

THE WAY FORWARD

Golf PRINCE
EDWARD
ISLAND

2024 - 2028 Strategic Plan





Golf PEI

MEMBER COURSES

(AS OF DECEMBER 1, 2023)



TABLE OF CONTENTS

SECTION ONE:	EXECUTIVE DIRECTOR MESSAGE	4
SECTION TWO:	ABOUT GOLF PEI	5
SECTION THREE:	THE WAY FORWARD	12
SECTION FOUR:	ACTION PLAN	15
SECTION FIVE:	SUMMARY	19



EXECUTIVE DIRECTOR MESSAGE

Golf does a lot of things.

It brings people together. It provides an opportunity to relieve stress and get outdoors. It builds communities and lasting friendships. It encourages a healthy level of competition. It provides job opportunities. It also contributes significantly to our province's economic well-being.

But most importantly, it is a part of our Island's identity. We are a golf Island, a destination sought by visitors from all over the world, **and we are proud of that.**

It's been ten years since Golf PEI was part of a strategic planning process. Back then, it was a collaboration of various organizations involved in the golf industry, and a plan was needed to address multiple issues plaguing the industry at that time. These included diminishing rounds, discounting, lack of clarity on roles and responsibilities, and other challenges. Now, a decade later, golf on the Island is in a much different state, and Golf PEI's role has become even more important.

After several years of sustained growth in the industry, the question now circulating in the minds of many golf operators is: **Do we continue on the road of status quo and hope for the best, or do we double down and grow our province into a powerhouse for golf tourism?**

Reflecting on this question, Golf PEI and its board of directors have embarked on ensuring the organization has a clear path forward for the next five years to maximize new opportunities. This document, aptly titled ***The Way Forward***, aims to provide Golf PEI with a sustainable and realistic path to success.

My sincere gratitude to all of those who have helped shape this plan, whether it be our hard-working golf courses and team members, our accommodation partners, funding partners and industry stakeholders, or golfers far and wide who know just how unique our province is when it comes to golf. A special thank you to James Cronk and Cronk Group for their work in gathering feedback and creating this plan.

The next five years allow us to take golf to the next level, and we cannot waste the opportunity.

Let's get to work.



A handwritten signature in black ink that reads "Sam MacPhail".

Sam MacPhail
EXECUTIVE DIRECTOR



MISSION:

To promote PEI as a golf destination, creating a positive economic impact for our membership, our partners, and the entire Island community.

VISION:

To make PEI the number one golf destination in North America.

CORE VALUES:

Our promise to our customers

- Island Hospitality
- Value
- Customization
- More than golf

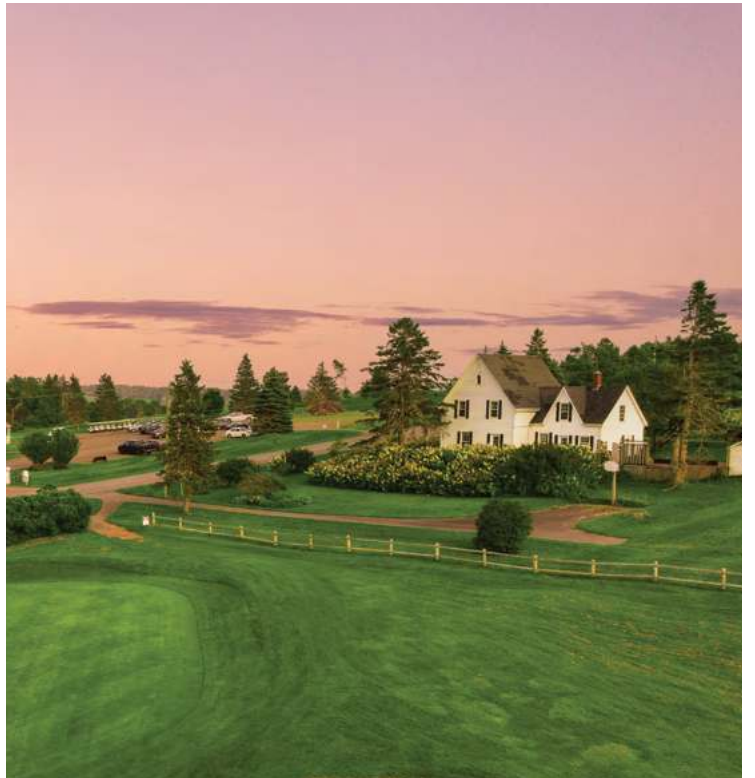


Golf PEI is a non-profit association of provincial golf industry stakeholders. Our mandate is to promote Prince Edward Island as a golf destination and to draw golfers from all over the world.

Golf PEI has 18 golf courses as members and over 30 more business entities as associate members, which are primarily accommodations partners.

