 226 jobs, $6.7 million in wages, and $2.9 million in state and local taxes.

The Standard Portland Classic stood out as the longest-running non-major tournament on the LPGA Tour and continued its legacy of success in Portland. Hosted at Columbia Edgewater Country Club's Macan Course, its location along the Columbia River and proximity to Portland International Airport created ease of access for both local fans and visiting spectators. The 2024 tournament featured world-class women's golfers, including eventual champion Moriya Jutanugarn, and provided a platform that not only showcased elite athletic competition but also reinforced Portland as a hub for professional sports. With the help of cell phone data from Placer.ai, it was estimated that the event attracted over 4,000 additional unique visitors, making it the most highly attended golf event in Oregon during the year.

Meanwhile, the Epson Tour's Wildhorse Ladies Golf Classic showcased rising professionals on their path to the LPGA Tour. Hosted in Pendleton at Wildhorse Golf Course, the event has steadily grown in stature and continues to highlight the importance of rural Oregon in the state's golf economy. Attendance tracking indicated the tournament attracted about 500 additional spectators.

Together, these two tournaments accounted for $16.4 million in direct spending during 2024, supported 174 jobs, and generated $4.3 million in labor income.

While championship events generally yield smaller ripple effects than ongoing course operations, they remain critical to positioning Oregon as a golf destination and strengthening local business ties. In fact, the state's two headline women's events produced $9.3 million in indirect and induced benefits alone, alongside 51 jobs and $2.4 million in labor income.

Overall, Oregon's 2024 championship golf tournaments not only generated significant economic returns but also reinforced the state's position as a premier golf destination, showcasing the sport's ability to drive tourism, support jobs, and benefit communities across both urban and rural regions.

Environmental Stewardship

Oregon's golf courses are woven into a landscape defined by diversity - lush temperate valleys, rugged coastlines, volcanic mountains, and the drier high desert east of the Cascades. The state's historically mild and wet climate allows for nearly year-round play in many regions, but also requires careful environmental management to balance natural resources with course maintenance and playability.

Water is the most critical environmental factor for golf facilities, and Oregon courses have made significant progress in stewardship. 86% of courses reported stable water consumption compared to prior years, while 13% achieved reductions. Despite consistent use, one-third of courses reported increases in water rates, adding economic pressure to conservation practices. Irrigated acreage also remained steady at most facilities (85%), though 5% reduced acreage and 9% modestly expanded. Notably, one in three courses use Evaporation Tables to guide irrigation, and 57% of those report applying less water than the tables suggest, demonstrating a proactive approach to conservation apart from the diagnosis tools.

Beyond water management, Oregon facilities are taking meaningful steps to reduce their environmental footprint.

- **Turfgrass Conversion:** Roughly 10% of courses have removed turfgrass in the past five years, with nearly all replacing turf with native vegetation, creating sustainable, naturalized landscapes.
- **Sustainability:** The Shortland Golf Course is an artificial turf and sand 'test case' for water conservation, reducing chemical inputs while creating consistent playing conditions.
- **Energy Savings:** About one-quarter of courses conducted energy audits, with most implementing changes achieving an average energy savings of 12%.
- **Best Management Practices** (BMPs) has been pivotal in the golf industry's efforts to improve environmental stewardship. BMPs encompass a range of strategies, including wildlife habitat management, chemical usage reduction, water quality and quality management. These practices emphasize understanding site-specific characteristics, conserving resources, and protecting local ecosystems.

