



GOLF
BUSINESS
CONFERENCE
2022



ORLANDO • JANUARY 24-26



NGCOA Located at the PGA Show



PGA
— 2022 SHOW —

TECHNOLOGY, PROFIT, & THE FUTURE

What you don't know is killing your business



THE PANEL



John Brown

CEO | GolfBack
CEO | Brown Golf Management



Jason Pearsall

CEO & Co-Founder | Club Caddie



Tim Ummel

Founder | IZON Technology



Competitive Displacement

Competitive Displacement is when one businesses strategic plan is to shift customers loyalty from one brand or business to it's own. This strategy typically involves use of customer data, effective marketing, and creating pricing or value loyalty with the customer. Competitive displacement capitalizes on the mistakes, mishaps, and missed opportunities of their competitors.

So I asked myself.....What mistakes did I make that led to losing profitability through competitive displacement?



THE AGENDA



DATA & MARKETING

- Actionable Stats
- Driving customer direct
- Maximizing premium inventory
- The power of marketing automation
- Measuring performance - The online highway



GOLF MANAGEMENT SYSTEM (GMS)

- Digital Buying Trends
- Use your GMS to increase revenue
- Use your GMS to decrease costs and get more out of your employees.
- Use your GMS to prevent fraud and theft
- More than just a POS & Tee Sheet



FACILITY TECH / EXPERIENCE

- Engaging Premium Audience in a DooH Environment
- Cut the Cord! Tomorrow's Clubhouse TV viewing Experience!
- Engaging On-Course Technology
- Understand the new path for golf courses in Web 3.0



INTERESTING INDUSTRY STATS

Provider	2021 Course Count	2021 Market Share
No Online Tee Times	5618	42.6%
Golfnow	3272	24.8%
All Other Tee Sheet Providers (e.g., Foreup, Lightspeed, Club Caddie, Teesnap, Club Prophet)	4091	32.6%

**Data reported by Apparition LLC in July of 2021*

Online Tee Time Market Share

12,981 COURSES RESEARCHED IN USA (11,500) & CANADA (2,050)



61.7%

Web Conversion Rate = Website users clicking to the booking engine

14.1%

Revenue Conversion = Reservation % compared to Booking Engine Clicks

37%

Percent of paid tee times booked online at Golfback

\$43.98

Average price of a round of golf online

21.7%

Average abandonment rate we see at GolfBack @tee time is added to cart

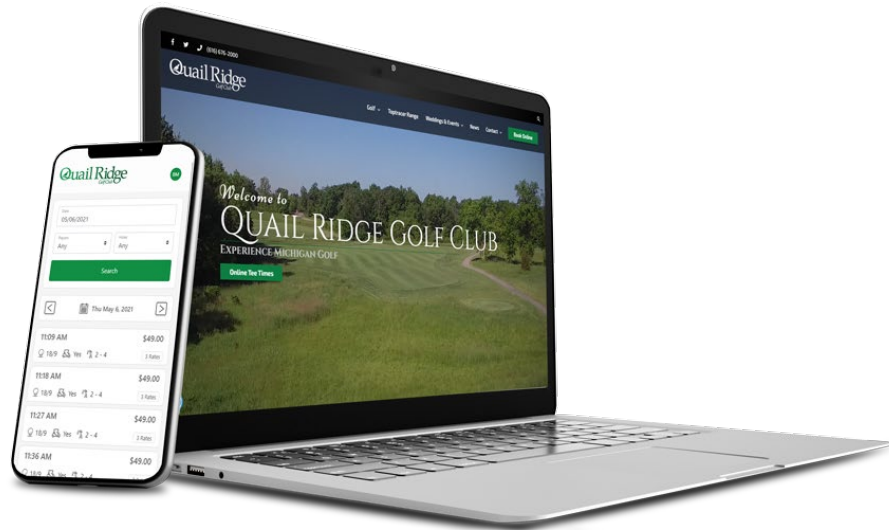
Avg ecommerce store 69%

34%

Percent of all tee times booked online within final 24 hours

55%

Percentage of rounds online a customer books a tee time only once online



DRIVING CUSTOMERS DIRECT

Control
Inventory

Lowest price market, own all channels tee times are being booked through, give the customer great value to book direct

Increased
Traffic

SEO increases, automate ability to collect data, SEM campaigns, stay ahead of the curve (online rounds will become a larger part of our business)

Become the
primary
communicator

Direct communication relationship w/ customer, you can build automations that focus on experience, profitability, reengagement, and loyalty.



