

2026

The 2026 Indoor Golf Membership Pricing Benchmark

What operators charge for entry, standard, and premium membership tiers — built from **460** facilities.



By **Josh Ray**,

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OPERATOR-GROUNDED
DATA FOR INDOOR GOLF
SIMULATOR FACILITY
OWNERS.

\$159

ENTRY TIER

\$189

STANDARD TIER

\$225

PREMIUM TIER



460 FACILITIES
ANALYZED



TIER-AWARE DATA.
CLEAR CONFIDENCE.



ACTIONABLE INSIGHTS
YOU CAN USE.

Foreword

I built this benchmark because I needed it for myself.

I own a small indoor sim facility in Oak Harbor, Washington. When it came time to set our membership price, I did what every operator does: I looked at four other places within driving distance, picked a number that felt close enough, and hoped.

If you've been through this, you know the version of it that doesn't show up in operator forums. *What if I price too high and nobody walks in? What if I price too low and leave real money on the table for the next two years? What if I get it wrong and I have to raise rates on members who already signed up — how badly does that go?* Those were the what-ifs that kept me up the week before I pulled the trigger. I'd run a spreadsheet, change one number, run it again, and by midnight I'd have a different answer than I had at 9 PM. Every operator I've talked to since has told me some version of the same story.

"What does the rest of the country actually charge?" was the question I could never answer with anything except guesses and a few Reddit threads.

So I started keeping a directory. It grew. Eventually it became 3,670 indoor golf simulator facilities across all 50 states, with whatever pricing each one publishes on their website. Alongside it, I analyzed 2,737 posts and 20,537 comments from indoor-golf operator discussions in industry groups and forums I had access to — the conversations where operators ask each other things like *"is \$179 too low for a 4-bay club in a town of 30,000?"* and get real, occasionally uncomfortable, answers.

This eBook is the analysis of that data.

A few honest disclosures before you read further:

I own a facility AND I'm building a software platform for facilities like mine — SnagATime. Those are two different hats, and I've tried to write this with the operator hat on. You'll find one CTA at the very end of the document. There are zero feature pitches in the body. Where I name booking-software vendors (Birrdi, Bookedbays, uSchedule, AllBooked, Registry, VTee Golf), I name them honestly, including in places where their pricing may be a better fit. The data is the data.

Every number in this document is labeled with its sample size and a confidence tier. Where possible, we provide the methodology, sample sizes, and confidence framing so you can judge how much weight to put on each finding. If a claim has fewer than 30 data points behind it, I tell you. If it has fewer than 10, I tell you that too and call it anecdotal. Where the data isn't strong enough to support a comparison cleanly, I don't publish the comparison — and I tell you why in the methodology section.

This is the pricing benchmark I wish someone had handed me three years ago.

— Josh

THE HEADLINE NUMBERS — WHAT 460 FACILITIES ACTUALLY CHARGE

\$159

ENTRY TIER

\$189

STANDARD TIER

\$225

PREMIUM TIER

Median monthly membership at the standard tier, by facility. Full distribution + per-cohort cuts in sections 4 and 5.

How to read this benchmark

This benchmark is organized into six parts. You don't need to read it linearly.

If you're pre-launch and figuring out where to set your membership price, start with Part I (the 14 models) and Part V (the decision tree). The middle sections are reference data you'll want later.

If you're already operating and considering a model change, start with Part III (model trade-offs) and Part IV (success stories + cautionary tales). The per-reservation pricing trap section (section 8) is for operators currently paying per-reservation booking-software fees who are watching their margins disappear during peak season.

If you just want the numbers, jump to Part II — sections 4 and 5. Median, distribution, breakdown by chain status, by bay count, by city size, by state.

If you want to understand the methodology and the limits of what this data can claim, read Part II section 3 first.

Every chart in this document includes its sample size (n=...) and a confidence tier in the caption. Confidence tiers are:

- **High** — at least 75 data points. Stable enough to act on.
- **Moderate** — 30 to 74 data points. Directional; verify against your local market.
- **Low (suggestive)** — 10 to 29 data points. A signal, not a conclusion.
- **Insufficient (anecdotal)** — fewer than 10 data points. A story, not statistics.

Anywhere a confidence tier isn't shown, it's because we declined to publish that cut at all. Those decisions are listed explicitly in section 3.

Part I — What’s actually happening in the field

1. The 14 indoor golf membership models we observe in the wild

Most operator content treats the membership question as a binary: *private vs. hybrid*. The reality is more granular, and the granularity matters because the wrong model can quietly bleed margin even when the price looks right on paper.

After classifying 1,859 facilities that offer some form of membership and applying the tier-aware extraction to the 460 facilities with parseable pricing (plus qualitative reads of the operator-conversation corpus), we identified 14 distinct membership models in active use today. Some are common. Some are rare. A few we observe at exactly one or two facilities and include here only as edge cases.

For each model below, you’ll get a one-paragraph definition, a real-world example (anonymized unless we have explicit consent to name the facility), the typical price band where we observe it, and a “who this fits” call-out.

1.1 Members-only / private (no walk-ins)

The facility sells memberships exclusively. Walk-in customers cannot book a bay at any price. Members typically get 24/7 access via a smart-lock or app-based door system, and the operator’s labor cost is nearly zero outside of cleaning and maintenance.

Typical price band: \$99–\$200/month. Lower than most hybrid models because the value proposition is access, not amenity.

Who this fits: small-to-mid-size facilities in markets where there’s enough demand to fill a recurring-revenue pipeline but not enough to staff a full retail operation. Common in towns of 15,000–60,000 population. Common at 1–4 bay facilities.

The trade-off: lower customer acquisition reach (you can’t attract one-time bachelor-party bookings or corporate events) in exchange for high revenue predictability and minimal staffing.

1.2 Hybrid (members + drop-in)

The facility sells memberships AND accepts walk-in/drop-in customers at a higher per-hour rate. Members get priority booking, discounted rates, sometimes 24/7 access while drop-ins are limited to staffed hours.

Typical price band: \$150–\$300/month for the membership; \$35–\$60/hour for drop-in.

Who this fits: facilities with 4+ bays in markets large enough to sustain both audiences. The dominant model among chain locations. Also the most common pre-launch choice for new entrants who don't yet know which audience their location actually serves.

The trade-off: more complex pricing rules (member rate vs. public rate, member time blocks vs. open booking), and member-vs-public price tension when peak hours fill with drop-ins paying more than members.

1.3 Public–first with loyalty (no formal membership)

The facility runs as a pay-per-visit business and uses a loyalty program — punch card, app rewards, repeat-customer discount — instead of a recurring membership. No flat monthly fee, no recurring billing.

Typical price band: N/A — no monthly. Hourly drop-in is the operator's actual product, typically \$35–\$50.

Who this fits: entertainment-forward venues with strong F&B sales. Venues where a recurring membership would cannibalize higher-margin one-time spend (cocktail-and-bay groups, birthday parties).

The trade-off: zero recurring revenue floor. Every month's revenue starts at \$0 and depends entirely on demand.

1.4 Founding members (discounted rate for first N members)

The facility offers a steeply discounted lifetime or multi-year rate to the first cohort of members — typically the first 25, 50, or 100. Often used as a pre-launch funding mechanism.

Typical price band: \$79–\$129/month locked for life or for 1–3 years, vs. a regular rate of \$149–\$249.

Who this fits: pre-launch operators who need cash before opening, OR operators in saturated markets who need a launch hook to compete with established competitors.

The trade-off: founding members live forever (or close to it). Three years in, you may have 40 founders paying \$89/month while new members pay \$199. The math gets uncomfortable around year 3–5. We discuss this in section 11.

1.5 Tiered (Bronze / Silver / Gold or equivalent)

The facility offers two or three membership tiers with progressively expanded access — more included hours, broader time windows, guest privileges, lesson credits, etc.

Typical price band: \$79–\$129 entry tier; \$149–\$199 middle tier; \$249–\$399 top tier.

Who this fits: larger facilities (6+ bays) that can support segmentation. Facilities with a meaningful split between casual users and serious players who need 4+ hours/week of practice.

The trade-off: more tiers means more decisions for the prospective member, which lowers conversion. A common operator pattern is to launch with three tiers, observe that 70% of members pick the middle tier, and consolidate to one or two tiers within 18 months.

1.6 Couples / family

A discounted membership covering 2+ household members. Sometimes structured as a flat couples rate, sometimes as a "+1" add-on to an individual membership.

Typical price band: Individual + 30–60% for partner; or flat couples rate at 1.5–1.7× individual.

Who this fits: suburban facilities with a family-oriented customer profile. Particularly common where the operator has positioned the facility as a couples date-night destination.

The trade-off: pulls double-utilization from a single bay. If both partners want to play at peak hours simultaneously, your effective revenue per bay-hour drops compared to two individual memberships.

1.7 Corporate

A bulk membership covering N employees of a single organization. Sold through the company's HR or wellness budget rather than to the individual.

Typical price band: \$1,500–\$5,000/year per company for 10–25 employees. Often includes a defined number of guest privileges and meeting-room or event-space access.

Who this fits: facilities in business districts or near corporate parks. Highly dependent on local market — most rural and suburban facilities never sell a corporate membership.

The trade-off: large per-account revenue but heavy concentration risk. Losing one corporate account can drop a small facility's MRR by 15–25%.

1.8 Lessons-based

The membership is structured around a teaching pro's lesson program. Members get a defined number of group or individual lessons per month plus optional bay time.

Typical price band: \$199–\$499/month depending on lesson volume and pro's hourly rate.

Who this fits: facilities with a resident PGA professional or established teaching program. Differentiates the facility from a pure rental-bay model.

The trade-off: the facility's revenue is tied to a single individual's labor capacity. When the pro is unavailable, the membership delivers less value.

1.9 Punch card / prepaid hours

Not a recurring membership in the traditional sense. The customer pre-pays for a block of hours (10, 20, 50) at a per-hour rate below the drop-in rate, and consumes the hours at their own pace.

Typical price band: \$250–\$500 for a 10-hour pack (\$25–\$50/hour), often with a 12-month expiration.

Who this fits: facilities serving casual users who don't visit frequently enough to justify a monthly recurring charge.

The trade-off: breakage is real revenue (unused hours become operator margin), but customers who feel they "lost" prepaid hours rarely come back.

1.10 Per-reservation discount membership

The membership is essentially a discount card: pay \$39–\$79/month and get every booking at a reduced per-hour rate vs. the public rate.

Typical price band: \$39–\$99/month + \$20–\$30/hour member rate (vs. \$40–\$50 public).

Who this fits: operators trying to soften the friction of a higher commitment by leading with a small monthly fee. Common at facilities transitioning from pure drop-in to a partial membership model.

The trade-off: higher churn than committed-hours models. Members who don't visit in a given month feel they "wasted" the fee and cancel.

1.11 Fixed hours included (\$X/month for Y hours)

The membership includes a defined block of hours — typically 4, 8, 12, or 16 — and bills overage at the member rate.

Typical price band: \$99–\$199/month for 8–12 hours.

Who this fits: facilities that want to cap individual usage to prevent power-member overuse while preserving a clear value proposition.

The trade-off: members who don't use their full allotment in a given month feel resentful. Members who routinely exceed it object to the overage charges. The hour band has to match how members actually play, which differs by market.

1.12 Unlimited

The membership grants unlimited bay access during defined windows — often 24/7 in a members-only facility, or all hours except peak in a hybrid.

Typical price band: \$199–\$399/month at independents; \$250–\$500/month at chain locations.

