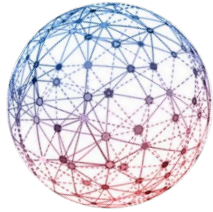


# 2018

## Market Sentiment Study:

Online Tee Time Distributors & Golf Management Software Providers



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**1.**

**Research Methodology**

# Research Methodology

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## Scoping

Insights meeting  
between GUSATTC and  
B2B International Teams

Development and  
review of the  
questionnaire with  
GUSATTC

## Exploration

Online survey with **926** OTTA  
/ GMS users

**299** completes from the  
NGCOA database

**627** completes from the  
PGA database

## Action Plan

Data processing

Report development and  
presentation

B2B International's key  
learnings and conclusions

# Research Methodology



“

*We knew this research would produce valuable insights for not only owners and operators, but also for online tee time agents and software providers. As such, we were very transparent in the development, distribution, and collection of this survey data. We invited all companies to provide input as to the phrasing and call of the questions that were asked in the survey. The survey was then distributed to NGCOA & PGA members.*

*The PGA of America, the NGCOA, and the Tee Time Coalition have not yet conducted a review of the online tee time ecosystem. This initial report was about putting science to perception. Our next study, which we encourage you to participate in, will provide you with the Tee Time Coalition’s objective analysis of each company’s adherence to our guidelines and standards.”*

**Jared Williams,**  
Managing Director  
Golf USA Tee Time Coalition

**2.**

**Recap Of The Research Objectives**

# Research Objectives

---



Discover How Tee Time Distributors & Golf Management Systems are serving golf course operators, through the eyes of the “customer” .

General feedback on perceptions, challenges and benefits of working with Online Tee Time Agents and Golf Management Systems will guide the research.

**3.**

**Golf Courses & Operators  
Represented in the Survey**



# Profiling Participating Golf Courses

926



Participating Golf Course Owners, Operators, & Golf Professionals

## Usage Of Golf Course Services:

Tee sheet / point of sale system

96%

4%

A company that provides you with website design, dynamic pricing, or marketing services

68%

27%

Tee time distributor

58%

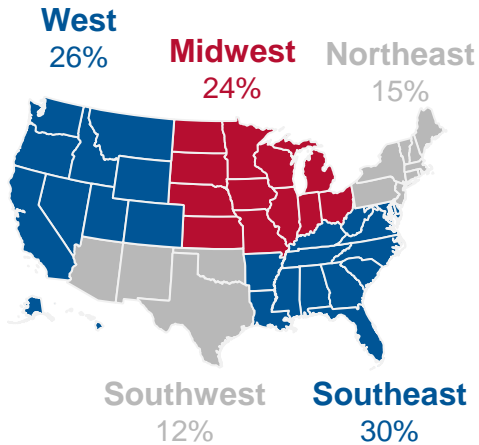
34%

Have not used within the past 2 years

Currently Use

Don't currently use, used with the past 2 years

## Region:



## Golf Course Management:

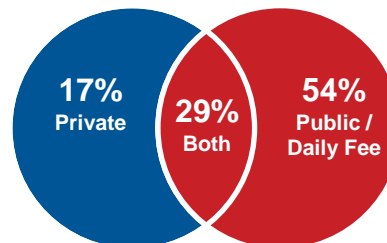
Privately Owned

80%

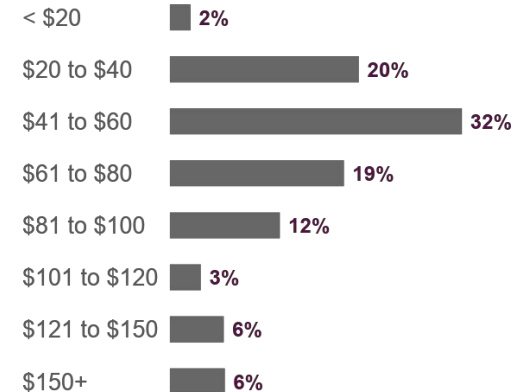
Run By A Management Company

20%

## Type Of Golf Course:



## Tee Time Rates:



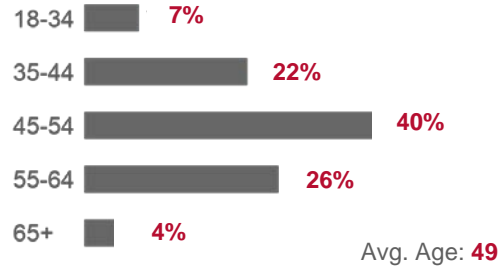
# Profiling Participating Owners & Operators

926

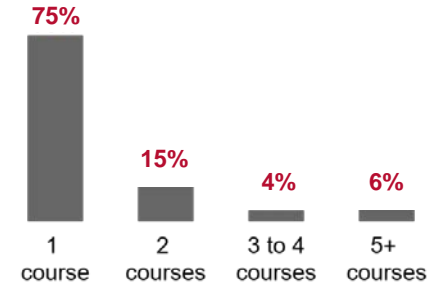


Participating Golf Course Owners, Operators, & Golf Professionals

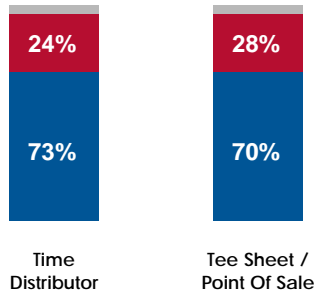
## Age:



## # Of Courses Responsible For:

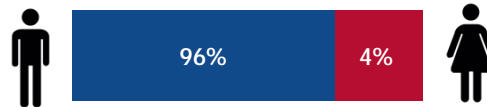


## Decision Making Responsibility:



- Ultimate decision maker/significantly influence
- Not involved in the decision making, but in frequent contact
- Not involved in the decision and not contact with the company

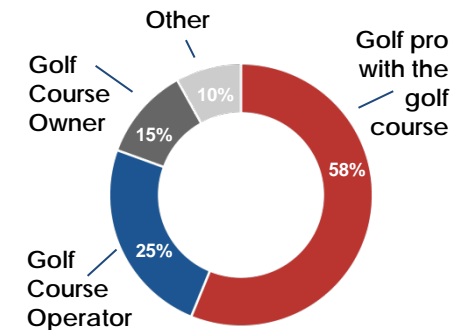
## Gender:



## Organization Membership:

PGA	99%
NGCOA	7%
Club Managers Association	2%
GCSAA	1%
Other	2%

## Role:



# Profile of Companies That Were the Subject of the Survey

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## B2Binternational's Statement on the Data Presented

A total sample size of 926 participating golf course owners, operators and golf professionals is a statistically robust sample size from which to assess the landscape of Tee Time Distributor & Golf Management System performance.

At its most conservative assumption when looking at findings among this number, the margin of error for results is +/- 3.15% at the 95% confidence level.

With regard to performance of specific suppliers contained in this report; some of these findings are statistically valid, some results are to be read directionally and some brands have been excluded where base sizes are too low to look at results at a directional level.



# 4.

## **Challenges, Benefits & Motivations For Using Suppliers**

## Challenges Working With Tee Time Distributors & Golf Management Systems

- Regardless of current supplier used, golf courses all experience similar frustrations when using tee sheet / POS systems.
- Top challenges faced by golf courses when working with tee time distributors relate to pricing issues, poor customer service, difficulty in using the software, and challenges with trading tee times, double booking, and player cancellations.

<b>Pricing (Price Integrity)</b> 37%	<b>Customer Service</b> 15%	<b>Trading Tee Times</b> 15%	<b>Not Providing Data</b> 14%
Feeling that prices are sold too low and thus devalues the overall golf course	Challenges in getting appropriate answers to technical difficulties	Difficulty accurately tracking traded tee times and other pricing on traded tee times	Issues around who owns the data that is collected, as well as unwillingness to provide courses with customer data
<b>Lack Of Control / Flexibility</b> 12%	<b>Difficult To Use</b> 9%	<b>Double Booking / Cancellations</b> 9%	<b>Unreliable / Down Time</b> 6%
Lack of control when it comes to setting prices for their courses. Also a lack of flexibility to meet each course's different needs.	Requires employee training that takes time and money. Software is slow and is difficult for golfers to book	Trouble when it comes to the software double booking for the same tee time. When players cancel or show up late for a tee time it is difficult to make that edit in the program	Golf course experience down times and unreliable software service periodically that frustrates employees and golfers

**Q11. What are the three biggest challenges your organization faces when working with tee time distributors and tee sheet / POS systems?**  
[UNPROMPTED]

” It is hard getting fair market pricing for distribution that is not trade tee times. I want to pay cash or a commission that is reasonable.

” When the reservation is cancelled with the golf shop counter, it is not recorded as a cancellation through the provider and does not get reposted online unless we call it in as a cancellation.

” \*\*\*\*\* is trying to create a monopoly via extorting some desperate golf courses. If the over supply of golf courses weren't bad enough, \*\*\*\*\* is compounding the problem by driving the pricing downward which will ultimately accelerate the death spiral of some courses

# Benefits Of Working With Tee Time Distributors & Golf Management Systems

- Owners and Operators appreciate the number of marketing tools available to them as well as the increased exposure they enjoy when working with Tee Time Distributors. Golf Management Systems tend to be easy to use (particularly POS systems) and they allow golf courses to collect and track more customer data.

