



Leveraging Competitive Analysis to Guide Product Direction

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1. The Digital Golf Scorecard Market Overview

Market Landscape

The digital golf scorecard market consists of applications (primarily mobile) that provide scoring capabilities for individuals during their golf round. At a basic level, these apps digitize the traditional paper scorecard. We identified 17 applications within this space including Marker Golf, seven of which were founded within the past five years.

The market can be segmented into three sectors based on the primary goal of the platform, identified through brand messaging, premium features, and platform hierarchy:

1. Group Play

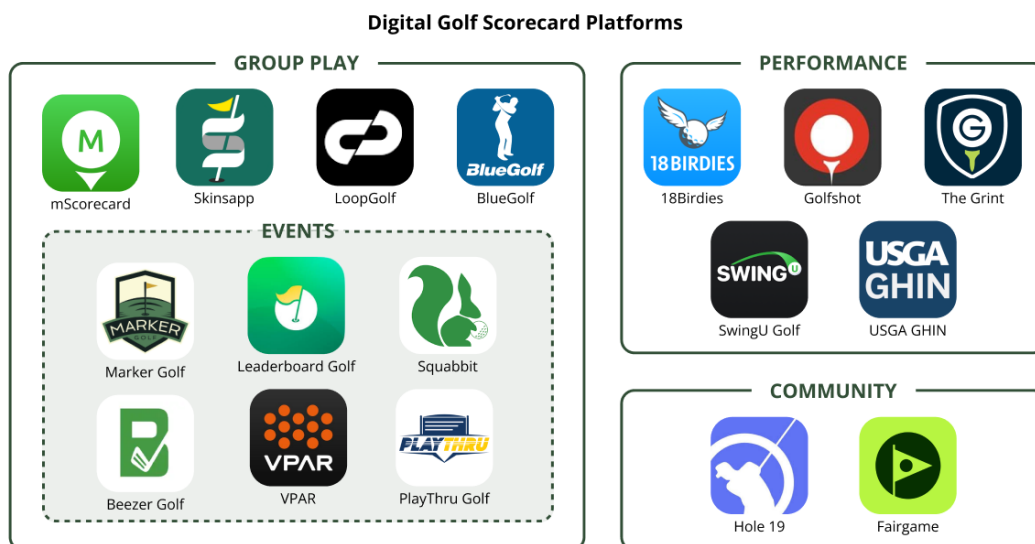
Platforms supporting group golf play through advanced scoring like group games, side games, leaderboards, and betting. **Event platforms** represent a subset of this sector, consisting of those applications that support multi-round tournament setup.

2. Performance

Platforms that focus on individual performance with manual shot tracking (i.e., chips, putts, fairway hits). Through data analysis, gamification, and even AI-powered coaches, these platforms take varied approaches to providing performance insights.

3. Community

Platforms that foster social connection within the golf community. Like the Strava of golf, these applications prioritize social feeds with posts and interactions.



Shared Functionalities

Interestingly, many features were consistent across the digital golf scorecard sectors. The most ubiquitous features included basic group games, GPS course tracking, and manual shot tracking (see table 1).

	Basic Group Games	GPS Course Tracking	Manual Shot Tracking	Course Preview	Social Feed	Handicap Calculator
<i>TOTAL (16)</i>	94%	81%	75%	50%	50%	44%
<i>GROUP PLAY (9)</i>	100%	78%	56%	33%	44%	33%
<i>EVENTS (5)</i>	100%	80%	20%	40%	40%	40%
<i>PERFORMANCE (5)</i>	80%	100%	100%	80%	40%	60%
<i>COMMUNITY (2)</i>	100%	50%	100%	50%	100%	50%

Table 1. Prominent features by sector. Calculations do not include Marker Golf.

While other data points like messaging and premium features allowed us to segment the market despite these shared functionalities, this observation is valuable in understanding the market dynamics and user needs. The proliferation of certain 'basic' features despite the platform's primary goal raises two hypotheses:

1. Digital scorecard platforms discovered that users expected certain basic features related to golf scoring. No matter the advanced functionalities, users would not sustainably use the platform in the absence of these basic features.
2. Digital scorecard platforms added these basic features in an attempt to drive adoption, regardless of user feedback, in a sort of 'feature factory' phenomenon. These basic features do not have a significant user impact and, in many cases, actually contribute to a poor user experience due to cognitive overload.