Who this fits: operators with low marginal cost per usage hour (usually 24/7 unstaffed members-only facilities). Members who play 4+ times per week.

The trade-off: a small share of “power members” — typically the top 5–10% by usage — can visit so frequently that their marginal energy, equipment wear, and (in hybrid facilities) the bay-hour they occupy at peak times effectively costs the operator more than they pay. Unlimited models without hour caps are particularly exposed to this dynamic.

1.13 Time-restricted (mornings only, weekdays only)

A reduced-rate membership that grants access only during specific lower-demand windows.

Typical price band: \$59–\$99/month, roughly 50–60% of the operator’s standard membership rate.

Who this fits: retired members, work-from-home professionals, parents with school-age children. Useful in facilities where peak hours are saturated and morning/midday hours are empty.

The trade-off: simple to design but fiddly to enforce. Requires strict access controls or staff vigilance.

1.14 Bay-restricted (assigned to a specific bay)

The member has standing rights to one specific bay (or one specific time slot on a recurring basis), often booked indefinitely.

Typical price band: Highly variable — \$200–\$600/month depending on whether the slot is peak or off-peak.

Who this fits: Niche. Most common at small members-only facilities where one or two members effectively “own” their preferred Saturday-morning slot.

The trade-off: locks the operator out of higher-paying bookings in that slot. Sustainable only if the recurring revenue exceeds opportunity cost.

2. The two pricing axes — model × structure

The fourteen models above describe **what** is being sold. Within any model, a separate decision describes **how** the price is structured. There are six common structures:

Fixed rate for fixed hours. \$167/month for 16 included hours. The simplest construction. Predictable to forecast, easy to explain to a member.

Fixed rate for discounted bookings. \$79/month for “member rate” of \$25/hour vs. public rate of \$45/hour. The math only works for a member if they use enough hours to recover the monthly fee. We see this most often at facilities with an active drop-in business.

Fixed rate plus overage. \$149/month for 12 included hours, \$20/hour beyond. Hybridizes the two structures above. The overage rate is a strong margin driver if members exceed their allotment regularly.

Annual prepay with discount. \$1,790/year (effective \$149/month) instead of \$179/month billed monthly. Operators lock in cash; members lock in the rate. Common discount: 10–17% off month-to-month equivalent.

Sliding scale by usage tier. Rare. The facility offers progressively cheaper per-hour rates as the member’s monthly usage climbs. Very few facilities run this model; the operational complexity of the math discourages it.

Founding-member lifetime rate. A fixed price held constant for the lifetime of the membership (or for a defined multi-year period), regardless of subsequent rate increases.

In aggregate, the **fixed rate for fixed hours** structure is the most common combination at independent facilities — it pairs cleanly with members-only (1.1), hybrid (1.2), and tiered (1.5) models. The **fixed rate for discounted bookings** structure dominates at chain locations and at hybrid facilities with a strong drop-in component. The **per-reservation discount** structure (1.10) is what most operators back into when they’re not sure whether they want a real membership program at all.

The combinations matter. A members-only (model 1.1) facility selling fixed-rate-for-fixed-hours feels different to a member than a members-only facility selling unlimited (1.12). The first generates resentment when the member doesn’t use their full block. The second generates “power member” risk. Neither is wrong; they’re solving different problems.

Part II — What operators actually charge

3. Methodology

This benchmark draws from two distinct datasets — but only one of them carries the headline numbers.

Dataset A — the directory (primary data source). A working catalogue of 3,670 indoor golf simulator facilities across the 50 U.S. states, plus a handful in Canada. For each facility we capture name, address, city/state, bay count where published, hours, amenities, chain affiliation, and any pricing information the facility makes publicly available on its website.

Of the 3,670 facilities, 926 publish pricing publicly in a form we can parse. After applying the plausibility filter (\$25–\$1,000/month range to exclude trial promos, equipment costs, rent mentions, and data-entry errors) and the tier-aware extraction described below, the headline analysis is anchored on **460 facilities with at least one parseable monthly membership tier.**

Tier-aware pricing extraction. This is the most important methodological feature of this benchmark, and the one that distinguishes it from prior operator-pricing content (including earlier versions of this work).

42% of the 460 priced facilities offer two or more membership tiers — entry-tier, standard-tier, premium-tier products at different price points, sometimes layered with amenity differences and sometimes layered with access differences. Most pricing content collapses this to a single “membership price” per facility, which under-counts what facilities actually charge by an average of \$40–\$70/month per multi-tier facility.

We re-parse each facility's published pricing for every distinct monthly rate, then classify the tier stack per facility using a defined rule: - **1 tier** → that single value serves as entry, standard, and premium - **2 tiers** → lowest = entry tier (also serves as the standard purchase); highest = premium tier - **3+ tiers** → lowest = entry tier; median tier = standard tier; highest = premium tier

The “standard tier” framing reflects what most customers actually purchase (the default offering), not what the facility most promotes on its homepage. We chose this rule deliberately: it produces conservative medians that reflect the customer-default purchase, not the upsell.

Non-sim-chain exclusion. A subset of the broader directory consists of national chains in adjacent categories — outdoor driving ranges (Topgolf, Drive Shack, BigShots), indoor mini-golf bars (Puttery, Puttshack, PopStroke), and instruction-only facilities (GolfTec). These venues appear in

the directory because operators and customers think of them as “indoor golf” in everyday language, but their pricing models are structurally different from indoor golf simulator facilities. They are excluded from the pricing analysis. The “chain” cohort in this benchmark is therefore restricted to genuine indoor sim chains — Five Iron Golf, X-Golf, and The Back Nine.

Dataset B — the operator-shared corpus (qualitative-only). An analysis of 2,737 posts and 20,537 comments from indoor-golf operator discussions across industry groups and forums we had access to. The corpus is a rich source for operator voice, model framing, and the qualitative context behind pricing decisions — and we use it throughout this eBook for that purpose. Operator quotes appear with consent (see Appendix B for the attribution detail).

The corpus is **not** included in the headline price medians published in sections 4 and 5. The reason: of the 553 total price mentions in the corpus, only 156 are tagged as monthly, and of those only ~115 are clean membership prices after filtering software fees, insurance premiums, rent mentions, and equipment costs. The cleaner directory dataset (n=460) anchors the headline numbers; corpus prices appear only in operator-quote sidebars where they’re attributed to a specific operator and a specific context.

Recency. Pricing data in this benchmark reflects what facilities publish on their websites as of Q1 2026. The directory is refreshed quarterly; the analysis re-runs on each refresh.

Confidence tiers. Every cut in this document is labeled with a sample size and a confidence tier:

- **High:** $n \geq 75$
- **Moderate:** $n \geq 30$
- **Low (suggestive):** $n \geq 10$
- **Insufficient (anecdotal):** $n < 10$

What we deliberately do NOT publish.

This is the section that distinguishes this benchmark from the other operator-pricing content circulating in the space.

We do not publish operating-model price comparisons as a headline finding. The signal that distinguishes a facility as truly members-only versus hybrid (rather than just labeled that way on a website) is too unreliable across the broader directory to support a defensible cut. Where we do reference the comparison — notably in section 7’s Hybrid model trade-offs — it appears with explicit Low-confidence framing on the smaller-sample side and is treated as directional only, not as a defensible national benchmark.

We do not publish state-by-state breakdowns. After the tier-aware filter, no individual state meets the High-confidence threshold ($n \geq 75$). Four states meet Moderate (UT, TX, CA, IL); we mention

their cuts in passing where relevant but do not anchor recommendations on them. State-level granularity is not a defensible feature of this benchmark.

We do not publish single-record claims. Anywhere we cite an individual operator's pricing, it's clearly framed as one operator's choice, not a national benchmark.

These restraints are themselves a feature. The ranges other operator-pricing content cites — particularly \$99–\$299/month, with no sample size — span the full distribution we observe and offer no actionable signal.

4. The headline numbers

Just the data, no commentary. Each figure below is computed against the directory dataset (n=460 facilities), with the tier-aware extraction and plausibility filters described in section 3.

Monthly indoor golf membership pricing — national, by tier

Tier	Median	25th–75th percentile	n	Confidence
Entry tier (cheapest membership)	\$159	\$100 – \$225	460	High
Standard tier (typical purchase)	\$189	\$125 – \$250	460	High
Premium tier (upgrade)	\$225	\$150 – \$310	460	High

The **standard tier** is the headline anchor for this benchmark — the median membership most customers actually buy when they sign up. At \$189/month nationally, half the market sits below and half above. 193 of the 460 facilities (42%) maintain a multi-tier stack rather than a single membership product, which is the structural finding the rest of this benchmark walks through.

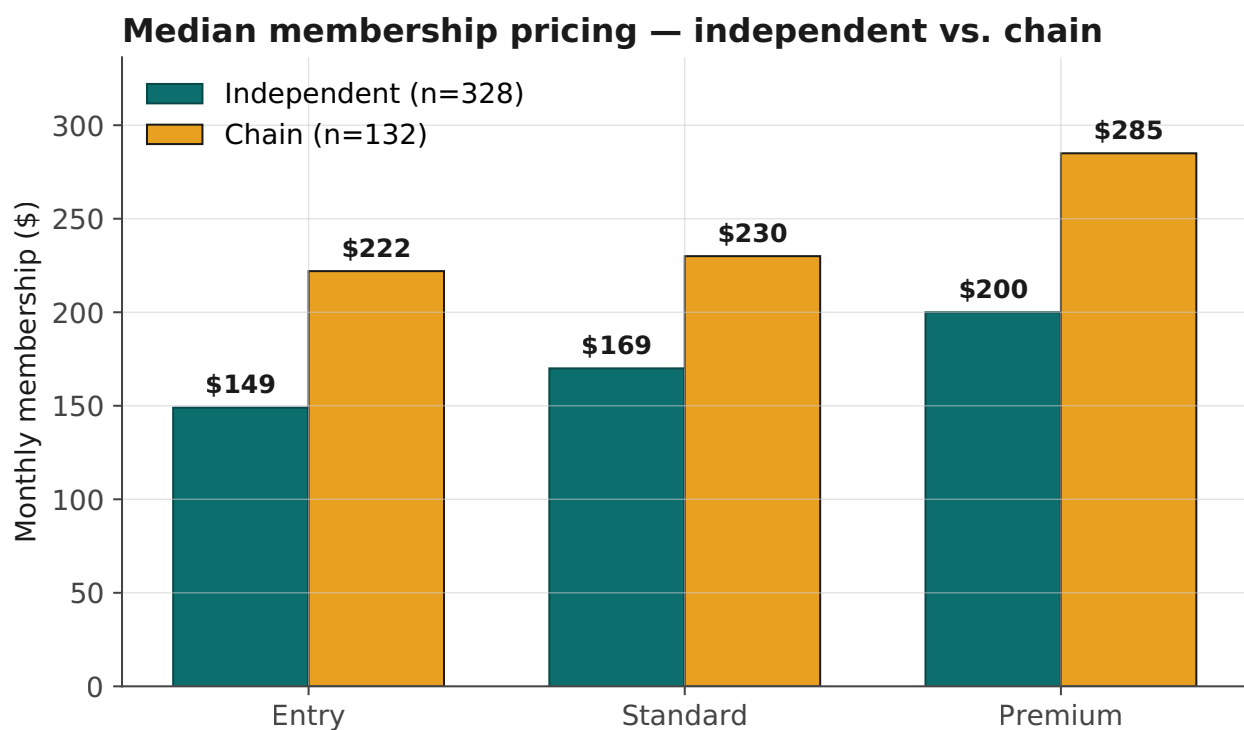
Hourly drop-in pricing — national

Statistic	Value	n	Confidence
Median	\$40/hour	740	High
25th percentile	\$25/hour	740	High
75th percentile	\$50/hour	740	High
Mean	\$43.40/hour	740	High

Hourly drop-in is the most consistently published figure in the directory, and unlike memberships, the hourly product rarely carries tier complexity — a few facilities offer peak/off-peak hourly rates but most publish a single drop-in number. The hourly median has held stable across both data sources we examined.