Marketing Assistance & Wide Exposure	Customer Data Collection & Tracking	Easy To Use Systems	Reporting Capabilities	Tech. Support	More Efficient Use Of Employees Time
31%	26%	26%	26%	26%	26%

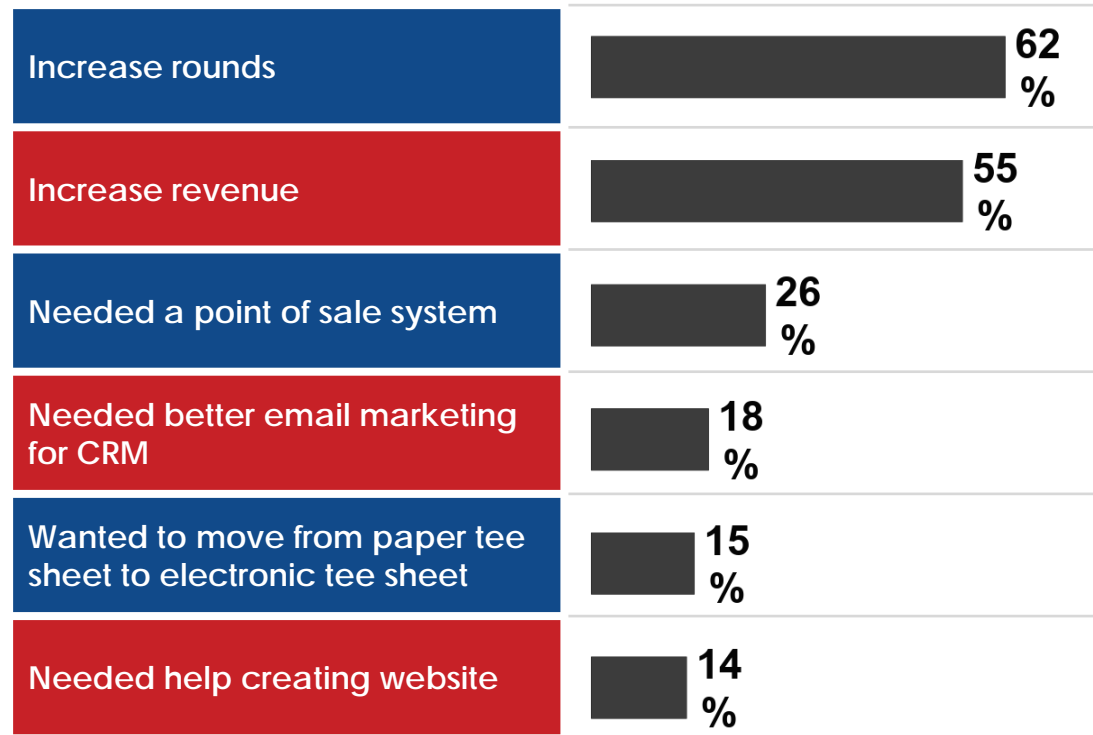
**Q12. What are the three biggest benefits your organization experiences when working with tee time distributors and tee sheet / POS systems?**  
**[UNPROMPTED]**

- “ With tee sheet / POS systems there are **so many options for reports where you can track rounds played, peak times, sales, etc.**
- “ Tee time distributors are good at one thing, **bringing new customers onto the course.** Once they are there you have to have a plan in place to convert those customers to your own.
- “ We are able to control our own dynamic pricing and prepaid pricing on our website. This has been a bonus! We do not use any other distributors to avoid confusion.
- “ Tee sheet / POS are **very sophisticated now with a lot of bells & whistles that allow us to be extremely efficient.**

# Motivation For Using A Tee Time Distributor

- Increasing rounds and revenue are the top motivators for using a Tee Time Distributor.

## Overall



**Q26a.** For which of the following reasons do you use [MAIN TEE TIME DISTRIBUTOR]? You may select up to 3.

# Motivation For Using A Golf Management System

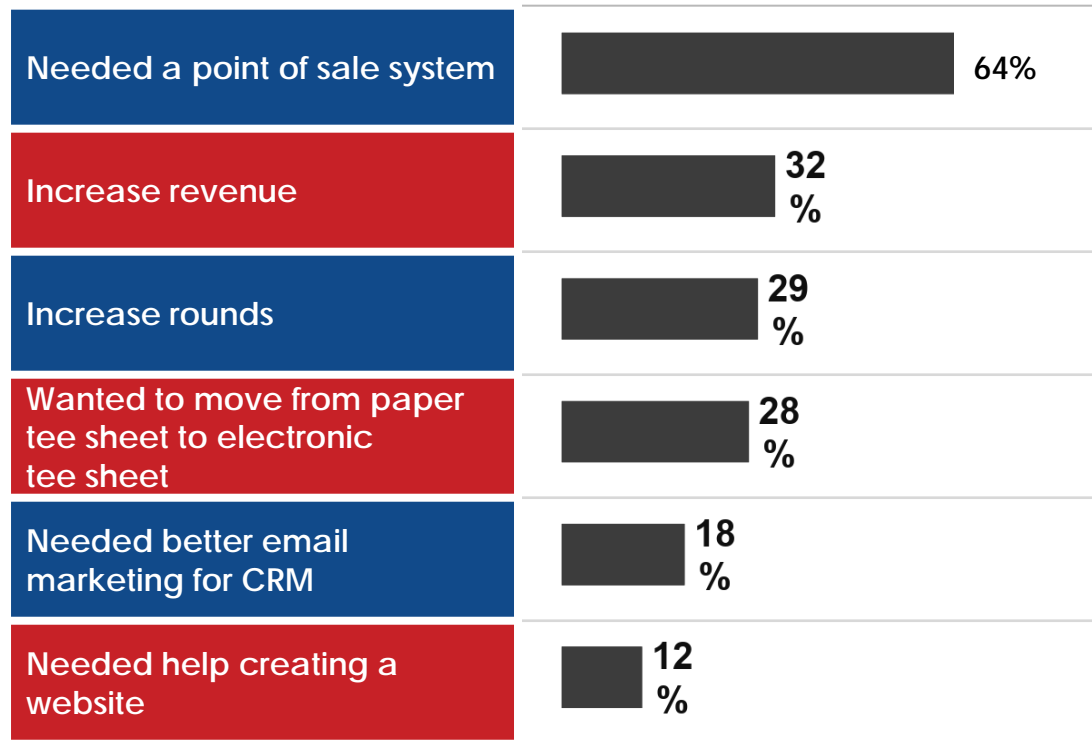
- **Golf Management System**

The need for a point of sale system is the top motivation for golf courses using a Golf Management.

Interest in increasing revenue, rounds, and wanting to move to an electronic system are strong secondary motivations.

**Q26b. For which of the following reasons do you use [MAIN TEE SHEET / POS SYSTEM]? You may select up to 3.**

## Overall









**5.**

**Focusing on Tee Time Distributors**

# Preferred Payment Method Of Tee Time Distributors

**Q30. Which one of these payment options is your most desirable method of compensation?**

Preferred Payment Method	Overall
Base	518
Barter	 46%
Fixed Monthly cost	 23%
Commission	 22%
Merchant Agreement	 10%

**Q31. In your opinion, would you like to see the barter option continued as a method of compensation?**

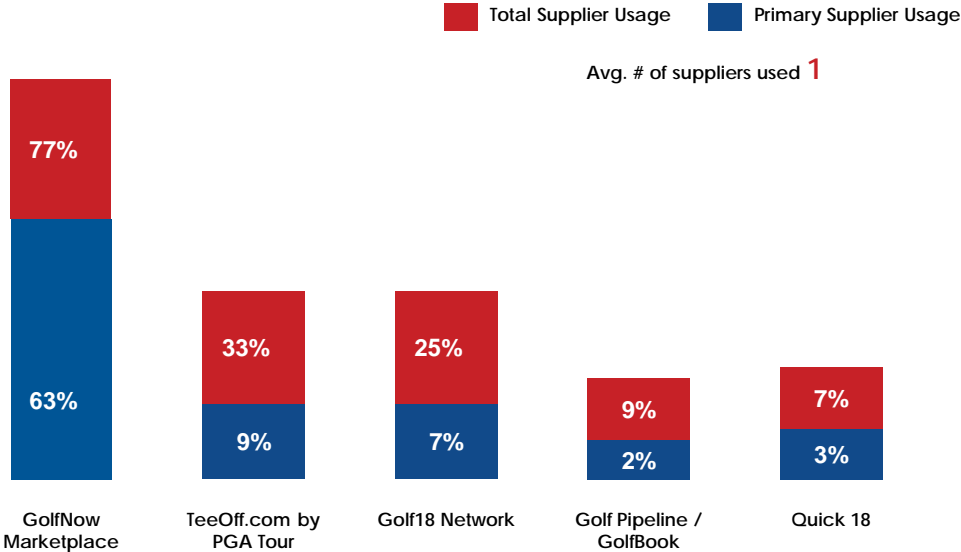
Should Barter Be Continued?	Overall
Base	518
Yes	45%
No	36%
Don't Know	19%

# Tee Time Distributor Penetration

- GolfNow Marketplace is the most commonly used Tee Time Distributor by far. TeeOff.com by PGA Tour and Golf 18 Network are its closest competitors, used by 33% and 25% of owners and operators respectively. 1.8 suppliers are used on average.

