



Missouri Golf Economic Impact Report

December 2025

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Missouri Golf Economic Impact Report

December 2025

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Metropolitan Junior Amateur Championship at Aberdeen Golf Club in Eureka, MO

Summary

\$2.1 Billion
Total Economic Impact

\$1.4 Billion
Direct Economic Impact

22,000
Total Jobs Supported

\$250 Million
Local Taxes

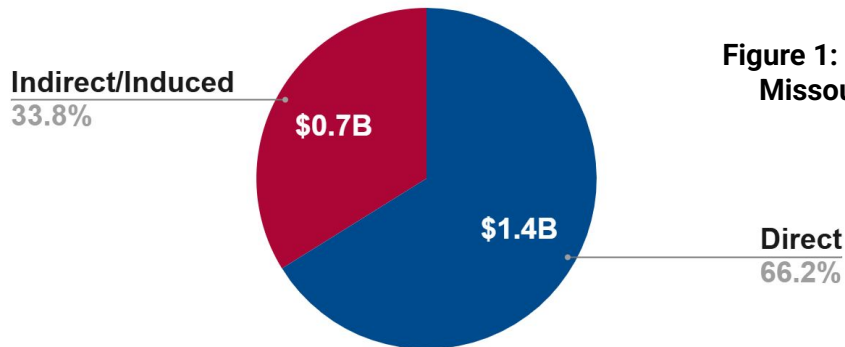


Figure 1: Economic Impact of Missouri's Golf Industry

Golf is a powerful contributor to Missouri's economy, culture, and workforce. In 2023, the game delivered a total economic impact of \$2.1 billion, including \$1.4 billion in direct economic output, while supporting over 21,700 jobs and generating \$250 million in state and local tax revenue. This impact spans daily golf course operations, tourism, capital investment, real estate, retail, and charitable

giving, making golf one of Missouri's most far-reaching recreational and economic engines.

Home to 318 golf facilities and 490,000 resident golfers, Missouri offers an accessible and diverse golf landscape. Participation rates exceed the national average (11% vs. 10%), and nearly 71% of courses are public, reflecting strong community access. Missouri also has a notably high share of short-format venues, with

Summary

Continued

with 117 courses under 18 holes, supporting time-strapped players and family-friendly access. The rise of indoor simulators (55) and miniature golf venues (93) expands engagement across seasons, age groups, and skill levels - an increasingly important factor in modern golf growth.

Missouri’s natural geography provides a compelling canvas for nationally ranked courses and destination resorts. From limestone cliffs and forested valleys to the shores of Lake of the Ozarks, the visual diversity draws visitors and fuels investment. Courses like Ozarks National, Payne’s Valley, and the soon-to-open Cliffhangers at Big Cedar Lodge exemplify the state’s emergence as a golf destination. Historic clubs like St. Louis Country Club (est. 1899) and Bellerive Country Club host top-tier events and reinforce the state’s longstanding golf tradition.

Golf facilities alone contributed \$1.3 billion in total impact, supported 13,700 jobs, and paid nearly \$400 million in wages. Capital investment added another \$143 million, a 120% increase from 2010, fueled by renovations, infrastructure upgrades, and new construction. The next largest contributor is golf-related tourism. It brought in \$407 million and 3,870 jobs, with nearly 800,000 annual golf travelers, two-thirds of whom stayed overnight. These visitors support not only golf properties but local restaurants, lodging, transportation, and retail throughout the state.

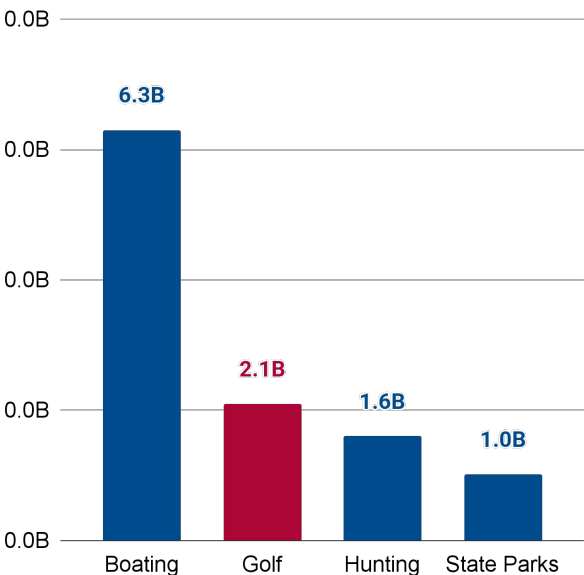
Missouri’s role in the national golf economy also includes manufacturing, retail, and innovation. Companies like Imperial Headwear, founded in 1916 and now based in

Bourbon, MO, are mainstays in the national supply chain. Other Missouri-based leaders include Rapsodo (golf technology), Newton Golf (equipment), and Mid-America Golf & Landscape (construction). Together, golf-related retail and wholesale operations generated \$65 million in economic activity and supported 1,800 jobs in 2023.

Importantly, Missouri’s golf community gives back - raising tens of millions annually for children’s hospitals, education foundations, hunger relief, and veteran services. Through events, tournaments, and youth access programs like Youth on Course and The First Tee, the game continues to inspire the next generation while contributing to healthier, more connected communities.

When comparing to other nearby states, Colorado’s golf industry produced \$2.0 billion in 2019, and Iowa’s reached \$817 million in 2015. Missouri outpaced both, (generating \$2.1 billion) highlighting the state’s success in growing the game.

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



Summary

Continued

Why This Matters

Golf in Missouri is much more than a sport, it's part of the fabric of our communities. From small-town courses to championship destinations, golf brings people together, supports local jobs, and strengthens our state's economy.

Every tee time, tournament, and lesson has a ripple effect, helping local restaurants, hotels, retailers, and service workers thrive. In total, the game supports thousands of Missouri families and small businesses each year.

But the impact doesn't stop with dollars and cents. Golf teaches life skills, creates friendships, and gives back through countless charity events and youth programs. It opens doors for kids discovering the game for the first time, veterans reconnecting through PGA HOPE, and families spending time together outdoors.

Simply put, golf matters in Missouri because it grows communities, builds character, and fuels economic vitality all while keeping the game fun, welcoming, and accessible for everyone.



Total Economic Impact

The golf economy in Missouri is made up of several interrelated segments that together form a broad and active industry. Each of these sectors, ranging from daily golf operations and visitor spending to infrastructure development and events, supports a mix of direct, indirect, and induced economic activity. In total, the statewide economic contribution of Missouri's golf industry exceeded \$2.1 billion, supporting jobs, generating labor income, and delivering tax revenue to state and local governments.

Among the strongest contributors were **golf facilities**, which include traditional courses, indoor simulators, resorts, and driving ranges. These venues accounted for \$1.34 billion in total economic activity, making them the single largest driver of golf's impact in the state.

Tourism-related spending followed closely, making up more than 19% of direct output. This highlights the dual role of Missouri golf in serving both local enthusiasts and out-of-state visitors, many of whom travel specifically to play at high-profile destinations.

Capital investments, such as new course development and upgrades to existing facilities, also played a critical role. With a total economic effect of \$143 million, this category comprised nearly 7% of the overall golf economy.

Other sectors, including real estate near golf communities, professional tournaments, charitable events, and golf retail and wholesale operations, also made substantial contributions. Table 1 breaks down these sectors, detailing how each supports Missouri's broader economy.

Table 1: Missouri's Golf Economy Impact in 2023 (\$ millions)

Industry Segment	Direct Economic Impact	Indirect/ Induced Impact	Total Economic Impact	% of Total Golf Economy
Facilities (including Hotels, Resorts, Topgolf, etc.)	\$902	\$436	\$1,338	63.8%
Tourism	\$232	\$175	\$407	19.4%
Golf Facility Capital Expenditures (Investments, New construction)	\$98	\$45	\$143	6.8%
Real Estate	\$79	\$16	\$96	4.6%
Retail (Shoes, Apparel, Equipment, Accessories)	\$26	\$11	\$36	1.7%
Wholesale (Apparel, Software, Hardware, Turf Products, etc.)	\$21	\$8	\$29	1.4%
Charitable Events	\$19	\$9	\$27	1.3%
Championship Events	\$12	\$10	\$22	1.0%
TOTAL GOLF ECONOMY	\$1,388	\$710	\$2,098	100.0%

Total Economic Impact

Continued

Comparison to Previous Economic Impact Analysis

Missouri’s golf economy has expanded significantly since 2010, with evidence of growth observed across every major category. As illustrated in Figure 3, gains were not isolated to a single sector— every area of the industry saw notable increases, reflecting a decade of broad-based development within the sport.

