



Tech
Session 201
Tuesday, September 16th
3:15 pm - 4:15 pm

Big Data: Driving Golf Course Profitability



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(Moderator)



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CEO and Co-Founder
Noteefy

- **Financial Benchmarks:** That can predict the financial health of a golf course.
- **Demand & Operations Management:** Mitigating Phone Calls & No-Shows with Technology
- **Customer Behavior & Interaction:** A cross section of data from over 100 golf courses around consumer behavior and statistics.



Heuristic ([/hjuˈrɪstɪk/](#); [Greek](#): "Εὕρισκω", "**find**" or "**discover**")

Refers to experience-based techniques for problem solving, learning, and discovery that find a solution which is not guaranteed to be optimal, but good enough for a given set of goals.

Where the exhaustive search is impractical, heuristic methods are used to speed up the process of finding a satisfactory solution via mental shortcuts to ease the cognitive load of making a decision.



#	Benchmarks that Predict the Financial Health of a Golf Course	2024 Benchmark	Municipal Indiana Course
1	Revenue: Multiply the prime rate green fee and cart rate times 60%. That result is multiplied by the number of starts. The result should equal your revenue from green fees and carts. Note season pass sales, loyalty cards, punches are added to the total gross revenue.	\$1,533,000	\$1,226,490
2	Net Effective Yield Revenue Per Round. Total Revenue divided by Total Rounds divided by Highest Green Fees Rate	60%	48%
3	Green Fee Indicator 1: Multiply the maintenance budget times .0001 the result should equal the green fee:	\$81.80	\$73.00
4	Green Fee Indicator 2: Multiply the median household income within 10 miles of the golf course by .00084. The result should equal the green fee. Median Household income is \$100,682	\$84.50	\$73.00
5	Fringe Benefits: Divide the total fringe benefits by payroll expense.	<30%	34%
6	Total Salary Expense: Total salaries should be 40% of the total revenue for a municipal/daily fee golf course < \$100. For a private club, salary expenses can run 47% - 52% based on higher level of service and membership dues.	45.00%	60%
7	Maintenance Expense: Total maintenance salaries plus all related expenses for the course, i.e., electricity, equipment supplies, fertilizer, gas, water, etc. of revenue. (Based on gross revenue).	35.00%	52.54%
8	EBITDA: Earnings before interest, taxes, depreciation and interest should exceed 20% of gross revenue.	Positive 15%	Negative 12%

#	Benchmarks that Predict the Financial Health of a Golf Course	2024 Benchmark	Municipal Indiana Course
9	Season Pass Fair Market Value: To determine the appropriate rate for season passes, multiply the number of playable days by 32%. That result is multiplied by the rack rate. That result is multiplied by 25%.	\$3,079	\$2,600
10	Cost of Goods Sold – Merchandise – 70%	70%	87%
11	Cost of Goods Sold - Food	40%	48%
12	Cost of Goods Sold – 30% Alcoholic Beverages	30%	41%
13	Advertising and Marketing	2.00%	0.06%
14	Chemicals, Fertilizers and Pesticides (Grounds Budget)	\$150,000	\$146,928
15	Water Expense: Multiple the number of gallons of water utilized by \$1.20 per thousand gallons (\$387 acre foot).	< \$80,000	12,122
16	Utilities (this may vary based on based on local rates, national guideline)	\$40,000	44,979
17	Equipment Repairs with Leased Costs should be nominal unless nearing the end of the lease	\$50,000	41,865

#	Benchmarks that Predict the Financial Health of a Golf Course	2024 Benchmark	Houston Daily Fee
1	Revenue: Multiply the prime rate green fee and cart rate times 60%. That result is multiplied by the number of starts. The result should equal your revenue from green fees and carts. Note season pass sales, loyalty cards, punches are added to the total gross revenue.	\$4,478,034	\$4,880,081
2	Net Effective Yield Revenue Per Round. Total Revenue divided by Total Rounds divided by Highest Green Fees Rate	60%	65%
3	Green Fee Indicator 1: Multiply the maintenance budget times .0001 the result should equal the green fee	\$112.60	\$110.00
4	Green Fee Indicator 2: Multiply the median household income within 10 miles of the golf course by .00084. The result should equal the green fee. Median Household income is \$70,665	\$59.36	\$110.00
5	Fringe Benefits: Divide the total fringe benefits by payroll expense.	30%	18.80%
6	Total Salary Expense: Total salaries should be 40% of the total revenue for a municipal/daily fee golf course < \$100. For a private club, salary expenses can run 47% - 52% based on higher level of service and membership dues.	40%	29.73%
7	Maintenance Expense: Total maintenance salaries plus all related expenses for the course, i.e., electricity, equipment supplies, fertilizer, gas, water, etc. of revenue. (Based on gross revenue).	30%	27.69%
8	EBITDA: Earnings before interest, taxes, depreciation and interest should exceed 20% of gross revenue.	15%	8.69%

Where We Are Seeing Course Operators Leverage Big Data to Improve Operations:

#1: Reducing Phone Calls to the Pro Shop

#2: Mitigating Perished Inventory



Big Data Insight #1: The \$100 Million Phone Call Problem - Hidden Costs of Outdated Pro Shop Communication Habits



Golf Courses Spend 6 Million Hours a Year on the Phone – Costing \$100 Million in Labor

Sizing the cost to course operators

Annualized per day impacts:

- 40-50 calls
- 60-75 minutes
- ~\$17 per hour in staff time

**6 million
hours = \$100
million
in labor
costs**

Source: National Golf Foundation
Based on NGF survey of U.S. golf course operators and analysis of call logs supplied by various facilities.

66% of all Golfers Reported Phone-Related Frustrations – Either On the Phone or On Site

Sizing the cost to consumers

Phone-Related Frustrations in the Past year, According to U.S. Core Golfers



On-site frustrations: 49%

- 41% While being helped in the pro shop/at the counter, staff assisting you were interrupted by phone calls
- 29% Had to wait in the pro shop/at the counter while staff finished lengthy phone conversations
- 14% Felt that phone calls were preventing staff from giving you proper attention during your visit



On-the-phone frustrations: 50%

- 36% Couldn't get through to a golf course (busy signal or went straight to voicemail during business hours)
- 28% Waited on hold for more than 2 minutes when calling a golf course
- 12% Hung up and called a different golf course because you couldn't reach someone quickly enough
- 10% Had to call a golf course back multiple times for the same issue

33% have not experienced phone-related frustrations in the past year

32% have experienced both on-site and on-the-phone frustrations in the past year

Source: National Golf Foundation

Based on NGF survey of U.S. Core golfers, fielded in August 2025 (n=406)

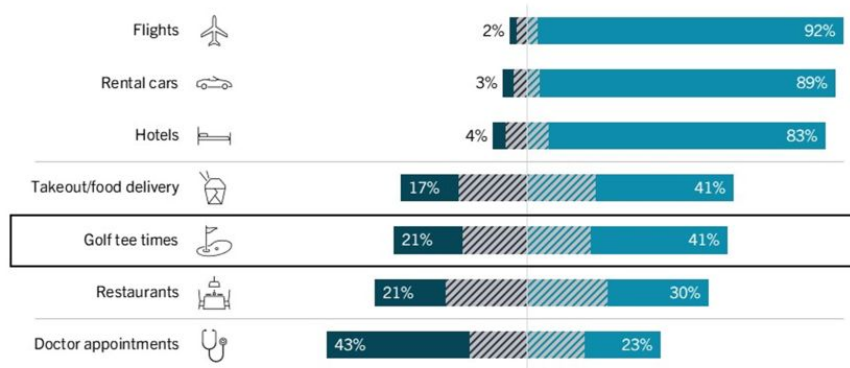
Q. Thinking about your experiences at golf courses over the past year or so, which of the following have you dealt with? (Select all that apply)