Table 3: Key Environmental Practice Areas at Oregon Facilities

Key Practice Area	% of Courses Increasing Adoption
Maintenance Operations	47%
Pesticide Management	43%
Cultural Practices	43%
Water Quality & Monitoring	40%
Water Management	38%
Nutrient Management	38%
Irrigation Infrastructure	36%
Energy Efficiency	30%
Pollinator Protection	21%

Crosswater Golf Club at Sunriver Resort

Environmental Stewardship

Continued

Innovative Practices at Work Across the State:

Tetherow Golf Club in Bend has pioneered sustainability through a multi-pronged approach:
- Reduced pesticide and fertilizer use through smarter irrigation and targeted spot treatments.
- Re-naturalized half of its 160-acre property (~80 acres) into low-maintenance, native vegetation.
- Utilizes sustainable materials such as plant-waste fertilizers and basalt stone sourced directly from the course.
- Invests in wildlife-enhancement measures including bird and bat boxes, rock piles, snags, and habitat corridors.
- Introduced pond fish (bluegill) to control mosquitoes naturally without chemicals.

Goat Caddies, Silvies Valley Ranch, Seneca, OR

Goats On The Course: From City Fairways to Ranchland

At **City of Portland's Eastmoreland Golf Course**, the par-5 13th hole is bisected by a ravine choked with blackberry bushes and noxious weeds. In 2024, rather than use herbicides or heavy machinery, Portland Parks & Recreation and Kemper Sports brought in local herd-rental firm GoGoatOregon. Ten goats and a llama spent two weeks clearing the steep banks, offering a natural and effective solution.

Silvies Valley Ranch, across the state in Eastern Oregon, is known for regenerative agriculture, water conservation, and biodiversity. The ranch integrates natural grasses, efficient irrigation, organic fertilizers, and goat caddies. Yes, goat caddies. The courses are designed to be played in opposite directions every other day, giving golfers two distinctly different experiences. This innovative approach enhances challenge and variety while reducing environmental impact and land use. On its 7-hole McVeigh's Gauntlet course, goats double as caddies trained to carry golf bags, adding a quirky, eco-friendly twist to a round.

Methodology

The methodology behind this economic impact study is based on the concept of an Input-Output (I-O) model. The most basic idea behind the I-O model is that industries within an economy are interconnected. For example, the inputs in manufacturing cars (aluminum and steel) are outputs from other industries (aluminum and steel manufacturing), and the inputs used to make steel (iron ore, coal, limestone, etc.) are outputs from other industries. Because these (and other) industries are interconnected, a change in the spending habits of one industry (building a new auto manufacturing plant) will have a cascading effect throughout the economy.

To estimate the impact of the Golf Industry in Oregon, the IMPLAN Pro™ software was used to prepare and customize an economic model capturing the effects of golf related spending throughout the State. IMPLAN is a regional input-output computer modeling system used by economists to estimate the economic effects of industry spending.

For this analysis, the output multiplier as well as the employment multiplier were used to establish how changes in the spending habits of consumers within the golf community impact total output and employment within the region. Local and regional data from the Bureau of Labor Statistics (BLS) on wages within an industry were utilized to generate total wage impacts, following the guidelines provided by the Bureau of Economic Analysis. Golf industry participants and partners were consulted to understand how resources are being used and that knowledge was applied to building up assumptions regarding regional spending patterns. Assumptions were generally conservative in nature, leading to relatively conservative changes in total output, employment, and wages with the goal of reporting a 'real-world' view of the game's impact in Oregon.

The IMPLAN software divides economic activity into three components - direct, indirect, and induced effects - and sums them to derive a total economic impact.

DIRECT EFFECTS are expenditures made in relation to golf facilities, related equipment, and events to golfers and tourists throughout Oregon. This initial spending causes ripple effects (also known as "multiplier effects"). These effects are called indirect and induced impacts.

INDIRECT EFFECTS are "supplier" effects. Golf industry businesses rely on other businesses to carry out their work. As purchases are made from these other firms, the economy is stimulated further. An example would be a professional golf tournament receiving tour buses full of spectators. The tournament is indirectly supporting the tour bus companies.

INDUCED EFFECTS are generated by changes in household expenditures. Companies responding to increased demand, driven by direct and indirect effects, hire more workers, or offer higher pay for longer hours, enabling employees to spend more on local goods and services. Tour bus drivers hired to work an additional tournament weekend would see a wage increase. The spending by tour bus drivers associated with the additional wages would be induced output.

