BEYOND THE BAYS

The Economics of Utilization and Revenue for Indoor Golf Facilities

2026 Indoor Golf Industry Report

Yardstick Golf

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Executive Summary

This report is based on the 2026 Indoor Golf Industry Survey, a study of 38 simulator operators across North America and the UK, run by Yardstick Golf and the Indoor Golf Alliance. It examines how operators define peak, shoulder, and off-season periods, how bay utilization fluctuates across those periods, and what role structured play (leagues, tournaments, and coaching) plays in transitioning a sim facility from a novelty destination people try only occasionally into an exciting experience that draws them back again and again.

The findings in this report reveal a consistent story. Leagues generate the highest value for sim operators in the shoulder season, when a facility can't predictably rely on walk-in traffic to fill bays. Our research indicates a facility running a league of 50 to 100 players sees shoulder-season utilization nearly double what a non-league facility records in the same time window. Beyond utilization, the visit-frequency differential between league participants and casual customers compounds into a significant per-player revenue potential.

Put another way, what do leagues mean for a sim operator? Think of two restaurants on the same street with a similar menu. One survives on whoever walks in that night. The other has tables booked weeks in advance, so management can plan, staff up, and deliver a great evening of entertainment. Sim facilities work the same way. Those operators that run leagues fill their bays 44% of the time over a year. Those without leagues fill them 29% of the time. League players also come back about 2.7 times as often as casual customers. That steady, repeated traffic is what makes a facility successful. Without it, you're the restaurant hoping for a good night. One business grows. The other gets by.

44% vs 29%	**2.7×**
avg. bay utilization: league vs. non-league facilities	more visits per year: league players vs. casual customers

Not every finding here carries the same weight. The utilization gap and the visit-frequency gap rest on the full survey sample and are stated as fact throughout this report. Other findings, including coaching's relationship to utilization, differences between dedicated simulator facilities and green grass clubs with simulator facilities, and the effect of specific pricing structures, rest on small subgroups of three to six respondents and should be understood as directionally useful but not statistically proven. Each of those subgroups is flagged where it appears.

This report is written for three audiences: (1) indoor golf operators; (2) dedicated simulator venues; and (3) green grass facilities with simulator facilities, who might be or should be evaluating if structured play is worth the operational investment it takes to execute.

Methodology

The 2026 Indoor Golf Industry Survey was distributed between early June and mid-July 2026 through three channels: an existing network of simulator golf operators, Yardstick Golf's operator network, and the Indoor Golf Alliance mailing list and member forum. The survey took approximately five minutes to complete and asked operators to report on facility profile, seasonality definitions, bay utilization by season, league and coaching programming, league pricing model, and customer visit frequency.

This report draws on 38 completed responses to the broad survey. A subset of respondents who opted in were invited to a follow-up with a ‘deep-dive survey’ covering fee structures, programming formats, audience segments, and revenue detail. Where deep-dive data appears in this report, it is identified as a single-operator response, not a benchmark.

Respondents self-reported which months they considered peak, shoulder, and off-season for their market, then estimated bay utilization as a range (under 20%, 20-40%, 40-60%, 60-80%, 80%+) for each period. This report uses the midpoint of each range when averaging across respondents. “League participant” was left to each operator's own definition, which generally meant anyone registered in a structured, recurring competition at the facility, as distinct from a one-off tournament entrant or a walk-in customer.

Facilities are grouped throughout this report as either dedicated simulator facilities (indoor-only venues) or green grass facilities (traditional courses or clubs with simulator bays), based on how each respondent characterized their operation.

Survey Limitations

This report targets 60 to 80 broad survey responses as the threshold for statistical confidence. At 38 responses, the study is short of that mark, and the findings below should be evaluated with that caveat in mind.

Two findings, the utilization gap between league and non-league facilities and the visit-frequency differential between league and casual customers, are based on the full, or nearly full, sample: (24 to 32 responses depending on the specific question. These findings are stated as fact throughout this report.

Several other findings rest on subgroups of three to six respondents: the relationship between coaching and utilization, differences by facility type, and the effect of specific league pricing models. These are flagged as directional wherever they appear in this report and should be treated as hypotheses worthy of further investigation through the deep-dive interviews now underway, not as statistical conclusions.