ONCE YOU DRIVE DIRECT > NOW YOU HAVE CREATED OPPORTUNITY



Relationship between golf course & customer

Keep Customers Coming Back

Daily Steals
(price loyalty)

Instant Rewards (increase value)

Automated Promo Codes
(Reengagement, Loyalty)

Maximize Premium Inventory

Dynamic Pricing

High Demand Days

Weather Algorithms

Tee Sheet Setup

Existing Yields

COPY ADD +

Utilization %	Day 0	1	2	3	4	5	6	7 - 14	
90 - 100	110	115	115	120	120	125	125	130	×
75 - 89	105	110	115	115	120	120	125	125	×
60 - 74	100	105	110	115	115	120	120	125	×
45 - 59	95	100	100	105	105	110	115	115	×
30 - 44	90	95	95	95	95	95	100	105	×
15 - 29	85	90	90	90	90	95	100	100	×
0 - 14	85	85	90	90	90	90	95	100	×

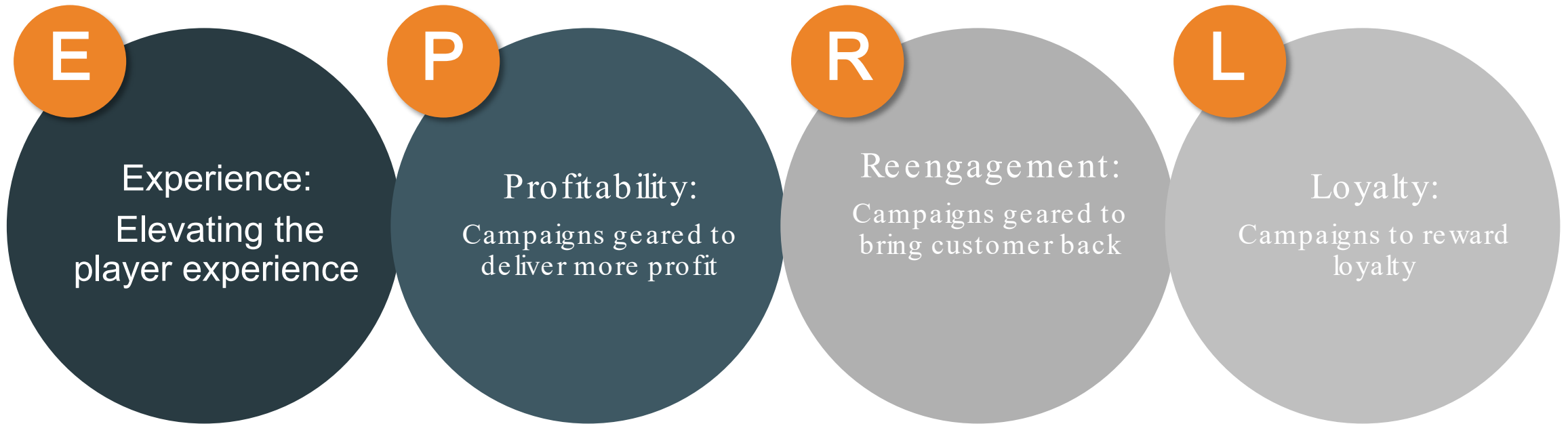
Condition
Sunny

Temp Range Impact

#	Temp Low	Temp High	Impact %
1	70	89	106
2	64	69	105
3	58	63	102
4	50	57	100
5	0	49	97



MARKETING AUTOMATION – NEVER SEND A MANUAL EMAIL AGAIN



E
Experience:
Elevating the
player experience

51%
Open Rate at GolfBack
Standard Email 18% 20% Across All Industries

P
Profitability:
Campaigns geared to
deliver more profit

7%
Click Through Rate
Standard Email 1.5% to 2.5% Across All Industries

R
Reengagement:
Campaigns geared to
bring customer back

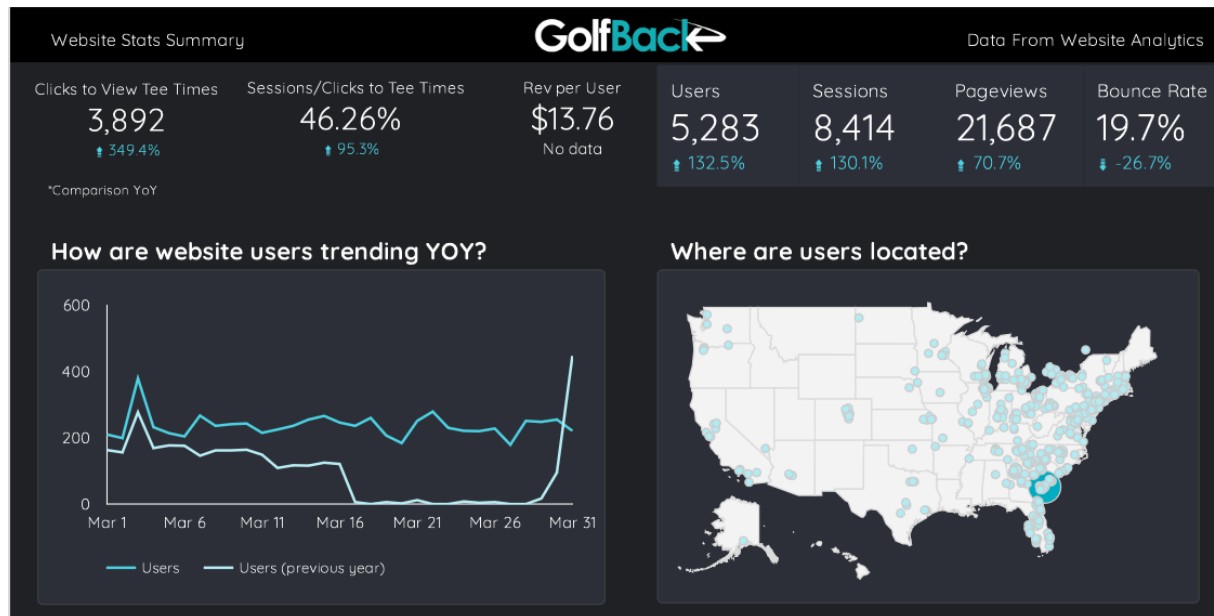
64%
More GF/CF revenue
resulted from automated
target emails vs. manual
Where direct link to booking engine was present

L
Loyalty:
Campaigns to reward
loyalty

80K
Automated Emails Sent in
2021



MEASURING PERFORMANCE – THE ONLINE HIGHWAY



- Booking Engine Stats
 - Online Revenue
 - Promo Codes
 - 23% of promo codes will be used over 10 times
 - Round booked by day / type
- Website Stats
 - Where users are located
 - Clicks to view tee times
 - Users & Sessions
- Internet Search Summary
 - Click through rate
 - List of google searches
- Marketing Database
 - Total active users
 - New contacts
 - Open rate
 - Email campaigns sent



5 DIGITAL BUYER TRENDS TO FOLLOW FOR UNITED STATES GOLF COURSES

Consumer buying habits are rapidly shifting towards an online preference...

1

More than 263 million American consumers purchase online (80%)