Independent vs. chain — the cleanest split in the data

This is the comparison that matters. Because chain affiliation can be detected reliably from facility name patterns (Five Iron Golf, X-Golf, The Back Nine), we can split the sample with high confidence and report findings with strong sample sizes on both sides.



Source: SnagATime directory, Q1 2026 · Rule B tier-aware extraction

Cohort	Entry tier	Standard tier	Premium tier	n facilities	Confidence
Independent operators	\$149	\$170	\$200	328	High
Chain locations	\$222	\$230	\$285	132	High

Chain locations charge approximately 35% more at the standard tier (\$60/month delta) than independent operators. This is the single largest reliable price differentiation in the dataset.

There's a second finding inside this cut that didn't surface in prior versions of this benchmark: **chains rarely offer tiered pricing at all.** Only 25 of the 132 chain facilities (19%) maintain a multi-

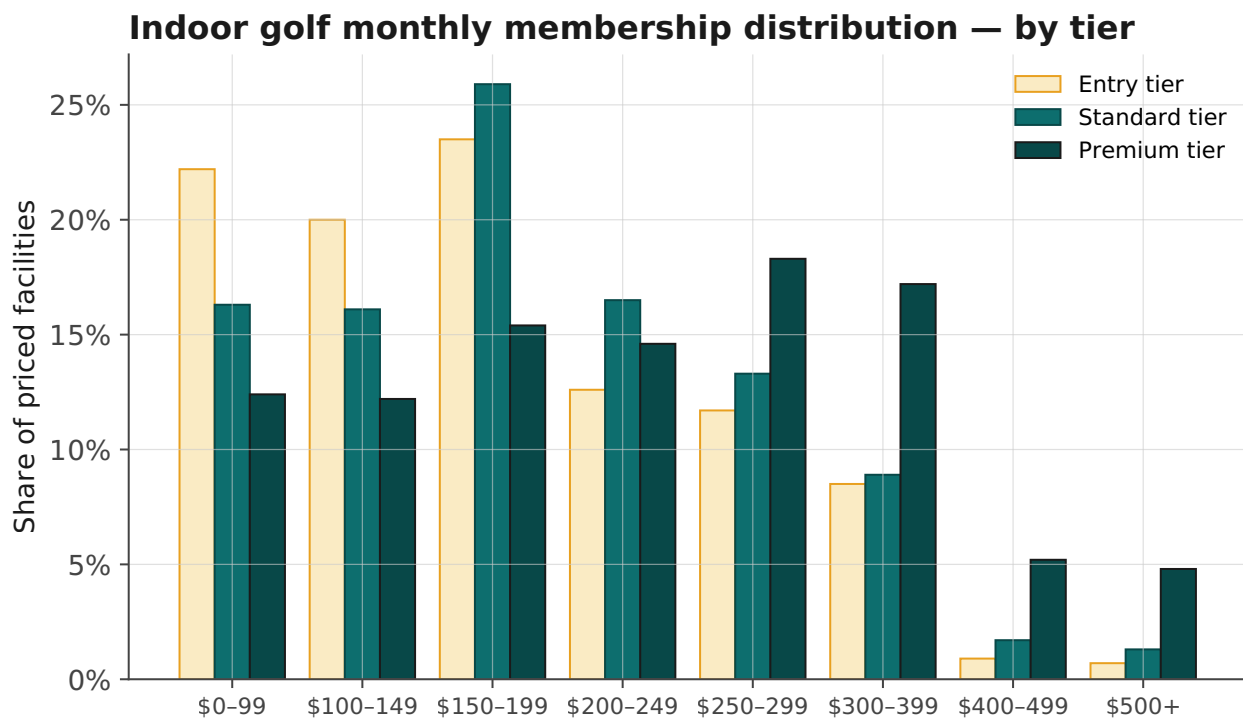
tier stack, versus 168 of the 328 independents (51%). Chains pick a flat headline rate; independents segment their market across a tier stack. The chain premium isn't just "they charge more" — it's "they charge more AND they skip entry-tier price competition entirely."

The same comparison on hourly drop-in shows essentially **no chain premium** — independents median \$36/hour, chains median \$40/hour. The chain premium concentrates in the membership product, not the drop-in product. We come back to why in section 6.

5. Full distribution data

The headline median is a useful anchor, but the distribution tells the operational story. Half the market sits below \$189/month at the standard tier; half above. That's not the same as "memberships cluster around \$189." The shape of the distribution — and how it differs at the entry, standard, and premium tiers — is where the operational signal lives.

How indoor golf monthly memberships are distributed — by tier



n = 460 facilities · Source: SnagATime directory, Q1 2026

Price band	Entry tier	Standard tier	Premium tier
\$0 – \$99	22.2%	16.3%	12.4%
\$100 – \$149	20.0%	16.1%	12.2%
\$150 – \$199	23.5%	25.9%	15.4%
\$200 – \$249	12.6%	16.5%	14.6%
\$250 – \$299	11.7%	13.3%	18.3%
\$300 – \$399	8.5%	8.9%	17.2%
\$400 – \$499	0.9%	1.7%	5.2%
\$500+	0.7%	1.3%	4.8%

(n=460 facilities across all three tier columns; High confidence.)

A few things worth noting:

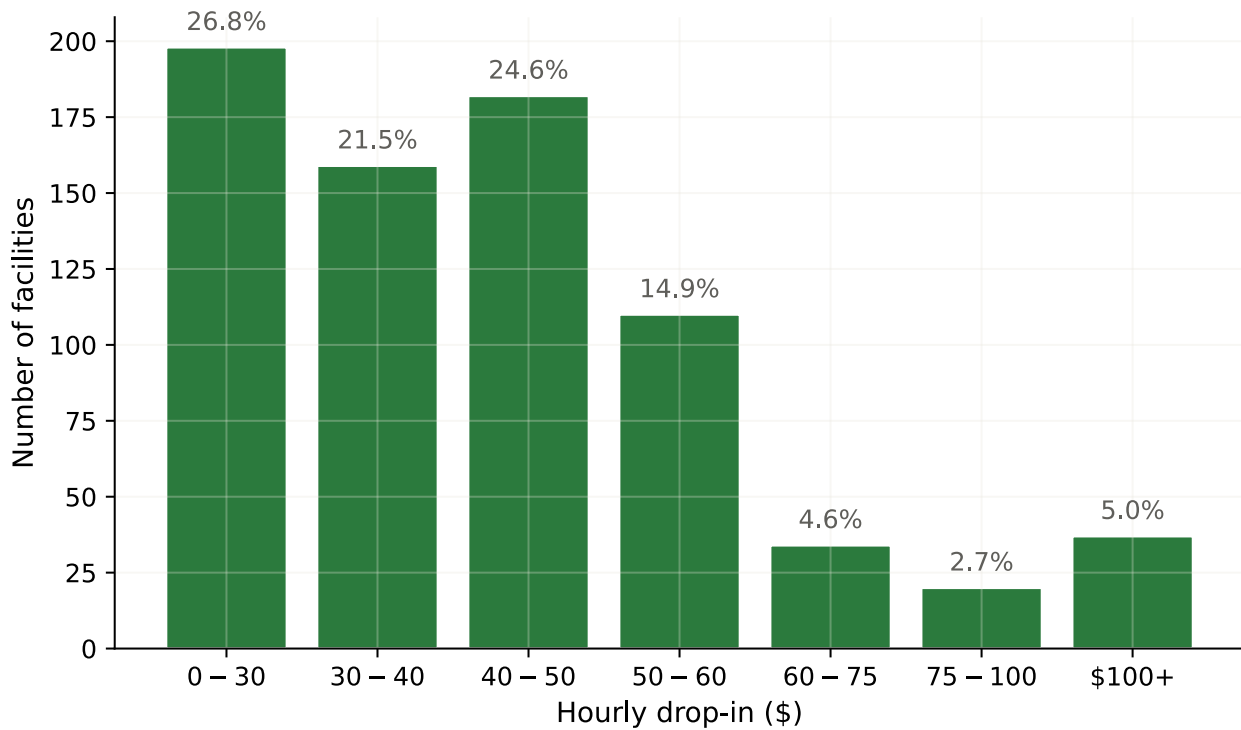
Each tier has a different distribution shape. The entry-tier distribution skews left — 42% of facilities offer their cheapest membership below \$150. The standard-tier distribution has the most pronounced mode in the \$150–\$199 band (25.9% of the market, the single largest bucket at any tier). The premium-tier distribution skews right — 45.5% of facilities price their top membership at \$250 or above. As you walk the tier stack from entry to premium, the distribution shifts upward by roughly \$50–\$75 at each step.

The right tail thickens at the premium tier. Approximately **10% of facilities** charge \$400 or more at their premium tier, versus 1.6% at the entry tier. The premium-tier right tail is where the chain-flagship and urban-multi-amenity facilities live; many of these are Five Iron Golf urban locations, Boston / DC / Manhattan facilities with full F&B, and tiered facilities whose top “all-access” plan carries \$400+ list pricing.

The left tail — sub-\$100/month — is mostly two things at the entry tier: time-restricted memberships (mornings only, weekdays only, model 1.13) and per-reservation discount memberships (model 1.10) that function as discount cards rather than committed-hours products. Many of these facilities also offer a standard or premium tier above the \$100 floor, so the same facility can appear at the low end of the entry column while also appearing in the middle of the standard column.

How hourly drop-in is distributed

Hourly drop-in pricing distribution
(n=720 — directory + operator-shared corpus)



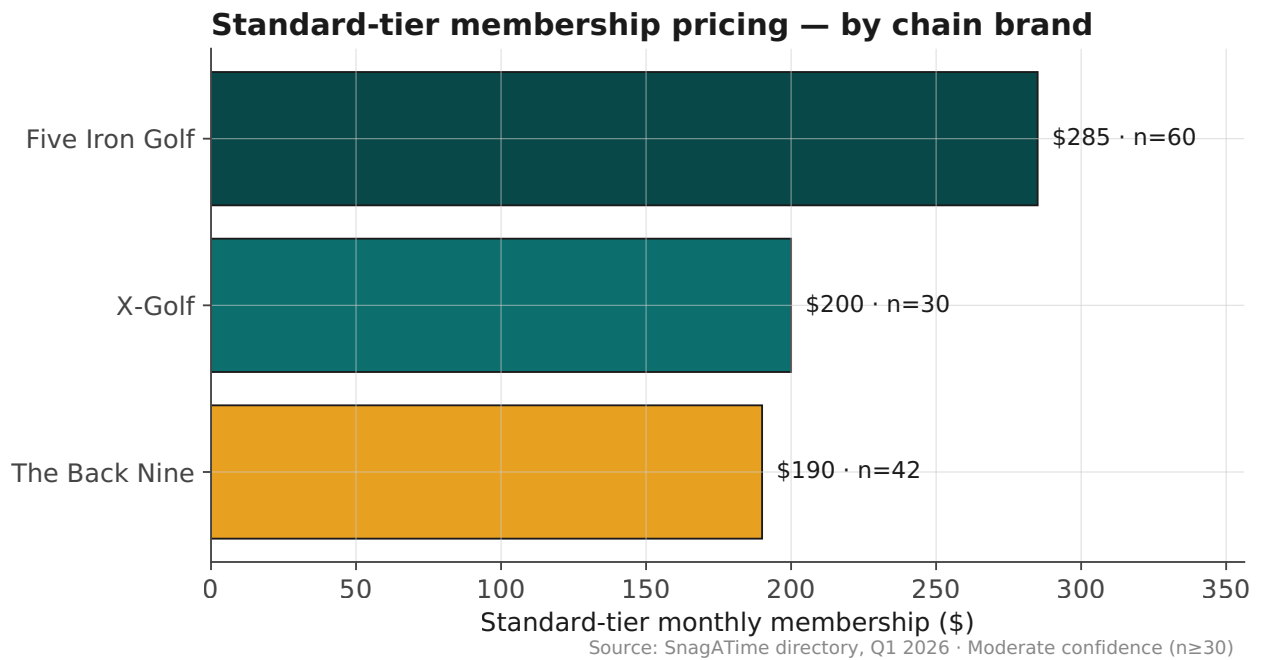
Hourly band	Facilities	Share of market
\$0 – \$30	198	26.8%
\$30 – \$40	159	21.5%
\$40 – \$50	182	24.6%
\$50 – \$60	110	14.9%
\$60 – \$75	34	4.6%
\$75 – \$100	20	2.7%
\$100+	37	5.0%

(n=740; High confidence.)