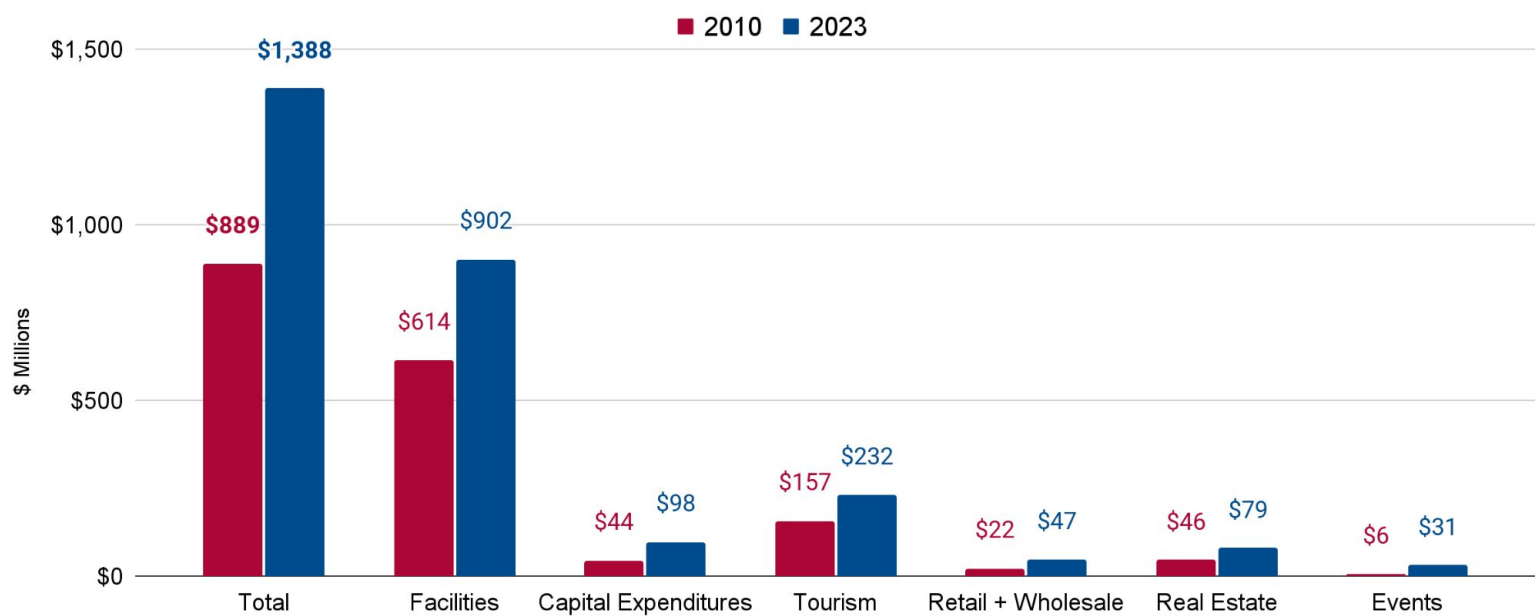
Among the most substantial changes was a 120% increase in Capital Expenditures, signaling a surge in facility investment, course upgrades, and resort development. Similarly, Professional and Charitable Events grew by 429%, demonstrating golf’s growing role in both community engagement and spectator interest.

Earlier estimates from 2010 placed Missouri’s direct golf economy at \$889 million

and its total impact at \$1.7 billion. By 2023, direct economic output had grown by 56%, despite methodological differences between studies. When adjusted for inflation relative to 2012 values, this reflects a 13% real increase, corresponding to a 3.5% compound annual growth rate, or 1.0% annually when adjusted for inflation.

However, caution is warranted when interpreting long-term trends. The studies used varied data sources and input-output models, and changes in survey methodology or economic assumptions may influence comparative results. Still, the consistent upward trajectory across all key sectors suggests that golf in Missouri has not only endured—but flourished—over the past decade.

Figure 3: Missouri Golf Direct Economic Impact vs. Prior Reports



What Makes Missouri Golf Unique

Golf Courses

Figure 4: Public vs. Private

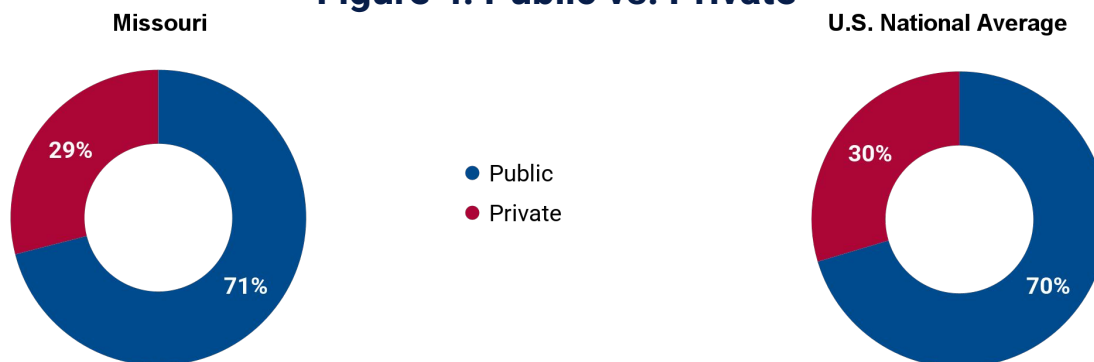
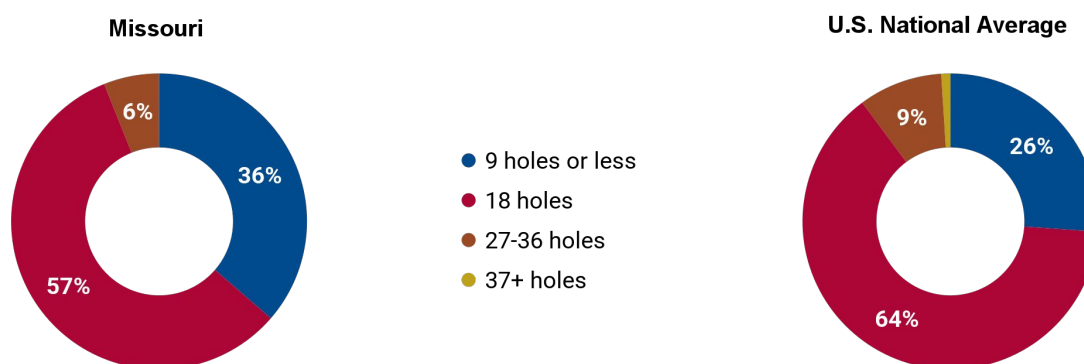


Figure 5: Number of Holes per Facility



Missouri's golf course landscape closely mirrors national trends in the United States regarding the distribution of public and private courses. Of the 318 golf facilities in Missouri, approximately 71% are accessible to the public—comprising 227 public golf facilities—while 91 are private. This aligns with the national average, where about 70% of golf courses are open to public play, including daily-fee and municipal courses, and the remaining 30% are private. This similarity indicates that Missouri offers a level of accessibility to golfers comparable to that found across the country, providing both accessible and exclusive golfing opportunities.

Missouri's golf courses differ slightly from national trends in hole count distribution. About 36% of Missouri courses have 9 holes or fewer, compared to 26%

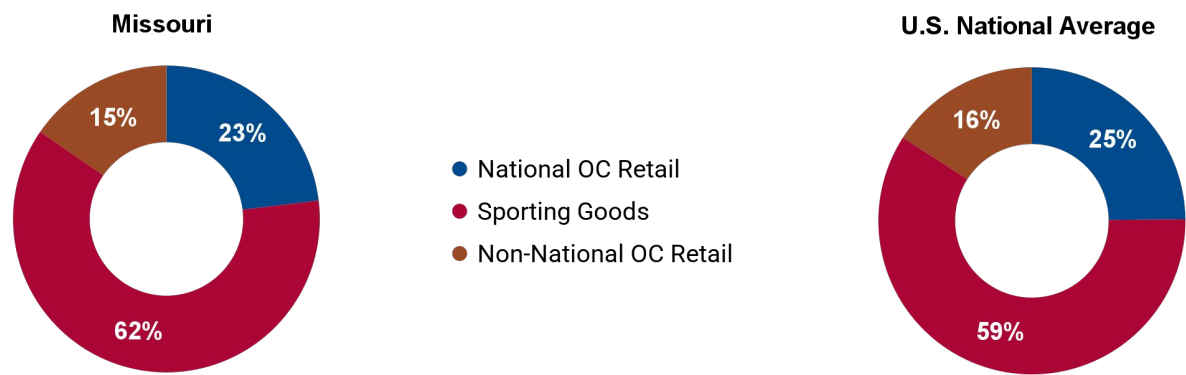
nationally. Meanwhile, 57% of Missouri's courses have 18 holes, slightly below the 64% national average. Courses with 27–36 holes make up 6% of Missouri's total, versus 9% nationally, and the state has no courses with more than 36 holes, compared to 1% nationally. This suggests a greater presence of shorter courses in Missouri.

Missouri's 55 indoor golf courses and 93 miniature golf courses highlight the state's diverse and accessible golf culture. These alternative formats offer year-round and family-friendly options that complement traditional outdoor golf. The relatively high number of indoor and miniature facilities suggests that Missouri values golf as both a recreational and social activity, appealing to a wide range of skill levels, ages, and weather conditions, making Missouri's golf landscape more inclusive and adaptable.