Golf Is An Outliner In Other Hospitality Categories On The Amount Of Calls Received

Golf books like restaurants and food takeout, not travel

How Golfers Book Services, Online vs. Phone

- Exclusively or mostly by phone
- ▨ Mix of both
- Exclusively or mostly online



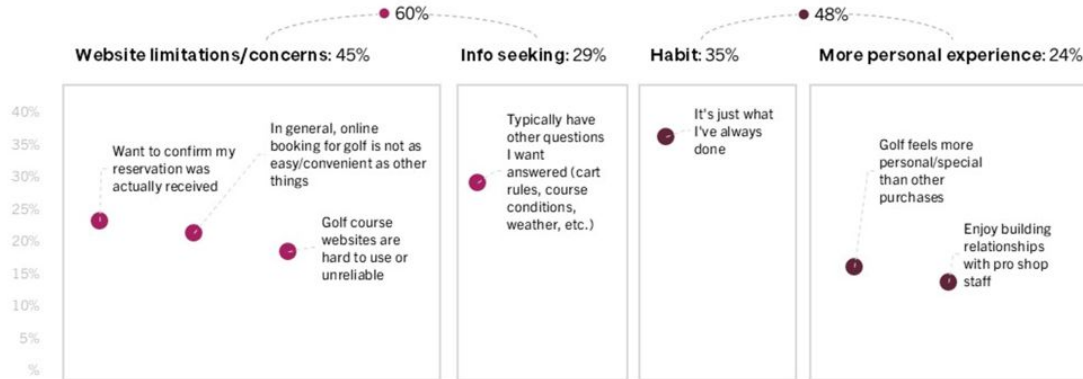
Source: National Golf Foundation
Based on NGF survey of U.S. Core golfers, fielded in August 2025 (n=406)
Q. For each of the following, how do you typically make reservations/bookings or place orders?

Why all the phone calls?

System shortcomings and behavioral inertia share blame for phone dependency

Drivers of Phone Dependency, As Stated by U.S. Core Golfers

- Operator system shortcomings
- Consumer behavioral inertia



The majority of golfers admit they could have accomplished what they needed – at least for some of their calls – without ever picking up the phone. 20% confessed that 'most of the time' their calls weren't necessary at all.

Source: National Golf Foundation

Based on NGF survey of U.S. Core golfers, fielded in August 2025 (n=406)

Q. Looks like you tend to book certain things online, but still use the phone (to a certain extent, at least) for golf tee times. What makes golf different?

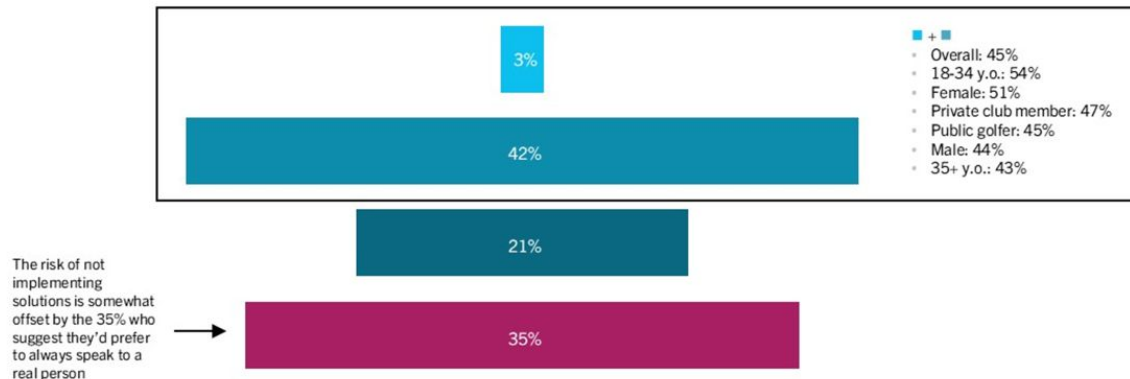
Q. In these instances, how often do you think you could have accomplished what you needed without calling?

Can AI Help? Where are We on Adoption Curve?

Most golfers express (some) openness to AI-based phone solutions

Openness to AI Phone Solutions, As Stated by U.S. Core Golfers

- Love it
- Be okay with it for simple stuff
- Skeptical/concerned
- Prefer to always speak to a real person

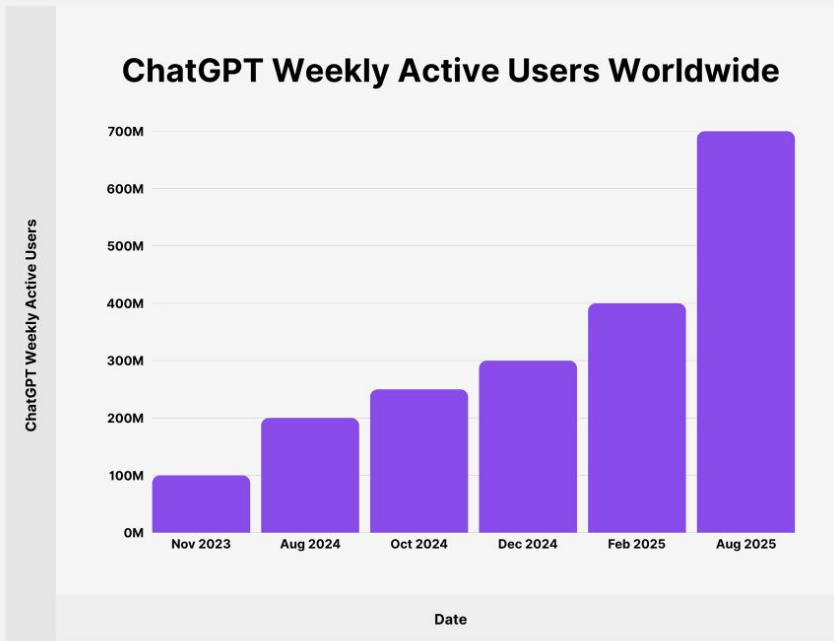


Source: National Golf Foundation

Based on NGF survey of U.S. Core golfers and U.S. golf course operators, fielded in August 2025 (n=406 golfers, n=136 operators)

Q. If golf courses began using 'AI agents' on phones to handle basic tasks and questions (bookings, pricing, course conditions, etc.), would you ...?

Consumer AI Use (ChatGPT) is Exploding



ChatGPT Statistics and Usage Trends



800 million WAUs
and **122 million DAUs**



5+ billion site visits monthly,
with average sessions around
8 minutes



15 million+ paying users,
strong enterprise traction, and
daily query volume exceeding
1 billion

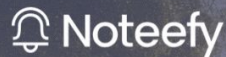
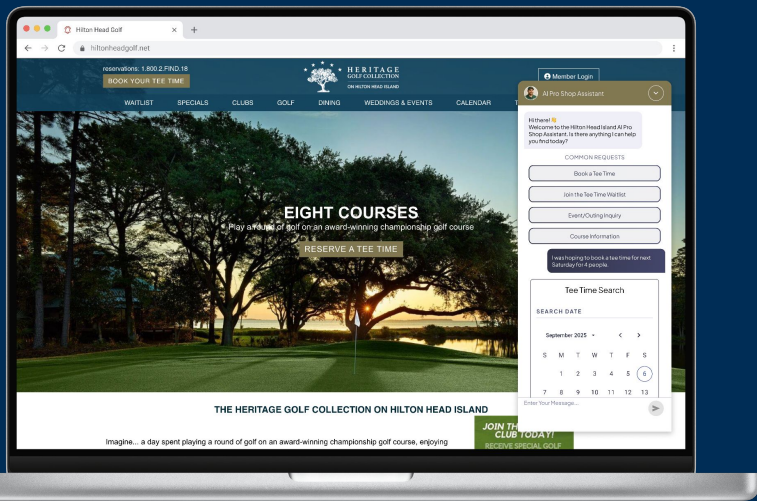


\$10 billion ARR by June 2025,
with projected revenue of
\$11-12.7 billion, and a **\$300 billion**
valuation backed by major tech
and financial players



60% market share, but
competition is intensifying
Global reach, led by US and India, with
infrastructure and environmental consid-
erations coming into play

We Believe the Future of Course Operations will be AI Enabled to Mitigate Phone Volume - Starting with Chat



AI Pro Shop Assistant



AI Pro Shop Assistant



Welcome to the Noteefy Links AI Pro Shop Assistant. Is there anything I can help you find today?