Findings

1. Seasonality: When Operators Win and Lose the Year

Most operators in this survey describe a season that follows the outdoor golf calendar in reverse: bay utilization peaks in the months when outdoor golf isn't an attractive option and declines once outdoor golf resumes. This pattern isn't universal, and where it breaks down matters for an operator when thinking about structured play programming.

Cold-weather operators

Operators in the Northeast and Midwest U.S., and Canada report almost unanimously characterize January and February as peak season. That peak erodes quickly: April, September, and October, roughly half the operating calendar, are where these operators describe shoulder-season conditions, with utilization well below the January-February high. The shoulder season, not the deep winter or the summer trough, is where a successful fiscal year is won or lost for these facilities.

Cold-weather operators (n=22)	J	F	M	A	M	J	J	A	S	O	N	D
Peak	100%	100%	86%	27%	5%	–	–	–	–	36%	77%	82%
Shoulder	–	–	18%	77%	36%	5%	5%	5%	59%	55%	27%	14%
Off-season	–	–	–	18%	77%	91%	95%	95%	45%	14%	–	–

Northeast, Midwest, Canada. Cell shows % of cold-weather respondents who tagged that month for that season. Months not mutually exclusive across seasons.

Warm-weather operators

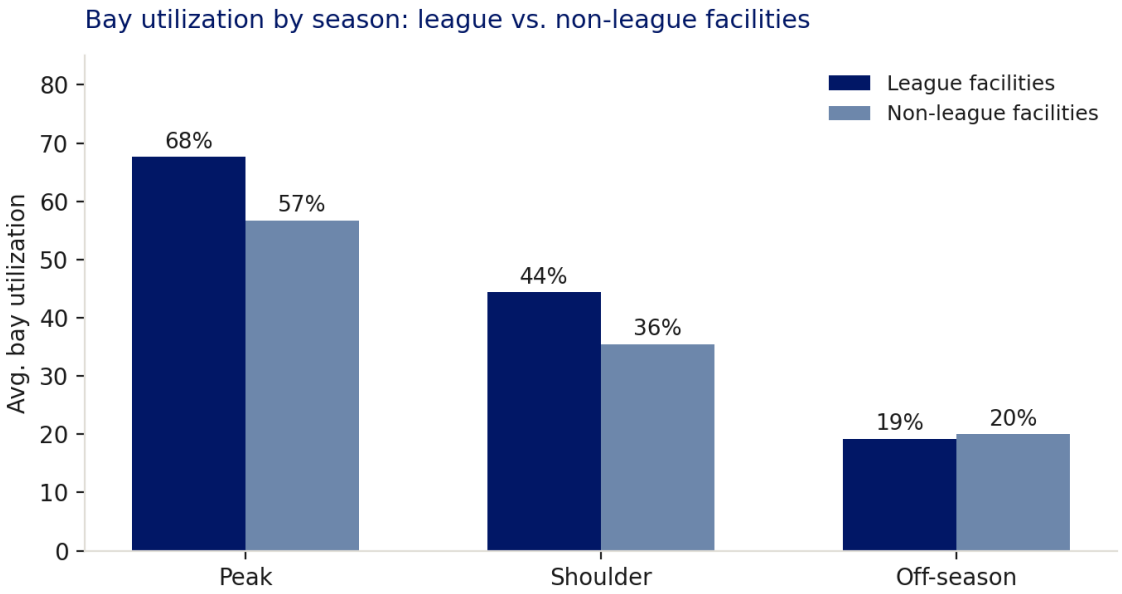
Operators in the South, Southwest U.S., and the UK don't show the same seasonal dynamics. Peak-season designations are spread evenly across the calendar, and there's no predictable slow season to manage. For these operators, the case for structured play isn't about maximizing a shoulder window. It's about creating a demand structure that grows the business irrespective of the annual calendar, since utilization without programming tends to stay flat rather than dip predictably.