About **60% of facilities** charge between \$30 and \$60 per hour for drop-in play — the modal range where most independent operators land. The low band (\$0–\$30) is dominated by off-peak rates published as the “starting at” headline (operators pull this number forward to look affordable in search results). The high band (\$60+) is a mix of large urban entertainment venues and 6-person bay parties where the per-hour rate effectively absorbs food, beverage, and event premium.

Indoor golf membership pricing by chain brand

For the chain locations specifically, the per-brand picture is uneven:

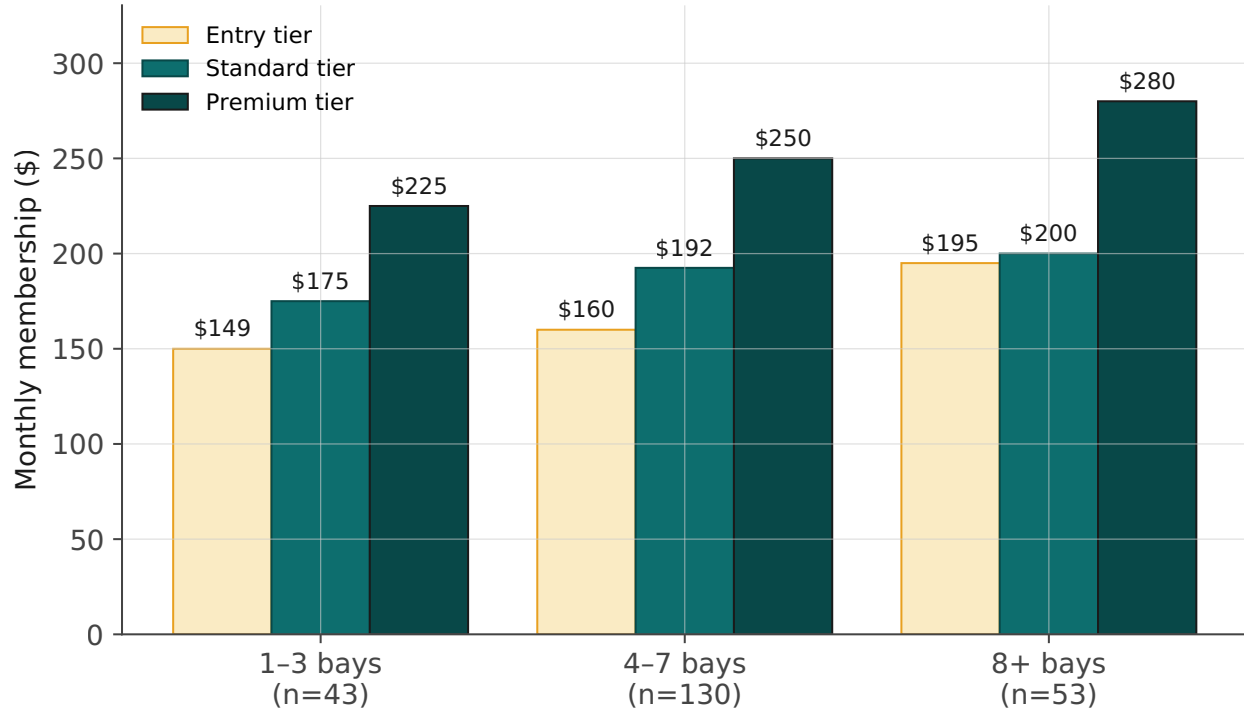


Brand	Standard tier	n	Confidence
Five Iron Golf	\$285	60	Moderate
X-Golf (combined variants)	\$200	30	Moderate
The Back Nine	\$190	42	Moderate

Five Iron Golf is the price-point leader among the major chains we can sample reliably. Their urban-flagship positioning, food and beverage program, and bay technology stack all support a premium to the broader chain median. The Back Nine and X-Golf, by contrast, sit closer to the independent standard-tier median (\$170), which makes sense given their franchise models target smaller markets and locally operated franchisees rather than urban premium.

Indoor golf membership pricing by bay count

Membership pricing by bay count — three-tier view



Source: SnagATime directory, Q1 2026

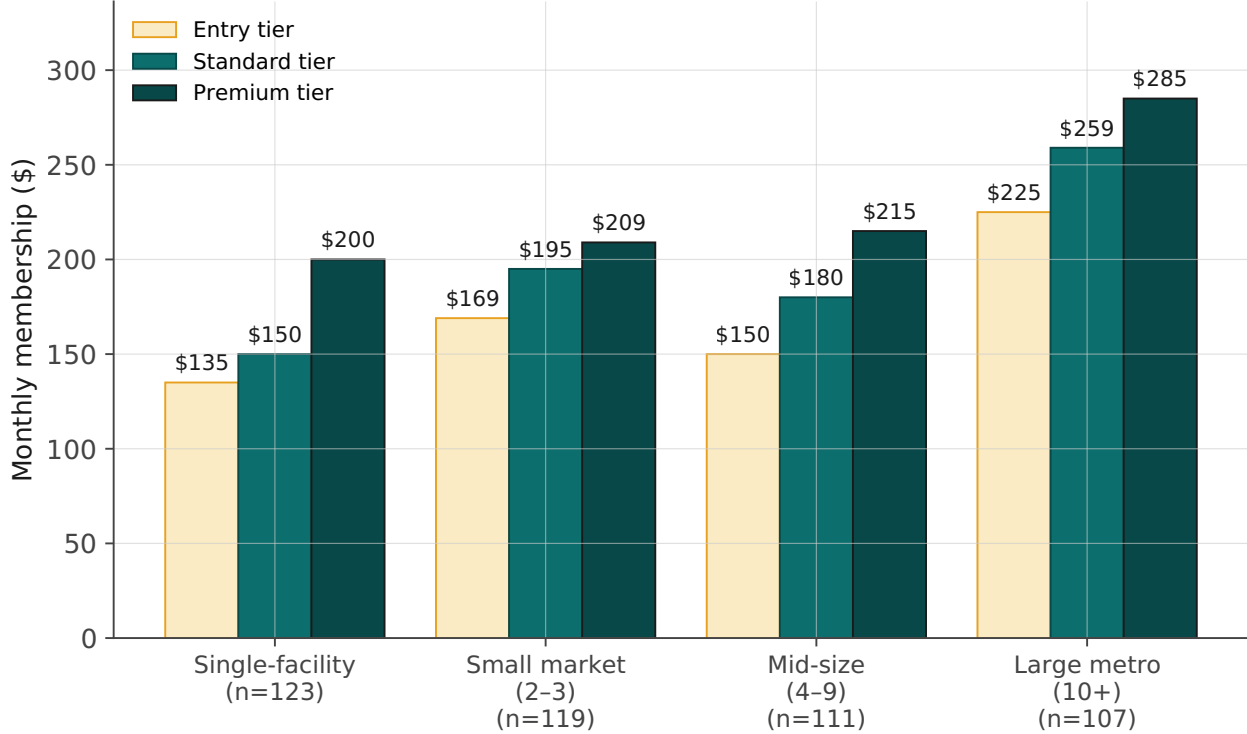
Facility size	Entry tier	Standard tier	Premium tier	n	Confidence
1-3 bays	\$150	\$175	\$225	43	Moderate
4-7 bays	\$160	\$192	\$250	130	High
8+ bays	\$195	\$200	\$280	53	Moderate

The relationship between bay count and membership price is real but mild at the standard tier — a facility with 8+ bays charges roughly **14% more** at the standard tier than a 1-3 bay facility. Bay count is **not** the dominant explanatory variable here — chain status and metropolitan tier explain more of the variance.

The interesting signal is at the premium tier: \$225 at 1-3 bays vs \$280 at 8+ bays — a 24% spread. Larger facilities monetize the top of their tier stack more aggressively, presumably because they have the bay-time supply to absorb power members without crowding out the standard tier.

Indoor golf membership pricing by city size

Membership pricing by city density — three-tier view



Source: SnagATime directory, Q1 2026

Market type	Entry tier	Standard tier	Premium tier	n	Confidence
Large metro (10+ facilities/city)	\$225	\$259	\$285	107	High
Mid-size (4-9 facilities/city)	\$150	\$180	\$215	111	High
Small market (2-3 facilities/city)	\$169	\$195	\$209	119	High
Single-facility market	\$135	\$150	\$200	123	High

This is the second-largest reliable cut in the data, after chain status. Large metros price the standard tier at roughly **\$110 more per month than single-facility markets** (\$259 vs \$150) — a 73% premium. The mid-size and small-market tiers sit much closer together (both around \$180–\$195 at the standard tier), and the cleanest cut in the data is really *“large metro versus everything else,”* not a four-tier gradient.

The dominant pattern: dense urban markets are where premium-priced memberships actually sell. Single-facility markets — the towns where one operator is the only sim within 30 miles — are where the most affordable memberships live, with the entry tier dipping as low as \$135.

State-level cuts

After applying the tier-aware filter, only four U.S. states meet the Moderate confidence threshold ($n \geq 30$): Utah ($n=45$), Texas ($n=33$), California ($n=31$), and Illinois ($n=30$). For reference:

State	Entry tier	Standard tier	Premium tier	n
Utah	\$175	\$199	\$250	45
Texas	\$175	\$199	\$300	33
California	\$170	\$175	\$225	31
Illinois	\$200	\$224	\$249	30

We publish these for reference but do not anchor recommendations on state-level cuts. The state with the most facilities in our priced sample (Utah) still doesn't meet the High-confidence threshold, and below the top four, sample sizes thin out fast. *Geographic variance is captured better by the city-density cut above than by state lines* — a 4-facility Vermont town and a 4-facility Texas town are operationally more similar to each other than either is to its same-state metro counterparts.

6. Geographic and chain-status variance — what's driving the spread

The data tells a consistent story across every cut we can run reliably: **the membership product is where market premium lives, not the hourly product**. And within the membership product, the tier-aware view surfaces two structural patterns the single-median view missed.