Golf PEI generates its revenues from a variety of sources that includes:

- Membership & Partner Fees
- Value Cards (Contra rounds provided by golf course members)
- ACOA Funding
- Tourism PEI Funding
- Reservation Centre Commissions
- Retail Store Commissions
- Joint Marketing Efforts



ABOUT **Golf** PRINCE EDWARD ISLAND

Often referred to as one of Canada's best golf destinations, Prince Edward Island provides a golfing experience that is on parallel with many of the great golf destinations across the globe. With everything from ocean side resorts to nine-hole community courses, golf on PEI has something for everyone, which is why golf is considered one of the four important tourism pillars and part of the Island experience.

More than that, the golf industry contributes significantly to the province's economic development and to the health and social well-being of many Islanders.

The game of golf contributes \$63 Million directly towards PEI's Gross Domestic Product (GDP), and indirectly, more than \$100 Million*

Almost 80% of the industry-related spin-off is the result of non-golfing consumption. Restaurants, retailers, accommodations, entertainment venues, tourism operators and others benefit directly from the influx of people who come to PEI to play golf. An estimated 28,000 Island residents play golf at 25 golf course facilities* (18 who are members of Golf PEI).

Golf on PEI... a valuable and precious industry!



An aerial photograph of a golf course, showing a large green fairway with several sand traps. A winding path or stream cuts through the course, and dense trees surround the area. The lighting suggests a bright, sunny day.

A New Reality!

Since COVID, the golf industry around the world has seen dramatic increases in demand that could never have been predicted. The reasons are many and the impact has been significant. In Canada, rounds of golf in 2023 continue to exceed pre-COVID figures by roughly 20%*, which has also been the case on PEI. More importantly, 2023 golf bookings and other PEI travel and tourism continued with strong bookings. This bodes well for the success over the next few years for the Island's golf industry and supporting tourism partners. That said, these factors and others magnify the importance and need for a solid five-year strategic plan to maximize this opportunity and more importantly, to ensure that Golf PEI is well situated for the years to come.

IMPORTANT GOLF PEI STATS

Key Performance Indicators (KPI)	2022	2023
Paid Rounds	176,000	190,000
Total Res Centre Revenue	\$1,695,000	\$1,707,000
# of Package Players	2,469	2,728
Average Length of Stay	4.35 nights	3.73 nights
Average Package Spend	\$686	\$625
Room Nights Booked	3,151	2,452
# of Contacts in Database	308,759	314,660



GOLF PEI SWOT ANALYSIS

(Strengths, Weaknesses, Opportunities, Threats)

SWOT analysis is a framework for identifying and analyzing an organization's strengths, weaknesses, opportunities, and threats. These words make up the SWOT acronym.

The primary goal of SWOT analysis is to increase awareness of the factors that go into making a business decision or establishing a business strategy. To do this, SWOT analyzes the internal and external environment and the factors that can impact the viability of a decision.

In reviewing feedback from all stakeholders, comparing Golf PEI to other markets, and in addition, taking into consideration other industry factors, Golf PEI has the following SWOT elements.

• STRENGTHS •

- Overall brand
- Collaboration of partners
- Quality of courses
- Value
- Proximity of options
- Variety of courses
- PEI extras (food, culture, etc.)
- Marketing
- Funding support

• OPPORTUNITIES •

- Increase off-season offerings
- Dynamic pricing to increase revenue yields
- Better utilize database
- Staff service training
- Buying group benefits
- More profile events
- Better use of technology and automation
- Bilingual services
- Airport expansion
- Shuttle services

• WEAKNESSES •

- Availability of consistent accommodations
- Availability of transportation on the Island
- No 'one stop' booking option
- Revenue yield not being maximized
- Inequity in ROI for all Golf PEI stakeholders
- Office procedures and systems lacking documentation
- Lack of consistency among courses on issues such as twilight times, rate terms, etc.
- Short season

• THREATS •

- Decline in golfers (youth, etc.)
- Decline in tourism
- Weather
- Decline in Golf PEI members
- Reduced funding from tourism partners (ACOA, etc.)
- Competition (Cabot, Myrtle Beach, etc.)
- Lack of collaboration between stakeholders

An aerial photograph of a golf course at dawn or dusk. The scene features a large clubhouse with a dark roof and multiple wings, situated on a green. In the foreground, a large, calm pond reflects the sky and the surrounding landscape. The golf course is lush with green grass, interspersed with sand traps and clusters of trees, some of which have autumn-colored foliage. The background shows a dense forest under a clear, light blue sky.