More than 263 million American consumers shop online—some 80% of the population—and this number is projected to climb to 291.2 million by 2025.

2

Millennials are the largest group of US digital buyers

Millennials aged 25 to 34 comprised 20.2% of online shoppers in the US in 2020. The second-largest online shopper demographic was 35- to 44-year-olds, who accounted for 17.2% of US digital buyers.

3

In 2022, US ecommerce sales will reach \$1 trillion, growing by double digits annually

In the US, online sales, including digital services, are anticipated to surpass \$1 trillion by 2022. This is 17% growth from 2021, when sales were estimated at \$933 billion. After 2022, ecommerce sales are forecast to grow by double digits.

4

54% of US consumers prefer to shop online

A 2021 Raydiant study on US consumer behavior reports that 54% of survey respondents prefer to shop online rather than in person. That is a 9% jump from last year's report.

5

Shop local trends continue as 70% of consumers shop small business websites

Intuit surveyed 1,500 consumers, finding that 70% are supporting local businesses by shopping online only, or a mix of online and in-store. Many shoppers (57%) buy local to keep money in their local communities, while some like supporting local creators (38%) and local nonprofits (19%). Better customer service is also a reason for shopping local, cited by more than a quarter of respondents.

70% of consumers shop local small business websites



Buy local to keep money in their communities



Like supporting local nonprofits.



Like supporting local creators



Buy from small businesses because of better customer service.

How to use your GMS to Increase Revenue: Golfshop

Online League Sign -Up and Registration : Recurring weekly events are hard to commit to. Catch golfers at the moment their ready to register, and before anything else comes up .

Online Golf Outing Team Registration/Prepayment : fill up outings, over 70% of purchasing decisions in connection with online registration are made for “today” or “tomorrow”

Book More than Just Tee Times Online : lessons, fittings, simulator bays, courts, outings, etc.