What Makes Missouri Golf Unique

Off Course Retail

Figure 6: Off Course Retail Locations By Type

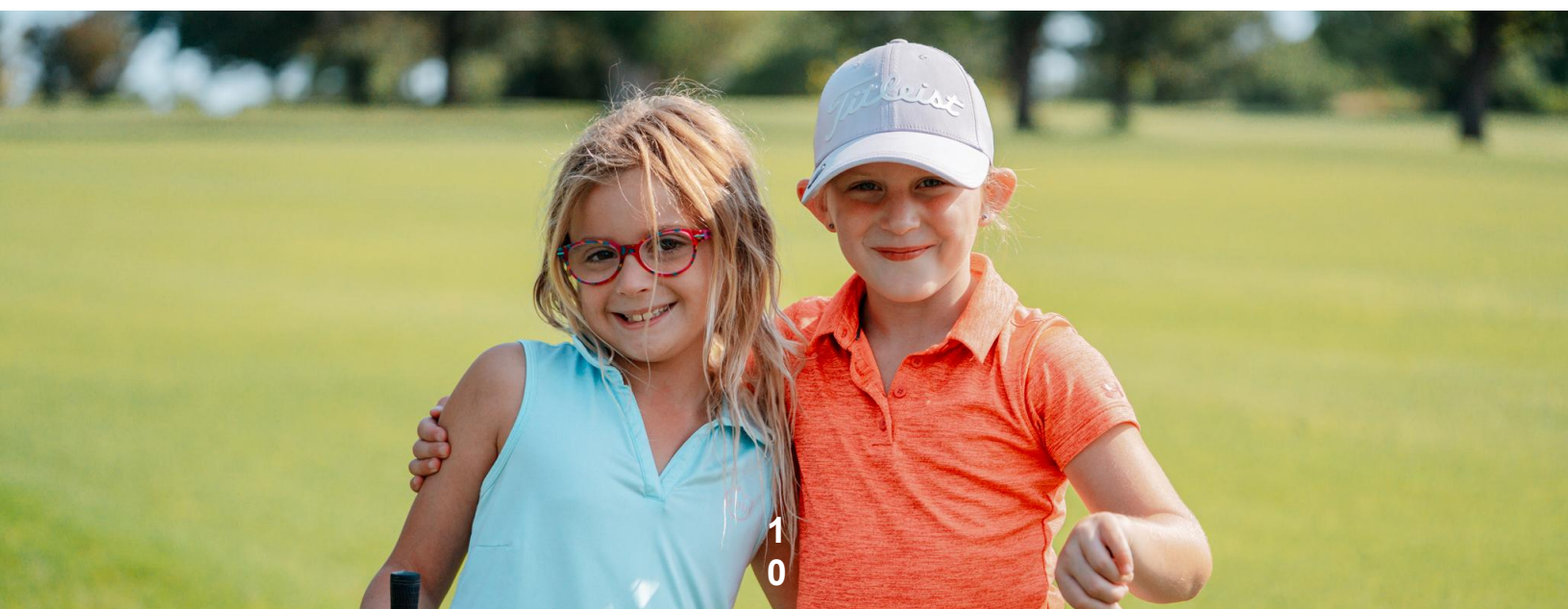


Missouri golfers have access to a broad selection of equipment through a mix of retail options. In addition to 32 sporting goods stores—such as Dick’s Sporting Goods, Dunham’s Sports, and Academy Sports + Outdoors—there are 20 dedicated golf retail stores offering more than 100,000 square feet of combined retail space. These include major national chains like Club Champion, GOLFTEC, and Golf Galaxy, as well as locally owned shops such as Golf Headquarters, Pro Am Golf USA, and Golf Discount Superstore.

Missouri’s golf retail distribution closely aligns with national trends. National

off-course (OC) retailers make up about 23% of Missouri’s total golf retail locations, compared to roughly 25% nationally. Sporting goods stores account for about 62% in Missouri, versus 60% nationally, while non-national OC retailers represent 15% in Missouri, nearly matching the 16% national average. These similarities indicate that, despite having fewer total golf retail locations, Missouri maintains a balanced mix of store types that mirrors national patterns, suggesting a consistent retail model serving golfers across different markets.

Young golfers having fun at the Missouri Junior Tour Championship





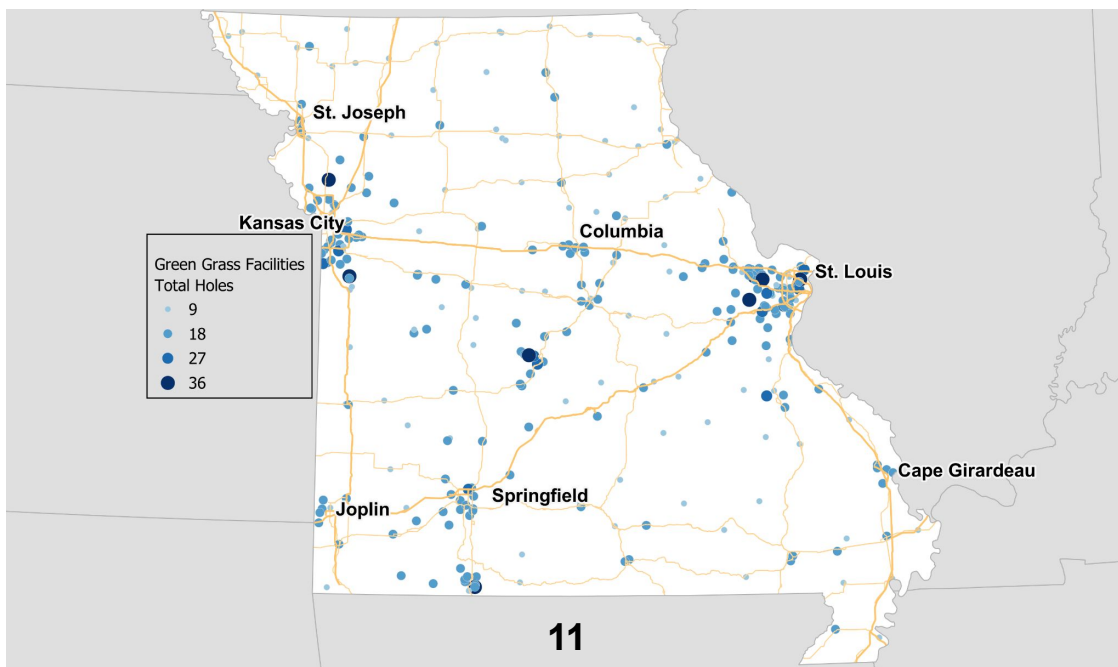
Algonquin Golf Club in Glendale, MO

Golf On & Off Course Facilities

Missouri's golf courses benefit from the same scenic beauty that draws visitors to its well-known natural attractions, such as the Ozark Mountains, Lake of the Ozarks, and numerous state parks. The state's diverse landscapes—including rolling hills, forested areas, river valleys, and limestone bluffs—create a striking backdrop for golf. These features enhance the visual appeal of the courses while also attracting outdoor enthusiasts looking for a wide range of recreational opportunities.

Missouri boasts 318 on-course golf facilities, distributed throughout the state as shown in Map 1, with clear pockets of golf courses in St. Louis and Kansas City with additional rural clusters near Lake Ozark and Branson. Missouri is filled with memorable and historic golf courses including two top 200 golf courses according to Golf Digest - St. Louis Country Club (ranked 128, up 10 from last year) and Bellerive Country Club (ranked 169), both in Saint Louis, MO.

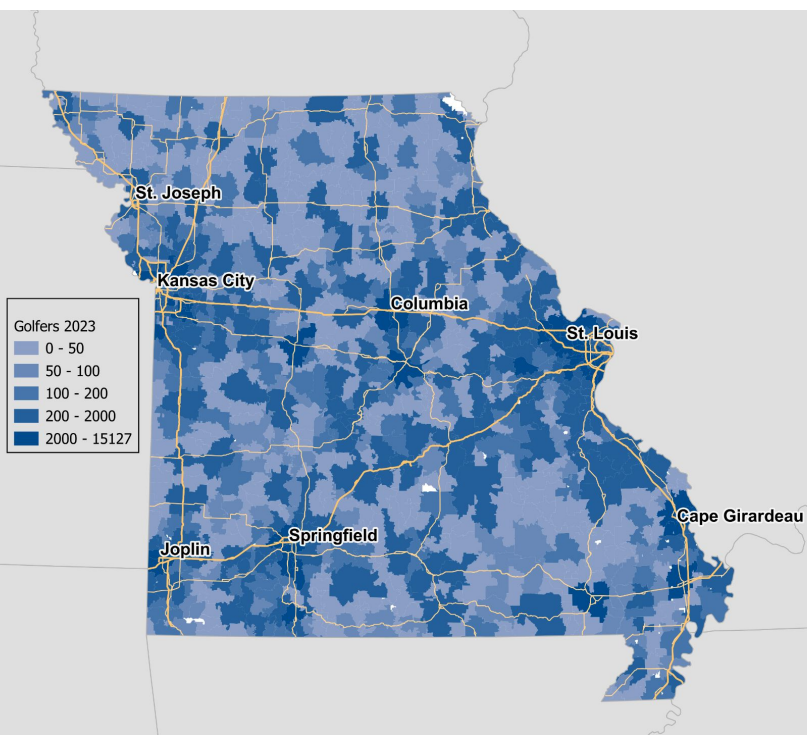
Map 1: Missouri On-Course Golf Facilities