THE WAY FORWARD

2024 ~ 2028

GOLF PEI - The Way Forward unveils a comprehensive blueprint for the organization's next five years. Rooted in FOUR key pillars (governance, operations, marketing, and revenue generation), our strategic plan aims to not only sustain but elevate PEI as a golfing paradise, enhancing both the on-course experiences and the broader economic impact for years to come. This collaborative effort, guided by expertise from within and beyond our borders, ensures that PEI remains a beacon on the global golfing map.

MEASURES FOR SUCCESS



Success for Golf PEI will be measured by GROWTH over the next five years in the following measurable Key Performance Indicator's:

1. Golf PEI Reservation Centre Revenue
2. Total Golf Industry Contribution to the PEI Economy
3. Paid Rounds
4. Accommodations Booked
5. Yield (Revenue Per Golfer / Per Round)
6. Growth of Golf PEI Database
7. Social Media Awareness / Impressions
8. Golf PEI Member & Stakeholder Satisfaction
9. Golf PEI Staff Satisfaction / Retention
10. Completion of Strategic Plan Objectives



SUCCESS PILLARS

To achieve greater success, as well as the objectives outlined above, GOLF PEI will focus on delivering improved results within FOUR KEY PILLARS. These are **GOVERNANCE, OPERATIONS, MARKETING** and **REVENUE GENERATION**.

GOVERNANCE

By reviewing board composition, roles, and responsibilities, we aim to refine our decision-making processes.

OPERATIONS

We seek to enhance the golfer experience through a unified booking system, customer service training, improved transportation options, and automation.

MARKETING

Our marketing strategy involves conducting a brand awareness study, re-evaluating marketing materials, and exploring partnerships with other golf destinations.

REVENUE GENERATION

Diversifying revenue sources is vital. We will explore new pricing models, maximize our database's benefits, initiate a new buying group opportunity, create new events, and assist our members in developing off-season revenue opportunities.



THE WAY FORWARD: 2024 - 2028 ACTION PLAN

Within each pillar we have developed a detailed action plan that will guide our path to greater success.

The WAY FORWARD ACTION PLAN includes TWENTY-ONE goals and objectives to be completed over the next few years.

In general, these efforts include:

- **GOVERNANCE**

Improving board governance, developing better systems within the office administration, and enhancing overall membership value.



- **OPERATIONS**

Implementing a unified point of sale system, providing 'Island Hospitality' customer service training to all staff, adding new transportation solutions, and bringing in opportunities to use new atomization and digitization technology.

- **MARKETING**

Completing a brand analysis and marketing review, developing new stories such as 'PEI Golf Trails', and expanding the affiliate program.



- **REVENUE GENERATION**

Creating new revenue products, adding dynamic pricing, expanding and monetizing the database, creating a GOLF PEI buying group, developing new special events and finally, supporting courses who want to offer winter season activities.

Golf PEI will embark on a coordinated effort to implement the following TWENTY-ONE action items during the next five years. These following action items have been colour-coded based upon their level of difficulty with green representing easier and red representing more difficult.

YEAR ONE

- 1. Board & Member & Stakeholder Surveys** - Complete annual surveys to identify areas for improvement.
- 2. New Golf PEI Services** - Provide other resource services to Golf PEI members such as business consulting, employment recruitment, job posting, group buying opportunities, etc. In 2024 launch a job posting service.
- 3. Golf PEI Terminology** - Create mutually agreed upon terminology and best practices such as twilight start times.
- 4. Office SOP's** - Document all operating procedures and processes, update job descriptions and ensure that all tasks are clearly defined and accountable.
- 5. Bilingual Website** - Update current website to be bilingual.
- 6. Brand Review** - Engage a third party to complete a brand review and market awareness study.
- 7. Database Growth, Management and Maximization** - Continue to grow database and to maximize potential revenue opportunities (this is an annual action item).
- 8. Staff Sales Training** - Ensure Golf PEI sales staff have the latest sales training tools and techniques.

■ EASIER ■ CHALLENGING ■ DIFFICULT



YEAR TWO

9. Office Location & Infrastructure - Pursue shared space possibly create a tourism info centre and hub. Explore opportunities for office efficiencies through use of new technology such as SLACK, EOS, CHATGPT, SEVEN SHIFTS and more.



10. Shuttle Service - Purchase a shuttle or partner with a hotel or other third party to provide on-demand transportation options.

11. Bilingual Employee - Add a bilingual speaking person to staff or if needed, contract out this service to a call centre with a dedicated French-speaking phone number.

12. New Board Structure, TOR'S & By-Law Updates - Assess the effectiveness of individual board members and the board as a whole and use the results to make improvements and set new board performance goals. Expand the Board to represent non-golf course affiliate members such as Hotels and restaurants and tourism partners. Update the by-laws as needed. Ensure Board has effective succession in place and is representative of DE&I.