**Q15a.** Which of the following tee time distributors have you used within the past 2 years?

**Q15b.** And which one would you consider to be your main tee time distributor?



# Previously Working With Tee Time Distributors

- For the most part, very few golf courses and golf course owners have ended their relationship with a Tee Time Distributor within the past 2 years.

**28%** of golf course operators stopped using a Tee Time Distributor in the past 2 years.

**Q15c. Which, if any, of these tee time distributors have you worked with in the past 2 years, but no longer work with?**

**Q24. Please explain in as much detail as possible why you no longer use a particular Tee Time Distributor.**

## WHY STOPPED USING A SUPPLIER

### Software Issues - 34%

Customers faced issues with **outdated and aging technology** that was **difficult to use** and had **limited reporting outputs** so they upgraded to a different supplier.

### Business Relationship - 18%

Customers felt that there was a **lack of customer support** or even a lack of **concern for the customer's business** – i.e. there was no relationship. There was a **lack of honest and open communication** (particularly for GolfNow Marketplace).

### Business practices - 17%

Customers faced issues with **price integrity** (pricing below the agreed amount) and an **over-promotion of deal rates over normal rates**. Suppliers **don't care about damaging the reputation** of their customers' courses.

### Supplier Effectiveness - 15%

Customers felt that working with suppliers had **little impact on increasing round counts and revenue**. The service was too expensive and offered **no value for money**.

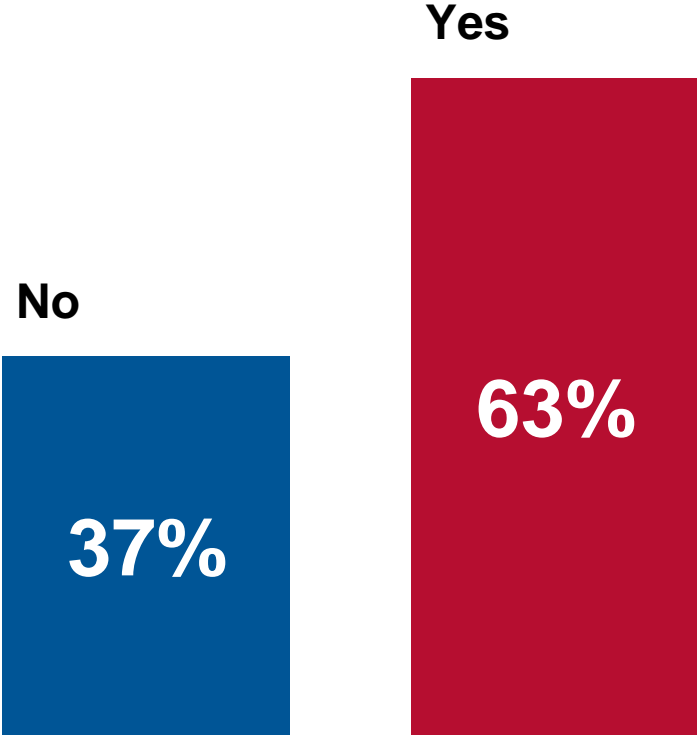
Are you satisfied with the contract  
you have with your tee time  
distributor?

# Contract Status With Primary Tee Time Distributor

## Is There A Written / Digital Contract In Place

- For the most part the majority of customers have a contract in place

**Q25a.** Does your golf course have a written/digitally provided contract in place with your main supplier...



## Satisfaction With Contract Terms & Payments **What Customers Said...**

- Golf course owners recognize Tee Time Distributors are making it easy for golf course operators as well as golfers who use the platform to make and accept payments. Golf professionals are now looking to their Tee Time Distributor to offer more payment options, show price integrity and to better supporters of its B2B customers.

**Q28a. In your view, how should [MAIN TEE TIME DISTRIBUTOR] make improvements with regards to your contract and payment terms? Q28b. And what do they do particularly well? [UNPROMPTED]**

<p><b>What Tee Time Distributors Are Doing Well</b></p>	<p><b>Payment Terms – 24%</b></p> <p>Golf course professionals recognize the variety of payment terms and options offered by their tee time distributor both in how the golf course pays the distributor and how the golfer pays.</p>	<p><b>Communication Of Terms – 12%</b></p> <p>Professionals appreciate a tee time distributor who communicates honestly and clearly about contract terms and pricing of tee times.</p>	<p><b>Easy To Use / Understand – 11%</b></p> <p>Tee Time Distributors make it possible for golf courses to select what works for them and are easily and quickly able to adapt to golf course owners requests and specific needs</p>
<p><b>What Tee Time Distributors Need To Improve</b></p>	<p><b>Payment &amp; Price Integrity - 39%</b></p> <p>Golf courses are looking for tee time distributors to offer a wider variety of payment options (i.e. trade, barter, cash, commission etc.) for both working with the distributor and selling tee times. Also courses want more control over the price at which tee times can be sold.</p>	<p><b>Better Customer Service / More Customer Centric – 20%</b></p> <p>Golf course are frustrated by delays in technical support and challenges in reaching sales reps to get clarification on questions. They also feel that suppliers are only after more money and aren't interested in building a partnership.</p>	<p><b>Need Better Communication – 13%</b></p> <p>Tee Time Distributors need to communicate with golf course owners better, particularly around pricing concerns and contractual terms and expectations.</p>

” **Simple and effective.** \*\*\*\*\* retains reservation fees and the customer pays the golf course upon registration. \*\*\*\*\* doesn't owe us and we don't owe them.

” We would like more **flexibility in setting trade times** and outlawing trade times during certain periods. I understand why some of this is impossible but I would love to have this.

How is the relationship with  
your tee time distributor?



# Satisfaction With Technology, Customer Data, Online Marketing, and Business Relationships

## What Customers Said...

**Q33a. In your view, how should [MAIN TEE TIME DISTRIBUTOR] make improvements with regards to technology, customer data, online marketing and the business relationship?**

**Q33b. And what do they do particularly well?  
[UNPROMPTED]**

### What Tee Time Distributors Do Well

#### Variety Of Marketing Options – 21%

Golf course owners are looking to the tee time distributors to market their golf courses to a wide variety of golfers through online, social media, and email blasts.

#### Technology / Innovation – 14%

Tee time distributors tend to keep up with evolving technology and innovation and work to incorporate this into their product offerings to make using the software easier for all parties

#### Customer Service – 13%

Tee time distributors tend to be responsive and work with golf courses to address issues and concerns when using their software

### What Tee Time Distributors Need To Improve

#### Open Communication & More Honesty From Distributor – 22%

Golf course owners are looking for a more open dialogue up front about what they can expect from the tee time distributor as well as what types of deals tee time distributors offer

#### Better Customer Service – 11%

Better communication between the tee time distributor and the golf course for troubleshooting and general inquiries

#### Improve Technology – 11%

Users are looking for a supplier who can keep up with golfers' changing preference in technology and offer software that is up to date and glitch free.

” In my opinion, \*\*\*\* has exceeded the technological needs of the golf industry, causing them to over value their services. I would need to hire a 40 hour per week employee to use all the technology services available. I don't know of any golf course that can afford that or one that would get the return on the employee.

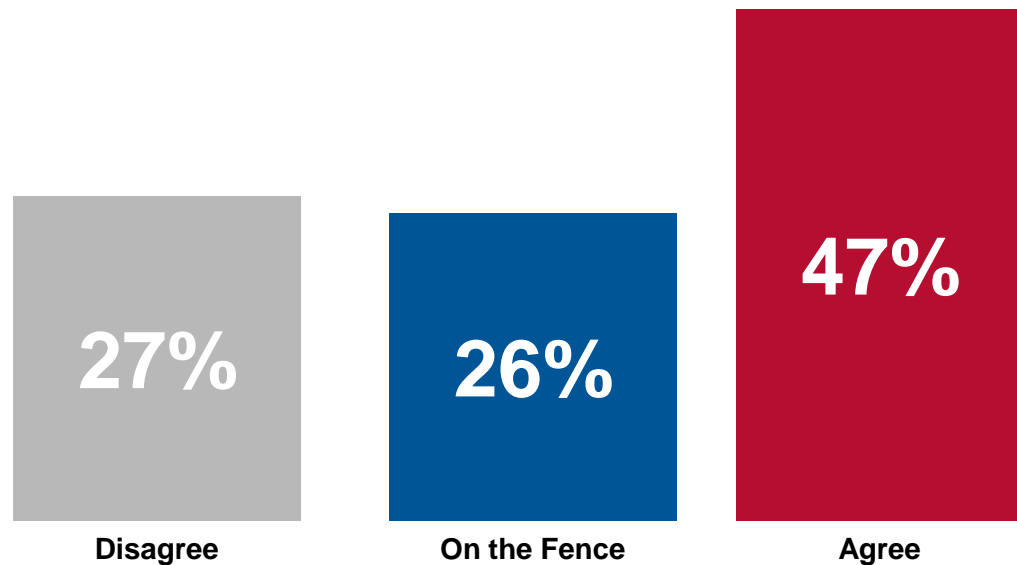
” They need to share ALL data with the golf course including barter times sold and tee times being booked on \*\*\*. Their technology is terrible. They are a distribution company and there is no way you should allow a distribution company access to all your facilities.