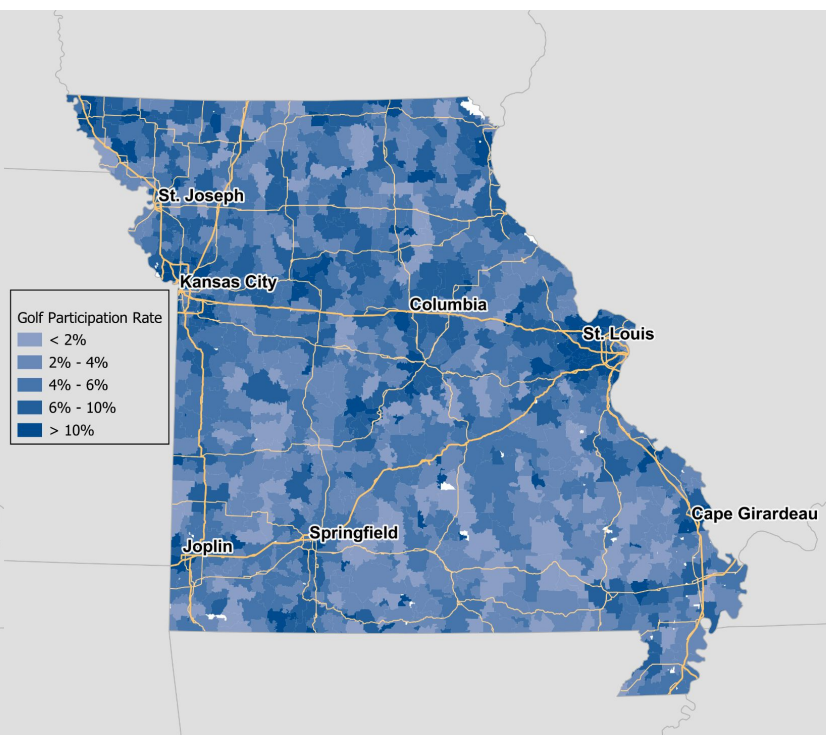
Golf On & Off Course Facilities

Continued

Map 2: Missouri Golfers by Zip Code



Map 3: Missouri Golf Participation Rate by Zip Code



Missouri's golf landscape extends far beyond traditional courses, offering a wide variety of off-course golf experiences that help broaden the game's reach and accessibility. A total of 148 off-course venues across the state—including indoor golf simulators, miniature golf courses, standalone driving ranges, and golf-centric entertainment facilities—offer flexible, casual options for players of all ages and skill levels.

Among these, 55 indoor golf facilities serve a key role in supporting year-round engagement, providing weatherproof practice environments and simulator-based play. Additionally, the 93 miniature golf venues create a welcoming and playful atmosphere for families and newcomers, often serving as the first exposure to golf in a relaxed, approachable format.

The state's golf community is made up

of approximately 512,000 resident golfers, including an estimated 102,000 avid players who tee it up 20 or more times annually. As shown in Maps 2 and 3, participation is highest in and around Kansas City, St. Louis, Columbia, Springfield, and Branson. Notably, areas like Lake Ozark and Poplar Bluff report elevated golf engagement relative to their overall populations, reflecting strong local interest.

Golf activity in Missouri has grown significantly over the past several years. In 2023, residents and visitors played an estimated 9.7 million rounds, marking a 39% increase from the 7.0 million rounds played in 2019, prior to the pandemic. This upward trend underscores the expanding role of both traditional and alternative golf experiences in fueling sustained interest and participation statewide.

Golf On & Off Course Facilities

Continued

Missouri's golf sector encompasses a wide range of venues—from public and private courses to destination resorts, indoor golf centers, driving ranges, and miniature golf attractions—all of which play a meaningful role in powering the state's economy. Collectively, these facilities generated \$902 million in direct economic output in 2023, creating around 11,000 jobs and producing \$294 million in labor income. The bulk of this impact came from core revenue sources such as greens fees, cart rentals, memberships, and food and beverage operations at course-based venues. To avoid overlap, retail-related revenues are accounted for separately in the Retail section of the report.

Beyond the direct spending at these venues, golf also stimulates economic activity through its broader network of suppliers and

the household spending of golf employees. These indirect and induced effects added another \$436 million to Missouri's economy in 2023, supporting 2,600 additional jobs and generating \$101 million in labor income across the state.

Altogether, Missouri's golf facilities contributed \$1.3 billion in total economic activity, sustained more than 14,000 jobs, and generated \$395 million in wages last year. The sector also delivered approximately \$167 million in state and local tax revenue, reflecting its value not just as a recreational outlet but as a key economic engine. This impact underscores how the state's strong mix of premier on-course destinations and modern off-course golf experiences drives economic growth while shaping Missouri's cultural and recreational identity.

Junior golfers enjoying camaraderie and competition at Junior Match Play Event



Golf On & Off Course Facilities

2023 On Course Movement Data - Cell Phone Tracking

249

Facilities with
Movement Data

12.4 Million

Total Visits

50,000

Visits per Location

+ 10.2%

YoY Visits vs. 2022

576,000

Facility Visitors/Month

+ 10.6%

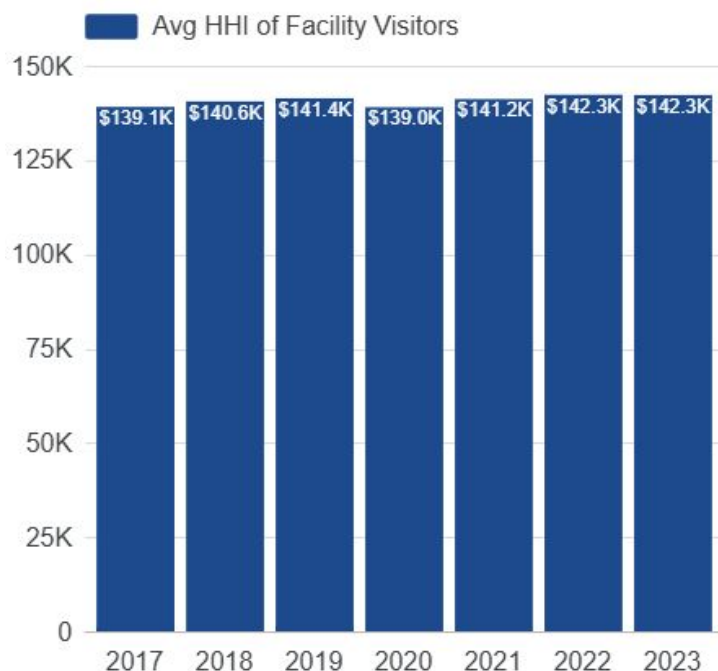
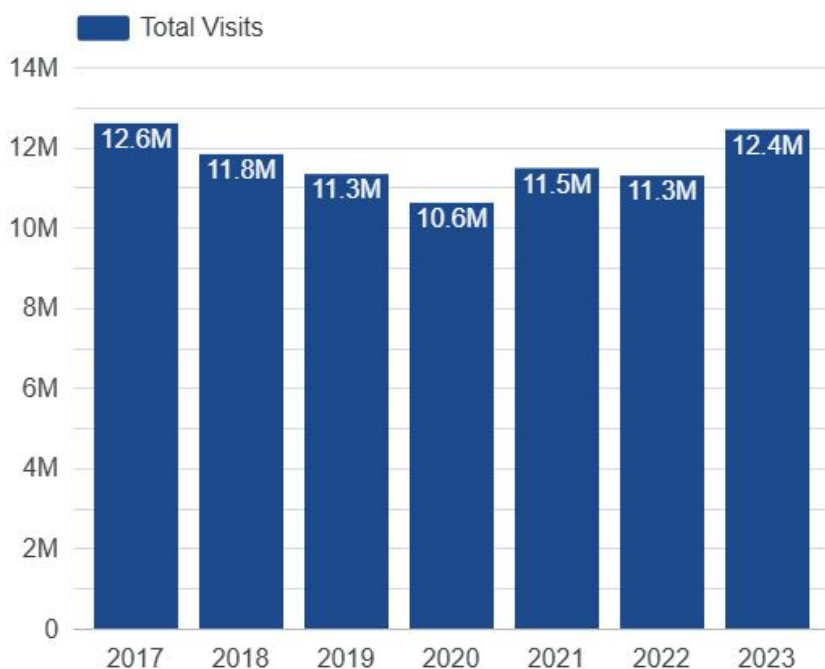
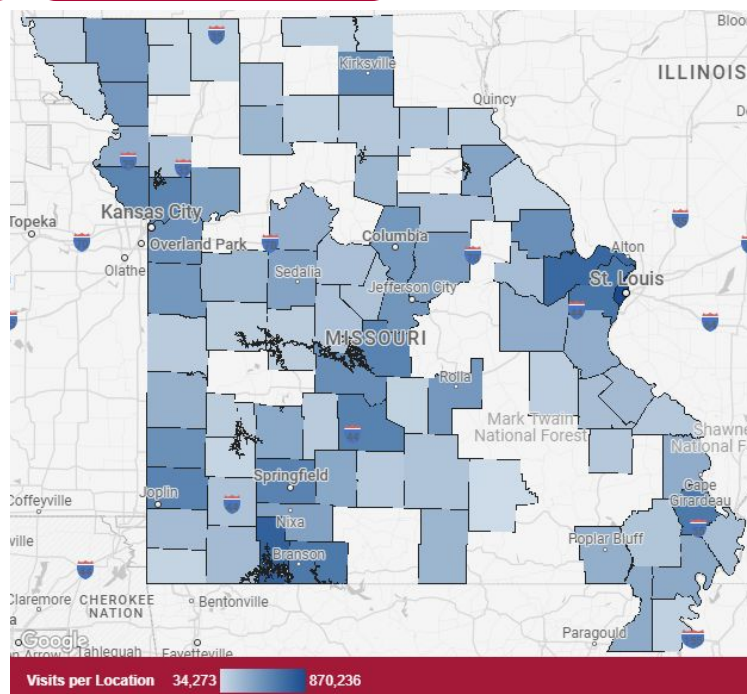
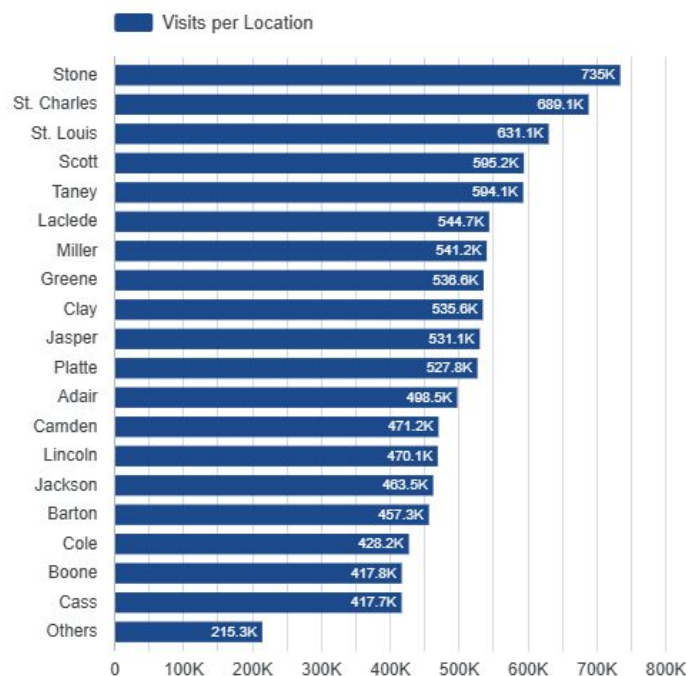
YoY Visitors/Month