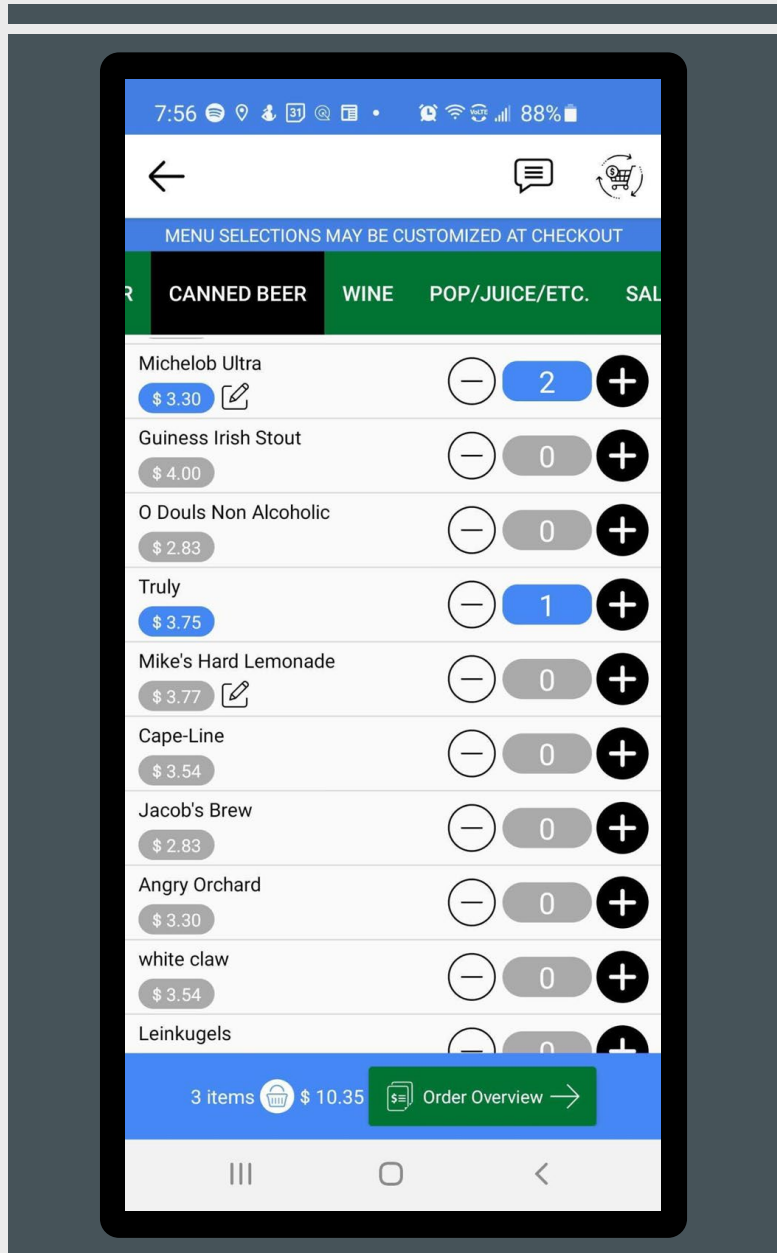
If You Sell it, Sell it Online: Equipment, Merch, Passes, Memberships, Gift Cards, etc.

Local Businesses: Electronic Hole Sponsorships on rangefinder, mobile app and in cart display.

Managed Marketing: Marketing Automation, Bringing Customer Back, Loyalty

Revenue Management: Channel Monitoring and comparison, eliminating non performing channels. Dynamic Pricing to drive up RevPAR.





How to use your GMS to Increase Revenue: F&B Revenue

Automated Upselling Suggestions : based on purchase history: Wine, Appetizers & Dinners they've liked in past.

Banquets/Weddings : instant electronic quotes, function sheets and online payments

Event Promotion and Registration: use your GMS for online event promotion and Registration/Prepayment (e.g. Member/Guest Dinner, Valentines Dinner, Super-Bowl Buffett)

Online Orders: Food and beverage to-go ordering for lunch and dinner, at turn pick-up ordering and on-demand, on course delivery.

Dynamic Pricing F&B: at peak times, golf rates change, why not cost of beers and hamburgers? Or simply, utilize price scheduling for things like Happy Hour.

Expand Loyalty Program to F&B: don't just bring them back to the golf course, bring customers back to bar or restaurant.

How to use your GMS to Increase Revenue: Other Suggestions

Decrease A/R: through automated billing and charging for members and events.

Convenience Fees: for customers who pay by credit card.