COMMON REQUESTS

Book a Tee Time

Join the Tee Time Waitlist

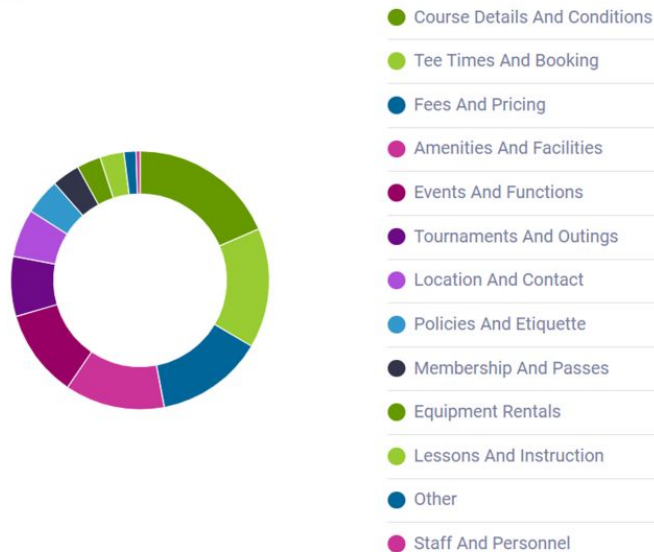
Learn About Our Amenities

Inquire About a Private Event

1000+ AI Chats in... What Are People Asking About?

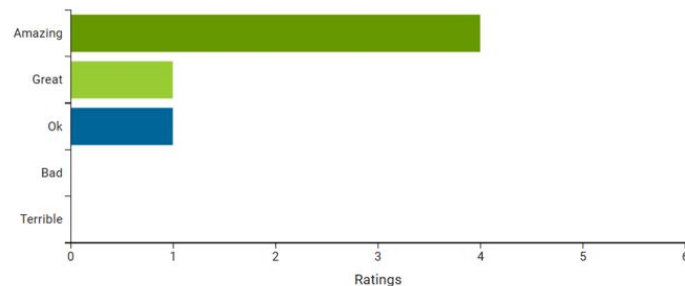
Early AI Pro Shop Data – High Interest in Course Details, Strong Reviews

Topics Discussed

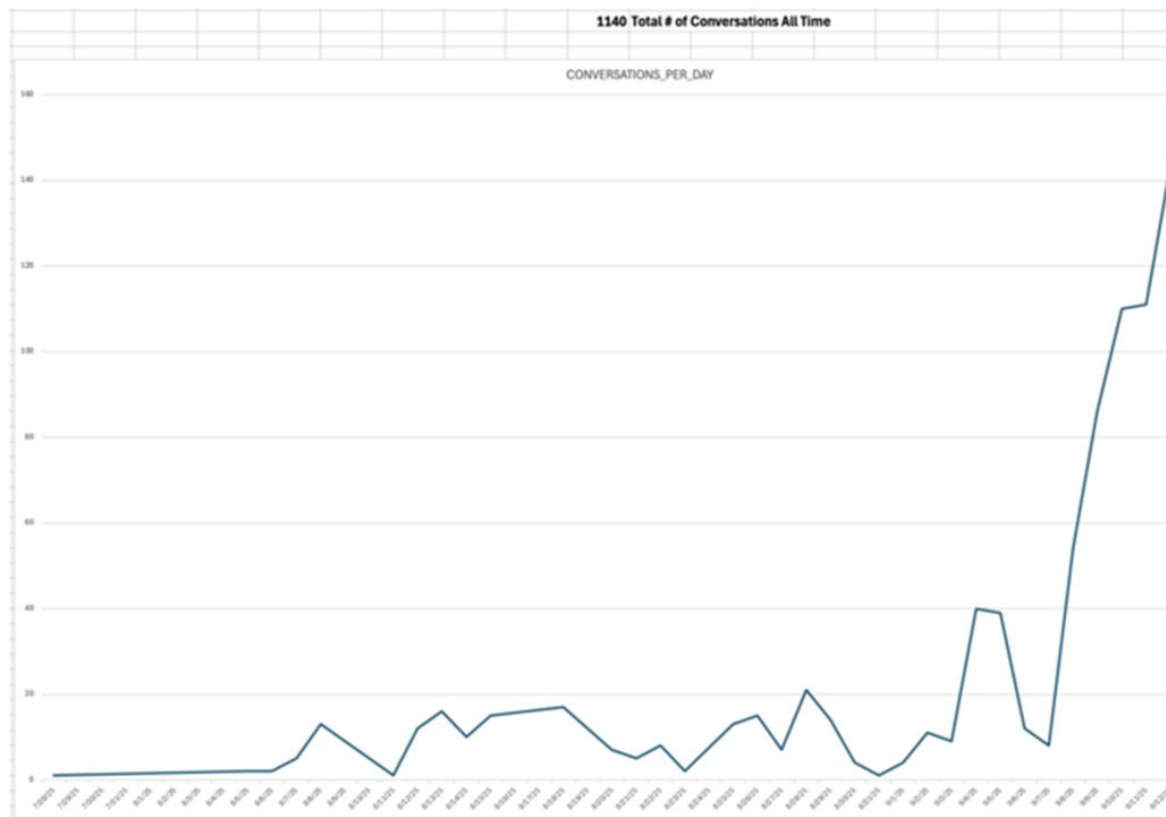


Session Ratings

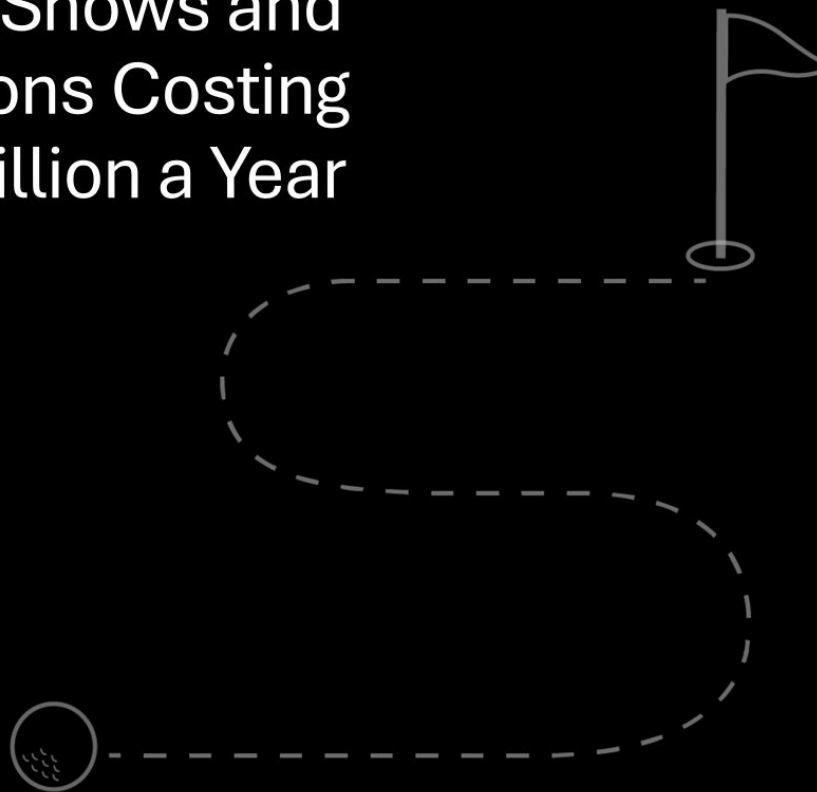
*This chart does not include conversations that have no rating.