1.8

Visits/Visitor/Month

- 0.3%

YoY Visits/Visitor/Month



* 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 growing and increasingly vital component of Missouri’s outdoor recreation and hospitality economy. In 2023, golf-related travel generated a total economic impact of \$407.4 million, including \$232 million in direct spending by nearly 800,000 golf-involved visitors, and an additional \$175.3 million through indirect and induced effects. Golf tourism accounted for 1.9% of all Missouri visitation, and played an outsized role in rural and resort communities where destination golf is a cornerstone of local economic activity.

Of these golf travelers, approximately 66% stayed overnight, a high proportion for a sport traditionally associated with day trips. These 526,000 overnight visitors were responsible for \$210 million in direct spending, or 91% of all golf tourist dollars. Their impact reached beyond green fees, extending into hotels, dining, transportation, shopping, and entertainment. Day-trippers, while smaller in spending, still contributed \$22 million to Missouri’s tourism economy.

Nowhere is this growth more visible, or more transformational, than in southwest Missouri, which has emerged as the Midwest’s leading golf destination. Anchored by Big Cedar Lodge, a resort vision brought to life by Johnny Morris, founder of Bass Pro Shops, the region has experienced a tourism renaissance powered by world-class course development and national media attention. Since 2010, six new golf courses have opened at Big Cedar alone, including collaborations with golf legends Jack Nicklaus, Gary Player, Tom Fazio, Tiger Woods, and Bill Coore & Ben Crenshaw architects.

Figure 7: Visiting Golfer Spending By Day Trip vs Overnight

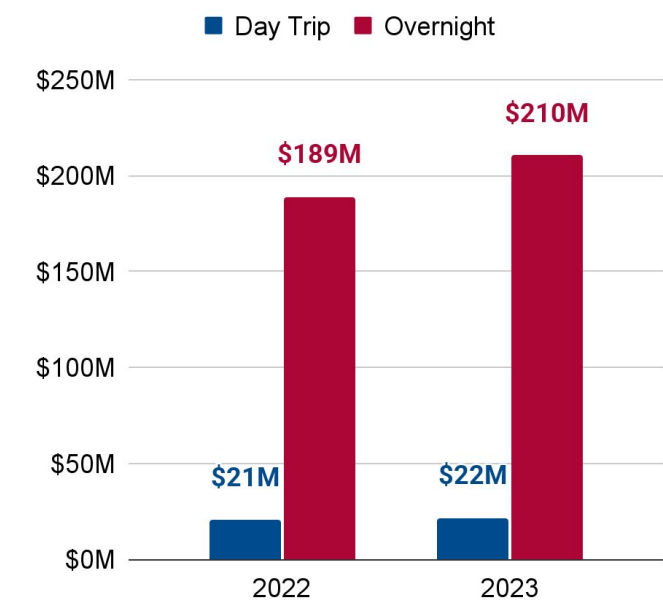


Table 2: Missouri Tourism and Golf		
Metric	2023 Value	%
Total Visitors to MO	41.9M	
Total Spending by MO Visitors	\$11.9B	
Total Visitors Participated in Golf Activities	796,000	1.9%**
Overnight Golf Visitors	526,000	66%
Day Trip Golf Visitors	267,000	34%
Overnight Golfer Direct Spending	\$210M	91%
Day Trip Golfer Direct Spending	\$22M	9%
TOTAL DIRECT SPENDING*	\$232.0M	77.4%
INDIRECT/INDUCED SPENDING	\$175.3M	22.6%
TOTAL TOURISM+GOLF IMPACT	\$407.4M	

* In order to avoid double counting, Total Direct Spending included a deduction of \$79 per traveler for golf-related expenditures.

** Percent of total annual tourism to Missouri.

Sources: ECONOMIC IMPACT OF VISITORS IN MISSOURI FY 2023 by Tourism Economics and : Missouri Division of Tourism



The Club At Porto Cima in Sunrise Beach, MO

Tourism

Continued

In 2025, the opening of Cliffhangers, an 18-hole par-3 course perched dramatically on a limestone hillside, adds to Big Cedar Lodge national allure. Designed by Johnny Morris and his son John Paul, Cliffhangers has been described as *"the most extraordinary par-3 course on Earth."* It's expected to draw high-yield golf travelers from across the country and elevate Missouri's tourism brand.

Missouri's mix of scenic landscapes, world-class design, and year-round affordability gives it a competitive edge in the national golf tourism market. It offers elite golf with shorter travel times, fewer crowds, and lower price points—an appealing combination for traveling golfers from the Midwest and beyond.

This dynamic fuels ripple effects across the state. In 2023, golf tourism supported 3,870 jobs and delivered \$130 million in labor income, benefitting resort staff, golf professionals, restaurant servers, and small business owners.

As new courses open and awareness grows, golf tourism will remain a magnet for high-value visitors, rural revitalization, and tax revenue. Missouri is not just a great place to play, it's emerging as one of the premier golf destinations in America.



Payne's Valley and Cliffhangers Courses at Big Cedar Lodge in Hollister, MO

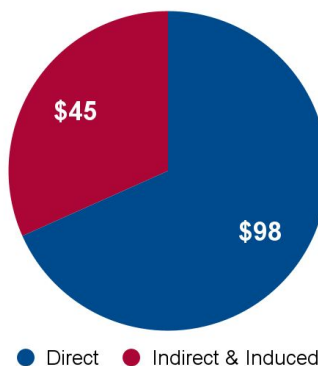
Capital Expenditures

From 2010 to 2023, capital investment in Missouri's golf industry increased significantly. The direct economic impact from these expenditures has more than doubled, underscoring a decade of growth. This surge has been fueled by both the expansion of existing facilities and the development of entirely new courses across the state.