Make Purchasing Easier: tokenize credit cards, or preferably ACH accounts (much less expensive to charge) and/or give a charge account secured by credit card / ACH.

Hit Singles and Doubles: They add up to a winning formula. Too many operators only try to hit home runs and miss out on low hanging fruit opportunities.

22650 | Michael Rawlins | michael@clubcaddie.com | 2622064010 | 1378

General | **Payment** | Membership | Playing History | Purchase History | Discount | Loyalty History | Gift Cards | Message | Customer File

[Add New Card](#) | [Add ACH Account](#)

Card Number:
Expiration Date:
CVV:

Name on Card (*) : City (Optional) :
Credit/Debit Card (*) : State (Optional) :
Address (Optional) : Zip Code (Optional) :

Saved Cards Auto Pay: Choose default monthly amount: OR Pay balance in full each month

Select default payment method for autopay

<input type="radio"/>		michael rawlins	**** * 0705	Expires 7/2024	<input type="button" value="Edit"/>	<input type="button" value="X"/>
<input checked="" type="radio"/>		Michael Rawlins	*****5174	Checking	<input type="button" value="Edit"/>	<input type="button" value="X"/>

How to use your GMS to Improve Employee Efficiency

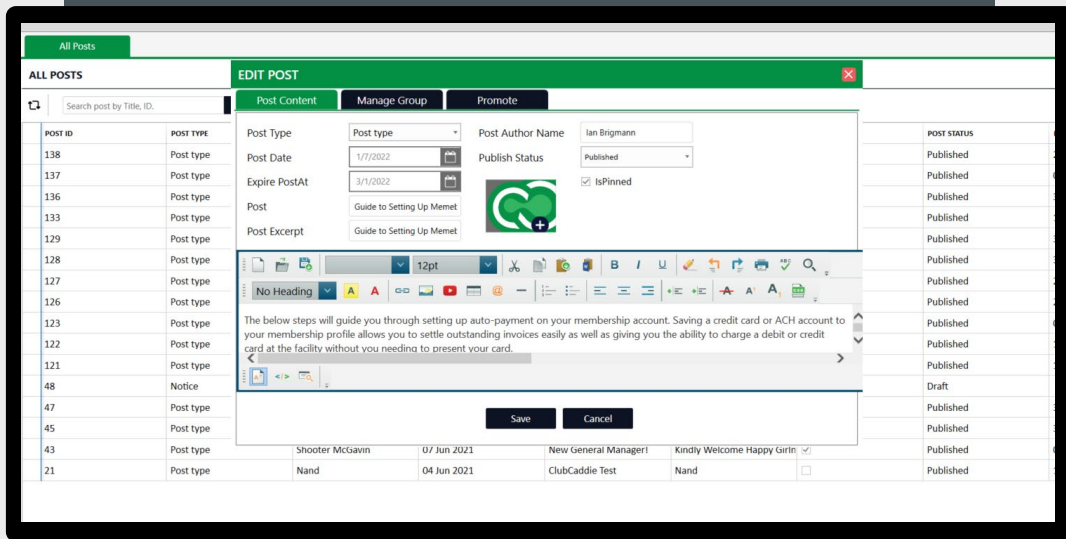
Train Staff on System: GMS provider should offer minimum of weekly trainings for golf, F&B, marketing & back-office. Employees are more productive if they know system on first shift, management is less burdened.

Give staff ability to work from home & lessen turnover: If you have the right cloud-based system, your staff can market activities/events, book banquets/golf outings/leagues, etc. from anywhere with internet. Staff should be able to control all of your channels from the GMS alone, without need to sign into other programs.

Utilize Customer Profiles: know about customer in advance (preferences, bag rack, suggested purchases, suggested playing partners, etc.) with more information, staff can improve interactions.

Take Advantage of Automation to get your team off the phone and POS register and in front of customer:

- Sell gift cards, passes, lesson booking, event registrations, memberships, etc.
- Make member/customer purchase history and billing information accessible from mobile/web.





GOLF MANAGEMENT SYSTEMS - How to use your GMS to decrease labor

Decrease Labor...

Golf Shop: Self Check-In from Mobile App and Kiosks, sell leagues, outings, passes online where data flows into GMS.

F&B: look at average sales volumes by hour, and period over period comparisons when scheduling labor. Also look at precedents from previous days/nights. These reports should be readily available in your GMS.

Membership: Automate membership sale and annual pass sign up process - all necessary data collected online and flows into GMS.

Accounting: Alerts for red flags (e.g., credit/debit sides of GL mismatch), direct sync into any accounting system, not exporting and importing or manually entering data.