UI/UX Assessment

Notably, the majority of digital scorecard platforms ranked poor to moderate in our UI/UX assessment. The key contributing factors to this assessment were as follows:

1. Visual hierarchy

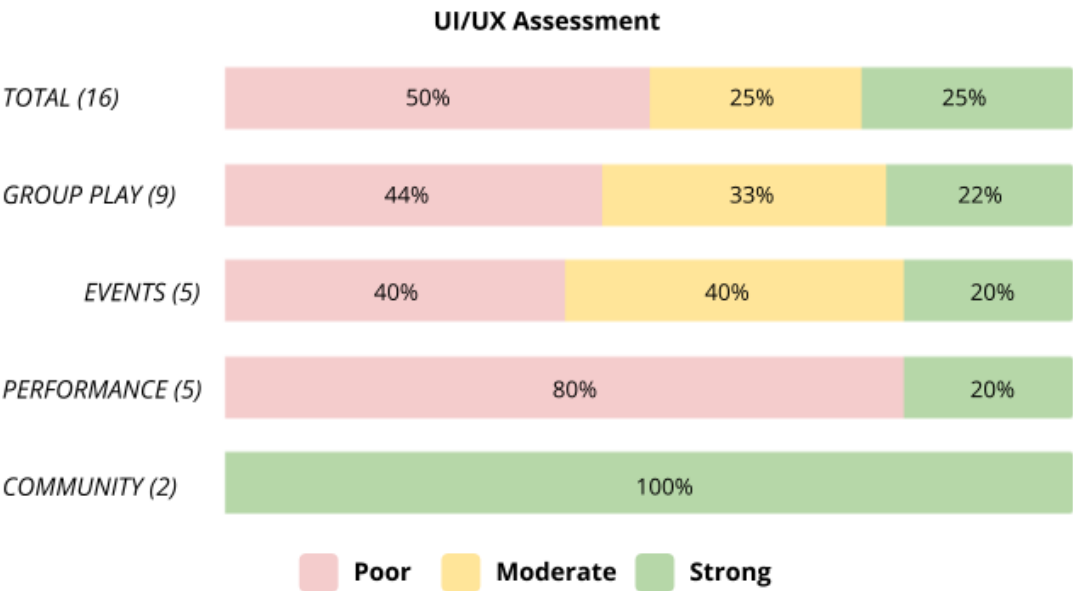
Many platforms lacked an effective visual hierarchy for their platform’s main screens, user flows, and navigation. Given the abundance of basic features, it was difficult for a user to identify the key actions necessary to achieve their goals on the platform; for example, setting up a scorecard.

2. Scorecard cognitive load

Many platforms had a high cognitive load on their scorecard view screens. There were often several nested screens—from leaderboard, to settings, to GPS, to scorecard—rendering it difficult for users to navigate.

3. User Interface

Many platforms had rudimentary user interface designs that appeared outdated due to color and stylistic elements.



Effective UI/UX design thus represents a significant area for differentiation within the digital scorecard market.

2. Competitive Landscape and Positioning

Direct Competitors

Event platforms within the Group Play sector represent Marker Golf’s direct competitors. The differentiation of advanced event functionality, as well as the lack of event platforms with online presence and/or strong UI/UX, make it a relatively unsaturated market. Interestingly, event platforms are characterized by multi-round functionality and are not significantly differentiated by other event-specific features (see table 2).

	Year Founded	App Store Reviews	Business Model	UI/UX Score	Advanced Games	Unlimited Games	Multi-round Setup
Marker Golf	2023	N/A	Freemium	Strong	✓	✓	✓
Leaderboard Golf	2022	274	Freemium	Strong	✓	✓	✓
Squabbit	2022	1,200	Free	Moderate	✓	✓	✓
VPAR	2007	59	Freemium + Service	Moderate	✓	✓	✓
Beezer Golf	2019	583	Freemium	Poor	✓	✓	✓
Play Thru Golf	2020	N/A	Freemium	Poor	✓	X	✓

Table 2. Event platforms representing direct competitors to Marker Golf.

Based on this assessment, Marker Golf’s main competitors include Leaderboard Golf and Squabbit.

- **Leaderboard Golf** ([website](#))
Founded in 2022, Leaderboard Golf is an event platform with additional features like GPS, manual score tracking, handicap posting, and a social feed, along with unlimited games and betting. Their platform facilitates multi-round events with helpful features like invite codes and group creation. With a strong UI/UX, Leaderboard Golf represents a main competitor for Marker Golf. A deep dive into news coverage and marketing assets (like [this LinkedIn post](#) on a recent iteration) could help assess Leaderboard Golf’s product roadmap and outreach strategy.

- **Squabbit** ([website](#))

Created in 2021 as a [seeming side hustle](#), Squabbit is a completely free event platform. Although the UI/UX is moderate, Squabbit's vast array of free functionalities—including GPS, manual shot tracking, unlimited games, and betting—along with tournament setup make it a competitor for Marker Golf. However, despite the app's 1,200 reviews, the lack of online presence raises questions about the platform's product development and outreach strategy.

Although in the Events sub-sector, Beezer Golf ([website](#)) and Play Thru (web app; [website](#)) do not pose as significant competitors at present due to their poor user experience. Notably, however limited by a poor user experience and London location, VPAR ([website](#)) may be an interesting case study for Marker Golf because it services organizations to host live events.

Indirect Competitors

Although not digital scorecards, several platforms partner directly with organizations to manage golf events. These include Golf Genius ([website](#)) and Golf Software ([website](#)), as well as VPAR (albeit this is also a digital scorecard). Should Marker Golf pursue event partnerships with organizations in the future, these platforms will become direct competitors and may warrant further evaluation.