The direct, indirect, and induced effects are estimated for labor income, economic impact, and employment impact.

Methodology

Continued

The calculations were conducted by Scott Kravitz, Vice President of Analytics at Buffalo Groupe. Contributions were also made by Sara Killeen, Managing Director of Research at Buffalo Groupe, and Kim Collins, Director of Data Analytics at Buffalo Groupe.

Data Sources

To provide the most accurate economic data related to the golf industry in Oregon, Buffalo Groupe conducted custom surveys to golf facilities, retailers, and wholesalers, throughout the state of Oregon from March through May of 2025. In total, of the 172 golf facilities in the state, 29% responded to the survey for a total of 50 participating facilities. Using data from these survey responses, Buffalo Groupe was able to generate estimates for comparable facilities and companies for rounds and economic impact throughout Oregon for which data were otherwise not available. The total facility, wholesaler, and retailer company figures and contacts were provided by Buffalo Groupe Research and via outreach to the local headquarters offices. It also provided the statistics differentiating Oregon from National Averages using their proprietary golfer model and golf facility databases.

"Golf tourism spending" was defined as the golf-related expenditures for individuals traveling more than 50 miles to play golf as a primary recreational activity and/or play one round of golf while on a trip. Travel could be defined as business or leisure and included both overnight and day trips. "The Economic Impact of Travel in Oregon - Calendar Year 2024 Preliminary" report published in April 2025 provided by Dean Runyan Associates, in collaboration with Travel Oregon, was used to benchmark total visitors to the area, average spending per trip, trip type, and spending activities undertaken while in the jurisdictions.

To capture golf related expenditures in 2024, this analysis relies on proprietary data provided by Buffalo Groupe via its research division, Longitudes Group, The Oregon Golf Association, and Golf Alliance of Oregon. The 2022 Capital Budget and Labor Survey conducted by the GCSAA was utilized to estimate capital expenditures for facilities that did not participate in the survey. Additionally, this analysis relies on data from primary survey research these organizations collaborated on with golf facilities, golf retailers, and golf associations throughout Oregon in 2025 to accurately capture golf related economic activity in 2024.

Methodology

Continued

Buffalo Groupe has been utilizing PII-compliant cell-phone tracking (or movement data) via Placer.ai since 2023 to understand the volume of foot traffic into retail and golf course facilities. By aggregating golfers entering into a geo-fenced polygon (i.e. golf facility or stores), the BG research team is able to understand visitor counts and the frequency of visits. Buffalo Groupe has geo-fenced nearly 14,000 golf courses and 1,150 off course golf retailers in the USA. This comprehensive database provides the ability to measure micro and macro-level golf course traffic on a weekly and annual basis correlating to rounds of golf and spending. Foot traffic at on-course golf facilities includes visitors for weddings, events, dining, and driving ranges, among other activities. While it may not directly correlate with rounds played, tracking all visitation provides insight into the overall health of the facility.

For the Oregon Economic Analysis, 154 of the courses (90% of Oregon golf facilities) were geo-fenced to measure the visitor trends in traffic in 2023 and 2024. To capture visitors to championship golf events, Placer.ai was also used to track movement to the events. The movement data was used to estimate total number of visits and visitors in comparable weeks in contrast to the week of the events.

Zillow was used in combination with Longitudes Group facilities to pull houses sold and built within 1 mile of a golf course within 2024.

Lastly, this analysis benefited from a series of interviews with manufacturers, turf seed growers, association personnel, facility managers, and event managers who graciously contributed confidential economic activity to this project to increase accuracy.

All figures in the economic impact analysis are adjusted to dollar year 2024 unless otherwise noted.

Limitations

Every reasonable effort was made to ensure that the estimates used in this report accurately reflect 2024 economic spending on golf in Oregon. Where data was unavailable to the point that no estimate was possible, no estimates were made. It is therefore likely that the economic impact of golf in Oregon is higher than the figures included in this report. With these limitations stated, Buffalo Groupe assumes no responsibility for inaccuracies in reporting by data sources used to compile this report, including golf facilities, associations, and others.