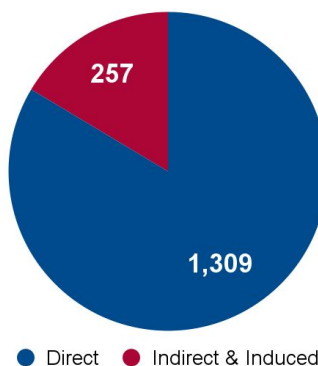
In 2023, new construction projects played a leading role in driving this momentum. Among the most notable is Cliffhangers Golf Course at Big Cedar Lodge, a dramatic 18-hole par-3 course designed by Johnny Morris and his son. Carved into the hillside next to Payne's Valley, Cliffhangers offers short holes and is designed with sharp elevation shifts, challenging green complexes, and visually striking pin placements. Construction began in early 2023, with an opening planned for 2025.

Golf-related investment has extended beyond commercial ventures as well. That same year, NFL star Patrick Mahomes added a full par-3 hole and putting green to his own backyard, exemplifying the growing personal enthusiasm for golf and reinforcing Missouri's rising status as a golf destination at every level.

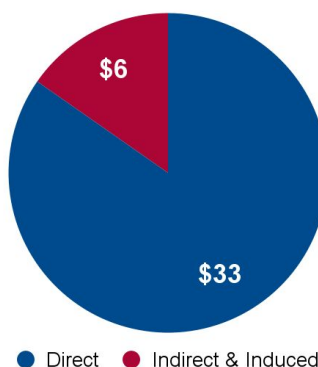
Capital Expenditure - Output



Capital Expenditure - Employment



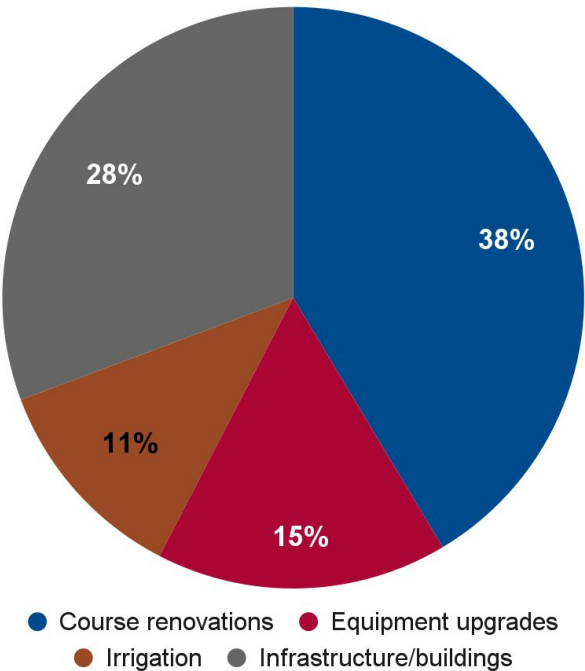
Capital Expenditure - Wages



Capital Expenditures

Continued

Figure 8: Golf Course Capital Investment by Category



In 2023, capital spending in Missouri’s golf industry—including new construction and facility upgrades—totaled \$98 million in direct economic impact, supporting 1,300 jobs and generating \$33 million in labor income.

Most of the investment focused on existing facilities, divided into four categories: course renovations, equipment upgrades, irrigation improvements, and infrastructure. As seen in Figure 8, Course renovations accounted for more than 38% of these expenditures, with average spending over \$275,000 per course, reflecting the need to maintain course quality amid high demand.

These investments also produced \$45 million in additional indirect and induced economic activity, supporting another 260 jobs and \$11 million in wages. In total, golf-related capital expenditures contributed \$143 million to Missouri’s economy and generated approximately \$19 million in state and local tax revenue.

Capital expenditures are vital to the growth and sustainability of Missouri’s golf industry. They enhance the quality and appeal of facilities, support job creation, and stimulate economic activity beyond the golf sector. By investing in new construction and upgrades, the industry not only meets rising demand but also drives long-term economic impact across the state.

Homes at Whitmoor Country Club in St Charles, MO



Real Estate

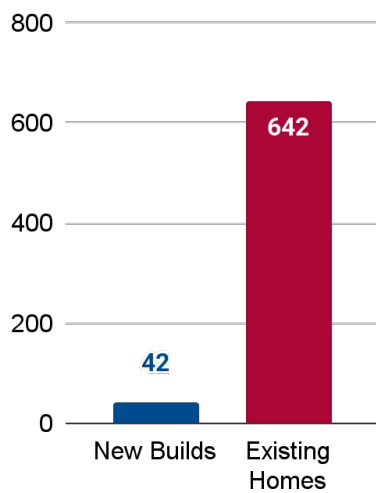
Golf courses in Missouri not only enhance the recreational appeal of communities but also significantly boost surrounding property values. Homes located within a mile of a golf course or inside golf communities benefit from what’s known as the “golf premium”—an increase in property value tied to the aesthetic and lifestyle benefits of proximity to green space. Studies estimate that this premium accounts for roughly 17% of a home's value in such areas.

To measure the direct impact of golf-related real estate in 2023, this 17% premium was applied to home sales near golf courses, alongside construction costs for new builds. That year, 42 new homes were built on or near golf courses in Missouri, each averaging \$581,000 in sale price, totaling about \$24 million—\$15.7 million of which was tied directly to construction.

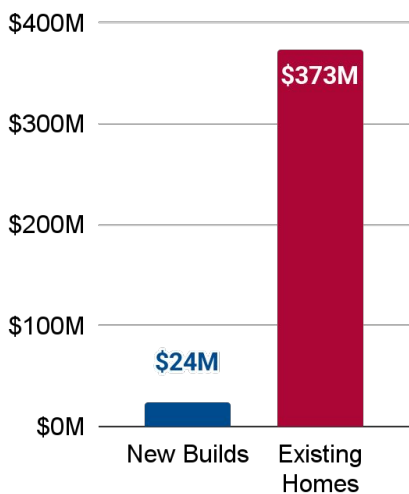
In addition, 642 existing homes in similar locations were sold in 2023, generating \$373 million in total sales value. The golf premium for these resales contributed an estimated \$63.4 million in added value. Combined, new construction and resale premiums generated \$79.1 million in direct economic impact.

This activity supported approximately 320 jobs and \$3.7 million in labor income. When accounting for indirect and induced effects, the total economic contribution of golf-related real estate exceeded \$96 million, supported 410 jobs, and resulted in \$7.3 million in state and local tax revenue—helping to fund public services across Missouri.

Number of Homes Sold

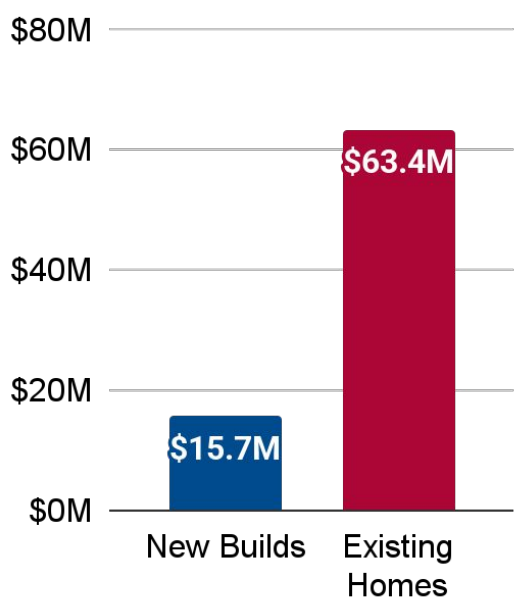


Total Value



Premium and Construction

Economic Impact



Retail and Wholesale Activity

Retail and wholesale operations played an important role in Missouri’s golf economy in 2023, contributing to both consumer-facing transactions and business-to-business commerce. Combined, golf-related retail and manufacturing activity produced \$47 million in direct economic output, with total economic activity—including ripple effects—reaching \$65 million statewide. Altogether, these operations supported approximately 1,800 jobs and yielded \$18 million in wages.

National chains like Golf Galaxy, GOLFTec, and Club Champion were major contributors to this sector, with 12 locations throughout Missouri employing local workers, sourcing from nearby suppliers, and helping stimulate spending at adjacent businesses. Meanwhile, eight locally owned golf retailers, including Golf Discount Superstore and Pro

Am Golf USA, provided additional value by reinvesting more of their revenues within their communities and amplifying local economic impact.

Together, these specialty and national golf retail outlets accounted for \$26 million in direct economic activity, supporting 1,200 jobs and generating \$8 million in labor income. Beyond these direct impacts, indirect and induced activity added another \$11 million, with 66 additional jobs and \$2.8 million in wages tied to supply chains and employee household spending.

In total, Missouri’s golf retail sector contributed \$36 million in economic output, supported 1,300 jobs, paid \$11 million in labor income, and returned an estimated \$3.1 million in state and local tax revenue, reinforcing its importance to the broader golf economy.