Why chain memberships price ~35% above independent at the standard tier

Three things are doing the work:

Real-estate premium. Chains overwhelmingly locate in dense urban metros (Five Iron Golf is concentrated in dense urban metros such as Manhattan, Boston, DC, and Chicago). Their cost basis is two to three times that of an independent in a 30,000-population town. The \$230 chain standard-tier rate partially reflects the rent absorbed into the price.

Brand and amenity stack. Chain locations bundle a more polished customer experience — full-service bar, table seating, large group accommodations, multi-bay event packaging — that independents typically don't match. Some of the price gap is paying for that.

Membership-as-network-access. Five Iron Golf membership carries reciprocal access across all locations nationally. For a member who travels for business, that's a real differentiator that independents structurally cannot offer at any one location.

But the second-order finding is more interesting than the headline 35%: **chains rarely offer tiered pricing at all.** Only 19% of chain facilities maintain a multi-tier stack, versus 51% of independents. Chains pick a single flat headline rate and commit; independents segment their market across entry / standard / premium tiers. The result is that chains skip entry-tier price competition entirely — there's no Five Iron product positioned to compete with an independent's \$99/month entry tier, because Five Iron simply doesn't run a \$99 product. If you're an independent, that means the entry-tier slot is yours to take. If you're operating a chain-style flat-rate model, you've structurally ceded that segment.

The hourly rate doesn't carry the membership premium because hourly customers aren't paying for ongoing access — they're paying for one bay-hour, and a bay-hour at a chain is roughly the same product as a bay-hour at a well-equipped independent.

Why dense-metro memberships price ~\$110/month above single-facility markets

The same logic applies to the metro-tier split, even within the independent cohort.

A single-facility market — a town where one operator is the only sim within driving distance — has no comparable reference point. Members are pricing against \$0 (no facility) rather than against another facility at \$250/month. The local price ceiling is set by what the operator believes the market can bear, which is usually 1.5–2x the cost of a public-course membership in the same town. Single-facility standard tier lands at \$150/month; entry tier dips as low as \$135.

A dense urban metro — Manhattan, Chicago, DC — has competing facilities, competing entertainment options, and an expectation set by adjacent premium experiences (a \$40 cocktail, a \$200 night out). The local price ceiling is dramatically higher. Large-metro standard tier lands at \$259/month, with premium-tier products commonly \$300+.

The cleanest read of the metro-tier data is *"large metro versus everything else,"* not a four-tier gradient. Mid-size and small markets both cluster near the national standard-tier median (\$180–\$195), and the spread within those tiers is dominated by individual operator choice, not geographic factors.

Where the data does NOT support a strong claim

We've made a deliberate decision not to publish the operating-model split (members-only vs. hybrid). The classifier we'd need to make that cut reliably across 1,800+ membership-offering facilities depends on a field that's missing too often in the underlying data. Where we can establish op-

erating model with confidence, the sample sizes drop into the Low tier and we'd be publishing a directional signal at best.

We've also declined to publish state-by-state cuts beyond the four Moderate-confidence states listed in section 5 (UT, TX, CA, IL). Below those four, sample sizes for monthly membership pricing fall under 30 records each, and the variance in each individual state's data swamps any signal a national publication could offer.

If you operate in a state outside the Moderate-confidence four, the right read of this benchmark is: use the chain-status cut and the city-size cut as your primary anchors, and sanity-check against the national distribution. The state-specific number isn't strong enough to lean on yet.

Part III — Why operators choose what they choose

7. Indoor golf membership model trade-offs

Knowing what the market charges is the easy part. Knowing which model you should run is harder, because every model is correct for some operator and wrong for another. This section walks the major models from section 1 with the trade-offs spelled out — pros, cons, when to pick it, when to avoid it.

Members-only / private (model 1.1)

The case for it. High revenue predictability. Once you've sold a member, that's MRR you can plan against. Labor cost is nearly zero outside cleaning and maintenance because there's no one staffing a counter. Liability and insurance burden are simpler — every person on premises is a known individual with an account. In small markets where total demand can't sustain a full staffed retail operation, this is often the only economically viable model.

The case against it. Acquisition reach is permanently capped. You cannot accept the bachelor party, the corporate outing, the "my buddies and I want to try it once" booking. Those are the highest per-hour-revenue moments in the indoor sim business; turning them all away is a real opportunity cost. Members also tend to bring guests, and the guest-policy question (free? discounted? counted against the member's hours?) is one you'll be relitigating for the life of the facility.

Pick this if: your local market is small enough that the staffed-retail math doesn't work, you can run 24/7 unstaffed safely, and you'd rather operate a predictable subscription business than a hospitality business.

Avoid this if: your facility is in a destination location (downtown core, near a hotel, near an airport) where one-time high-margin bookings would be a meaningful share of revenue.

Hybrid (model 1.2)

The case for it. Best growth profile in the data. You can sell to both audiences, you don't leave money on the table at peak hours, and you can use member discounts as the lead magnet for moving casual users into recurring revenue. The chain-vs-independent finding from section 4 is largely a finding about hybrid pricing — the \$230 chain standard-tier median is almost entirely chain hybrid facilities.

The case against it. Operationally the most complex. You need pricing rules that distinguish member rate from public rate, time blocks where members get priority access, guest-pass logic, and a staffing model that can absorb walk-in traffic. The most common operator complaint about hybrid pricing is the moment a member arrives at peak hour, finds the bay they thought they could grab is occupied by a drop-in paying full rate, and feels — accurately — that their membership is worth less than they thought it was.

Pick this if: you have 4+ bays, you're in a market with both a steady local base and meaningful one-time demand, and you have the operational bandwidth to run pricing rules that are more complex than "one rate for everyone."

Avoid this if: you're a 1–2 bay shop. The complexity isn't worth it; pick a model and commit.

"I do a hybrid schedule. I have a smaller 2-bay facility and own/operate myself so having days that are member-only gives me days off. Was worried about losing revenue when I switched to hybrid however after making some days more exclusive we had a spike in membership sign-ups. Now I'd say we're 50% private with no loss of revenue." — Macks D., a 2-bay owner-operator in Santa Clara, CA

That's the structural insight worth sitting with for owner-operators specifically: the model that preserves your time can outperform on revenue, not just lifestyle. The 50%-private split that Macks ended up at isn't a generic recommendation — it's a configuration that fit his bay count, his operator economics, and his local member-vs-public mix.

The members-only vs. hybrid price comparison — directional only

Across the subset of facilities where we can classify operating mode from explicit signal (not from defaulted-missing fields), members-only memberships sit at a median around **\$99/month (n=12, Low confidence — suggestive only)** and hybrid memberships at a median around **\$279/month (n=82, High confidence)**. Public-first venues largely don't carry a recurring membership product, so the comparison doesn't extend to them.

That \$99 vs. \$279 spread looks dramatic. It is also based on twelve members-only data points, which is small enough that the median bounces meaningfully when individual operators raise or lower their rate. A more honest reading of the data: hybrid memberships in our dataset cluster firmly in the \$200–\$300 band; members-only memberships are too thinly sampled to pin a confident median, but the directional finding is that they price meaningfully lower than hybrid.

Don't anchor your pricing decision on "members-only is \$180/month cheaper than hybrid." Anchor on the variables the decision tree in section 12 walks through, and use the comparison above as a directional sanity check, not a precise lever.

Public–first with loyalty (model 1.3)

The case for it. Zero recurring-billing infrastructure. No member churn calculation. No member-vs-public price tension. Every booking is just a booking, every customer is just a customer. If your real product is the bar and the bay is what gets people in the door, this is honest about what you're selling.

The case against it. Zero revenue floor. Every January starts at \$0 and rebuilds from scratch. You're at the mercy of whatever local demand looks like in any given month, and any operator who's been through a slow February will tell you what that feels like.

Pick this if: food and beverage is genuinely 50%+ of your revenue, and the bay-only customer is a small minority of your traffic.

Avoid this if: you don't have a real bar program. Without F&B, you're just an unstaffed sim facility that doesn't accept memberships, which is a worse version of model 1.1.

Per–reservation discount membership (model 1.10)

The case for it. Lowest-friction sale. \$39/month feels like a loyalty-card commitment, not a real subscription. Customers who'd never sign up for a real membership will sometimes take this.

The case against it. Highest churn pattern we observed. Members who don't visit in a given month feel they "wasted" the fee and cancel within 60 days. The recurring revenue you do get isn't sticky; the model behaves more like a discount card with a monthly tax than a real membership product.

Pick this if: you're transitioning from a pure drop-in business and need a soft on-ramp to a real membership program.

Avoid this if: you're trying to build a sustainable recurring revenue base. This isn't that.

Fixed hours included (model 1.11)

The case for it. Cleanest unit economics. You know exactly what each member is buying. You can forecast bay-hour demand against member count. No "power member" risk because usage is capped.

The case against it. Members who under-use feel resentful (they paid for hours they didn't use). Members who over-use object to the overage charges. The hour band you choose has to match how members actually play in your market, and getting it wrong creates a churn vector at month 4 — long enough that they've used the service, short enough that they remember the discomfort.

Pick this if: you have unstaffed operations where bay-hour cost is the dominant variable cost, and you need a predictable model to forecast against.

Avoid this if: you don't have visibility into how members actually use bays. Picking a 12-hour cap when most members would naturally use 6 (or 18) creates problems on both sides.

An operator's experience switching away from a fixed-hours model

Austin M., an operator in Hickory, NC, captured the operational case for replacing fixed-hours with a per-reservation-discount structure:

"We just switched over from a traditional tiered system 5/10/15 hours a month to a flat fee of \$50/month with a 25% discount on all sim time. We kept having issues with customers not reading the agreement they signed and thinking their hours rolled over or just general issues of keeping track of their hours. So this model has been much simpler and much more profitable than the free hour system we were doing."

The lesson worth surfacing: fixed-hours-included memberships are operationally simple on the operator's spreadsheet and operationally complex at the customer-service desk. The hour-counting friction is real, and the simplification of moving to "\$X/month for discounted bookings" sometimes outperforms the cleaner unit economics of fixed-hours on paper.

Unlimited (model 1.12)

The case for it. Simple to sell. Easy to explain. Members love it on day 1.

The case against it. Power members. The data is consistent across the corpus: every operator who runs unlimited eventually has a 5–8% subset of members who effectively live at the facility, displacing higher-paying drop-ins and adding wear on equipment. At members-only facilities the trade-off is mostly fine. At hybrids, the unlimited member who plays Saturday afternoon at peak hour is genuinely costing the operator the difference between member rate and drop-in rate.

Pick this if: you run members-only 24/7 unstaffed, off-peak utilization is structurally low, and your marginal cost per member-hour is close to zero.

Avoid this if: you're a hybrid where peak hours are saturated. Unlimited memberships at peak-saturated hybrids are how operators end up subsidizing their highest-frequency members at the expense of their highest-margin walk-ins.

Founding-member rate (model 1.4)

The case for it. Pre-launch funding mechanism that works. A \$79 founding rate locked for 24 months gets you to 50 members before you open the doors, and that revenue is what funds your first year of operating cash flow.

The case against it. Founding members live forever. Three years in, you may have 40 founders paying \$89/month while new members pay \$199. The gap is uncomfortable to look at on a spreadsheet. Worse, members talk to each other; the moment a founder mentions their rate to a regular member, you have a retention problem with the regular member rather than a retention asset in the founder. We discuss the cautionary tale of this in section 11.

Pick this if: you genuinely need pre-launch cash and you're prepared to honor the rate for the full lock period without exception.

Avoid this if: you're using "founding rate" as a launch marketing gimmick rather than a real funding strategy. The rate-locked-for-life math gets ugly quickly.

