



Customer Satisfaction Study

Conducted for the
City of San Diego Golf Operations Division

October 2011



Purpose of Study

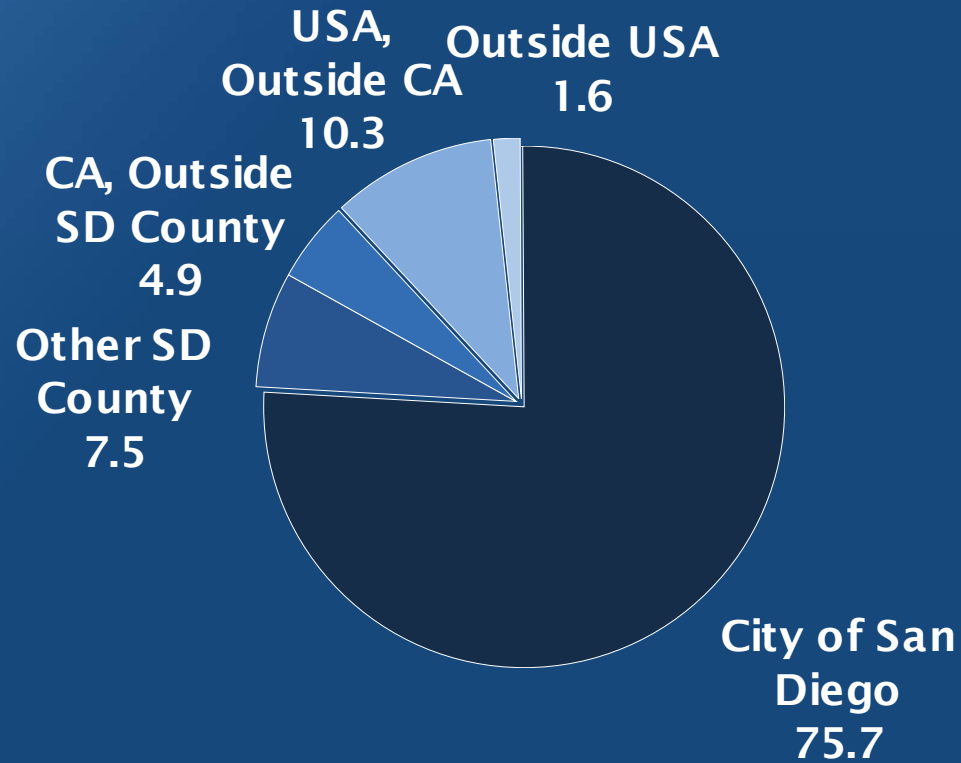
- Profile customers' frequency of golf play in general and at the three San Diego courses
- Evaluate customer experiences with and perceptions of the three City golf courses
- Establish benchmark performance indicators that can be tracked over time
- Collect background and demographic data relevant to understanding customers' perceptions, and needs