AI Chats Are Growing Exponentially



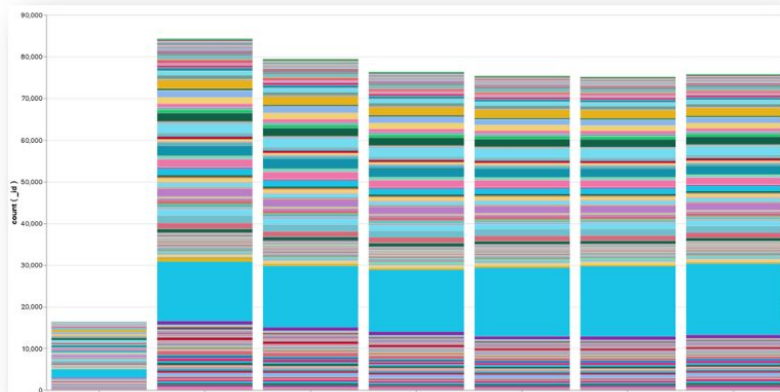
Big Data Insight #2: No Shows and Last Minute Cancellations Costing Course Operators \$1 Billion a Year



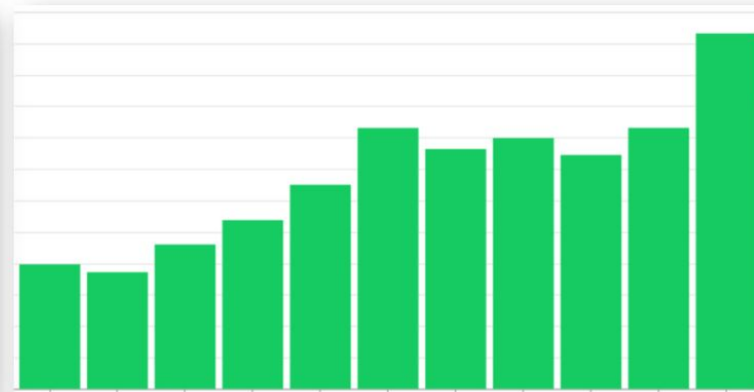
Checking in on Future Demand Insights

Record Numbers of Golfers are creating 'future searches' and signing up for the Noteefy platform

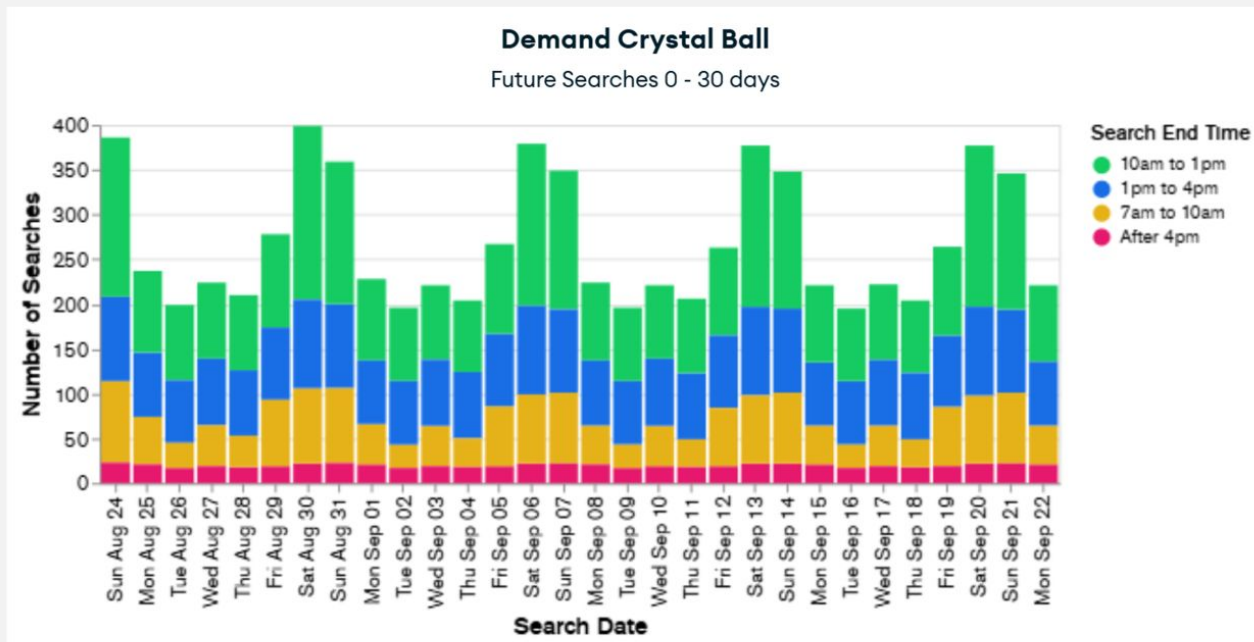
Future Searches Through Fall



New Users – In Season Courses



Courses Are Using Big Data & Analytics to See Future Demand



No Shows & Short Shows are Costing the Industry Over \$1.6 Billion a Year in Revenue



\$14 billion in green fee revenue collected by public courses in the US (NGF)



\$1.2 billion in lost Green Fee Revenue using **8.63% no show rate** (Metolius)



Average course generates an additional \$54k in ancillary revenue, or \$18.85 per round (NGF & Noteefy)



10% of no shows are due to unplayable weather conditions (Metolius)

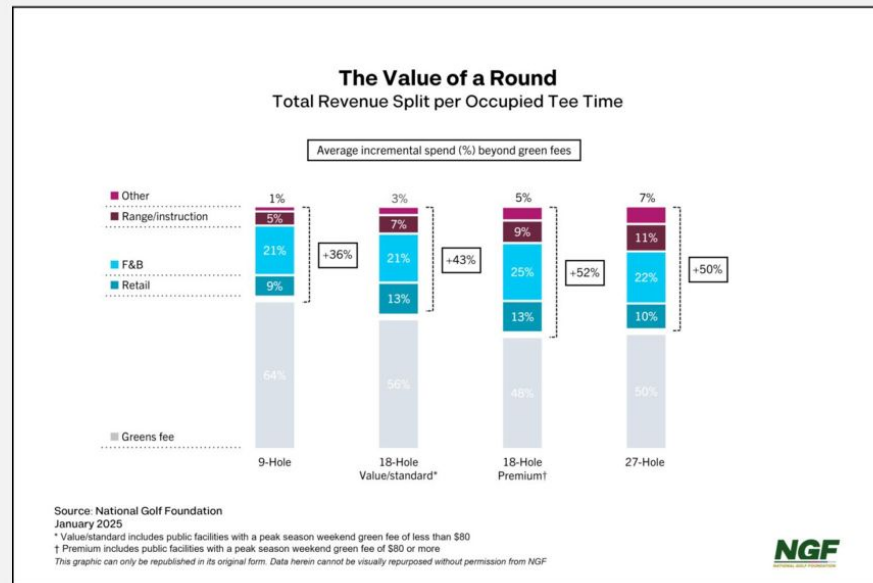


\$1.65
BILLION
Industry Lost Tee Time Revenue

\$142K PER
COURSE

No- Show Revenue Pain is Compounded Due to the Total Value of a Tee Time

A Tee Time is Worth 43%
- 50% More Than The
Green Fees



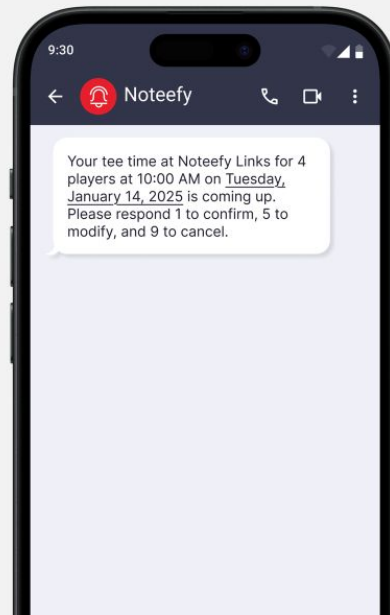
15% + Cancellation and Modification Rates Across All Rounds

