



WHITEPAPER

# No-Shows Are Costing Golf Operators Over a Billion Dollars a Year in Revenue

How Technology and Policy Can Mitigate This Problem in 2025





When a group of golfers on the tee sheet “short shows” or “no shows” for a booked tee time, it might seem like a minor inconvenience for the operator. After all, that’s only one slot may or may not be filled. But add up the short shows and no-shows over an entire season and across the nearly 16,000 golf courses in the United States, and the negative financial impact is massive.

For clarity, short shows are defined when part of a group misses its tee time, and no shows are defined as an entire group missing its tee time. In this document, they are collectively referred to as no shows.

[Noteefy](#) and [Metolius Golf](#) analyzed more than 10 million rounds across 500-plus golf courses, finding that **9% of all tee times go unused due to no-shows, resulting in excess of \$1.2 billion in lost green fees annually**. The actual percent is expected to be much higher, because the 9% of no shows are only when the operators took the action of registering the no-show in the tee sheet, which can happen less frequently.

Factor in ancillary golfer spend in retail and food and beverage (F&B), and the median course operator in the U.S. is missing out on roughly **\$150,000 in total annual revenue** per course that should have otherwise been captured.

In this whitepaper we’ll break down

1. The size of the no-show problem,
2. What golf can learn from other industries (like Restaurant and Airlines) about preventing no-shows
3. Recommendations for policy and technology to mitigate this problem in 2025.



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## Understanding the Size of the No-Show Problem in Golf

By studying the NGF Economic Analysis Report: (AGIC\_Economic-Impact-Report) we can measure the size of the no show revenue impact in golf.

- **Average Public Course No-Show Rate:** 9% of all tee times result in a no show, based on a Noteefy / Metolius study of 500-plus courses and 10 million-plus rounds.
- **Total US Golf Courses:** 15,945 (73% are public)
- **Total Rounds Booked:** 531 million (387.63 million at public courses)
- **Average Rounds per Course:** 33,302

## Revenue Impact Course Operators is Well Beyond Green Fee Losses

- **Total Public Green Fee Revenue:** \$13.95B
- **Average Green Fee Revenue per Course:** \$1.2M
- **Average Total Revenue per Course:** \$1.69M (including ancillary spend)
- **Daily Green Fee Rate:** ~\$43.00 (Source - PGA: [By the Numbers: Golf in 2024](#))
- **Blended Revenue Per Tee Time:** \$54.86 (including ancillary spend)
- **No-Show Revenue Impact per Course:** ~\$103,419 (in green fees alone)



Tobacco Road, Sanford, NC | A Noteefy Course



## Only 33% of Course Revenue is coming from Green Fees on Average: The Total Blended Value Per Tee Time is Up to 50% Higher Than the Cost

Summarizing, the true blended impact of no-shows:

- **Lost Green Fees:** If your course relies heavily on public play (as most do), every empty slot translates to lost revenue that's difficult to recoup.
- **Retail & F&B Misses:** Golfers who skip their rounds also skip the chance to purchase food, drinks, merchandise, lessons and more.
- **Damaged Customer Experience:** A "booked" tee sheet might lead some legitimate players to look elsewhere. When they see you're supposedly full, you lose that potential business.

What's not factored here, albeit material and even more staggering, is loss of customer lifetime value and diminishing returns on cost of customer acquisition. Simply put, marketing costs to gain customers aren't optimized if a customer drops a course from his / her rotation over, say, a one, three or five-year duration, perhaps even over decades.