24/7 Support: workarounds usually end up causing more work. You should be able to reach your GMS system provider anytime you need them.

GOLF MANAGEMENT SYSTEMS - How to Detect Fraud & Employee Theft

Deleted Item / Deleted Tab Report: see what employees are deleting from the register. Prevents them from taking cash and then deleting tab. **GMS solution:** require manager overrides to delete items and/or tabs from register.

Void / Return Reports: Monitor what's sales orders are being voided out, when, for how much and by what employees.

Floor Pricing: establish the minimum price an item can be sold for, restrict discounting privileges and permissions, require manager overrides.

Average Sales by Employee Per Hour and by Payment Type: With enough data, these reports can be valuable to help you identify good/bad performing employees and to raise possible red flags. (e.g., if credit card or member ID sales are similar, but cash sales are consistently less, there may be a reason for that) also look out for higher than average discounts.

The screenshot displays the Orange Lake Golf management system interface. At the top, there's a navigation bar with icons for REGISTER, TEE SHEET, STARTER SHEET, ACTIVITIES, EVENTS, CUSTOMERS, VOUCHERS, SALES, and REPORTS. The main content area shows a 'SALES VOID/RETURN REPORT' for the date 01/15/2022. The report is filtered for the time period 10:40 AM to 10:40 AM. The table below lists voided items with columns for Code, Void, Order ID, Void Date, Empl, and amounts.

Code	Void	Order ID	Void Date	Empl		
01/15/2022	10:40 AM	2858920	01/15/2022 10:40 AM	Tommy Izzo		
01/15/2022	10:40 AM	2858919	Logo Ball	1	\$3.99	\$3.99
01/15/2022	10:40 AM	2858918	Reserve Rental	1	\$29.00	\$29.00
01/15/2022	10:40 AM	2858922	Ahead Logo Towel	1	\$24.99	\$24.99
01/15/2022	10:40 AM	2858923	18 Hole Cart Fee	1	\$20.00	\$20.00
01/15/2022	10:40 AM	2858923	18 Hole GF	1	\$45.00	\$45.00
01/15/2022	10:40 AM		SALES TAX			\$8.00
01/15/2022	10:40 AM		Tender - Credit Voucher \$130.98			
						\$130.98
Code	Void	Order ID	Void Date	Empl		
01/15/2022	01:24 PM	2861021	01/15/2022 2:24 PM	Russell Hornbeck		
01/15/2022	01:24 PM	2861021	9 Hole Cart Fee	1	\$12.00	\$12.00
01/15/2022	01:24 PM	2861022	9 Hole GF	1	\$20.00	\$20.00
01/15/2022	01:24 PM		SALES TAX			\$2.08
01/15/2022	01:24 PM		Tender - Credit Voucher \$34.08			
						\$34.08
Code	Void	Order ID	Void Date	Empl		
01/15/2022	01:24 PM	2861039	01/15/2022 2:27 PM	Russell Hornbeck		
01/15/2022	01:24 PM	2861042	9 Hole Cart Fee	1	\$12.00	\$12.00
01/15/2022	01:24 PM	2861042	9 Hole GF	1	\$12.00	\$12.00

GOLF MANAGEMENT SYSTEMS - How to Detect Fraud & Employee Theft

Tips: if employees are reporting cash tips and they are as a consequence, they report earning less than minimum wage, you're facilities making up the difference. Comparing average tips earned by hour, by check, by day, terminal location and payment type vs. other employees can help identify who is underreporting.

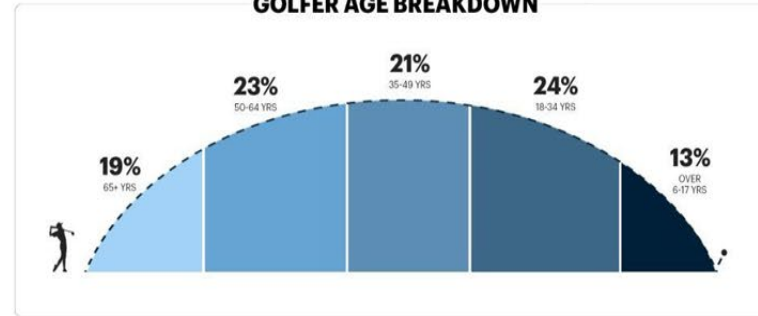
Starter App and Starter Receipts: some facilities ask how to decrease nonpaying golfers. Your GMS has an app for that. Starter receipts work too.

Audit Inventory: most GMS systems include inventory audit systems that help you to identify loss. Compare audits and trends overtime.