700,000 Tee Times Confirmed This Season

45,000 Cancellation Requests

30,000 Modification Requests

15%+ Cancellation or Modification Rates

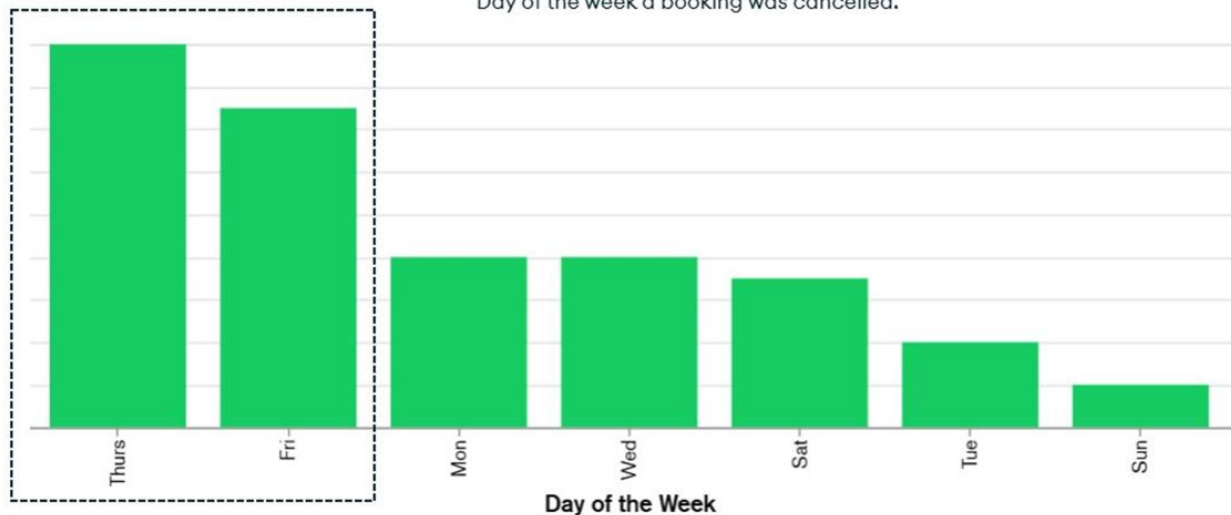


Cancellations surge on Thursdays and Fridays

Cancellations On Thursday And
Friday Give Operators Only 24-48
Hours To Re-fill Weekend Tee Times

Cancellations per Day of the Week

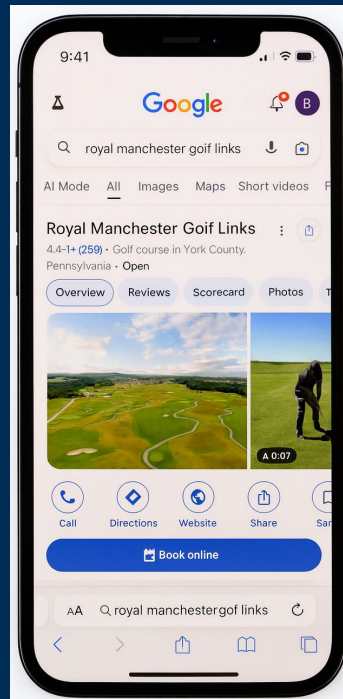
Day of the week a booking was cancelled.



Search Data Validates Awareness not Discovery = Golfer Knows You

- Traffic is concentrated in Organic (65.94%) and Direct (29.97%). Your audience already knows the brand and offering.
- Within Organic, the top queries are overwhelmingly branded (meaning the user searched the course by name)
- Generic discovery (“golf course near me”) exists but is much smaller than branded course-name queries.
- Implication: Marketplaces aren’t required for discovery. Focus on converting branded intent via your site and Google Business Profile (plus Reserve with Google).

1	Organic Search	21,983 (63.46%)
2	Direct	11,729 (33.86%)
3	Referral	788 (2.27%)
4	Organic Social	287 (0.83%)
5	Unassigned	34 (0.1%)



Search Data Validates Awareness not Discovery = Golfer Knows You

Queries leading to your site ①

Top Trending up Trending down Clicks

royal manchester	↑ 32%	3.77K
royal manchester golf	↓ 17%	2.25K
royal manchester golf links	↑ 41%	1.75K
royal manchester golf course	↑ 76%	835
royal manchester tee times	↑ 50%	338
golf courses near me	↑ 18%	217
royal manchester golf links scorecard	↑ 19%	217
royal manchester golf links tee times	↑ 315%	162
manchester golf course	↓ 14%	102
royal manchester scorecard	↑ 136%	85
royal.manchester	↑ 24%	62
royal manchester golf links photos	↑ 15%	61
royal manchester golf club	↓ 64%	52
manchester links	↑ 34%	51
golf near me	↓ 2%	50
manchester royal golf	↑ 338%	35
manchester golf links	↑ 278%	34

Queries leading to your site ②

Top Trending up Trending down Clicks

lederach golf	↑ 24%	4.49K
lederach golf course	↑ 6%	4.38K
lederach golf club	↑ 2%	2.08K
lederach	↑ 8%	1K
lederach golf course tee times	↑ 141%	311
golf courses near me	↓ 20%	256
lederach tee times	↑ 12%	140
laderach golf	↑ 2,025%	85
leddy's pub	↑ 14%	73
letter rock golf course	↓ 27%	62
lederach scorecard	↑ 190%	61
golf near me	↓ 7%	56
lederach golf course map	↑ 28%	55
lederach golf course photos	↑ 7%	47
lederach country club	↑ 23%	37
golf course near me	↓ 3%	36
lederach golf course scorecard	↓ 37%	36

Queries leading to your site ③

Top Trending up Trending down Clicks

dolphin head golf club	↑ 7%	2.26K
dolphin head golf	↑ 11%	1.22K
dolphin head golf course	↓ 57%	959
dolphin head	↓ 48%	648
dolphin head golf club tee times	↑ 9%	89
dolphin head hilton head	↓ 27%	86
dolphin head golf hilton head	↓ 5%	78
dolphin head golf club photos	↑ 4%	73
golf courses near me	↓ 4%	72
dolphin head golf club membership	↑ 31%	64
dolphin golf course hilton head	↑ 40%	63
hilton head golf	↓ 30%	57
dolphin head golf course hilton head	↓ 18%	50
dolphin head tee times	↓ 43%	50
golf hilton head	—	40
dolphin head golf club hilton head	↓ 17%	38
golf courses hilton head	↑ 111%	38