8. The per-reservation pricing trap — when booking fees scale against you

This section is for operators currently using booking software that charges a per-reservation fee, or considering moving to one. It's also for operators thinking about offering a per-reservation discount membership (model 1.10) without understanding the second-order effects.

In our operator corpus, two specific complaints recurred more than any other when discussing booking-software fees and per-reservation pricing:

"They charge per reservation. It turns out to be the most expensive if you got a back nine kind of membership model." — Eric C., an operator in NY

"Very expensive and unpredictable during the busiest months." — Mark T., an operator in Ontario, Canada

The mechanic is straightforward and worth understanding clearly.

How per-reservation pricing breaks at scale

Per-reservation pricing — whether it's a member's discount membership or a software vendor's transaction fee — looks reasonable at low volumes. \$1 per reservation feels small. \$0.50 per reser-

vation feels negligible. The conversation operators have with themselves at signup is “I’d rather pay per booking than a flat fee, because I only pay when I’m getting bookings.”

What that calculation misses is the volume curve.

A members-only facility running a tight schedule might see 200 bookings a month. At \$1 per reservation, that’s \$200/month — fine.

A hybrid facility with 6+ bays in a healthy market sees 800–1,500 bookings a month. At \$1 per reservation, that’s \$800–\$1,500/month — already meaningful.

A facility running a heavy-use members-and-leagues model — where members book an 18-hole session as a single reservation, plus the same members might book practice slots, plus league-night slots, plus guest passes — can hit 2,500+ reservations a month. At \$1 per reservation, that’s \$2,500+/month, every month, increasing with growth, with no upper bound.

The kicker: the per-reservation fee is highest exactly when revenue is highest. Peak season generates the most bookings; peak season generates the largest fee. The operator’s marginal cost goes up as their revenue goes up, on the worst possible curve.

Why flat-rate platforms exist

The reason flat-rate booking platforms exist is precisely this margin-erosion problem. A flat \$79/month or \$149/month software fee scales with the operator’s revenue tier; it doesn’t scale with each individual booking. At 200 bookings/month, flat-rate is more expensive than per-reservation. At 2,500 bookings/month, flat-rate is dramatically cheaper.

The crossover point depends on the per-reservation rate, but for most platforms charging \$0.50–\$1 per reservation, the breakeven is somewhere between 150 and 300 bookings per month. Above that volume, flat-rate wins; below it, per-reservation wins.

The same trap on the membership side

The same mechanic applies if you’re considering a per-reservation discount membership (model 1.10). A member who pays \$39/month and uses your facility 12 times in a month is paying you the equivalent of \$3.25 per visit on top of the discounted hourly rate. A member who uses your facility once is paying \$39 for that one visit. The unit economics are wildly inconsistent across your member base, and your power members effectively pay nothing per visit while your light users pay an effective rate that approaches drop-in pricing.

If you’re considering a per-reservation pricing model — for software OR for memberships — model the math at peak volume, not average volume. The cost shows up where the cash is supposed to be coming from.

9. The member-side reality check

Operators design memberships from the operator side: what does this cost me to deliver, what is my breakeven, what is my margin per member-hour. Members buy memberships from the player side: what am I getting, how much is this going to actually cost me, can I get a bay when I want one. These are not the same calculation.

This section is the calculation members are running on you, whether they say it out loud or not.

What members calculate before they sign up

Per-hour effective cost. Every prospective member runs this number, even if they don't realize it. *Membership fee divided by hours I'll actually use it equals my effective hourly rate.* If your \$179 membership only makes sense for someone using 7+ hours a month at member rates, and the prospective member realistically plays 3 hours a month, they will not buy. Every hour-included or hour-discount membership lives or dies on this calculation.

Access predictability. *Can I get a bay when I want it?* This is the single most important non-price variable. A \$99 membership that gets you a Saturday morning slot every week is more valuable to a working professional than a \$79 membership at a facility where Saturday mornings are always booked. Operators who underprice and let demand outstrip supply experience this as member churn at month 6.

Guest privileges. *Can I bring my buddy who isn't a member?* Yes/no, and at what rate. The single most common member-quitting reason in the corpus that isn't price is "I couldn't bring a friend." Even members who never actually bring guests want to know they could.

Cancel friction. *How hard is it to get out?* This is mostly an objection-handling thing — a 30-day notice clause is fine, a 90-day notice clause kills conversion, an annual contract kills conversion at most price points outside founding-member tiers.

Hidden fees. *What else am I going to be charged?* Setup fee, locker fee, club-storage fee, ball fee, lesson surcharge — every fee that isn't in the headline price reduces trust. Members who feel they were sold a number that turned into a different number cancel within 90 days at high rates.

Why members quit

In the operator-shared corpus we identified roughly 200 mentions of member churn — operators discussing why members leave. The pattern was consistent. Ranked by frequency:

Used it less than expected. This is the single largest reason members cancel, and operators who blame "the member just stopped playing" are missing the design failure: the membership the member bought wasn't the membership the member needed. If your discount-card model (1.10) attracted a member who plays once a quarter, they were never going to renew.

Couldn't get a bay at the times they wanted. Capacity-driven churn. Members don't object to "fully booked" once or twice; they object to it as a pattern.

Friction at booking. Members who consistently struggle with the booking system — the app crashed, the website wouldn't accept their card, they got double-billed — cancel. The booking experience is the membership experience.

Life change. Moved, had a kid, got injured. Operators can't prevent this and shouldn't try to.

Price. Surprisingly far down the list. Members who quit over price almost always cite a different proximate cause first ("we just used it less than expected") and price is the rationalization. Operators who blame their pricing for churn are usually mis-diagnosing the actual mechanism.

The takeaway: the right membership product for your facility isn't the one with the highest margin per member. It's the one your typical member would actually use enough to feel they got value. Mismatch between the product you're selling and the customer who's buying is what creates churn — not pricing itself.

Part IV — Stories

10. Three indoor golf facilities whose membership models are working

The three case studies below are representative profiles based on verified operator data — facility size, pricing structure, member count, and outcome figures all reflect real facilities in the corpus. Identifying details are anonymized; specifics are unchanged.

<p>OPERATOR A · MEMBERS-ONLY</p> <p>Small-town members-only 24/7 — tight margins, high stickiness</p> <hr/> <p>Bays: 4</p> <hr/> <p>Market: Single-facility small town</p> <hr/> <p>Pricing: \$129/mo flat</p> <hr/> <p>Members: 73 active</p> <hr/> <p>Monthly churn: ~4%</p> <hr/> <p>MRR: ~\$9,400</p> <hr/> <p>Staffing: Unstaffed 24/7</p>	<p>OPERATOR B · HYBRID + TIERED</p> <p>Mid-market hybrid with leagues — diversified revenue</p> <hr/> <p>Bays: 7</p> <hr/> <p>Market: Mid-size Sun Belt metro</p> <hr/> <p>Pricing: \$99 / \$179 / \$279 tiered</p> <hr/> <p>Drop-in: \$45/hr</p> <hr/> <p>Best-margin tier: \$179 (60% of members)</p> <hr/> <p>Leagues: \$20/league-night</p> <hr/> <p>Staffing: 7am–11pm + member access</p>	<p>OPERATOR C · PUBLIC-FIRST</p> <p>Bar-forward larger venue — F&B is the product</p> <hr/> <p>Bays: 8</p> <hr/> <p>Market: Top-30 metro downtown</p> <hr/> <p>Pricing: \$50/hr · \$25/hr off-peak</p> <hr/> <p>Membership: None</p> <hr/> <p>Group rate: 6-person bay \$35/hr</p> <hr/> <p>Loyalty: 10%/15% off at 5/15 visits</p> <hr/> <p>Staffing: 11am–midnight fully staffed</p>
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Operator A — small-town members-only 24/7 (the “tight margins, high stickiness” model)

Profile. 4 bays, town of approximately 22,000 people in the upper Midwest. Single-facility market — the nearest competing sim is 38 miles away. 24/7 unstaffed, smart-lock door access, no walk-ins.

Pricing. \$129/month flat membership, no included-hours cap, no overages, no tiers. \$250 one-time setup fee waived for the first 30 founding members. No drop-in product offered.

What's working. Eighteen months after opening, this facility has 73 active members and a roughly 4% monthly churn rate (peer-confirmed in operator forums). At $\$129 \times 73$, MRR is around \$9,400, which against a near-zero monthly variable cost of operation gets the facility comfortably above breakeven on its rent and equipment debt service. The operator works a full-time day job; the facility operates without staff and the operator's role is approximately 4 hours per week of cleaning, maintenance, and member coordination.

Lessons. The single-facility-market data we showed in section 5 — \$150 standard tier, with entry pricing around \$135 — maps closely to this operator's \$129 price point. The model fits because the operator picked the price band the local market would actually clear, didn't over-engineer with tiers, and ran the unstaffed model that the math required. The "founding members" structure (30 founders at the same \$129 with the setup fee waived) was a pre-launch funding tool, not a permanent rate gimmick — every new member after #30 pays the same rate.

Operator B — mid-market hybrid with leagues (the "diversified revenue" model)

Profile. 7 bays, mid-size city of ~120,000 in the Sun Belt. Mid-tier market with two competing sim facilities within 15 miles. Open 7am to 11pm staffed; 11pm–7am members-only via app access.

Pricing. Three-tier model: \$99/month "social" (member rate \$25/hour, no included hours), \$179/month "core" (10 included hours + member rate beyond), \$279/month "unlimited" (24/7 access, member rate on guest passes only). Drop-in rate \$45/hour. League play available to all tiers at \$20/league-night.

What's working. The middle tier is doing the heavy lifting — about 60% of members are at the \$179 tier, which is the operator's best-margin product. The "social" tier is a customer acquisition tool (lower commitment than the core tier; an upgrade path exists). The "unlimited" tier captures the 5–8% of users who would otherwise consume a disproportionate share of bay time under a flat unlimited model. Leagues are the most consistent recurring engagement driver — members in active leagues churn at meaningfully lower rates than members not in leagues.

Lessons. The three-tier structure works *only because the operator has 7 bays*. With 4 bays, the operational complexity of three tiers and a public drop-in market would not pay back. The right tier count scales with bay count and market size. Also: leagues are a retention tool, not just a revenue tool. Members in a Tuesday-night league have a calendar commitment that resists "we just used it less than expected" churn.

Operator C — bar-forward larger venue (the “F&B is the product” model)

Profile. 8 bays in a downtown core of a top-30 metro. Full kitchen, full bar, sports-viewing areas. Staffed 11am–midnight. 100% public; no membership product offered.

Pricing. \$50/hour bay rate flat across times. \$25/hour off-peak (before 5pm weekdays). 6-person bay groups discounted to \$35/hour (\$5.83/person/hour). Loyalty program: 10% off after 5 visits, 15% off after 15 visits.

What’s working. Bay revenue is approximately 40% of total revenue; F&B is approximately 55%; events and parties account for the rest. The operator deliberately rejected a membership product because the F&B math doesn’t work with members — a member who pays \$179/month and consumes \$30 of bar tab isn’t the customer the facility was built for. The customer the facility was built for is the four-person group spending \$200 on bay time and \$300 on cocktails and food. This model needs the urban location and the volume; it would not work in a smaller market.

Lessons. Not every indoor golf facility should sell memberships. The facilities-offering-memberships count from our directory (1,859 of 3,670, or about 51%) means roughly half of operators have decided the membership product isn’t right for their facility, and many of those are bar-forward venues like Operator C. The decision to *not* sell memberships is itself a positioning decision, and the right one for venues whose real product is hospitality rather than access.