Warm-weather operators (n=9)	J	F	M	A	M	J	J	A	S	O	N	D
Peak	56%	56%	67%	22%	44%	44%	56%	33%	33%	44%	44%	56%
Shoulder	–	14%	57%	57%	29%	29%	14%	29%	57%	57%	43%	–
Off-season	50%	25%	–	38%	38%	38%	38%	38%	38%	25%	12%	38%

South, Southwest, UK. Cell shows % of warm-weather respondents who tagged that month for that season. Small group (n=9); directional. Months not mutually exclusive across seasons.

2. Leagues and Structured Play

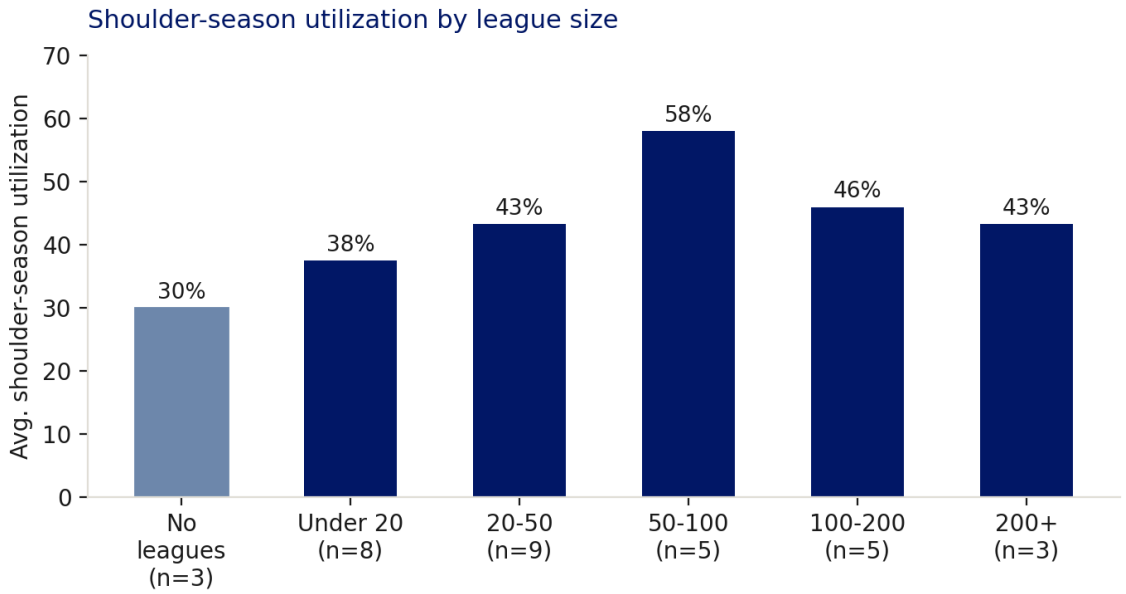
According to the full survey, facilities running leagues average 44% bay utilization for the year. Facilities without leagues average 29%. However, that differential isn't distributed evenly across the season.



Bay utilization by season, league vs. non-league facilities. Peak: n=37. Shoulder: n=36. Off-season: n=36.

The utilization gap is widest during peak and shoulder months, when a league calendar generates recurring bay commitments that don't depend on walk-in traffic. It narrows sharply in the off-season, where league and non-league facilities land within a percentage point or two of each other, reflecting that few operators run active leagues during their slowest months.