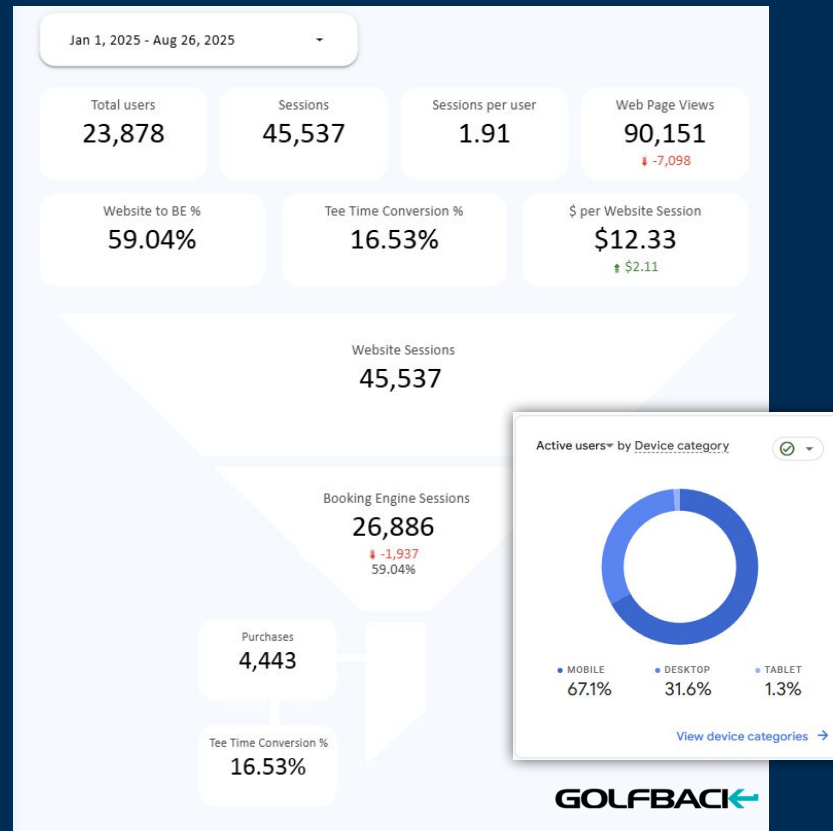
Conversion Rate = Means Profits

What's broken:

- 67% of booking sessions happen on mobile, but overall conversion is only 9.9% vs. 15.1% via Reserve with Google.
- That delta = money left on the table.

Solutions to increase conversion rate:

- Eliminate barriers to bookings (Forced logins, question funnels before inventory)
- Mobile-first booking engine with fast checkout.
- Adopt Reserve with Google where appropriate to capture high-intent mobile searchers.
- Always-on automations that notify teams members when gaps can be filled in the tee sheet to open more opportunities for bookings.
- Optimize websites to get golfers to your booking engines faster



High-Intent Demand You Already Own

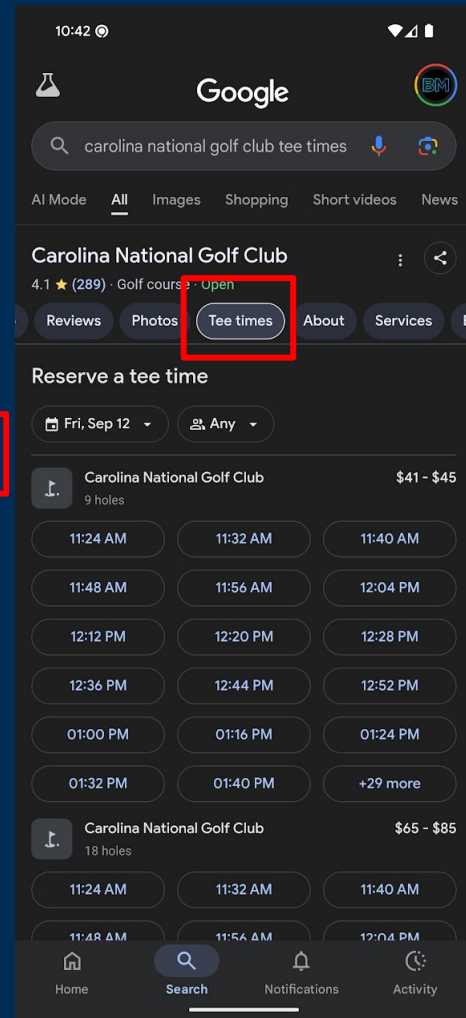
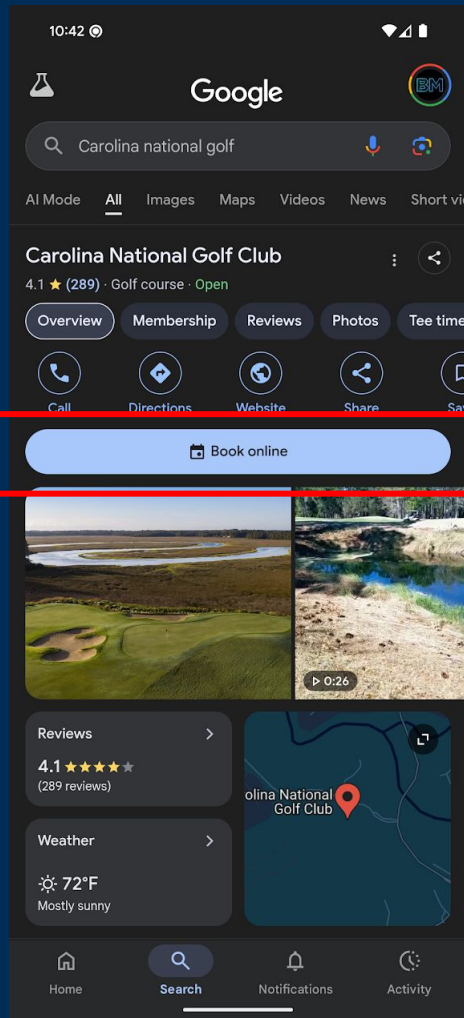
Reserve with Google brings high-intent, mobile-first bookings straight to your tee sheet

The data:

- RwG Conversion Rate: ~15%
- Total of online rounds booked: ~11.5%

Importance of owning this channel is high.

- Customers are searching directly for you
- Clicking on your listing
- You should get the attribution, not a 3rd party



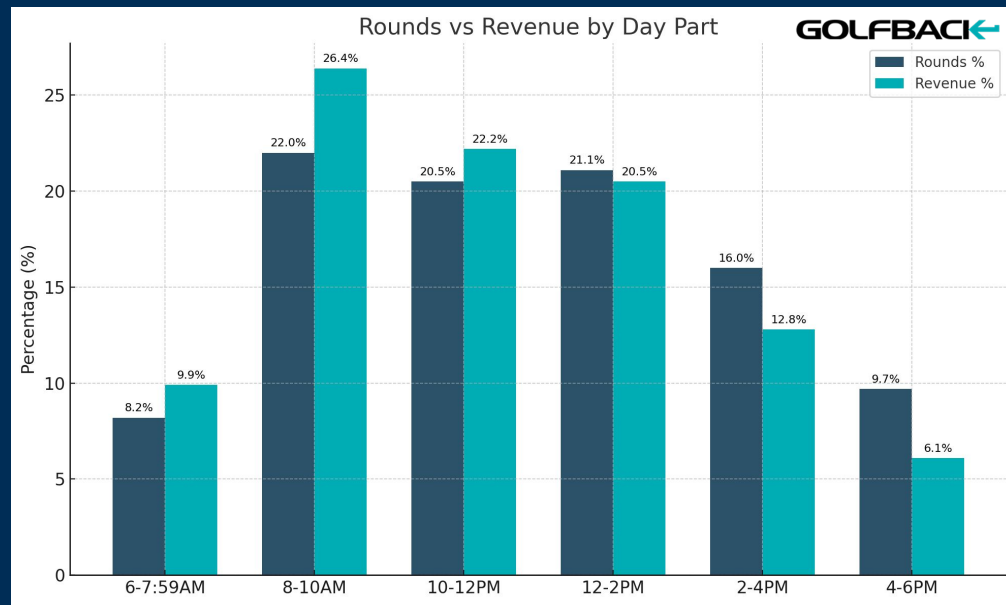
Daypart Yield Is Mispriced

The data:

- 8-10AM accounts for 22% of rounds but 26.4% of revenue
- 6-7:59AM outperforms (9.9% revenue vs. 8.2% rounds)
- After 2PM, rounds remain strong (26%) but revenue lags (18%)

Mornings drive premium revenue and provide proof golfers pay more for prime times.