\$65 Million

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



\$4.4 Million

State and Local Tax
Revenue



1,800 Jobs

Contributed by Golf
Retail and Wholesale
Activity

Retail and Wholesale Activity

Continued

Missouri is home to a diverse array of golf-related manufacturers and wholesalers, each adding unique value to the industry, including:

- Imperial: leading manufacturer of premium golf headwear. Founded in 1916 and headquartered in Bourbon, Missouri, the company supplies custom-branded headwear to golf courses, resorts, and tournaments across the country. Imperial is a preferred brand for both professionals and amateurs, reinforcing Missouri's role in the national golf supply chain.
- Rapsodo: based in St. Louis, Missouri, is a leader in sports technology, known for its golf launch monitors and performance tracking tools. Its products are used by golfers of all levels, making Missouri a key player in golf innovation.
- Newton Golf: a golf equipment company, based in Kansas City, Missouri, known for its innovative Newton shafts designed to improve swing performance and reduce strain
- Missouri Soybean Association: supports golf by hosting fundraising tournaments and investing in soy-based golf ball research to promote sustainable materials
- All Star Pro Golf: supplies golf courses nationwide with pro shop and tournament products. Known for

personalized service and quick shipping, it has supported the golf industry for over 60 years.

- Golf Cart Distributors: Clear Creek, M&M Golf Carts, TNT Golf Carts, and Gateway Golf Carts serve golf carts to both recreational and commercial markets across the Midwest
- Mid-America Golf and Landscape: a leading golf course construction firm based in Lee's Summit, MO. With over 30 years of experience specializing in renovations and new builds, the company has completed 800+ projects nationwide.

These manufacturers and wholesalers, along with other supporting companies, combined to contribute \$21 million directly to the state's golf industry, while supporting 450 jobs making \$4.6 million in wages.

Additionally, businesses supported by these wholesalers, combined with household spending from employees, contributed an extra \$8.4 million, resulting in the creation of another 64 jobs and boosting labor income by \$2.3 million. Altogether, golf wholesale and manufacturing added \$29 million to Missouri's economy, supporting 520 jobs and contributing over \$7.0 million in earnings. Their contribution of \$1.3 million in state and local tax revenue highlights their role in bolstering the state's economic vitality.

Charitable Impact

Golf in Missouri significantly contributes to charitable causes, supporting a wide array of organizations and community initiatives across the state. The following events especially played a critical role in addition to many others:

- Price Cutter Charity Championship (Springfield): Since its inception in 1990, this Korn Ferry Tour event has raised over \$19.4 million for nearly 50 children's charities throughout the Ozarks.
- Stifel Charity Classic (St. Louis): Formerly known as the Ascension Charity Classic, this PGA TOUR Champions event raised more than \$800,000 in 2024 for charitable organizations.
- MFA Oil Charity Golf Scramble & Concert: This annual event supports Feeding Missouri to fight hunger across the state.
- Dan McLaughlin Charity Golf Tournament and Auction: benefits the Special Education Foundation, supporting children with disabilities in the St. Louis area.
- Ronald McDonald House Charities of St. Louis: hosts multiple golf tournaments, including the Scramble for Charity, to support families with seriously ill children.
- Retrieving Freedom Golf Scramble (Clinton): raises funds to provide service dogs to veterans and children with autism.
- The Arc of the Ozarks Charity Golf Tournament: supports children with autism and other neurological disorders in southwest Missouri.

In addition to these events, the following associations also played a vital role in growing golf in MO with their contributions to juniors, minorities, and under-resourced communities:

- Missouri Golf Association: Coordinates tournaments across the state with the help of volunteers, promoting amateur golf and providing competitive opportunities for all ages. MGA helps sustain a strong statewide golf community through events, junior golf programs, and rules education.
- Metropolitan Golf Foundation: Based in St. Louis, the foundation funds scholarships, supports junior players with travel stipends, and backs youth access programs like Youth on Course and The First Tee. Its efforts help reduce barriers to golf for underserved youth in urban Missouri communities.
- Tee Masters Golf Club of St. Louis: For over 40 years, Tee Masters has advanced inclusion in golf by organizing tournaments and youth outreach. They mentor young people, especially from minority communities, and collaborate with local nonprofits to deliver education, leadership, and character-building programs through golf.
- Golf Foundation of Missouri: Focuses on introducing the game to young people across Missouri with clinics and instructional programs. Their work encourages youth development by using golf to teach responsibility, respect, and perseverance—particularly in rural and under-resourced areas.

Charitable Impact

Continued

Golf-related charitable activity in Missouri had a meaningful impact on both communities and the state's economy in 2023. Collectively, charitable events and initiatives generated \$19 million in direct economic activity, supported 250 jobs, and provided \$6.2 million in labor income.

Beyond direct contributions, these efforts also spurred \$8.6 million in additional economic impact through indirect and induced effects—such as spending by

vendors, suppliers, and employees connected to charitable golf events. This secondary activity supported an additional 50 jobs and \$2.0 million in wages.

Altogether, golf's charitable contributions in Missouri drove \$27 million in total economic output, supported 300 jobs, generated \$8.2 million in labor income, and contributed \$3.7 million in state and local tax revenue.

Veterans and Active Duty Military enjoying PGA HOPE (Helping Our Patriots Everywhere) event



Championship Events

In 2023, Missouri's championship golf events—the AdventHealth Championship, the Price Cutter Charity Championship, and the Ascension Charity Classic (rebranded as the Stifel Charity Classic)—generated a combined \$12 million in direct economic activity, supported 80 jobs, and contributed approximately \$1.6 million in labor income.

The Ascension Charity Classic, rebranded as the Stifel Charity Classic, continued its success as a PGA TOUR Champions event in St. Louis. Hosted at Norwood Hills Country Club, the tournament featured top-tier professionals and has become a key driver of tourism and brand visibility for the region. According to cell phone tracking data from Placer.ai, the tournament attracted an additional 9,300 unique visitors, making it the highest attended event in Missouri in 2023.

The AdventHealth Championship, part of the Korn Ferry Tour, was held at Blue Hills Country Club in Kansas City. The event attracted fans, sponsors, and regional visitors, driving local spending in hospitality, dining, and transportation. Cell phone data showed the tournament attracted an additional 3,600

unique visitors, bolstered by enhanced media coverage and player visibility.

Meanwhile, the Price Cutter Charity Championship, another Korn Ferry Tour event, took place at Highland Springs Country Club in Springfield. A cornerstone of Missouri's golf calendar for over three decades, this tournament not only raises millions for children's charities but also drew 2,200 spectators from across the region.

Although championship events typically produce smaller indirect and induced effects than year-round golf operations, they play a vital role in stimulating local business relationships and elevating Missouri's standing as a golf destination. In 2023, these three events generated an additional \$9.6 million in indirect and induced economic activity, supporting 55 jobs and contributing \$2.8 million in labor income.

Altogether, Missouri's major golf tournaments in 2023 delivered a total economic impact of \$22 million, supported 130 jobs, generated \$4.4 million in labor income, and contributed \$1.5 million in state and local tax revenue.

116th Missouri Amateur Championship at Payne's Valley Golf Course in Hollister, MO



Environmental Stewardship

Golf courses across Missouri are increasingly recognized not just for recreation, but for their role in environmental conservation. These landscapes preserve large tracts of open space that help protect native species, absorb stormwater, improve air quality, and offer scenic green buffers in both urban and rural communities. Through evolving practices, Missouri's golf industry is showing that high-quality course conditions and ecological responsibility can go hand in hand.

Water use remains a major priority for environmental improvement. While Missouri doesn't face the extreme drought conditions of the western U.S., courses here continue to make meaningful strides in reducing water consumption. According to 2023 data, 70% of Missouri golf facilities that referenced evaporation tables applied less water than recommended, demonstrating intentional conservation beyond basic compliance. Additionally, 57% of facilities that adjusted their irrigated acreage reported a net reduction, helping shrink water demand without sacrificing turf quality. These outcomes are supported by practical improvements such as irrigation audits, moisture sensors, and smarter scheduling.