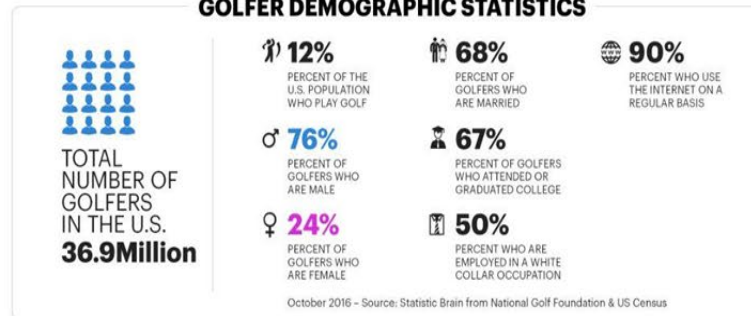
Employee Name	Total Sale	Unearned Revenue and Refunds	Total Discount	Discount Percentage
Unassigned	\$ 0.00	\$ 0.00	\$ 0.00	0.00%
dchill	\$ 30,712.87	\$ -232.16	\$ 309.46	1.06%
rhornbeck	\$ 62,265.38	\$ -294.98	\$ 755.09	1.28%
anthonym	\$ 12,238.04	\$ -175.00	\$ 160.07	1.39%
bgmacademy	\$ 4,924.00	\$ 0.00	\$ 0.00	0.00%
joshw	\$ 29,223.39	\$ -90.52	\$ 1,178.75	4.12%
pgeronimo	\$ 17,495.74	\$ 0.00	\$ 435.54	2.58%
kjackson	\$ 12,971.48	\$ -1,550.00	\$ 190.33	1.74%
jbilsky	\$ 26,761.64	\$ -5,861.00	\$ 22.30	0.11%
jwesley	\$ 14,390.21	\$ 0.00	\$ 82.50	0.61%
kdemas	\$ 9,511.73	\$ 0.00	\$ 111.29	1.23%
jkennedy	\$ 3,586.48	\$ 0.00	\$ 43.18	1.27%
gustavo	\$ 8,947.79	\$ 0.00	\$ 68.30	0.81%
tizzo	\$ 36,643.34	\$ 0.00	\$ 337.85	0.99%
pprice	\$ 16,464.43	\$ 0.00	\$ 321.44	2.04%
jhynes	\$ 1,283.38	\$ 0.00	\$ 0.00	0.00%
thart	\$ 3,365.85	\$ 0.00	\$ 64.50	2.00%

Understanding the Golfer of today as you prepare for 2030...

GOLFER AGE BREAKDOWN



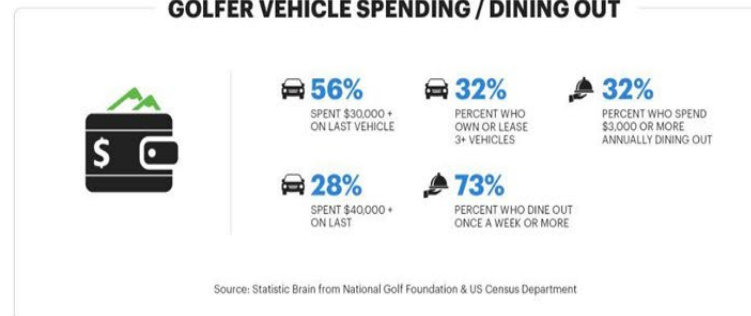
GOLFER DEMOGRAPHIC STATISTICS



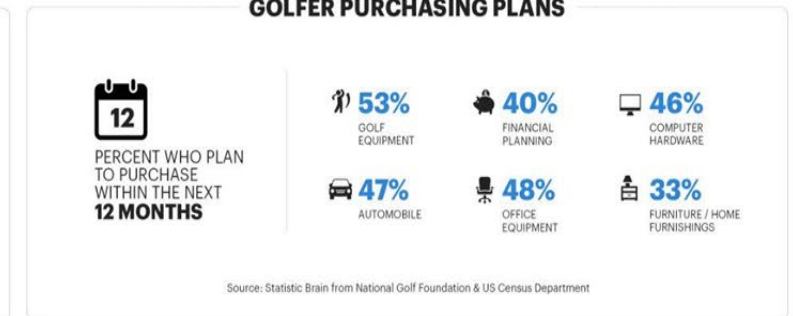
GOLFER HOUSEHOLD INCOME / ECONOMICS



GOLFER VEHICLE SPENDING / DINING OUT



GOLFER PURCHASING PLANS



CUT THE CORD!