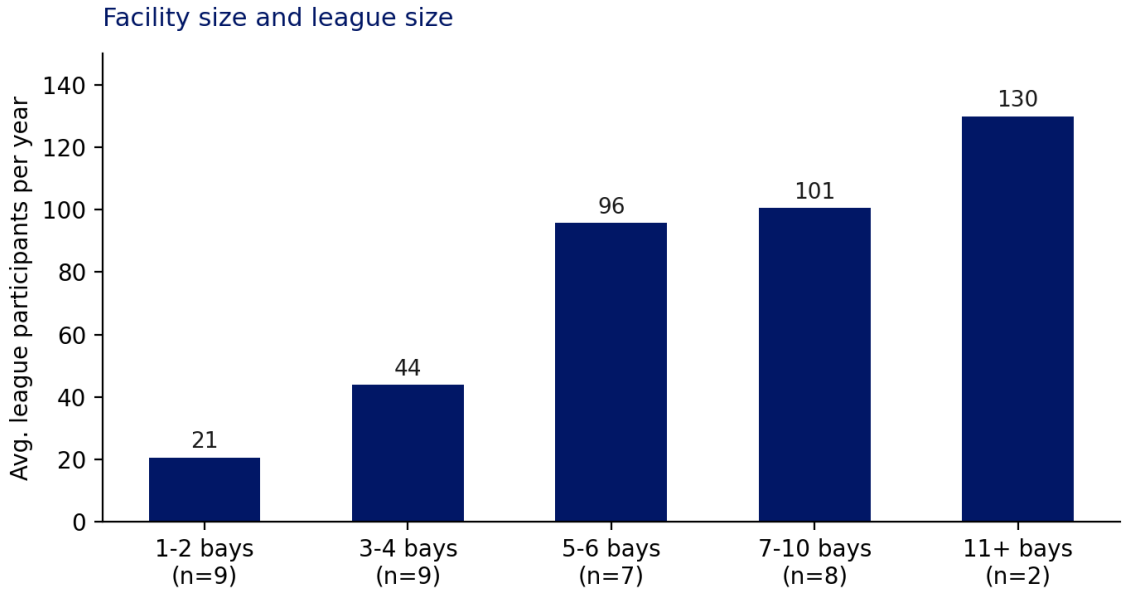
League size and the shoulder-season sweet spot



Average shoulder-season utilization by number of league participants per year.

Facilities running leagues of 50 to 100 participants see shoulder-season utilization around 58%, or nearly double the 30% reported at facilities with no league play at all. This finding is arguably the most significant finding in the current data. Above 100 participants, the shoulder-season effect moderates, which may reflect that very large leagues concentrate on playing in peak months rather than spreading it into the shoulder. This pattern is worth confirming in the deep-dive interviews.

Facility size and league size



Average league participants per year by number of bays.

Larger facilities run bigger leagues, unsurprisingly, but the scale of the relationship is worth calling out: a 1 to 2 bay facility averages 21 league participants a year, while a 7 to 10 bay facility averages 101, roughly five times as many. That's a reasonable planning input for an operator developing a new league program corresponding to their bay count, though the sample buckets above are small (2 to 9 respondents each) and a facility with fewer bays running a larger, tighter-scheduled league isn't ruled out by this data.

Note: *the facility-size comparison is based on 2 to 9 respondents per bay-count bucket and should be read as directional.*

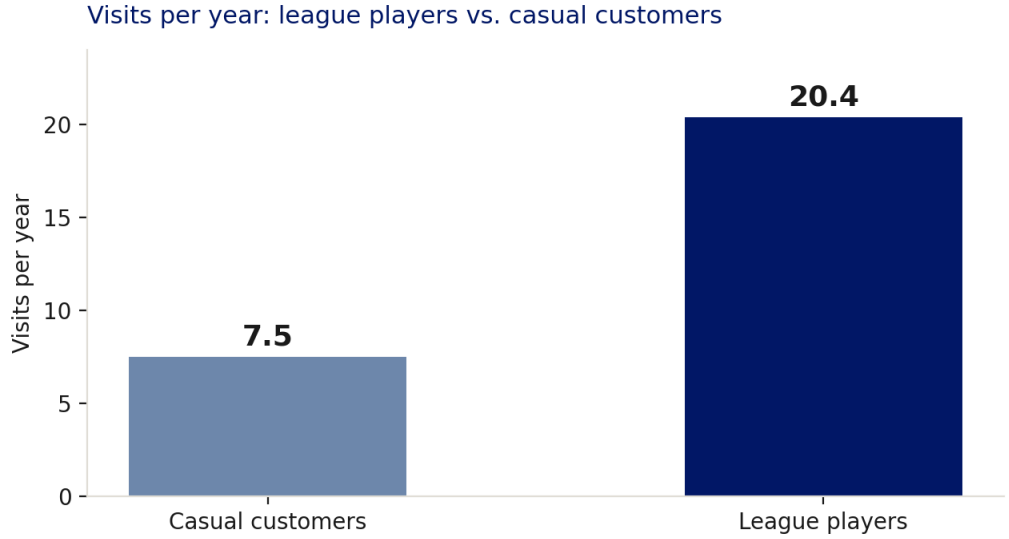
Fee structures

Operators running leagues split evenly between two pricing approaches. Half charge a league entry fee plus bay charges for play; 40% charge a single-entry fee that covers everything, including bay time, prizes, and F&B where offered. In this sample, the all-inclusive model shows a modestly higher average shoulder-season utilization (47%) than the entry-fee-plus-bay-charges model (43%), though with 13 and 15 respondents in each group, that difference is too small to treat as a real effect.