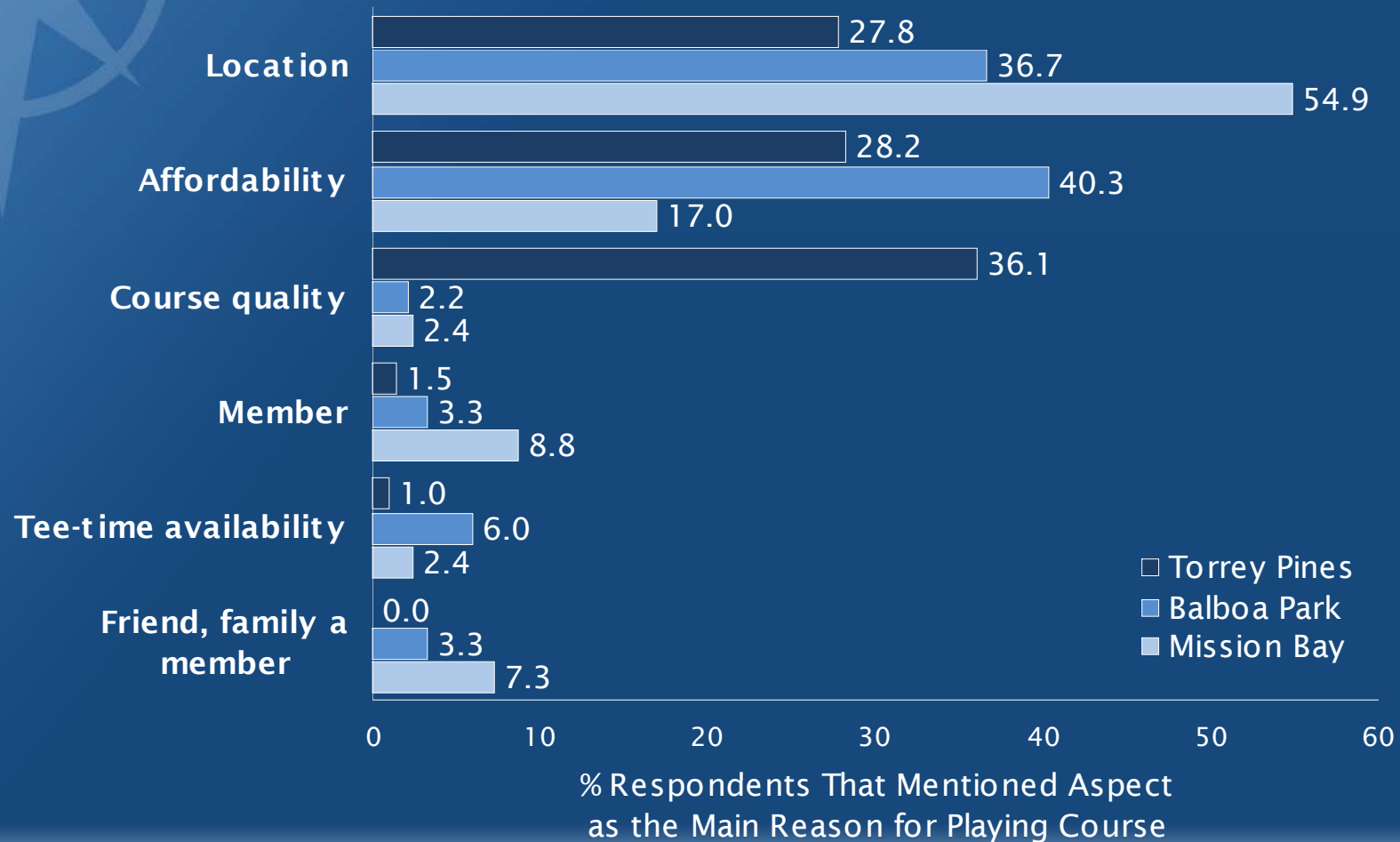
Methodology of Study

- Telephone and Web survey
- 1,306 customers who played at least one round of golf at Torrey Pines, Balboa Park, or Mission Bay in 2010
- Recruited via telephone and email
- Conducted Apr 29 to May 9, 2011
- $\pm 2.7\%$ margin of error