Future Market Entrants

Given the shared functionality, it is feasible that other digital scorecard platforms will enter the Events sub-sector in the future by adding multi-round events. With strong user experience and online presence, notable potential future market entrants include LoopGolf (currently Group Play; [website](#)), Fairgame (currently Community; [website](#)), and 18 Birdies (currently Performance; [website](#)). Having developed a strong user base in their respective sectors, as well as existing game play functionality, these platforms could represent direct competitors should they add events in the future.

3. Product Direction and Priorities

Product Direction

Based on this market analysis, Marker Golf's competitive positioning in the Events sub-sector is the key differentiator within the digital scorecard market. As such, product development should point towards becoming the leader within this Events sub-sector in order to (1) capitalize on the relatively unsaturated market and (2) create a competitive moat against potential market entrants.

Product Priorities

Given the dynamics surrounding shared basic features and the lack of differentiation *within* the Events sub-sector, the key priorities for product development are as follows:

- 1. Maintain alignment between competitive positioning and user needs.**

Marker Golf's current users predominantly utilize the event functionality, rather than the individual scorecard. Track whether events remain the primary goal of users and adjust marketing and/or competitive positioning accordingly.

- 2. Optimize the current event user experience.**

Given that strong UI/UX is a competitive differentiator within the digital scorecard market, continue to assess the ease and efficacy of the current event functionality and iterate as needed.

- 3. Continuous discovery of advanced event functionality.**

Continued user research to identify event-related needs and solutions that will differentiate Marker Golf within the Event space (i.e., group creation on Leaderboard Golf).

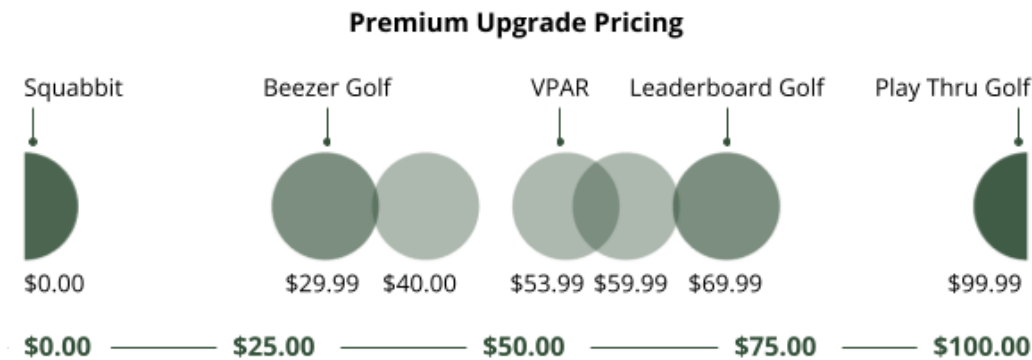
- 4. Assessment of baseline user needs.**

Assess whether the lack of certain basic features like GPS, manual shot tracking, and handicap posting are contributing to bounce rates on the platform. Be strategic and selective about interpreting user feedback (i.e., determining the actual, not perceived, user impact) to test the aforementioned hypotheses and iterate.

4. Business Model and Pricing Considerations

Freemium Model: Pricing

With the exception of a few free platforms, the majority of digital scorecard apps operate with a direct-to-consumer freemium model. Most apps have one premium tier, with membership ranging from \$29.99 to \$99.99 following a free trial of 1-2 weeks.



The pricing for Marker Golf should integrate this research with customer willingness to pay.

Freemium Model: Features

Notably, the delineation of which features are free versus premium helps to define the platform’s competitive positioning within the market. All freemium platforms in the Event sub-sector have multi-round setup as a premium feature.

Although Marker Golf’s direct competitors within the space likewise have advanced games as a premium feature, launching Marker Golf with these for free will help to gain traction on the platform and get users ‘in the door.’ Harkening to priority (1) on the product direction, Marker Golf may consider making this functionality premium if they observe that users are utilizing the individual scorecard rather than the event and want to monetize on this (see table 3).

	Basic Games	Advanced Games	Unlimited Games	Betting	Multi-round Setup	No Ads
Marker Golf	Free	Free	Free	N/A	Premium	Free
Leaderboard Golf	Free	Premium	Premium	Free	Premium	Free
Squabbit	Free	Free	Free	Free	Free	Free
VPAR	Premium	Premium	Premium	N/A	Premium	Premium
Beezer Golf	Premium	Premium	Premium	Premium	Premium	Premium
Play Thru Golf	Free	Premium	N/A	N/A	Premium	Free

Table 3.Free versus premium features for Event platforms.

Organizational Partnerships

In the future, Marker Golf may consider pursuing partnerships with organizations for event setup as an additional revenue stream with higher-value deals. Further assessment of the aforementioned platforms that do this may be helpful.

You can access the full competitive research dataset [here](#).