Note: *the fee-structure comparison above is based on 13 to 15 respondents per pricing model and should be read as directional.*

3. Visit Frequency and Engagement

League players visit 20.4 times a year on average. Casual customers visit 7.5 times. That's a 2.7x differential, and it's one of the two most significant numbers in this study.



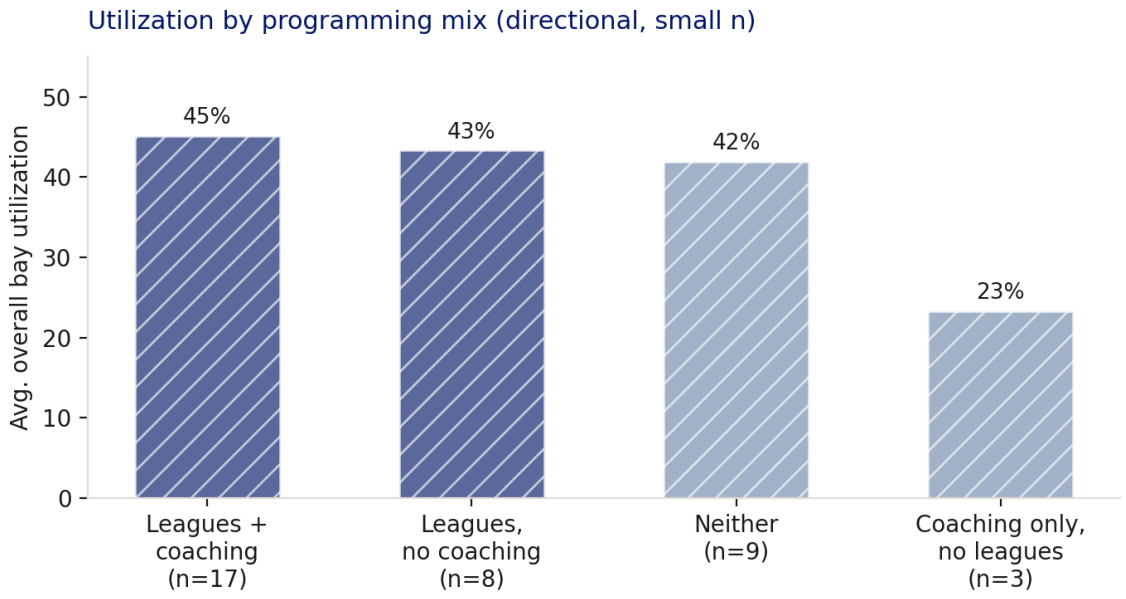
Average visits per year, league players vs. casual customers. n=32.

For context, the entertainment and hospitality industry averages 1.3 visits per customer per year overall. Even casual simulator customers, at 7.5 visits, already outperform that baseline by a wide margin, which says something about the format's inherent stickiness before any programming is added. League players are performing closer to a restaurant regular (roughly 22 visits a year) than to a Top Golf visitor (1.2 to 1.5 visits a year).

85% of sim survey respondents reported that leagues increase customer engagement at their facility, and just over half of those characterized the increase as significant, meaning more than a 10% lift in utilization.

4. Coaching

Coaching shows a more complicated relationship with utilization than do leagues. Facilities that run both leagues and coaching programs average the highest utilization in the survey (45%), narrowly ahead of league-only facilities (43%). That's the expected pattern: coaching attracts an incremental cohort of players who are already comfortable at the facility and therefore natural candidates to join a league.