Appendix

Table 4: Economic Impact, Jobs, Labor Income and Taxes by Category										
		Tourism	Facilities (including Hotels, Resorts, Top Golf, etc.)	Wholesale (Equipment, Footwear, Bags, Turf Seed, etc.)	Real Estate	Capital Expenditures	Retail (shoes, apparel, equipment)	Charitable Events	Championship Events (without tourism)	Total Economic Contribution
Total Economic Input	Direct	$505.6M	$486.1M	$216.6M	$184.1M	$69.7M	$63.1M	$23.0M	$16.4M	**$1,564.5M**
	Indirect	$151.9M	$114.6M	$81.5M	$12.2M	$16.8M	$14.9M	$5.7M	$5.6M	**$403.1M**
	Induced	$180.9M	$111.0M	$40.8M	$25.2M	$16.1M	$17.2M	$5.2M	$3.7M	**$400.0M**
	Total	**$838.4M**	**$711.7M**	**$338.8M**	**$221.5M**	**$102.7M**	**$95.1M**	**$33.8M**	**$25.7M**	**$2,367.7M**
Jobs	Direct	5,173	4,730	573	467	732	1,240	249	174	**13,292**
	Indirect	701	587	546	70	84	87	28	30	**2,134**
	Induced	979	653	227	136	93	100	30	21	**2,239**
	Total	**6,853**	**5,970**	**1,346**	**674**	**909**	**1,427**	**308**	**226**	**17,665**
Labor Income	Direct	$161.5M	$141.2M	$60.7M	$6.4M	$20.5M	$19.6M	$6.9M	$4.3M	**$421.1M**
	Indirect	$36.0M	$22.5M	$28.1M	$4.4M	$3.5M	$3.5M	$1.2M	$1.3M	**$100.3M**
	Induced	$54.9M	$31.3M	$12.4M	$7.6M	$4.7M	$4.9M	$1.5M	$1.1M	**$118.4M**
	Total	**$252.4M**	**$195.0M**	**$101.1M**	**$18.4M**	**$28.7M**	**$28.0M**	**$9.6M**	**$6.7M**	**$639.8M**
State and Local Taxes	Total	**$96.6M**	**$92.9M**	**$14.7M**	**$24.0M**	**$13.2M**	**$3.2M**	**$4.5M**	**$2.9M**	**$252.1M**

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General Limiting Conditions

Economic Report

The economic report is based on information collected from direct Buffalo Groupe research completed for the state of Oregon in 2025 for the data year of 2024.

General

Every reasonable effort has been exerted to ensure 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 source used in preparing the report.

Custom Buffalo Groupe Facility Survey – 2025

Buffalo Groupe conducted a survey among golf facility operators in Oregon in an effort to gather inputs to help quantify the economic impact of golf in the state. Data collection took place in the first half of 2025. Key survey questions centered on operational data such as rounds, revenues and expenses, as well as capital expenditures, employment/staffing and charitable events.

Regional Input-Output Modeling System

IMPLAN Pro™ software economic modeling system was used to derive estimates of golf-related direct and secondary economic impacts (including value added, employment, and labor income). The methodology and calculations were prepared and reviewed for soundness and accuracy.

Acknowledgments

The economic impact report was prepared by Buffalo Groupe, LLC, in agreement with the Golf Alliance of Oregon. In addition, support for this report was provided by the following allied golf organizations: **Oregon Golf Association, Oregon Chapter of the Club Managers Association of America, Oregon Golf Course Owners Association, Pacific Northwest Section of the PGA and the Oregon Chapter - Golf Course Superintendents Association of America.**The economic study was conducted by Sara Killeen, Scott Kravitz, and Kim Collins of Buffalo Groupe Research.

General

Every reasonable effort has been made to report the most accurate, reliable, and timely information possible. 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 preparation of the report.

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