13. New Membership Structure - Implement a tiered system of membership based on services desired. For example, add additional levels of cost commitment that provides extra services such as shuttle transport, staff training, partner offers from suppliers, etc. Explore adding non-golf course membership options.

14. New Funding Terms - Based on these membership changes and other factors, review and improve funding continuity by seeking longer terms with funding partners.

15. New Marketing Plan - Distribute an RFP to seek a new marketing/creative partner and create a new marketing plan that identifies new offers, such as Golf PEI Trails, other destination partners, enhanced social media, and new branding materials. Create a Golf PEI SIM experience for trackman, etc.

16. New Products & Pricing - Using dynamic pricing analysis and based on historical demand, develop new pricing options to include premium package offerings with additional benefits. Develop and promote a new membership program for non-islander golfers only that offer exclusive benefits to such as priority tee times, discounted rates, access to special events, and loyalty rewards. Create defined packages for corporations to bring their corporate event to PEI, including an airfare partner, hotel, dining, etc. Introduce a customer loyalty program that rewards repeat golfers with exclusive discounts, perks, or access to special events.

17. Seasonal Add-ons - Provide resources, marketing and support to Golf PEI members interesting in expanding their revenue opportunities with off-season options such as skating rinks, biking trails, Golf Simulators, Wellness, etc. Create a GOLF PEI 'Open for Winter' marketing plan that promotes member courses who are open for winter for activities (such as bike trails, snowshoeing) or dining (Christmas, New Year's).

YEARS THREE TO FIVE

- 18. Unified Booking System** - Provide a unified POS booking system for all Golf PEI Members and other Tourism options to offer a 'one stop shop' tourism booking service that maximizes dynamic pricing opportunities.
- 19. Golf PEI Member Staff 'Island Hospitality' Customer Service Training** - Train the 'Island hospitality' service standard and training processes for all Golf PEI member courses, including an annual staff training day to kick-start the season.
- 20. New Events** - Create new branded events that target specific objectives such as low season times, age groups, other PEI tourism objectives. Work with other tourism partners to create events that drives awareness and traffic to our desired market - this could possibly include another Skins Game, an RBC Scramble Event, a Women's Event, Golf & Food Festival, etc.
-
- 21. Strategic Plan Review** - At the end of year three we will review the progress of The Way Forward Strategic Plan, as well as other market factors, and if needed, adjust the plan as necessary.



SUMMARY

Already renowned as one of Canada's premier golf destinations, Prince Edward Island offers a diverse range of golf experiences, from oceanfront resorts to community courses. Beyond its golfing allure, the industry significantly contributes to the province's economic development.

GOLF PEI's new strategic plan, **The Way Forward: 2024-2028**, encapsulates the collective efforts of Golf PEI, its stakeholders, and experts from the global golf industry. It charts a visionary plan of action for the next five years, with a firm commitment to enhancing our standing as one of the world's best golf destinations.

Rooted in four strategic pillars – **Governance, Operations, Marketing, and Revenue Generation** – the plan is tailored to maximize opportunities, both on and off the course. By implementing the action items that have been identified, Golf PEI will continue to ensure that every opportunity is explored, and the results gained from these efforts will benefit all islanders today, tomorrow, and the in the years to come.



Thank You!

Thank you to all who have contributed to the development of this strategy, including:

GOLF PEI BOARD OF DIRECTORS

Paul MacCormack, Ben King, Ryan Garrett, Kris Currie, Woodrow Bishop, Sean Joyce, Chris Croken

GOLF PEI MEMBERS

Rustico Resort Golf & Cottages, Brudnell River Golf Course, Glasgow Hills, Anderson Creek Golf Club, Fox Meadow Golf Course, Dundarave Golf Course, Countryview Golf Club, Eagles Glenn, Stanhope Golf & Country Club, The Links at Crowbush Cove, Avondale Golf Club, Forest Hills Disc & Golf Course, Red Sands Golf Course, Belvedere Golf Club, Clyde River Golf Club, Mill River Golf Course, Belfast Highland Greens Golf Course, Green Gables Golf Club

STAKEHOLDERS

Tourism PEI, Atlantic Canada Opportunities Agency (ACOA), PEI Golf Association (PEIGA), National Golf Course Owners Association of Canada (NGCOA).

GOLF PEI STAFF

Sam MacPhail, Jennifer Sanderson, Stephanie MacDonald, Janelle Parsons, Ryan MacLean and others

OTHER RESOURCES

Thank you to the many industry experts throughout the Canadian and global golf industry who provided their insights.

DATA SOURCES*

Golf PEI Annual Reports

National Allied Golf Association Economic Impact Study 2014

National Golf Course Owners Association of Canada – Rounds Reports, Annual Reports, Consumer Surveys and others

Cronk Group – Golf PEI Stakeholder Survey 2023