Afternoons drive volume, not yield signaling price-sensitive play best suited for discount/value offers.



*GreatLIFE Golf Data - represents 36 resort, public, or semi-private golf courses

Automated Marketing Returns Profits

Standard campaigns are like shouting to a crowd - you'll get some attention, but lots of misses

Automation Wins - Why?

- Relevancy
- Personalization at scale
- Always On

Automations are like tapping the golfer on the shoulder at the perfect time, which leads to high engagement and more revenue

493

Average Direct From
GRO Marketing
Rounds

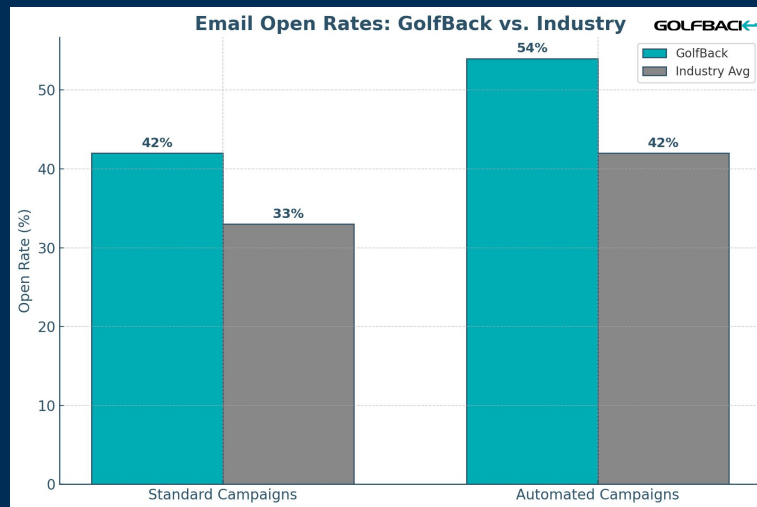
\$30K

Average Direct From
GRO Marketing
Revenue

7.1%

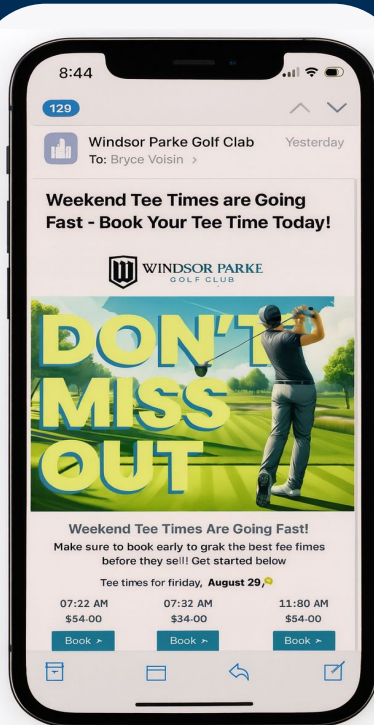
% of Online Revenue

YTD 2025 GolfBack Clients | Stats from Direct Click on a marketing campaign to purchase



*Industry data according to Omnisend. Industry is not limited to the golf industry.

Automated Marketing Returns Profits



Dynamic Automation

[Home](#) / [Automations](#) / [Edit Dynamic Automation](#)

General Email Template

General

Name
Weekend Golf Planning ✓

Description
Communication to Golfers to book their tee times for the upcoming weekend at Royal Manchester ✓

Email Subject
Weekend Forecast is calling for Golf 🌤️ ✓

Choose Who This Automation Will Send To

6378 contacts are included in your segment selection. Send to Customer Segments

Friday Player Saturday Player Sunday Player

Press 'Enter' to add another segment

Exclude Customer Segments

Twilight Passholder Member Employee

Press 'Enter' to add another segment

Lifetime Spend Greater Than 0

Choose When The Automation Will Send

At 7 AM On Wednesday Every Week

☒ Include Tee Times

Choose Tee Times to Show in Automation (When available)

Tee Times Start At 9 AM And Show For The Following Saturday

Golfers wait, that provides an opportunity

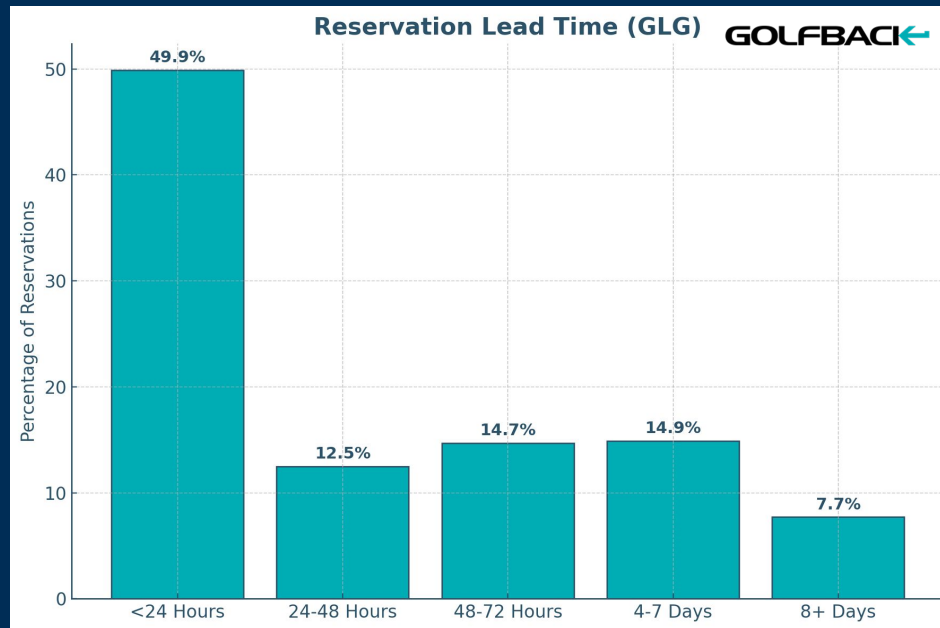
50% of online bookings are <1 day out; 63% are <2 days. There's a soft spot at days 3-6.

Are you incentivizing golfers to book further out?
Dynamic pricing can reward early commitment without undercutting peak rates.