# Relationship With Tee Time Distributors

- Regardless of golf course profile, nearly half of those using Tee Time Distributors feel that they are in direct competition with their supplier.

I Am In Direct Competition With My Online Tee Time Provider

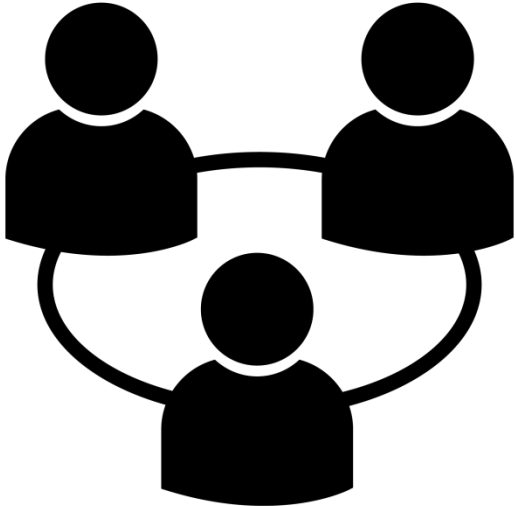
**Q19.** Please indicate the extent to which you agree / disagree with the following statement regarding your relationship with tee time distributors . . .



# Satisfaction With The Business Relationship By Main Tee Time Distributor

**Q32. Now how satisfied are you with the business relationship with [MAIN TEE TIME DISTRIBUTOR]?**

Percentage of survey respondents giving Tee Time Distributors a satisfaction ratings of 8, 9, or 10 in the following categories

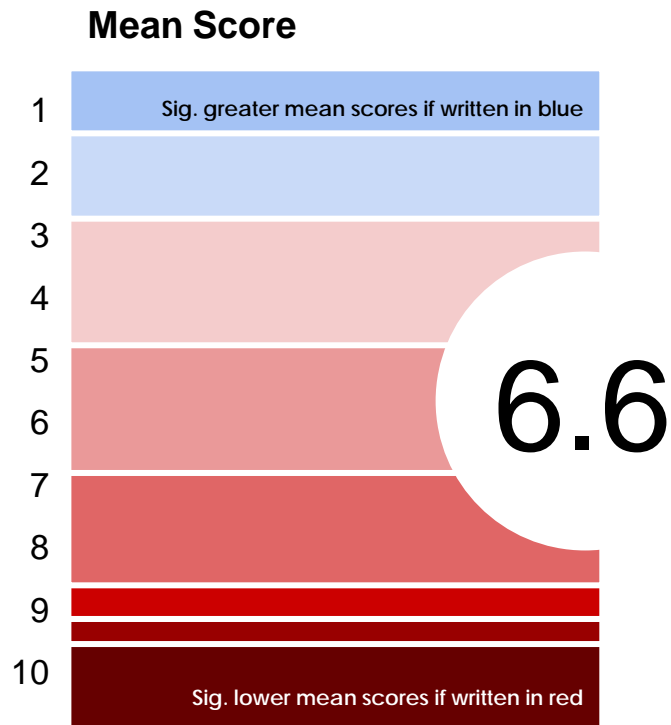


# Satisfaction Ratings for Tee Time Distributors

# Overall Satisfaction With Tee Time Distributors

- The Aggregate Satisfaction Score for all Tee Time Distributors is 6.6 out of 10.

**Q35.** *Thinking of the full experience you have with your main tee time distributor, overall how satisfied are you with your main tee time distributor, using a scale from 1 to 10 where 1 means “not at all satisfied” and 10 means “extremely satisfied”.*



# What Is Driving Satisfaction?



Many people are not always able to **articulate what drives satisfaction with a supplier** and therefore what is important.



We can use statistical tests to reveal the **correlation between the satisfaction scores given to each of the attributes** and the **overall satisfaction** with Tee Time Distributors. We call this “**derived**” importance.

A high correlation allows us to “derive” that the attribute is **an important driver of satisfaction**. The absolute value of the correlation coefficient measures the strength of the relationship.

For example:

- A correlation closer to 1 indicates a very strong driver of overall satisfaction: providers should focus on improving this attribute to maintain customer loyalty
- A correlation closer to 0 indicates a negligible impact on overall satisfaction: providers need not spend as much effort on such an attribute

# What's Important, What's Not?

## Satisfaction With Tee Time Distributors

- Being easy to do business is the strongest driver of satisfaction, and is the only strength area for Tee Time Distributors.
- Satisfaction needs to be improved for the remaining drivers of satisfaction that sit within the "important weakness" quadrant.

- A Open contract (i.e. non-exclusive)
- B★ Flexible and amendable contract Contract Terms
- C Reasonable process for terminating contract
- D Communication of auto-renewals
- E Payment terms (i.e. when receiving money)
- F★ Fair and reasonable pricing structure
- G Speed of payment transfer Payment
- H Adherence to payment standards
- I Offers a range of payment methods beyond barter
- J★ Payment terms when adding services to contract
- K★ Yield management tools
- L★ Respond to reviews, ratings and content Technology & customer data
- M Provides monthly sales reports
- N Full collection and transfer of customer data
- O Provision of digital reports analyzing customer data
- P Full disclosure of all marketing channels used
- Q Up-to-date inventory Online marketing
- R★ Honest marketing practices
- S★ Accurate display of discount percentages
- T Accurate representation of non-barter 'rack rates'
- U★ Accurate representation of pricing for barter-rounds
- V★ Displaying honesty and integrity Business relationship
- W★ Being easy to do business with

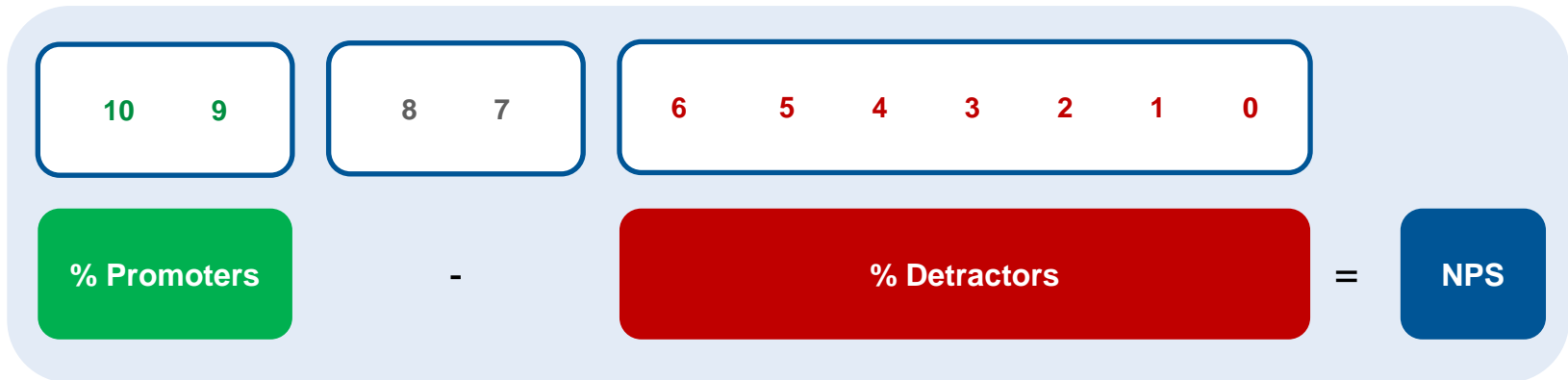


★ = a top 10 driver of satisfaction

# Net Promoter Score for Tee Time Distributors



# Net Promoter Score



From a B2B perspective we know there is a **direct correlation between the advocacy score received and the immediate intentions of the customer**. Detractors usually leave within six months unless the sources of detraction are addressed and promoters usually spend more.