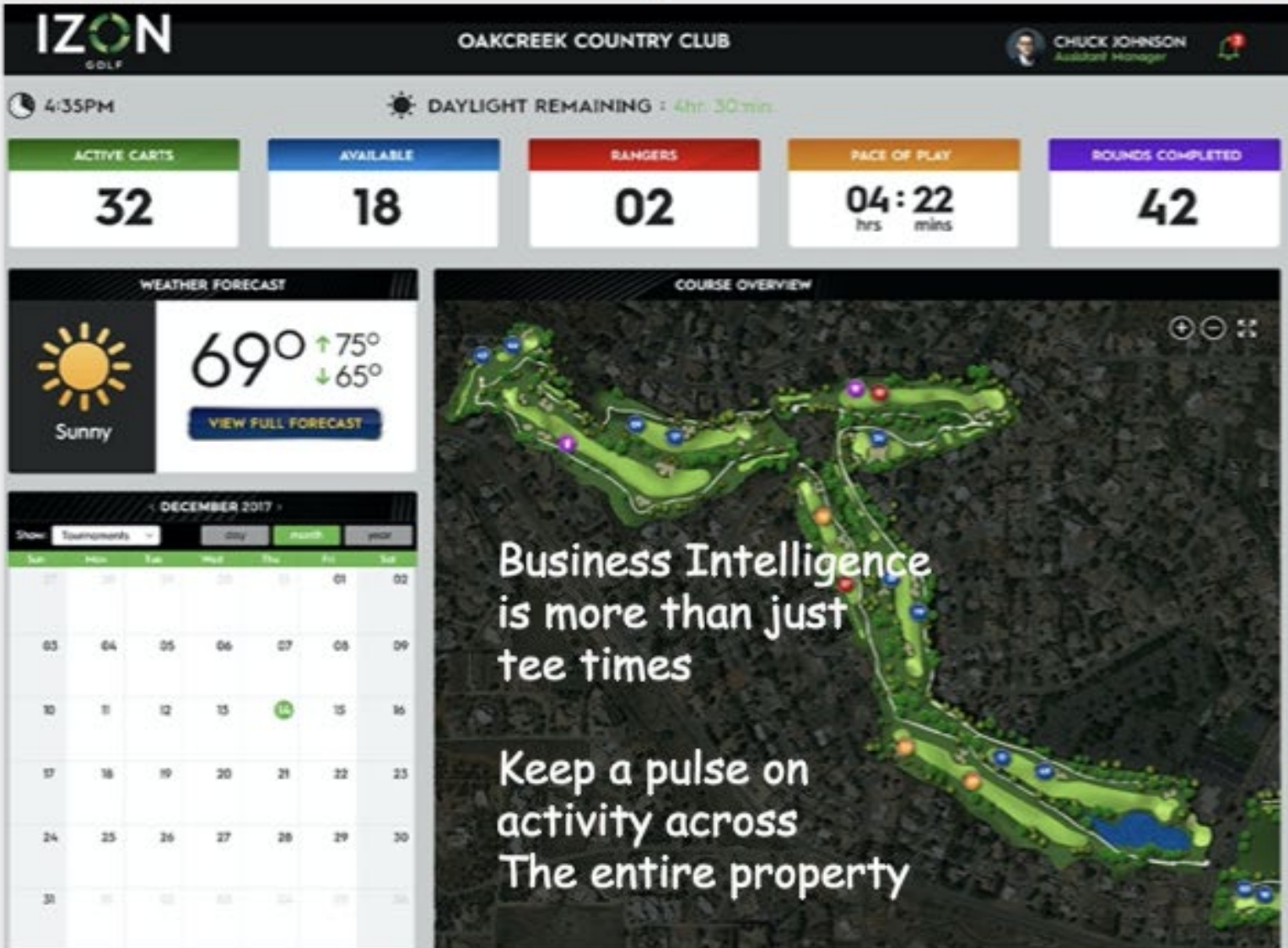
**Enhance Your
Clubhouse Experience**

**YOUR Message
to YOUR Golfers**

**Share in the
Ad Revenue**



ENGAGING ON COURSE EXPERIENCE



WEB 3.0

Remember when we
thought no way this
Facebook thing would
ever succeed?

Crypto, NFT...
Digitize it all!

Bring your courses
to the masses!



THE 2030
EXPERIENCE:

AREAS OF FOCUS

Self Service is the new quality service

Automation & Integrations

Direct Marketing

On Course

Conditioning

B
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THANK YOU