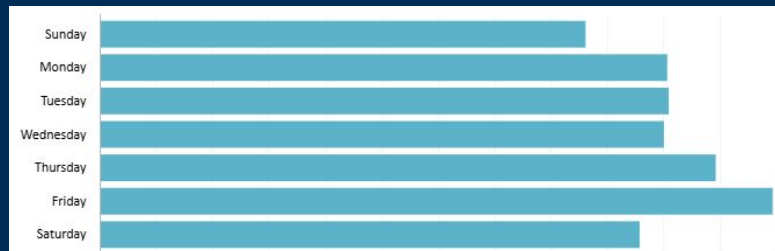
Weekday vs. Weekend booking trends

- 42% of online bookings Fri, Sat, Sun
- 58% of online bookings Mon, Tue, Wed, Thurs
- Lowest booking: Sunday 12%
- Highest booking: Friday 17%

Utilize data to push messaging at the right time to the right players



*GreatLIFE Golf Data - represents 36 resort, public, or semi-private golf courses



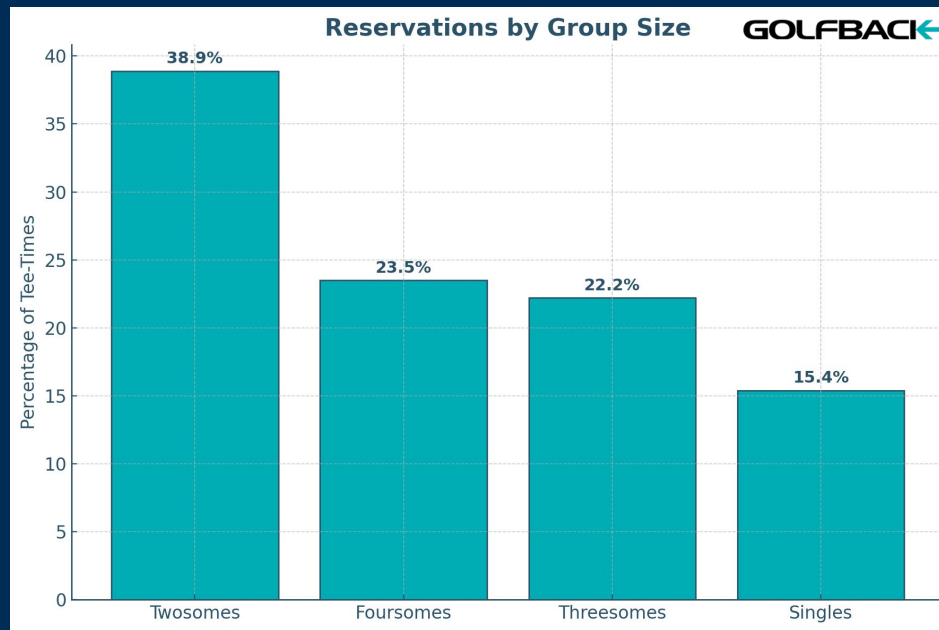
Foursomes Drive Yield, Singles fill the gaps

The Data:

- Twosomes = 38.9%
- Foursomes = 23.5% (Yield Gold)
- Singles = 15.4%

Solutions:

- Foursome-Only Promotional offers
- Singles Controls to fence singles into 2-4 player slots (no full tee capture), keeping inventory pairable.
- Operator Pair-Up Alerts to increase 4some opportunities.



*GreatLIFE Golf Data - represents 36 resort, public, or semi-private golf courses

Cultivate Your Database = Compounded Revenue

Without continuous capture and reactivation, your database stagnates.

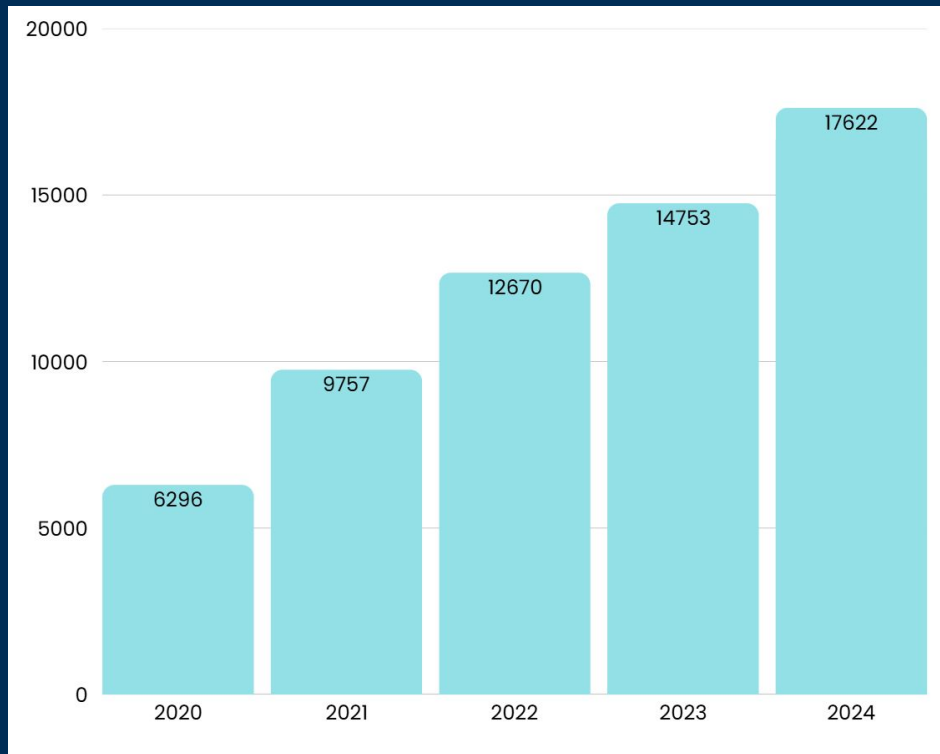
Building Customer Profiles:

- Online Bookings
- Web Forms
- Point of Sale
- Eclub/Newsletters

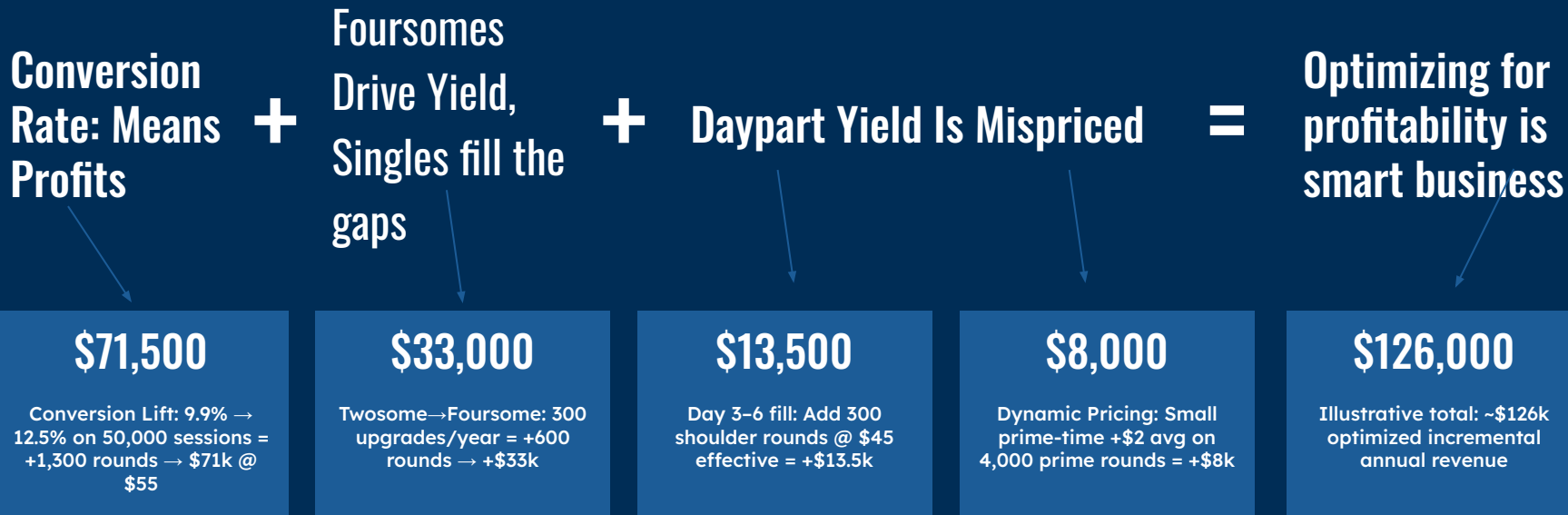
The Data:

- Avg Database Growth Year 1 = 54.9%
- Avg Contact Spend (2020-2024): \$579
- Avg Customer Acquisition Cost (2020-2024): \$0.23**

Average Email Contact Increase



Big Data = Driving Golf Course Profitability



Appendix