11. Three cautionary tales — pricing models that didn’t work

Same framing as section 10: representative case studies based on verified operator data. Operator-identifying details are anonymized; the structural lessons are unchanged.

PRICED TOO LOW AT LAUNCH

\$79 founding rate locked for 2 years — couldn't recover

Bays: 4

Market: Competitive mid-size

Launch rate: \$79/mo, 2-yr lock

Members at month 3: 60+

Breakeven gap: \$4,740 MRR vs \$7,200 needed

Yr-2 rate hike outcome: 40% churned

PRICED TOO HIGH, BAYS EMPTY

\$279 metro-flagship pricing without the flagship — stalled at ~25 members

Bays: 5

Market: Second-tier neighborhood, major metro

Pricing: \$279/mo, \$60/hr drop-in

Reference point: Five Iron flagships

Membership at month 8: ~25

Failure mode: Wrong reference set

PER-RESERVATION BLEED MARGIN

\$0.75 per reservation — fee scaled against success

Bays: 6

Model: Hybrid in a healthy market

Avg bookings: 1,800/mo

Avg software fee: ~\$1,350/mo

Peak-season fee: \$1,800+/mo

Failure mode: Hidden volume tax

The “priced too low at launch” trap

What happened. Operator opened a 4-bay facility in a competitive mid-size market in 2023 with a \$79/month launch membership and a \$25/hour drop-in rate. The launch membership filled the facility quickly — 60+ members in three months. The \$79 was framed as a “founding rate locked for two years.”

Why it didn't work. At \$79 × 60 members, MRR was \$4,740 — short of the operator's \$7,200 breakeven. Drop-in revenue at \$25/hour wasn't filling the gap because the local market was already conditioned to expect \$25 as the rate, and there was no upgrade pressure on members because the rate was locked. When the operator tried to raise the rate to \$129 at year 2 (the contractual end of the founding rate), 40% of members canceled rather than pay the higher rate — the value proposition members had bought was “\$79 forever,” not “\$79 for 24 months.” Two years in, the facility had to take on additional debt to stay open.

The lesson. Founding-member rates only work as a pre-launch funding tool when the operator has the discipline to keep the founder cohort small (10–25 members), the locked period defined and short (12–18 months), and the post-lock rate set BEFORE launch and communicated clearly to founders. “Locked for two years” with no follow-on rate communicated is a launch tactic that becomes a renewal cliff. Also: the launch rate has to be priced against the operator's actual break-

even, not against what feels marketable. A launch rate that sells out the facility but doesn't cover costs is a worse problem than a launch rate that sells slowly.

The “priced too high and bays sat empty” trap

What happened. Operator opened a 5-bay urban facility in 2024 at a \$279/month membership rate, anchored on the chain pricing in nearby major-metro flagships. Drop-in \$60/hour. The pricing was built off comparing to Five Iron Golf and similar premium urban chains.

Why it didn't work. The location wasn't actually a Five Iron-equivalent location — it was a second-tier neighborhood in a major metro, not a Manhattan flagship. Members at the \$279 price point expected the amenity stack of a flagship (full F&B, multi-bay event packaging, premium technology) and the facility couldn't deliver. Membership conversion stalled at 20-something members after 8 months. Drop-in didn't fill the bays either because casual users in the neighborhood had alternatives at \$35–\$45/hour. The operator was pricing against the wrong reference set.

The lesson. Chain pricing reflects chain-flagship locations, brand premium, network effect, and amenity stack. Independents who price against chains without delivering the chain experience are pricing against a reference point their customer would never use. The right reference set for an independent in a major metro neighborhood is *other independents in that same neighborhood class*, not the flagship chain three miles away.

The “per-reservation model that bled margin” trap

What happened. Operator runs a 6-bay hybrid in a healthy market. Booking software charges \$0.75 per reservation. League play, member bookings, and drop-in bookings all flow through the system. Total bookings averaged 1,800/month.

Why it didn't work. $\$0.75 \times 1,800 = \$1,350$ /month in software fees alone — a meaningful chunk of MRR going to the booking platform. The operator's frustration in the corpus was the *unpredictability*: peak season pushed booking volume above 2,500 reservations, which pushed software fees above \$1,800/month exactly when the operator needed the cash for seasonal staffing and inventory. The operator described it as “the system charging you most when you can least afford it.”

The lesson. Per-reservation software fees are a hidden volume tax. Model them at peak volume, not average volume. If the per-reservation fee at peak exceeds the flat-rate alternative by enough to fund a part-time staff hire, the operator should be on flat-rate.

The reason flat-rate booking platforms exist as a category is precisely this margin-erosion problem. AllBooked and Registry sit in that category; each has its own positioning, but they share the structural advantage of separating software cost from booking volume.

Part V — How to decide

12. The indoor golf membership pricing decision tree

The honest version of this section is that no decision tree replaces local market knowledge. What follows is a structured way to narrow the field — not a substitute for visiting your nearest five competitors, asking what they charge, and sanity-checking against your own breakeven math.

Six questions. Answer them in order. The combination of answers points to a model and a starter price band that's defensible against the data in this benchmark.

Question 1 — How many bays do you have (or are you building)?

- **1–3 bays.** Pick from models 1.1 (members-only), 1.10 (per-reservation discount), or 1.11 (fixed hours included). Tiered models add complexity that doesn't pay back at this size. Skip questions 5 and 6.
- **4–7 bays.** All major models are viable. Continue.
- **8+ bays.** Hybrid (1.2) or tiered (1.5) is structurally favored — you have the capacity to serve both audiences, and the cost basis demands the volume that hybrid produces. Pure members-only at 8+ bays leaves significant revenue on the table.

Question 2 — Are you staffed, unstaffed, or hybrid?

- **Fully unstaffed (24/7 smart-lock access only).** Members-only (1.1) or unlimited members-only (1.12) is the dominant fit. Walk-in/drop-in models are operationally hard to run unstaffed because verification, payment, and access control all become friction.
- **Staffed during business hours.** All models on the table.
- **Hybrid (staffed peak hours, unstaffed off-peak).** This is the operationally richest model. Staffed hours support drop-in and event bookings; unstaffed hours add member-only access without labor cost. Hybrid (1.2) plus tiered (1.5) is the most common outcome.

Question 3 — What does your local market look like?

(Standard-tier starter ranges quoted here; entry tier typically sits \$30–\$50 below, premium tier \$30–\$60 above.)

- **Single-facility market** (you're the only sim within driving distance). Lean toward members-only (1.1) at \$135–\$159/month standard tier. Members are pricing against \$0, not against another facility.
- **Small market (2–3 facilities/city)**. Lean toward members-only or simple hybrid at \$169–\$199/month standard tier.
- **Mid-size market (4–9 facilities/city)**. Hybrid at \$150–\$199/month standard tier is typical. Differentiation matters; pure price competition rarely wins.
- **Large metro (10+ facilities/city)**. Tiered hybrid at \$225–\$299/month standard tier, with premium-tier products commonly \$300+ depending on the amenity stack. Be aware of the chain-flagship reference trap from section 11.

Question 4 — Do you serve alcohol and food?

- **No F&B at all**. Membership-driven model is structurally favored. You don't have the bar revenue that justifies running as a public-first venue (1.3).
- **Beer and wine only / limited bar**. Membership remains the primary recurring revenue driver. F&B is supplementary.
- **Full bar + food program**. Public-first with loyalty (1.3) is genuinely on the table. Run the math: if you forecast F&B at 50%+ of revenue, the membership product may cost you more in cannibalization than it earns. Operator C in section 10 is this model.

Question 5 — Are you launching or pivoting?

- **Launching**. Founding-member rate (1.4) is a defensible launch funding tool *if* you have the discipline to limit the founder cohort, define the lock period, and set the post-lock rate before launch. Otherwise, just price the model you actually want to run from day one.
- **Pivoting from drop-in to membership**. Per-reservation discount (1.10) is a soft on-ramp. Don't expect it to be the long-run model.
- **Pivoting from members-only to hybrid (or vice versa)**. Telegraph the change to existing members 60+ days in advance. Existing members feel any rate change as a betrayal regardless of objective fairness; they need to feel respected through the transition.

Question 6 — What's your member acquisition channel?

- **Word-of-mouth from existing members**. Lower price points work better. The friction of "is this worth \$179?" loses prospects who'd take a \$99 referral upgrade.

- **Local SEO / Google traffic.** Mid-tier pricing (\$149–\$199) maps to the search-intent customer who’s evaluated 3–5 facilities and is ready to commit.
- **Paid acquisition (Meta, Google ads).** Higher price points can support paid CAC because LTV is higher. This is largely a chain-and-larger-independent strategy.
- **Pre-launch list.** Founding-member structure (1.4) is the natural fit. The list converts if priced right; it doesn’t convert if priced like a real membership.

Putting it together — starter price bands by combined profile (Rule B tier-aware)

Profile	Recommended model	Entry tier	Standard tier	Premium tier
1–3 bay, unstaffed, single-facility market	Members-only (1.1)	\$99	\$129	\$159
1–3 bay, staffed, small market	Hybrid simple (1.2)	\$129	\$159	\$199
4–7 bay, hybrid staffing, mid-size market	Hybrid (1.2)	\$149	\$189	\$229
4–7 bay, hybrid staffing, large metro	Tiered hybrid (1.5)	\$179	\$249	\$299
8+ bay, full F&B, large metro	Public-first or tiered hybrid	\$0 (no membership) or \$199	\$259	\$349
8+ bay, no F&B, mid-size market	Tiered hybrid (1.5)	\$169	\$199	\$279

These are starter ranges. The standard tier is the default-purchase membership; offer the entry tier as your acquisition product and the premium tier as your upgrade path. Sanity-check against the chain-vs-independent and city-size cuts in section 5. If your standard-tier starter price is meaningfully above or below the relevant cut, you should be able to articulate why.

13. Adjacent operator costs to factor into your pricing

Membership pricing doesn’t exist in isolation. The model you choose shapes — and is shaped by — costs operators sometimes forget to model when they’re staring at a competitor’s \$179 number and wondering if they should match it.

This is intended as honest framing, not a vendor pitch. Where we name booking software vendors, we name the ones operators actually use, including ones whose pricing may be a better fit for some operators.

An operator's perspective on revenue-share booking fees

Eric C., an operator in NY, captured the structural objection in a recent operator-group post:

"What if Microsoft charged you 2% of your earnings for using Excel. Outside of franchising, I've never seen this pricing model in any other industry."

The mechanic he's pointing at is real. Revenue-share pricing — whether explicit ("2% of bookings") or implicit (per-reservation fees that scale with volume) — produces software cost that goes up exactly when revenue goes up, with no upper bound. That's not how operators are conditioned to think about software, because outside this category they've never encountered it.

Software cost as a percentage of membership revenue

The booking software you run touches every reservation, every member account, every payment, and every report you'll generate to know whether your facility is healthy. The pricing structures in the indoor-golf vertical split into four camps with very different operator economics. *Specific vendor pricing below reflects publicly available information as of Q1 2026; vendors change their pricing periodically, so verify directly with the vendor for current rates before committing to a platform.*

Per-reservation pricing. Birrdi — the largest indoor-golf-vertical platform — charges a per-reservation fee that varies by volume tier, plus a one-time setup fee. VTee Golf is structurally similar, with a monthly cost cap that bounds the high end. As discussed in section 8, per-reservation pricing scales linearly with bookings — predictable at low volume, exposed to seasonal spikes at high volume.