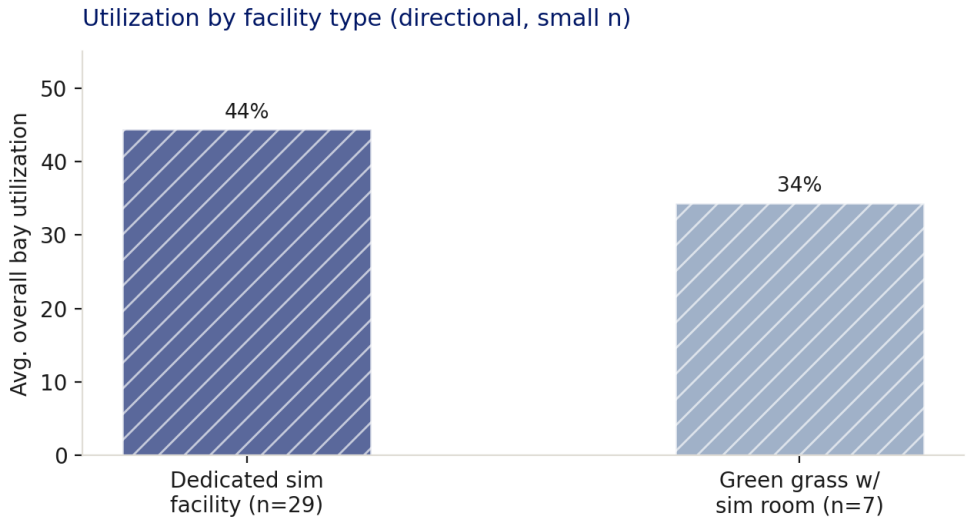


Average overall bay utilization by programming mix.

A counterintuitive result is what results when coaching is the solo structured program. Facilities offering coaching but not leagues average 23% utilization, lower than facilities offering neither leagues nor coaching (42%). This is based on just three respondents and shouldn't be treated as a real effect until and unless it shows up in a larger sample. But it's worth calling out: coaching without a structured program to funnel players into leagues may not be doing the retention work operators assume. If lessons don't lead somewhere, for example, to a league, a tournament, or a standing rebooking, they may function as a one-off service rather than a driver of repeat visits.

Directional: *the coaching-without-leagues comparison is based on a sample of n=3 and should be read as directional rather than conclusive.*

5. Facility Type Differences



Average overall bay utilization by facility type.

Dedicated simulator facilities average higher utilization (44%) than green grass clubs with a simulator room (33%) in this sample. That difference could reflect several things this survey wasn't built to isolate dedicated sim facilities may run more aggressive league programming, may serve a dedicated customer base built specifically around the simulator experience, or may simply prioritize the simulator business differently than a club where it's a simply a club amenity seemingly unrelated to the outdoor course operation.

Note: *the facility-type comparison is based on 29 dedicated-facility and 7 green-grass respondents and should be read as directional. This is a specific question the deep-dive interviews are built to test.*

6. Revenue Implications

Applying standard per-visit economics, a $35-per-hour bay rate, a two-hour average visit, and a $150 seasonal entry fee, to the visit-frequency differential produces a significant per-player revenue difference. A league player generates an estimated $1,200 to $1,500 a year depending on pricing model, against $525 to $675 for a casual customer. That's a positive difference of $675 to $825 per player, or roughly 2.2 to 2.3 times more revenue per player converted from casual visitor to engaged league player.

+$675–$825 estimated annual revenue lift per player converted to a league	**$9,900** estimated annual value of even the smallest league (under 20 players)

For a facility running a league of 50 to 70 players, that per-player lift translates to somewhere in the neighborhood of $40,000 to $75,000 in annual incremental revenue. Even the smallest league, under 20

players, leagues are worth an estimated $9,900 incremental revenue a year versus running no leagues at all.

This model doesn't separate food and beverage spend by league participants versus casual visitors, which may be a potential profit pool worth understanding. Sam Weatherhead, at Links & Drinks, described league players compounding their F&B spend through takeout food orders during slow shoulder-season weeks. Kathy Bailey, at 19th Hole in Mokena, IL, estimated roughly $30 in incremental F&B and merchandise revenue per league per session in her facility's deep-dive response, another reported finding worth investigating with a larger sample.

Revenue model assumptions: $35/hour bay rate, 2 hours/visit, $150/season entry fee, 15 league visits/year, 7.5 casual visits/year, $20 F&B/visit where applicable. Source: Yardstick Golf analysis of 2026 Indoor Golf Industry Survey data.