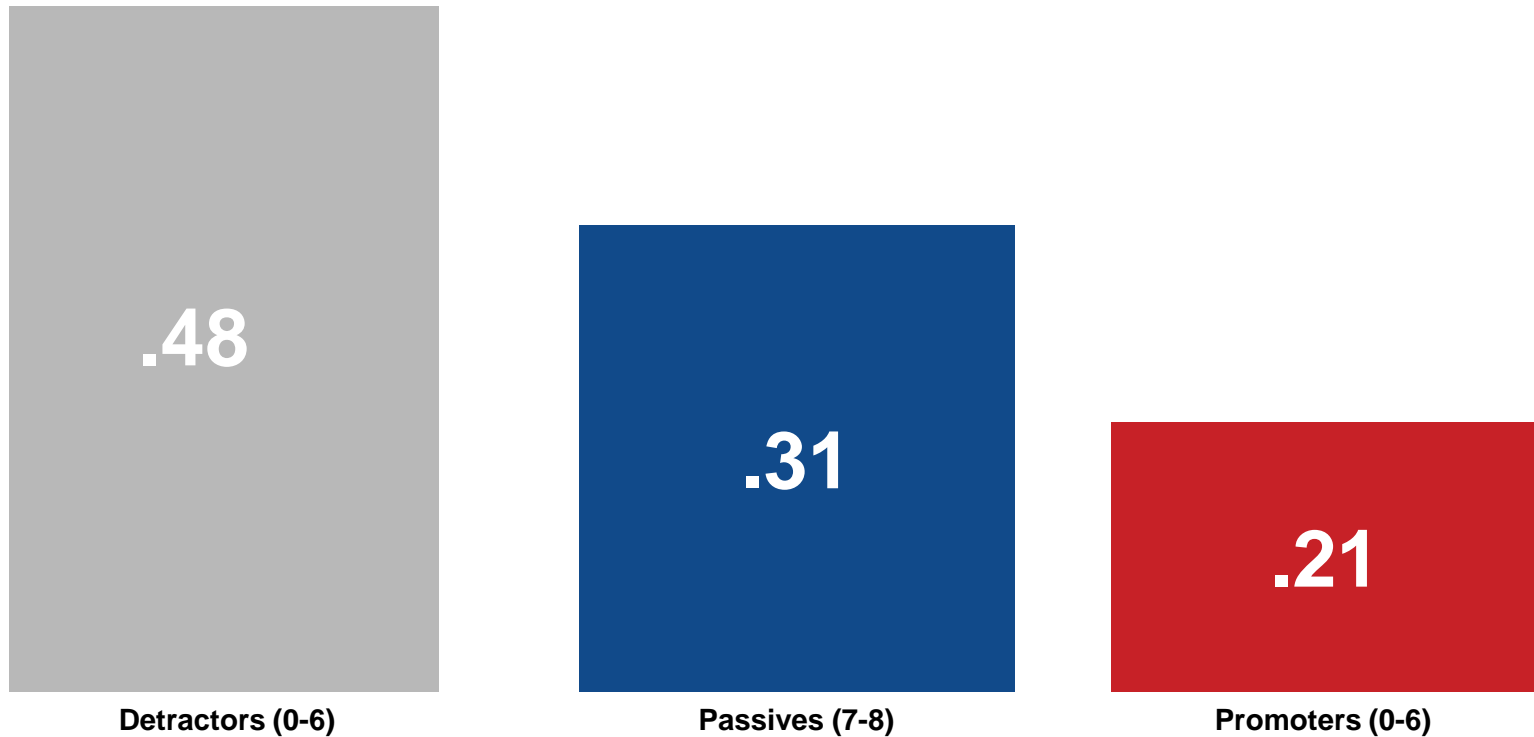
The Net Promoter Score is a **metric of brand loyalty / advocacy** and scores can range from -100 to 100. Customer NPS scores tend to be higher so from a B2B perspective, the scores can be interpreted as follows:

- Below 20 – Poor score, considerable improvement required
- 20 to 35 – Moderate score but can be improved upon (the average for business-to-business companies is 24)
- 36 to 45 – Good score, but not great
- 46 to 55 – Excellent score
- Above 55 – Outstanding score

# Likelihood To Recommend Tee Time Distributors

---

Average Net Promoter Score = -27



# What Influences Golf Courses Operators' Willingness to Promote and Recommend Their Tee Time Distributor

- Regardless of the current Tee Time Distributor used, negative perceptions of brands are driven by a lack of price integrity, poor customer service and a lack of impact on business. Customers believe the image of their course is being cheapened by their supplier
- On the other hand, customers who felt their suppliers helped grow their business and offered good customer service were more likely to be brand advocates.

## Top Reasons For Low Scores (0 – 6)

1. Tee times sold for too little money – cutting into profit margins – **7%**
2. Doesn't generate much business / in direct competition with customers – **19%**
3. Not a large supplier / not well known – **5%**
4. Lack of price integrity – selling tee times for too little money – **33%**
5. Poor customer service – **11%**
6. Inconsistent – only works under the right manager for the right course – **4%**

## Top Reasons For High Scores (9 or 10)

1. Like payment modes (barter & commissioning) – **8%**
2. Good customer service – **37%**
3. Easy to use – **3%**
4. Affiliated with the PGA Tour – **2%**
5. Helps grow business – **5%**
6. Leaders (resources to reach a large number of golfers) – **3%**
7. Helps with marketing / increasing course awareness – **2%**

**Q18. Please explain why you gave that score, in as much detail as possible**

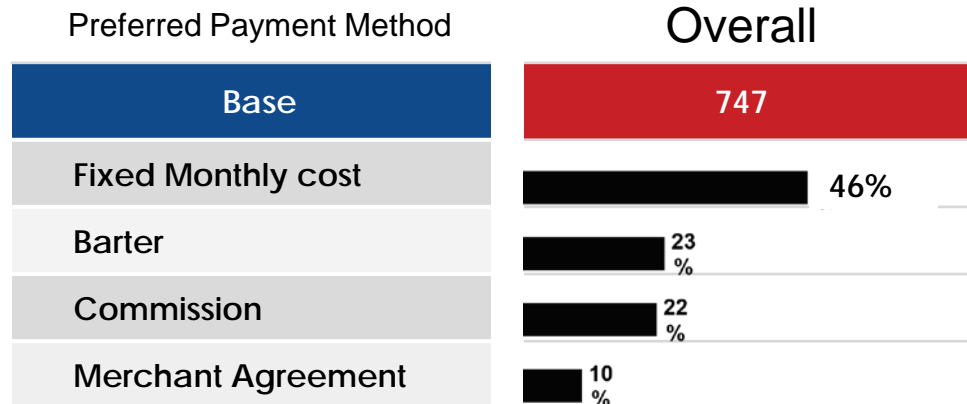
**6.**

**Focusing On Golf Management Systems**

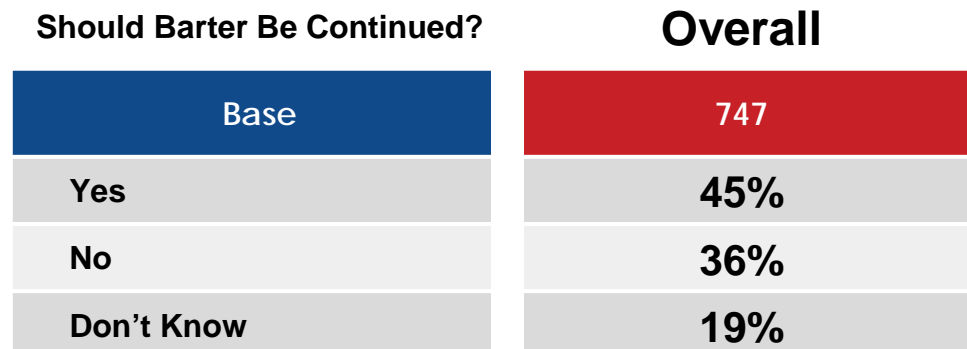
# Preferred Payment Method Of GMS By Vendor

- The majority of customers of Golf Management Systems prefer to pay a fixed monthly cost. Interestingly among suppliers with the strongest penetration (EZLinks & GolfNow), customers are open to considering the barter method.
- On the whole, the perception of barter tends to be less popular for GMS – however more of those currently using the method are more likely to want to see it continue to be an option compared to those who don't use it.

**Q30. Which one of these payment options is your most desirable method of compensation?**



**Q31. In your opinion, would you like to see the barter option continued as a method of compensation?**



# Previously Working With GMS

- For the most part, very few golf courses have ended a relationship with a Golf Management System within the past 2 years.

60% have remained loyal to their current Golf Management Systems provider over the past 2 years.

**Q20c. Which, if any, of these tee sheet / point of sale systems have you worked with in the past 2 years, but no longer work with?**

**Q24. Please explain in as much detail as possible why you no longer use a particular Golf Management System.**

## WHY STOPPED USING A SUPPLIER

### Software Issues - 32%

Customers faced issues with **outdated and aging technology** that was **difficult to integrate with other software** and **lacked customization options**.

### Business Relationship - 17%

Customers felt that there was a **lack of customer support** or even a **lack of concern for the customers business** – i.e. there was no relationship. The relationship **often deteriorated after a merger between two companies**.

### Business practices - 15%

Customers faced issues with **price integrity** (pricing below the agreed amount) and felt they were in **direct competition with their supplier**.

### Supplier Effectiveness - 15%

Customers felt that the software was too expensive and offered **no value for money**, while delivering **little impact on the business**.



We switched to \*\*\*\*\*sheet from \*\*\*\*\* tee sheet due to \*\*\*\*\* only being interested in selling their trade times and not willing or interested in working with the golf course operator.

Are you satisfied with the contract  
you have with your Golf  
Management System?