Missouri's Golf Course Best Management Practices (BMP) guide, developed by GCSAA, further drives sustainable progress. It outlines proven strategies for protecting water quality, reducing pesticide use, improving energy efficiency, and restoring native vegetation. From integrated pest management to nutrient control and riparian buffer zones, BMPs

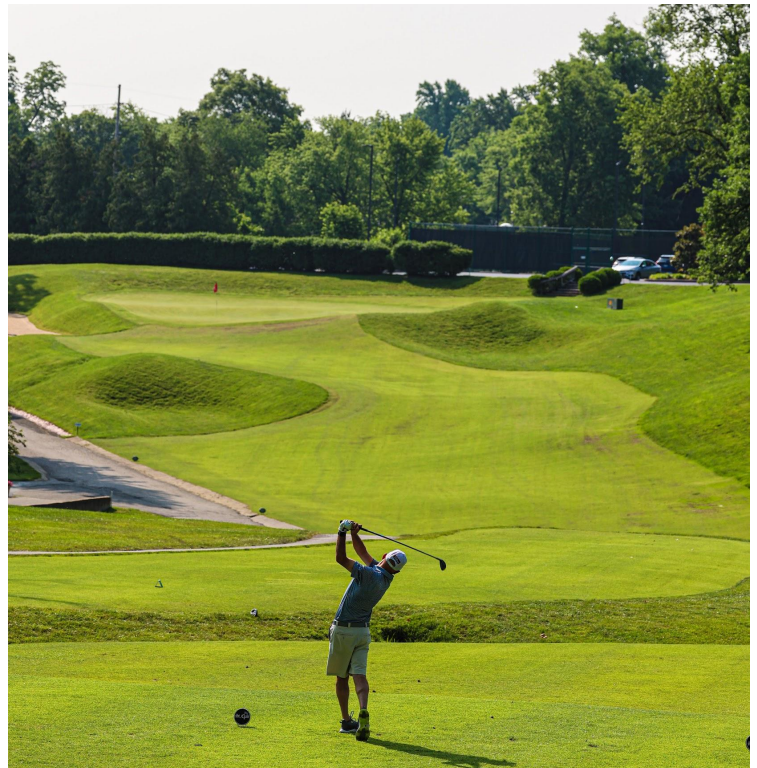
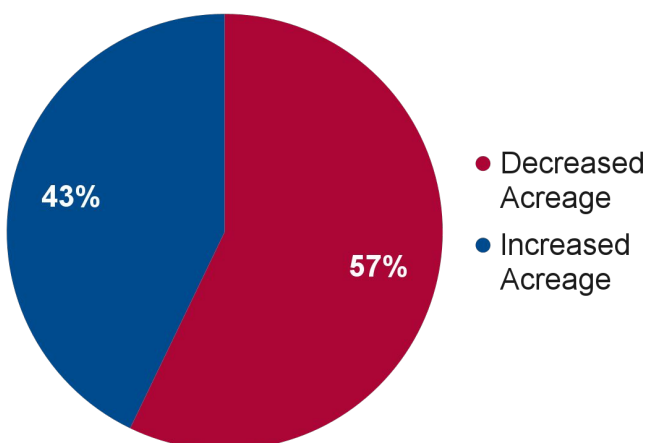
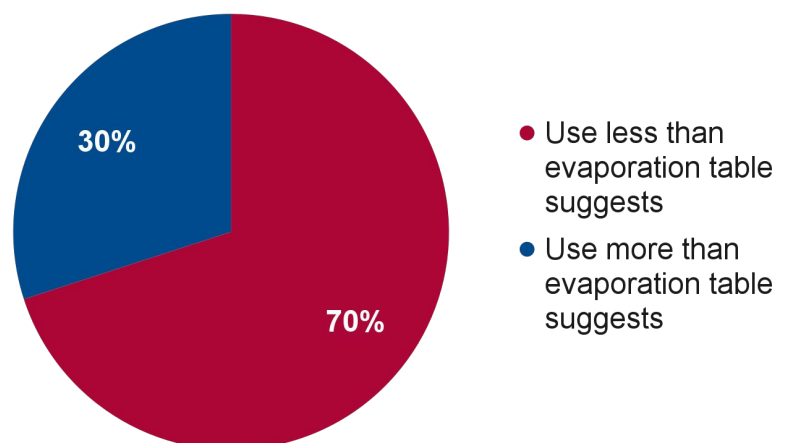


Figure 9: Irrigated Acreage '22 vs. '23



* Survey respondents who said irrigated acreage was either increased or reduced

Figure 10: Evaporation Table '22 vs. '23



* Survey respondents who use an evaporation table and either used more or less than suggested



Family and fans enjoying the Women's Amateur Championship

Environmental Stewardship

Continued

provide Missouri superintendents with tools to minimize environmental impact while maintaining playable, beautiful landscapes.

At Ledgestone Country Club in Branson West, these concepts are in action.

Superintendent Kolby Armbruster led a five-year plan that included precision irrigation strategies and comprehensive course analysis, allowing the course to significantly cut water usage without compromising performance. His efforts, profiled in GCM magazine, highlight how Missouri golf leaders are proactively managing natural resources while enhancing turf quality and guest experience.

Beyond individual facility efforts, Missouri's commitment to conservation is also reflected in its participation in national

environmental programs. As of 2024, 19 Missouri golf courses are certified members of the Audubon Cooperative Sanctuary Program. This initiative recognizes facilities that maintain wildlife habitats, reduce chemical inputs, protect water sources, and engage the local community in environmental education. From nesting boxes and pollinator zones to water-quality monitoring, certified courses go beyond standard maintenance to actively enhance their surrounding ecosystems.

Together, these efforts position Missouri as a model for sustainable golf course management—where the game supports not just recreation, but the health of the land, water, and communities it touches.

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 Missouri, 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 Missouri.

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 Missouri. 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 Maggie Buchanan, Director of Research at Buffalo Groupe.

Data Sources

To provide the most accurate economic data related to the golf industry in Missouri, Buffalo Groupe conducted custom surveys to golf facilities, retailers, and wholesalers, throughout the state from June to September of 2024. In total, of the 318 golf facilities in the state, 31% responded to the survey for a total of 99 participating facilities. Using data from these survey responses, Buffalo Groupe was able to generate estimates for comparable companies for rounds and economic impact throughout Missouri for which data were otherwise not available. The total facility, wholesaler, and retailer company figures and contacts were provided by Buffalo Groupe Research. It also provided the statistics differentiating Missouri 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. “ECONOMIC IMPACT OF VISITORS IN MISSOURI FY2023” report from 2023 provided by Tourism Economics, in collaboration with The Missouri Division of Tourism, 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 2023, this analysis relies on proprietary data provided by Buffalo Groupe via its research division, Longitudes Group, The Missouri Golf Association, and Missouri Sections of the PGA. 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 Missouri in 2024 to accurately capture golf related economic activity in 2023.

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 Missouri Economic Analysis, 249 of the courses (78% of Missouri golf facilities) were geo-fenced to measure the visitor trends in traffic in 2022 and 2023. 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 2023.

Lastly, this analysis benefited from a series of interviews with manufacturers, 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 2023 unless otherwise noted.

Limitations

Every reasonable effort was made to ensure that the estimates used in this report accurately reflect 2023 economic spending on golf in Missouri. 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 Missouri 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

		Facilities (including Hotels, Resorts, Top Golf, etc.)	Tourism	Capital Expenditures	Real Estate	Retail (shoes, apparel, equipment)	Wholesale (Headwear, Shafts, Golf Carts, Accessories, etc.)	Charitable Events	Professional Events (without tourism)	Total Economic Contribution
Total Economic Input	Direct	\$902.0M	\$232.0M	\$97.5M	\$79.1M	\$25.6M	\$20.9M	\$18.6M	\$12.1M	\$1,387.8M
	Indirect	\$236.5M	\$86.8M	\$27.9M	\$11.1M	\$5.6M	\$6.0M	\$5.2M	\$7.6M	\$386.7M
	Induced	\$199.3M	\$88.6M	\$17.3M	\$5.3M	\$4.9M	\$2.4M	\$3.4M	\$1.9M	\$323.1M
	Total	\$1,337.9M	\$407.4M	\$142.7M	\$95.5M	\$36.1M	\$29.3M	\$27.2M	\$21.7M	\$2,097.6M
Jobs	Direct	11,144	2,955	1,309	319	1,220	453	251	76	17,728
	Indirect	1,327	426	155	65	51	35	29	45	2,132
	Induced	1,225	489	102	29	15	29	21	10	1,920
	Total	13,697	3,870	1,566	412	1,286	516	301	131	21,780
Labor Income	Direct	\$293.8M	\$83.6M	\$33.2M	\$3.7M	\$8.0M	\$4.6M	\$6.2M	\$1.6M	\$434.7M
	Indirect	\$48.3M	\$21.0M	\$6.0M	\$3.2M	\$1.4M	\$1.7M	\$1.1M	\$2.2M	\$84.9M
	Induced	\$53.0M	\$25.7M	\$4.6M	\$1.5M	\$1.3M	\$0.6M	\$0.9M	\$0.6M	\$88.4M
	Total	\$395.1M	\$130.3M	\$43.9M	\$8.4M	\$10.8M	\$7.0M	\$8.2M	\$4.4M	\$608.0M
State and Local Taxes	Total	\$167.1M	\$46.4M	\$19.3M	\$7.3M	\$3.1M	\$1.3M	\$3.7M	\$1.5M	\$249.7M

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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 Missouri in 2025 for the data year of 2023.

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 Missouri 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.

IMPLAN Input-Output Modeling

The IMPLAN economic modeling system was used to estimate direct and secondary economic impacts, including value added, employment, and labor income.

Acknowledgments

The economic impact report was prepared by Buffalo Groupe, LLC, in agreement with the Missouri Golf Association. In addition, support for this report was provided by the following allied golf organizations: the Missouri Golf Association; the Midwest and Gateway Sections of the PGA of America; the Metropolitan Amateur Golf Association; the St. Louis District and Mid-America Chapters of the Club Management Association of America; the Heart of America, Mississippi Valley, and Ozark Chapters of the Golf Course Superintendents Association of America; and Central Links Golf. The economic study was conducted by Sara Killeen, Scott Kravitz, and Maggie Buchanan 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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