TPC Scottsdale - Stadium Course, Scottsdale, AZ | A Noteefy Course



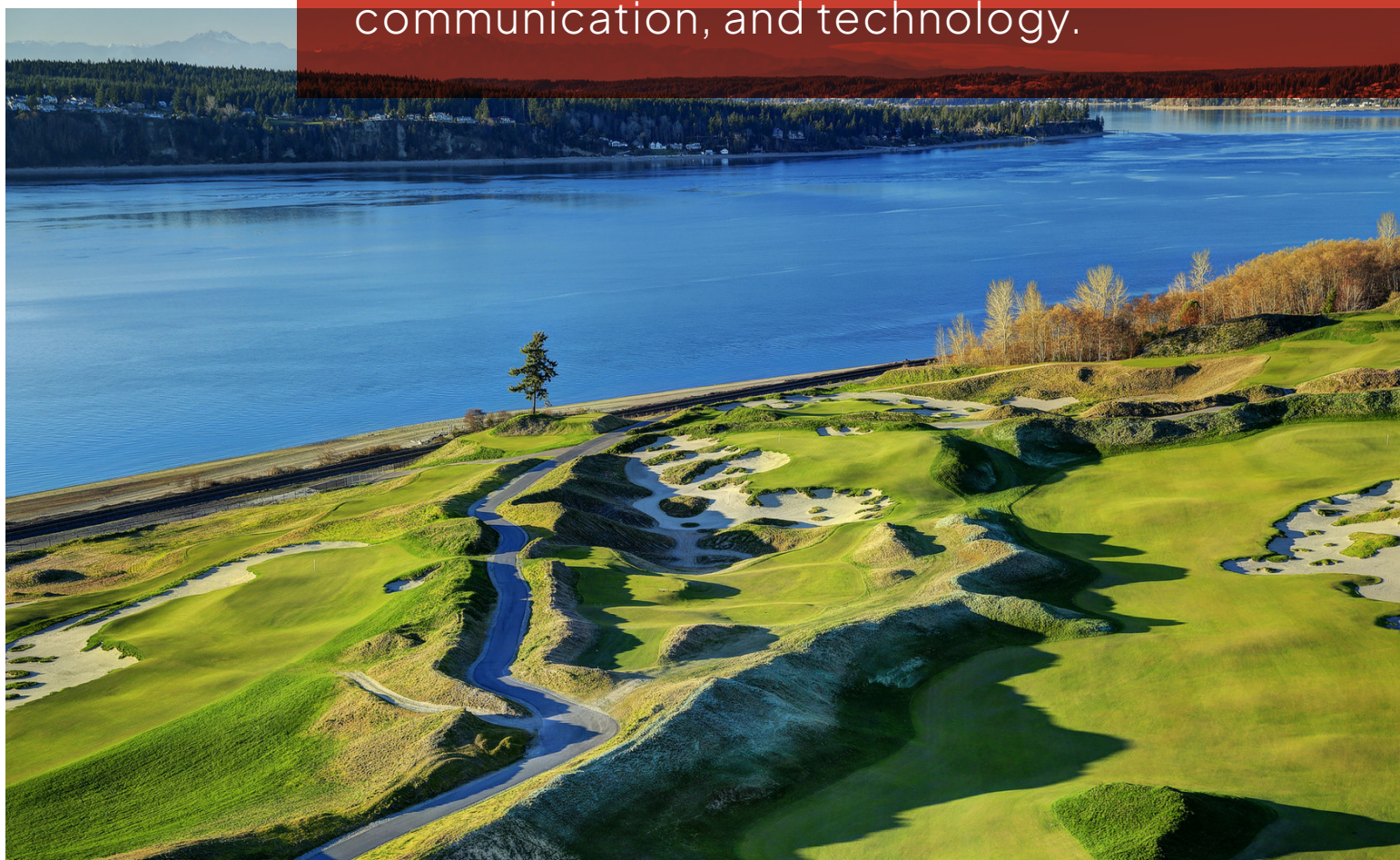


## Factoring Weather Impact into True Costs of No-Shows

As an outdoor sport played in seasonal markets, golf faces a risk of weather conditions impacting no-show rates with nothing an operator can do about it. Sometimes it rains or snows unexpectedly, wiping out playability for that day.

To properly account for no shows due to weather, Metolius and Noteefy analyzed more than four million tee sheet hours using Metolius's proprietary weather classification AI model. It revealed that 11.4% of no shows are due to unplayable weather conditions. This means that nearly 90% of no shows can be addressed by golf operators via improved booking policies, communication and technology.