# Contract Status With Golf Management System

## Is There A Written / Digital Contract In Place

- At least 7 in 10 customers of Golf Management Systems have a written or digital contract in place with their supplier.

**Q25b.** Does your golf course have a written/digitally provided contract in place with your main supplier...

Yes

27%

No

73%



## Satisfaction With Contract Terms & Payments **What Customers Said...**

- Improvements to contract terms and payments center around fairer and clearer contract terms, better pricing integrity (not charging too little for rounds of golf), and an overall improving customer service. However, customers recognize that the systems are generally easy to use and there are low pricing options for those with small budgets.

**Q29a. In your view, how should [MAIN TEE SHEET / POS SUPPLIER] make improvements with regards to your contract and payment terms?**

**Q29b. And what do they do particularly well? [UNPROMPTED]**

<p><b>What Golf Management Systems Are Doing Well</b></p>	<p><b>Customer Support – 19%</b></p> <p>Golf course professionals appreciate the open and honest communication they currently enjoy with their tee sheet / POS supplier and feel that this communication keeps expectations on track.</p>	<p><b>Easy To Use / Understand – 15%</b></p> <p>Tee sheet / POS Suppliers are currently doing well when it comes to having contract terms and software that are easy to use and understand.</p>	<p><b>Low Pricing Options – 12%</b></p> <p>Tee sheet / POS Suppliers are currently doing well when it comes to offering options with set low pricing to attract golf courses who cannot make a substantial investment for such robust software</p>
<p><b>What Golf Management Systems Need To Improve</b></p>	<p><b>Fair and Clear Contract Terms – 27%</b></p> <p>Golf courses are interested in their tee sheet / POS suppliers offering fairer contract terms that are easy to understand. This would improve the overall relationship between golf courses and suppliers.</p>	<p><b>Increased Pricing Integrity – 20%</b></p> <p>Golf course professionals are frustrated when suppliers sell tee times on the course's behalf, at greatly discounted prices. The operators believe this negatively effects the perception of their courses</p>	<p><b>Improved Customer Service – 13%</b></p> <p>The tee sheet / POS supplier is an investment for most golf courses, in return, professionals expect suppliers to have knowledgeable customer service staff that can accurately and quickly address questions &amp; concerns.</p>

- ” Their rep was really helpful and willing to help me out in any way possible, especially setting up my tee sheet to fit my needs.
- ” If they are going to continue moving toward a flat monthly fee, they need to make them more affordable. Otherwise, courses will prefer to remain on the “per tee-time booking” model.

# Satisfaction With Technology, Customer Data, Online Marketing, and Business Relationships

## What Customers Said...

**Q34a.** *In your view, how should [MAIN TEE SHEET / POS SUPPLIER] make improvements with regards to technology, customer data, online marketing and the business relationship?*

**Q34b.** *And what do they do particularly well? [UNPROMPTED]*

### What Golf Management Systems Do Well

#### Customer Service – 19%

Responsive to customer issues and complaints

#### Easy To Use – 14%

Easy for both the end users as well as the golf courses

#### Technology / Innovation – 14%

Improve both the platform in which tee sheets are available as well as the interface in which customers see when booking tee times

### What Golf Management Systems Need To Improve

#### More Robust System / More Updates – 23%

Customers are looking for tee sheet / POS suppliers to offer systems that are “all-inclusive” and constantly provide updates to improve already existing technology

#### Better Reporting Format / Platform Interface – 13%

Make the reporting outputs be more robust and more detailed. Offer customization specific to the needs of my facility.

#### Better Customer Service – 11%

Users are looking for more responsive to customer issues and complaints

” They are very **open and honest**. They are also **eager to accommodate improvement suggestions** and quite often already have a comparable solution in production.

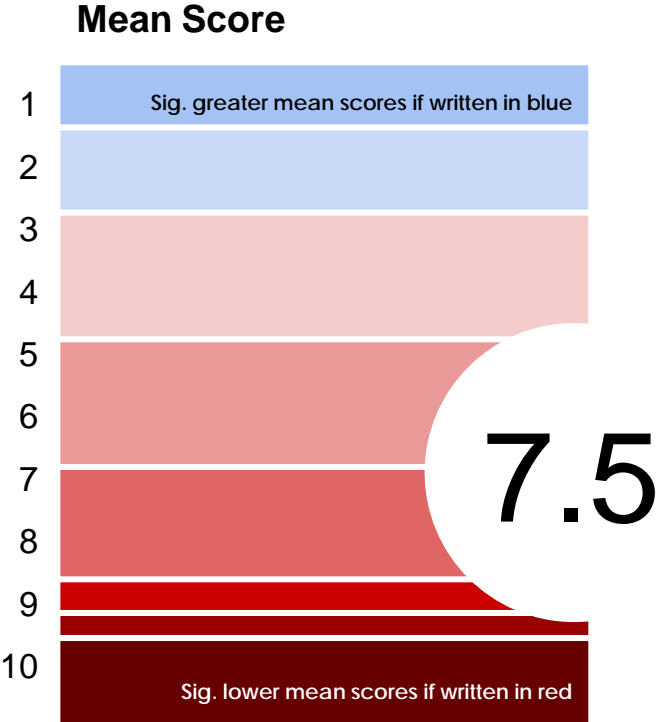
” I just **wish the system was faster** and the tee sheet reports need to be upgraded to have an option on the print screen to only print booked tee times. **There is no need to print 5 sheets of paper to print off tomorrow’s only tee time at 11am.**

# Satisfaction Ratings for Golf Management Systems

# Overall Satisfaction With Providers of Golf Management Systems

- The Aggregate Satisfaction Score for all Tee Sheet and Point-of-Sale providers is 7.5

**Q35.** Thinking of the full experience you have with your main Tee Sheet / POS supplier, overall how satisfied are you with Tee Sheet / POS supplier, using a scale from 1 to 10 where 1 means “not at all satisfied” and 10 means “extremely satisfied”.



# What Is Driving Satisfaction?



Many people are not always able to **articulate what drives satisfaction with a supplier** and therefore what is important.

We can use statistical tests to reveal the **correlation between the satisfaction scores given to each of the attributes** and the **overall satisfaction** with Tee Time Distributors. We call this “**derived**” importance.



A high correlation allows us to “derive” that the attribute is **an important driver of satisfaction**. The absolute value of the correlation coefficient measures the strength of the relationship.

For example:

- A correlation closer to 1 indicates a very strong driver of overall satisfaction: providers should focus on improving this attribute to maintain customer loyalty
- A correlation closer to 0 indicates a negligible impact on overall satisfaction: providers need not spend as much effort on such an attribute

# What's Important, What's Not?

## Satisfaction With Golf Management Systems

- The business relationship, online marketing and technology / customer data are key to driving satisfaction among customers of Golf Management Systems – largely customers are satisfied for these attributes.
- Satisfaction for full disclosure of all market channels used could be improved.

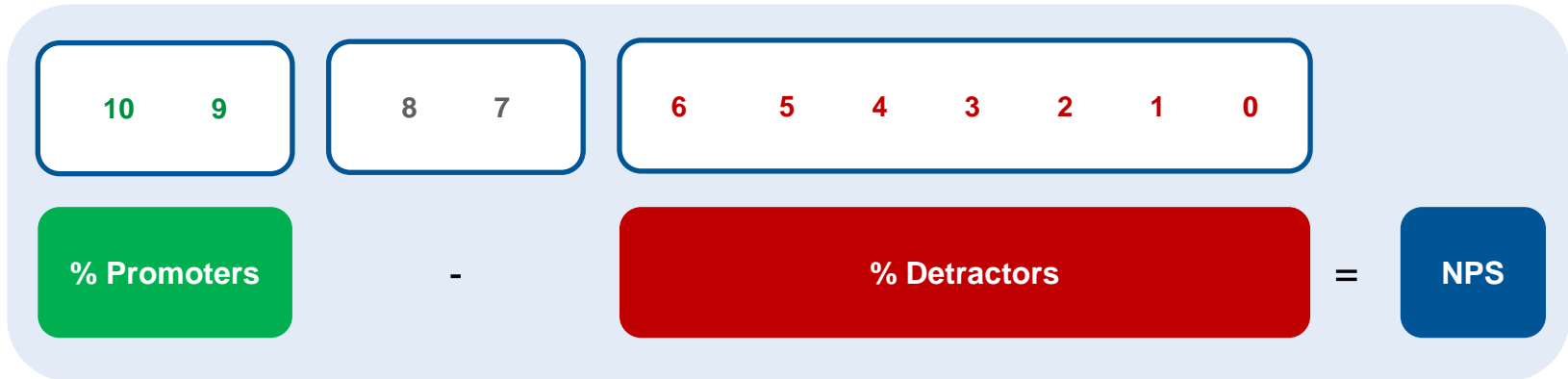
- A Open contract (i.e. non-exclusive)
- B Flexible and amendable contract
- C Reasonable process for terminating contract
- D Communication of auto-renewals
- E Payment terms (i.e. when receiving money)
- F Fair and reasonable pricing structure
- G Speed of payment transfer
- H Adherence to payment standards
- I Offers a range of payment methods beyond barter
- J ★ Payment terms when adding services to contract
- K ★ Yield management tools
- L ★ Respond to reviews, ratings and content
- M Provides monthly sales reports
- N ★ Full collection and transfer of customer data
- O Provision of digital reports analyzing customer data
- P ★ Full disclosure of all marketing channels used
- Q ★ Up-to-date inventory
- R ★ Honest marketing practices
- S ★ Accurate display of discount percentages
- T Accurate representation of non-barter 'rack rates'
- U Accurate representation of pricing for barter-rounds
- V ★ Displaying honesty and integrity
- W ★ Being easy to do business with



★ = a top 10 driver of satisfaction

# Net Promoter Score for Golf Management Systems

# Net Promoter Score



From a B2B perspective we know there is a **direct correlation between the advocacy score received and the immediate intentions of the customer**. Detractors usually leave within six months unless the sources of detraction are addressed and promoters usually spend more.