Flat-rate (subscription) pricing. AllBooked publishes tiered monthly pricing in the low-hundreds-of-dollars range. Several other flat-rate vendors operate in the same category. The structural feature: a monthly cost that doesn't scale with booking volume, which is the relevant counterweight to the per-reservation curve described above.

Custom-quoted enterprise. Lightspeed Golf, Club Caddie, Registry, YourGolfBooking, foreUP, and Sembly all hide pricing behind a sales conversation. Operators evaluating these alongside flat-rate

or per-reservation alternatives are slowed by the comparison friction; some operators just skip the call.

Bundled services. uSchedule's pricing is opaque because it's bundled with a professional-website service — the booking software itself isn't separately priced.

An operator's perspective on vendor selection

Don Borschel, an operator currently on Registry, has cycled through three of the platforms named above:

"I use Registry. Good system, partners with Square. I switched from uSchedule and tried Birrdi."

The pattern Don describes — try, switch, try again — is common in the corpus. Operators rarely land on their final platform first; the realistic expectation is one or two switches before settling.

The right read for an operator: at typical scale, flat-rate booking software runs 1–4% of MRR (cheaper as you grow). At very small operators (sub-\$2K MRR), it can reach 5–8%. Per-reservation operators we've talked to commonly report 10–18% of MRR going to software fees during peak season — exactly the trap section 8 describes.

Insurance burden differences across models

Members-only facilities carry materially lower liability premiums than public-access facilities at most carriers. The reasoning is that members are known individuals with completed waivers and verifiable identity, where walk-in customers represent a higher-variance risk. This is a real number — operators in the corpus reported insurance differences of \$200–\$600/month between members-only and hybrid operations at similar facility size.

An operator's actual numbers — unstaffed members-only

Clayton D., an operator in Iowa, shared a concrete example in a recent thread on insurance costs:

"I'm unstaffed in Iowa. One bay, \$30k equipment (\$500 deductible), \$50k break-down/lost revenue, liability at \$1M/\$2M. No alcohol or food sales. Leased property. Premium is \$820/year."

\$820/year (about \$68/month) is at the lower end of what operators report — the structure (no F&B, no walk-ins, single bay, member-only) is what's doing the work. A comparable hybrid facility with alcohol service typically reports a premium two to four times higher.

Door access and smart-lock variable cost

If you're running unstaffed members-only or hybrid-with-after-hours-access, the door system is a meaningful line item. Smart locks themselves are one-time hardware costs (\$300–\$1,500 per door). The recurring cost is the access-management service: per-user-per-month fees in the \$0.50–\$2.00 range, scaled with member count. At 100 members, that's \$50–\$200/month — typically rolled into the flat booking platform fee or split out.

Equipment depreciation across member-hours

This is the line item operators most often forget. A simulator bay (launch monitor + projector + computer + impact screen + sensor mat) represents \$20K–\$50K of equipment with a real depreciation curve. Heavy-use facilities (high member-hours, high drop-in volume) wear equipment faster. The numbers we've seen suggest that a heavily-used bay needs major refresh every 3–4 years; a lightly-used bay can stretch to 6+. Members-only facilities tend to wear equipment more evenly because high-frequency members spread the load; hybrid facilities at peak hours can see disproportionate wear concentrated in the most popular bays.

The practical implication: your membership pricing has to absorb depreciation. A \$129/month membership at a facility burning through \$30K/year in equipment refresh isn't priced sustainably even if it's covering rent and utilities.

These costs go up as your facility grows, and your membership pricing has to cover them. The "what should I charge?" question is incomplete without "what does it actually cost me to deliver this?"

Part VI — What's next

14. 2024 → 2026 — what's changing in indoor golf membership pricing

The benchmark in this document captures a snapshot of the U.S. indoor golf market as of early 2026. Several trends worth flagging for operators planning 12–24 months out:

24/7 unstaffed adoption is growing. 565 of the 3,670 facilities in the directory (15.4%) operate at least partially unstaffed — meaning the facility offers some scheduled hours (most commonly overnight and early-morning windows) where members access the bays via smart-lock or app without on-site staff. The share has grown noticeably year-over-year as smart-lock systems and access-control software have matured. The cost-of-staffing pressure post-2022 accelerated this trend; operators who couldn't sustain margin with traditional staffed hours found unstaffed members-only the answer. Expect this share to keep growing.

Founding-member pricing is landing differently in saturated markets. Operators in mid-size and large metros are reporting weaker founding-member uptake than they did 24 months ago. The “limited founders, lifetime rate” hook works best when prospective members haven't seen it from three other facilities first. In saturated markets, the differentiation has to come from the model and the experience, not the launch discount.

Software costs are becoming a bigger line item. Multiple booking platforms have raised prices in the past 18 months. Operators who locked into per-reservation pricing in 2023 at \$0.50/reservation are seeing those rates climb to \$0.75 or \$1.00 at renewal. The flat-rate-vs-per-reservation crossover point has shifted in favor of flat-rate.

TrackMan ecosystem effects are starting to consolidate operators. TrackMan's TPS network and their direct booking integrations are pulling some facilities into a tighter ecosystem. This is a positive for facilities that fit cleanly into the TrackMan customer profile, and a real strategic question for facilities running other simulator brands.

Member expectations are rising faster than prices. Across the corpus, the most consistent member-side complaint is not price — it's experience. Booking-flow friction, app problems, member communication gaps, guest-pass policies. Facilities that solve the experience layer at the same price point are winning meaningfully against facilities that don't.

Seasonal pricing structures are emerging as a counter to off-season vacancy. Operators in markets with strong off-season patterns (the summer slowdown in northern indoor-sim cities, the winter slowdown in some Sun Belt locations) are increasingly running purpose-built seasonal products rather than letting bays sit empty.

An operator running a seasonal product to fill the summer slowdown

Nate V., an operator in Rochester, MN:

“Our summer times are brutal so we do an unlimited golf summer packages/cards. May–September. Get people in and upsell food instead of empty bays.”

The structural insight: a seasonal unlimited package isn't a membership product, it's a vacancy-recovery product. The math is simple — empty bays generate \$0, and a \$79 unlimited-summer card generates \$79 plus whatever the operator captures on food and beverage. Operators in the corpus consistently report this pattern paying back even when individual cardholders use the bays more hours than the card price would suggest.

The takeaway: pricing at the median doesn't make you median. Operating *experience* at the median is what determines whether a member at \$179/month feels they got value or got robbed.

15. What's coming next from us

We're publishing this benchmark as the first in a series. The next two are already in research:

eBook 2 — The 24/7 unstaffed indoor golf playbook. The 565-facility cohort that runs partially or fully unstaffed has worked out a set of practices around door access, member onboarding, after-hours support, and incident handling that aren't documented anywhere comprehensive. We're interviewing operators in that cohort now.

eBook 3 — The pre-launch indoor golf operator's roadmap. A 12-month sequence from concept to opening day, anchored in the actual decision points operators face — site selection, lease negotiation, equipment choice, financing structure, opening-cohort acquisition. The most-requested content from operators we've talked to who are 6–18 months from opening.

If you want the next eBooks the day they ship, the email signup at the end of this document gets you on the list. We don't email frequently and we don't sell the list.

A note about SnagATime

I mentioned at the beginning that I'm building a software platform for indoor golf operators, called SnagATime. The platform is a flat-rate booking and operations system — bookings, members, leagues, access control, reporting, payments — designed for the operator profile this benchmark describes. We tier as Foundation / Autopilot / Scale, our pricing is on our website, and we publish our roadmap.

I'm not going to turn this benchmark into a product pitch. If the data was useful, the next-best step is to keep operating your facility well; we'll be here when and if your booking-software situation becomes a real problem you want to solve. If you're ready to look at platforms now, we're at snagatime.com — and we're equally happy to recommend a competitor (Birrdi, uSchedule, All-Booked, Registry) if their fit is a better match for your facility size and stage.

The data is the data. Use what's useful. Skip what isn't.

— Josh

Appendices

Appendix A — Methodology notes

Sample size and representation. The 3,670 indoor golf facility directory represents one of the most complete public catalogues of U.S. indoor sim facilities currently available, but is not a complete census. We estimate the true U.S. facility count at 4,500–5,500, suggesting the directory captures roughly 65–80% of the actively operating market. Sample sizes for pricing analysis are smaller because only 926 facilities publish pricing in a parseable form.

Confidence tier thresholds. High ($n \geq 75$), Moderate ($n \geq 30$), Low / suggestive only ($n \geq 10$), Insufficient / anecdotal ($n < 10$). Tier labels appear on every chart and table in the body.

Chain detection. We identify chain affiliation by facility-name pattern matching against the three chains that have enough records with published pricing to support reliable cohort analysis: Five Iron Golf, X-Golf (and X Golf variant), and The Back Nine. Other multi-location operators (Topgolf, Drive Shack, BigShots, Puttery, Puttshack, PopStroke, GolfTec) appear in the directory but operate adjacent business models (outdoor driving range, mini-golf, instruction-only) and are excluded from the pricing benchmark.

Outlier exclusion. Monthly memberships above \$1,000 and hourly rates above \$300 are excluded as likely data-entry errors or specialty offerings (private fittings, all-day venue rentals) outside the scope of conventional membership and drop-in pricing.

Recency. Directory pricing reflects what facilities publish on their websites as of Q1 2026. Corpus quotes drawn for qualitative context note the year of the original discussion where it materially affects the framing.

Operating-model split (members-only vs. hybrid) deliberately not published. The classifier needed to make this cut reliably depends on a field that's missing on roughly 48% of records and defaults to "members-only" when missing — inflating the members-only sample with facilities of unknown actual model. Where we can establish operating model with confidence, sample sizes drop into the Low tier. We've made the editorial decision to publish only the cuts we can defend at scrutiny.

Geographic granularity. Only four states (Utah, Texas, California, Illinois) met the Moderate-confidence threshold ($n \geq 30$) after the tier-aware filter; state-level cuts are limited to those four. Below the Moderate-confidence four, sample sizes thin out fast and we publish nothing as a state-level benchmark.

Appendix B – Operator quotes and recurring themes

A selection of operator-shared moments from the corpus that anchor the analysis above. Named operators appear with consent. Where consent is pending, attribution has been anonymized.

"They charge per reservation. It turns out to be the most expensive if you got a back nine kind of membership model."

The quote that made section 8 a section. The realization that per-reservation pricing produces uncapped variable cost was the entry point into our analysis of why flat-rate booking platforms exist.

"Very expensive and unpredictable during the busiest months."

Same dynamic, customer-side framing. Operators feel this most acutely in peak season, exactly when the operator has the least bandwidth to renegotiate or migrate platforms.

"We just used it less than expected."

The most common reason members cancel, by a wide margin. Operators who blame the member are missing the design failure: the wrong member bought the wrong product. The right framing is "we sold them a membership that didn't match how they actually play."

"I'd rather pay per booking than a flat fee, because I only pay when I'm getting bookings."

The intuition operators bring to per-reservation software pricing at signup. It's the wrong intuition. The math at scale tells a different story.

About the author

Josh Ray owns and operates Puget Sound Golf Club, a small indoor golf simulator facility in Oak Harbor, Washington. He is the founder of SnagATime, a flat-rate booking and operations platform purpose-built for indoor golf simulator facilities. This benchmark grew out of his work building a directory and pricing reference for his own facility — research he could not find anywhere else when he needed it.

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End of The 2026 Indoor Golf Membership Pricing Benchmark.