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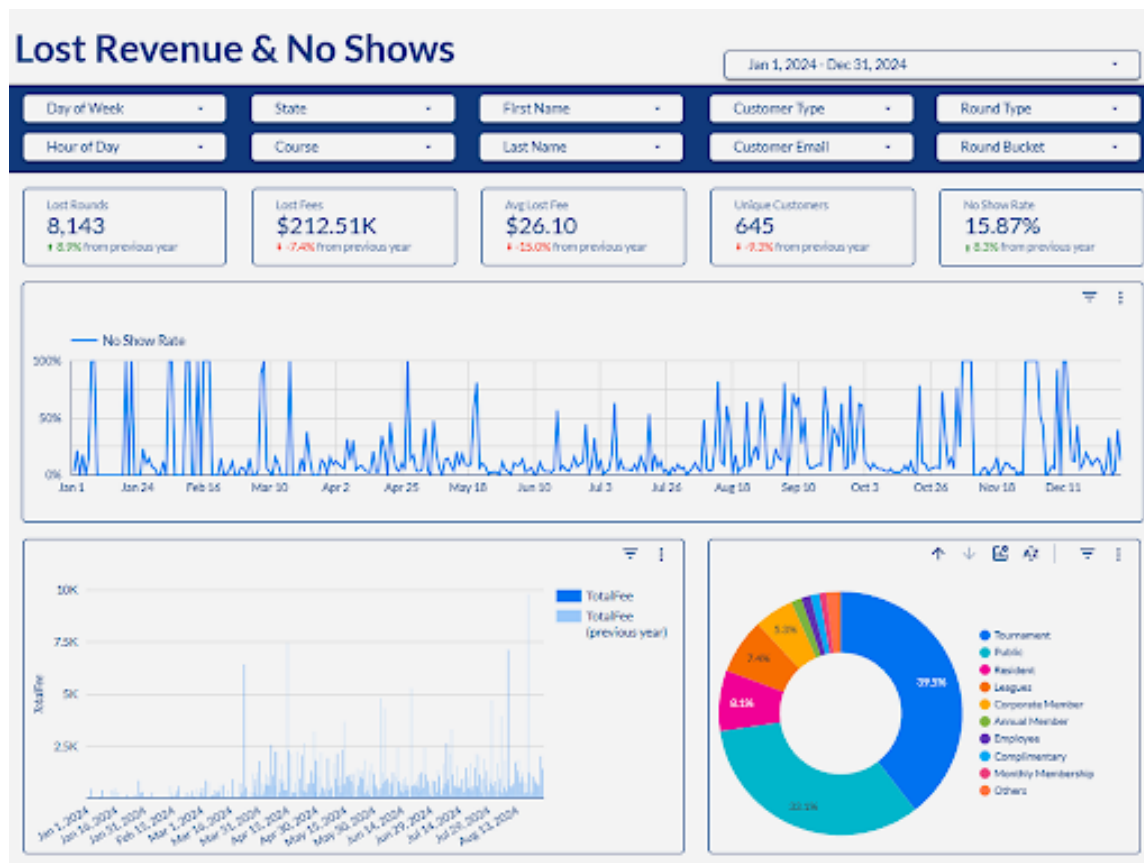


Chambers Bay, University Place, WA | A Noteefy Course



Case Study: Popular public course outside Denver is losing over \$200,000 in revenue on the table from lost no-shows.

Drilling into an individual course example- the below dashboard shows the \$200k+ impact of no-shows on a popular daily fee facility outside the Denver market. Despite it's popularity - over 8,000 rounds throughout the year resulted in a no-show or last minute cancellation.







## Why Do No-Shows Happen So Often in Golf?

**Lack of Commitment:** If a course doesn't implement a financial or policy-related consequence, some golfers book multiple tee times or simply fail to cancel. This is the primary driver of no-shows. As Charlie Munger said, "Show me the incentive and I will show you the outcome."