The Net Promoter Score is a **metric of brand loyalty / advocacy** and scores can range from -100 to 100. Customer NPS scores tend to be higher so from a B2B perspective, the scores can be interpreted as follows:

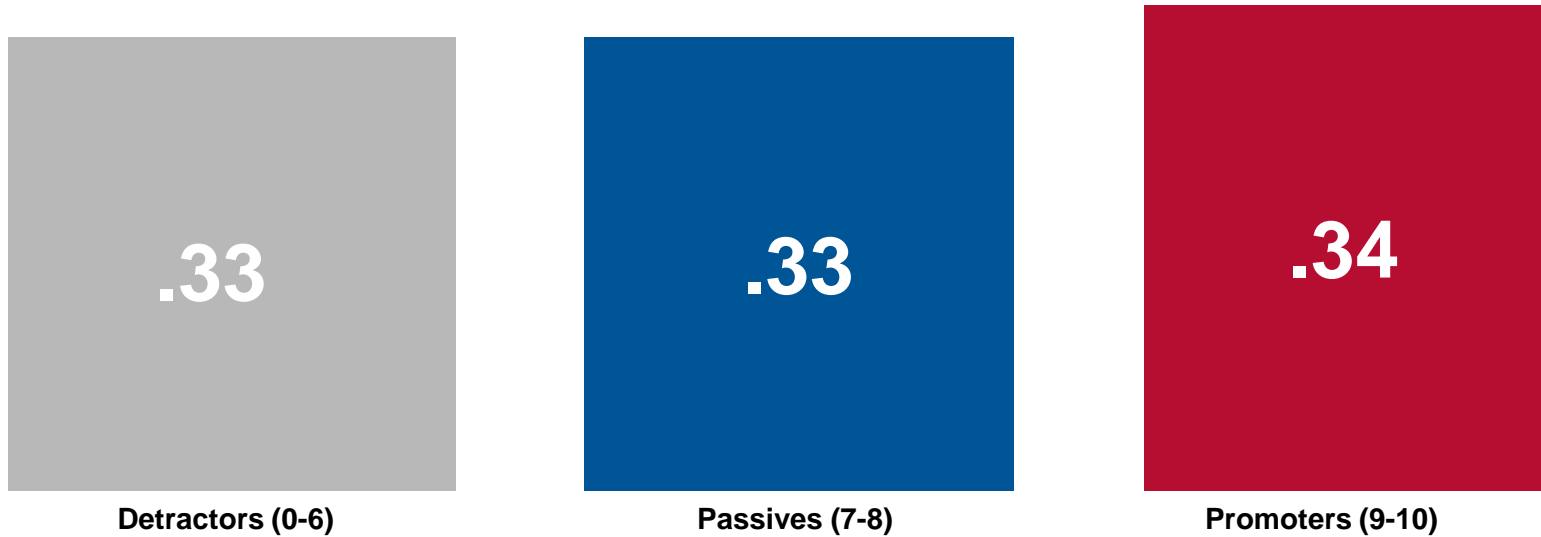
- Below 20 – Poor score, considerable improvement required
- 20 to 35 – Moderate score but can be improved upon (the average for business-to-business companies is 24)
- 36 to 45 – Good score, but not great
- 46 to 55 – Excellent score
- Above 55 – Outstanding score



# Likelihood To Recommend **GMS**

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Average Net Promoter Score = +1



# Motivation For Likelihood To Recommend Score

- Consistent drivers of negative perceptions across suppliers include outdated technology, difficult to use systems, poor customer service and restrictive systems.
- On the other hand, customers who felt their suppliers offered supportive customer service, easy to use solutions and solutions that fit in with the golf course were more likely to be brand advocates.

**Q23. Please explain why you gave that score, in as much detail as possible.**  
**[UNPROMPTED]**

## Top Reasons For Low Scores (0 – 6)

1. Technology is outdated, restrictive, and not keeping up with changing customer needs
2. Difficult system to use, Technical issues
3. Expensive, unreliable solution
4. Inaccurate information being posted
5. Poor / slow customer service
6. Limited flexibility / customization
7. Competitors offer better systems
8. Price integrity & payment model

## Top Reasons For High Scores (9 or 10)

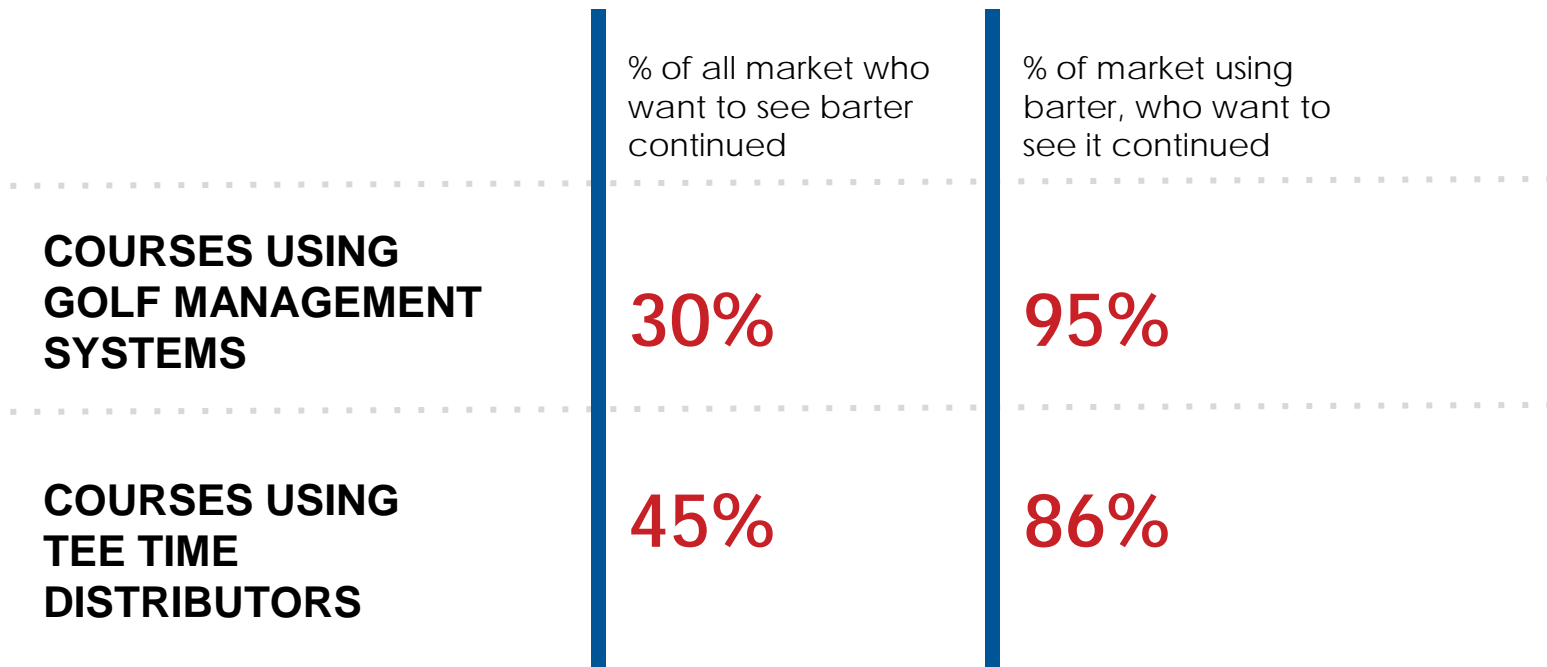
1. Good customer support
2. Easy to use software platform
3. Pricing options (multiple pricing options available to golf course)
4. Technology / innovative
5. Good solution
6. Good / informative customer support

**7.**

**Key Learnings & Conclusions**

# Key Learning Barter: A Popular But Complicated, Method Of Compensation

- On the whole, the barter method of compensation doesn't have a very strong reputation. However, among those currently using the method, perceptions are positive:



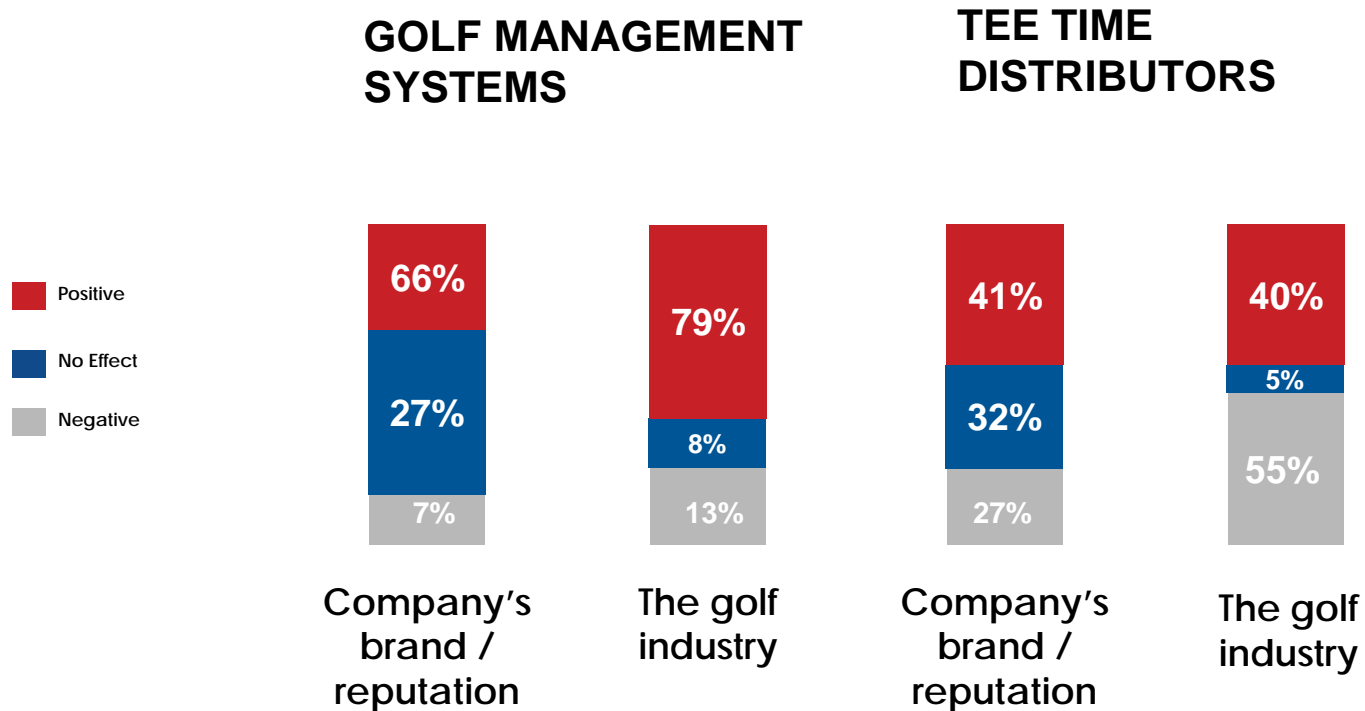
Currently the barter system is used much more as payment to Tee Time Distributors rather than Golf Management Systems (46% compared to 24% respectively).

# Impact of Software & Distribution Vendors on your Course

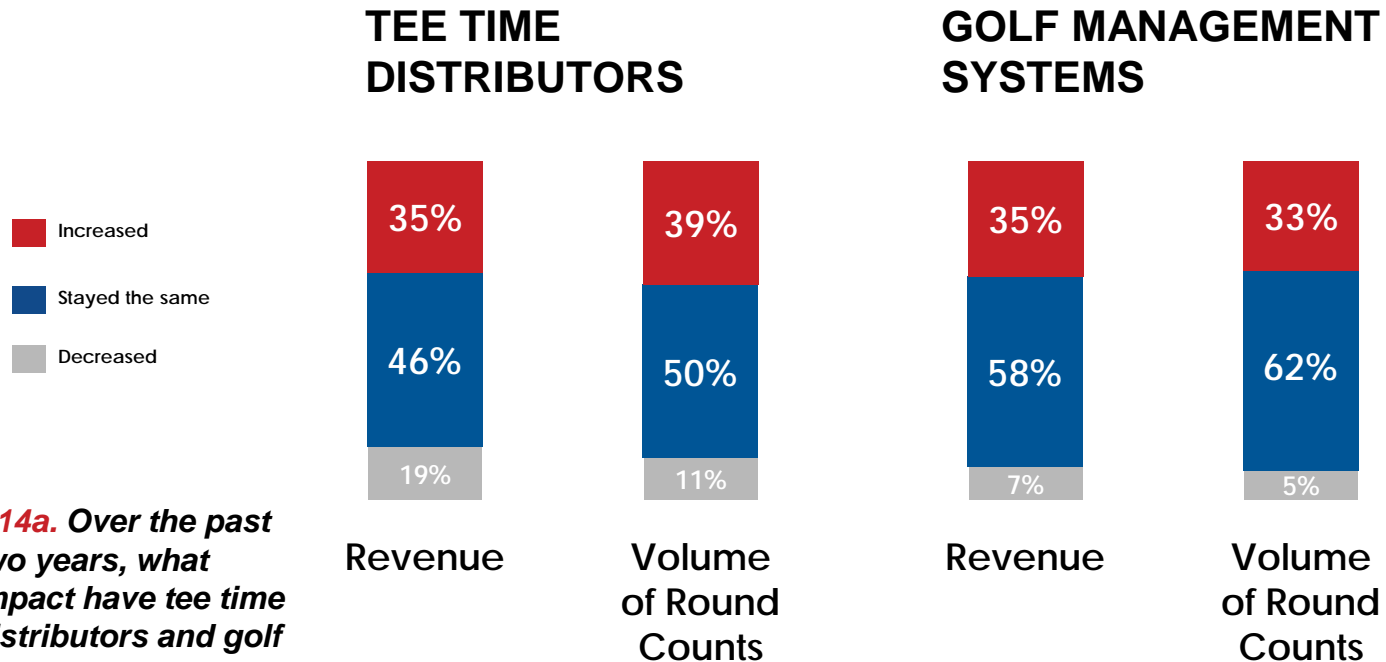
Company Type	Satisfaction	NPS	Key Issues With Supplier
Target Benchmark For a B2B	8.0-10	+24	N/A
Tee Time Distributors	6.6	-27	<ul style="list-style-type: none"> <li>- Price integrity</li> <li>- Poor customer service</li> <li>- Lack of impact</li> </ul>
Golf Management Systems	7.5	+1	<ul style="list-style-type: none"> <li>- Outdated technology</li> <li>- Inaccurate information posted</li> <li>- Competitors Product is Better</li> </ul>

# Key Learning: The Market Is Much More Positive About Golf Management Systems Than Tee Time Distributors

- Customers of Golf Management Systems are much more likely to think these systems have had a positive impact on their business and the golf industry at large compared to customers of Tee Time Distributors:



# Key Learning: Half of the Market Indicated That Third Parties Had Little To No Impact on Revenue and the Number of Rounds Played



**Q14a.** Over the past two years, what impact have tee time distributors and golf management systems had on your course's . . .



# Key Learning: Consistencies In Satisfaction Drivers Across Customer Type, But Different Aspects Of Service Valued

## TEE TIME DISTRIBUTOR SPECIFIC TOP DRIVERS

Accurate representation of pricing for barter-rounds

Flexible and amendable contract

Fair and reasonable pricing structure

Payment terms when adding services

Yield management tools

Respond to reviews, ratings and content

Honest marketing practices

Accurate display of discount percentages

Displaying honesty and integrity

Being easy to do business with

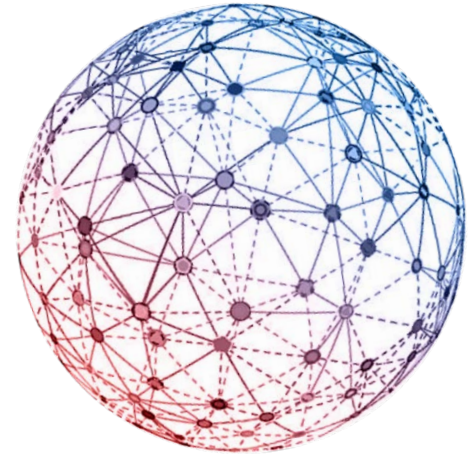
## GOLF MANAGEMENT SYSTEM SPECIFIC TOP DRIVERS

Full disclosure of all marketing channels used

Up-to-date inventory

Collection and transfer of customer data

- On the whole the things that drive satisfaction among golf course owners and operators are consistent when they deal with Tee Time Distributors and Golf Management Systems. Both types of business need to ensure they focus on building a relationship with customers, offer appropriate technology (yield management, respond to reviews etc.), and be honest around marketing (honest practices and accurate display of discount percentages).
- **Customers of Tee Time Distributors** are more likely be delighted by **a flexible contract and control over payment terms**.
- **Customers of Golf Management Systems** are more likely be delighted by **online marketing practices and collection & transfer of customer data**.
- The key difference between the two business types is that Golf Management Systems are better at satisfying customers than Tee Time Distributors.



# 2018

## Market Sentiment Study:

Online Tee Time Distributors & Golf Management Software Providers