Operator Spotlights

The findings above describe the survey data in aggregate. The two accounts below come from operators who agreed to be interviewed: an operator, from the panel discussion that accompanied this survey's preliminary results; and an operator from the first completed response to the deep-dive follow-up survey.

Sam Weatherhead, Links & Drinks Indoor Golf Bar — Oconomowoc, WI

Links & Drinks runs six bays (Full Swing Pro 2.0) alongside a full bar, over 80 bourbons, 30-plus tequilas, ten beers on tap, and a deliberately simple kitchen built around a single dual Turbo Chef oven. Weatherhead joined as a bartender when the facility opened roughly three years ago and pitched the ownership group, none of whom were golfers, on restructuring their first fall league. The facility now runs three league seasons a year: a smaller spring league (60 to 80 players over six weeks), a fall league (100 to 120 players, ten weeks), and a winter league that's grown into the facility's largest program, capped at 240 players over ten weeks. The competitive format is two-person team best ball. Weatherhead added a local rule after an early season revealed a flaw: a strong golfer paired with a weaker one under traditional best ball effectively benched the weaker player. Under the current format, the second ball breaks ties, so every stroke from both players still counts for the match.

Pricing is a single upfront fee per team, split into playing credits rather than a weekly bay charge. This model lets Weatherhead track who has and who hasn't paid without the need to invoice each week. He credits Golf Genius directly with making a 240-player league operationally possible: “It takes a huge load off my plate versus what I was having to do with paper and pencil scorecards during that first league season.”

To accommodate the large roster using only six bays, Weatherhead extended league play windows incrementally rather than all at once, opening Fridays until 6pm (up from 5pm) and adding all-day Sunday league play, which created room for 40 to 50 additional league players without displacing the walk-in customers he still wants on Friday and Saturday nights. He described league players as the facility's most loyal customers by a wide margin: “We see them not just on their league nights or on a rainy day in April. We're going to be their first thought of a place to come play.” Each league season ends with a bracket-style championship and player party, with first-place prizes typically set to match a team's entry fee.

Kathy Bailey, 19th Hole — Mokena, IL

19th Hole runs multiple concurrent leagues each season, including two simultaneous winter leagues with combined participation of over 200 players. Pricing combines a seasonal registration fee ($200 per player) with per-session bay rental ($35 per hour for a typical two-hour, 18-hole round), funding a $25,000 seasonal prize pool drawn from registration revenue.

Bailey described league revenue as “very predictable — leagues smooth out our cash flow significantly,” and estimated roughly $30 in incremental food, beverage, and merchandise revenue per league play

session. League play currently accounts for an estimated 40% of the facility's annual simulator revenue, against 60% from casual play. Asked what she'd tell a new operator starting a league program, Bailey pointed to a process decision made early: flight every player by handicap from the start, rather than beginning with two broad divisions, which she credits as a key driver of the program's growth over time.

Implications and Recommendations

If you don't run leagues yet

Even a small league, under 20 players, is worth nearly $10,000 a year versus running no leagues at all. Schedule when business activity is weakest: April, September, and October for cold-weather markets, or any month at all for warm-weather markets without a customary slow season.

If you run a small league (under 50 players)

50 to 100 participants is the point where shoulder-season utilization nearly doubles in this data. Coaching is a natural feeder for league recruitment, but only when it's paired with an actual invitation to join. Left on its own, sim coaching programs don't show the same utilization benefit that leagues do.

If you run an established league

Check whether your food and beverage pricing and staffing reflect how often your league players actually show up. At 20-plus visits a year, they're a fundamentally different customer than the one your general pricing may be built around. Track how many coached players convert into league members: that conversion rate is the next lever available to most operators in this survey, and it's not one the current data set was built to measure directly.

About the Partners

Yardstick Golf

Yardstick Golf studies what drives profitability in indoor golf, using surveys, benchmarking data, and research across hundreds of operators to identify the factors that separate a break-even facility from a thriving one. That research underpins a set of practical tools for operators and prospective owners, including a business planning toolkit and a startup financial forecast built specifically for golf simulator businesses, modeling realistic utilization, revenue, and cost assumptions for the format.

https://yardstickgolf.com/open-a-golf-center/