**Scheduling Conflicts:** Life happens—business calls and family obligations arise, or friends bail at the last minute.

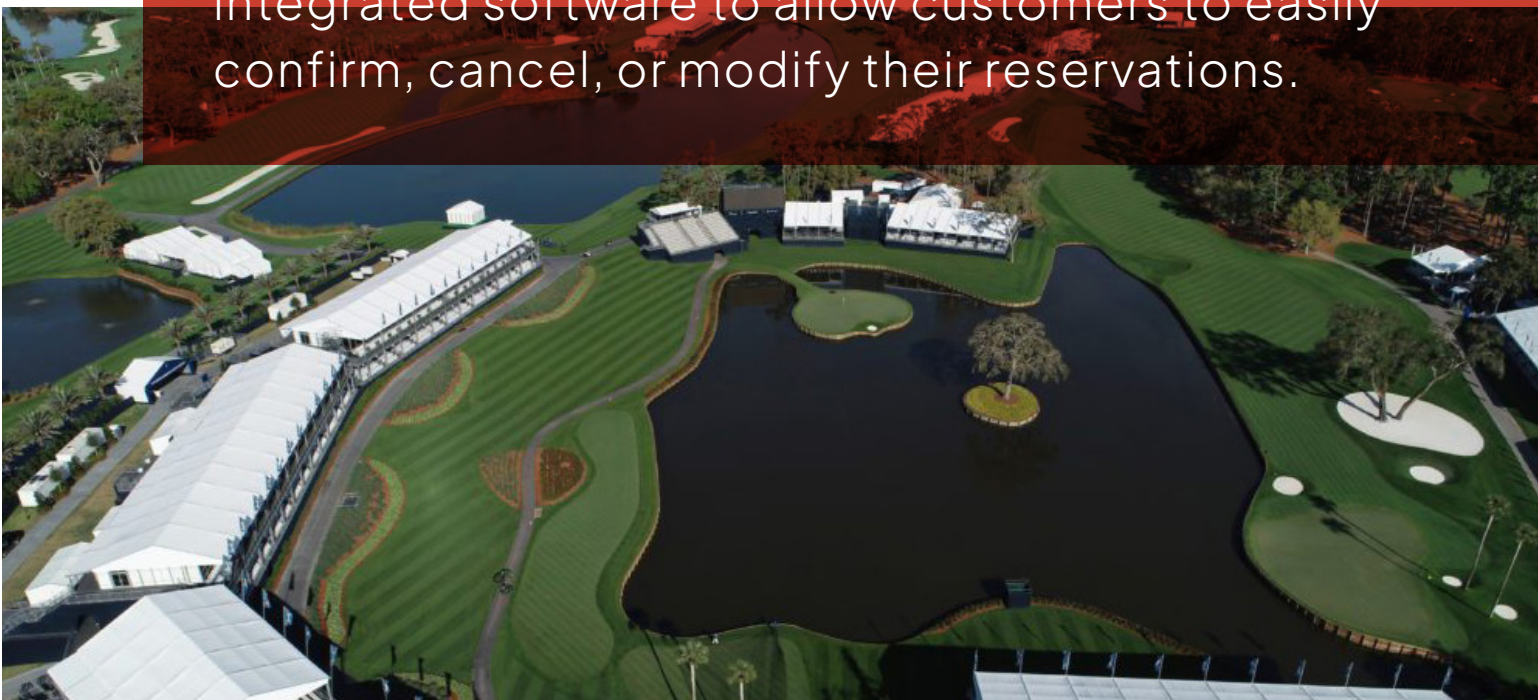
**Poor Weather Forecasts:** Rain, high winds, or excessive heat can scare away casual golfers, especially when there's no penalty for pulling the plug.

## No-shows are Not Unique to the Golf Industry: What Can Be Learned from Other Industries

Golf shares a similarity to industries like restaurants, hotels, airlines and even movie theaters that have perishable inventory and experience elevated rates of no shows.

A commonality is that an enforced cancellation policy coupled with the efficiency of technology is a key driver to keep customers, guests and constituents accountable and updated on their commitments. Restaurants and airlines, for example, utilize integrated software to allow customers to easily confirm, cancel or modify their reservations through SMS, chatbots and online portals.

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TPC Sawgrass - THE PLAYERS Stadium Course, Ponte Vedra Beach, FL | A Noteefy Course



## How the Restaurant Industry Approaches Solving No-shows

The golf industry faces a no-show problem strikingly similar to the challenges restaurants encountered before companies like OpenTable transformed how reservations are managed.

Both industries rely heavily on forward-looking reservation data to make critical decisions about staffing, resource allocation, and operations, with no-shows creating a ripple effect of inefficiencies and financial losses. Similar to a no-showed foursome, a single missed reservation can wipe out a restaurant's profit margin for a shift—a significant blow in an era of heightened financial pressure and staff shortages.

This problem is widespread. OpenTable's data highlights a staggering 28% of Americans say they haven't shown up for a reservation in the past year. What many don't realize is that cancelling is better than simply not showing up.

For example, at Philadelphia's Blackfish restaurant, if six people don't show up for one dinner, Blackfish loses 5% of its income – most of the restaurant's profit margin. This also doesn't include the impact on food and staffing costs, among other things, that no-shows have on restaurants since they make decisions based on reservations booked.

To address this, OpenTable launched its [“Show-Up for Restaurants”](#) initiative, combining customer education on the impact of missed reservations with technology-driven solutions like automated reminders, flexible cancellation policies, and penalties for habitual no-shows. Core to this strategy is OpenTable's “four strikes and you're out” policy, which swiftly addresses chronic no-shows by removing them from the reservation ecosystem. This ensures accountability while protecting restaurant operators from repeated losses.

For the golf industry, the stakes are equally high. An unfilled tee time isn't just lost revenue; it represents wasted operational capacity, inefficiencies in resource allocation, and diminished customer trust.

Borrowing lessons from the restaurant industry's proactive approach, golf operators must prioritize educating golfers about the broader impact of no-shows—not just on individual courses but on the overall golfing experience. Implementing tools like SMS and email reminders, reservation holds, and dynamic rebooking systems could transform how golf courses manage demand. Ultimately, just as OpenTable successfully aligned diner accountability with operational needs, the golf industry has an opportunity to leverage education and innovation to solve its own no-show problem and build a more sustainable, efficient future.

With the right combination of policy and technology, operators should be able to capture up 40–60% of no-shows this year – according to industry research from Restaurants and Travel.





## Suggestions for golf course operators looking to make an impact on no-shows in 2025:

### 1. Set your cancellation / no-show policy, then enforce it strictly by taking a credit card

#### CREDIT CARD CAPTURE

Requesting a credit card at booking sets an expectation and makes golfers more likely to commit or proactively cancel if plans change.

#### 24 & 48-HOUR CANCELLATION POLICY

Clearly communicate a deadline for cancellations. Enforce a small fee for no-shows or late cancellations to discourage casual booking.

### Example of what good looks like: Palm Beach County

Booking Rules for PBC: [Okeeheelee Golf Course - Online Booking](#)

*If you are unable to locate a tee time that fits your needs, we invite you to add your tee time preferences to the new Okeeheelee Tee Time Assistant to help connect you with your desired tee times.*

*Twilight Tee Times do not guarantee 18 holes. Carts are due back to the clubhouse as posted in the clubhouse.*

*A credit card is required to reserve a tee time. Cancellations must be made 24 hours in advance to avoid a no-show fee. Your card may be charged up to \$20.00 per player that does not get checked in. - See our NO-SHOW POLICY.*

*Please take a copy of your reservation either on your phone, or on paper in the unlikely event the course does not have a copy. When you need to cancel less than 24 hours in advance due to an emergency, please call us directly at 561-964-4653.*

*All booked rounds are for 2 players per cart. Single rider carts are based on availability. When available, a single rider surcharge will apply.*

The results? Palm Beach County has a no-show rate 75% below market average.

### How Palm Beach County Communicates Their No-Show Policy

#### PRE-PAY (PROS & CONS)

Pros: Strongly deters no-shows and secures guaranteed revenue.

Cons: Many golfers may resist full pre-payment, especially if they're concerned about weather or scheduling conflicts. Additionally - this creates significant friction among golfers who are booking to lock in the rate for the full group in many cases.



## 2. Improved Technology

### Automated Reminders in Tee Sheet Systems

Email or text reminders reduce inadvertent no-shows. These messages can prompt golfers to confirm or cancel, opening up slots for others if they can't make it.

### Automated Confirmation Texts & Digital Waitlist

A service like Noteefy automatically confirms tee times and manages waitlists. When a golfer cancels, the system can instantly alert the next person on the waitlist, drastically reducing the chance of wasted slots.

In Conclusion: No-shows are a billion dollar revenue problem for golf, but are preventable and “low hanging fruit” for new revenue in 2025.

No-shows might be a billion-dollar headache for the golf industry, but they're far from an unsolvable problem. By tightening up policies and leveraging automated technologies, your course can turn many of those losses into revenue. The goal isn't just to impose stricter rules—it's to create a more efficient operation that respects both the golfer's time and your bottom line.

Remember: every slot recaptured is more than just a green fee gained—it's a customer experience enriched, a pro shop sale made, and like an increase in F&B purchase secured. In a competitive market, that kind of advantage can drive loyalty, profit, and growth for seasons to come.

Sources:

*NGF: 2024-NGF-Rounds-Played-Summary.pdf*

*PGA: By the Numbers: Golf in 2024*

*NGF Economic Analysis Report: AGIC\_Economic-Impact-Report-2023.pdf*





# GOLF'S **#1** DEMAND TECHNOLOGY

Maximize revenue, operations, & customer experience