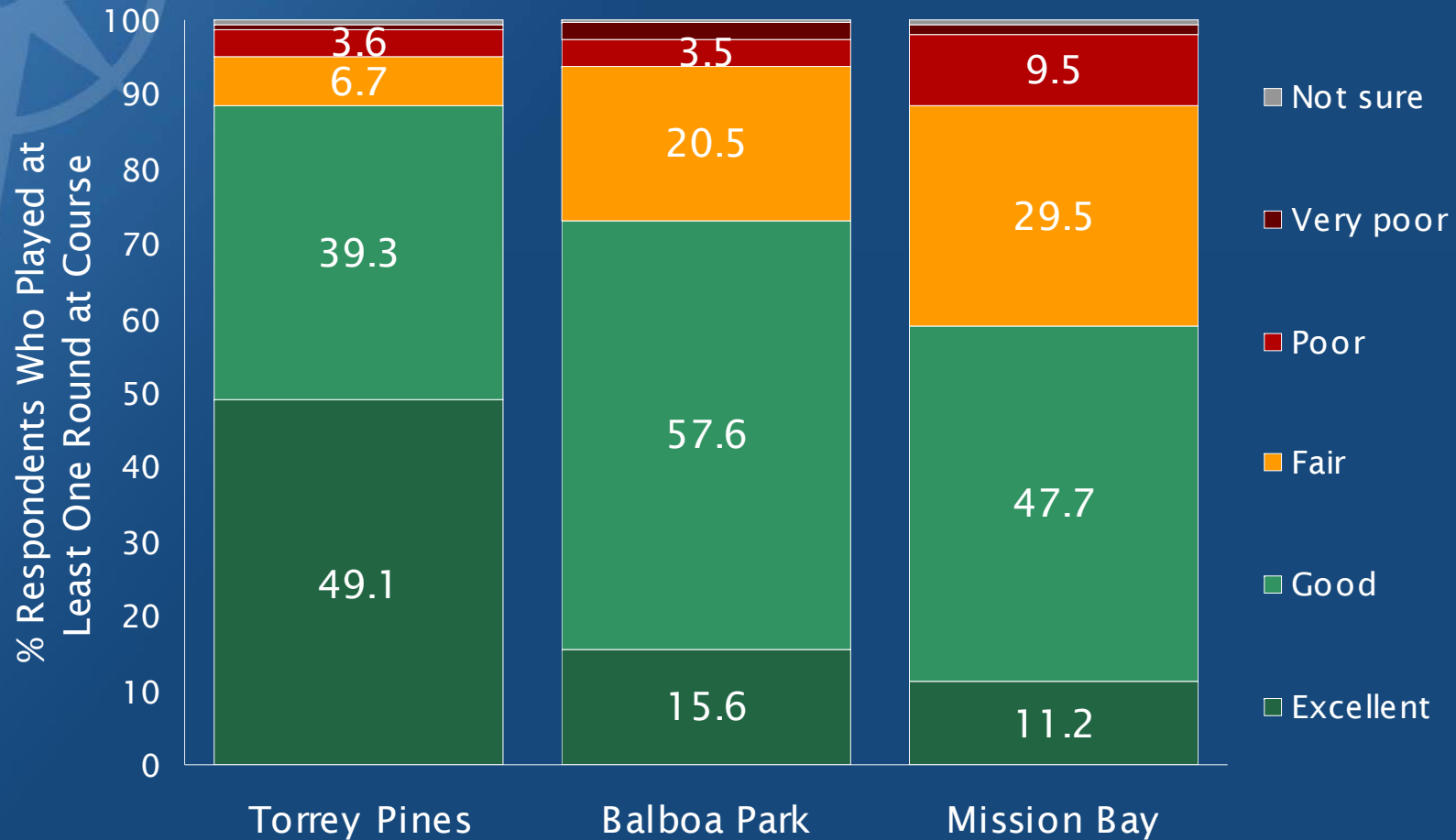
Current Residence of Customers



Reason for Playing San Diego Course Most Often



Rating City of San Diego Golf Courses



Most Mentioned Suggestions for Improvement

Torrey Pines	Balboa Park	Mission Bay
No changes needed (20%)	Not sure / Cannot think of anything (25%)	Not sure / Cannot think of anything (20%)
Reduce fees, costs in general (14%)	No changes needed (17%)	No changes needed (16%)
Not sure / Cannot think of anything (14%)	Improve green conditions (11%)	Improve course quality (14%)
Enforce speed of play (10%)	Improve course quality (10%)	Reduce fees, costs in general (12%)
Improve access to tee time info (8%)	Improve facility maintenance (8%)	Improve green conditions (11%)

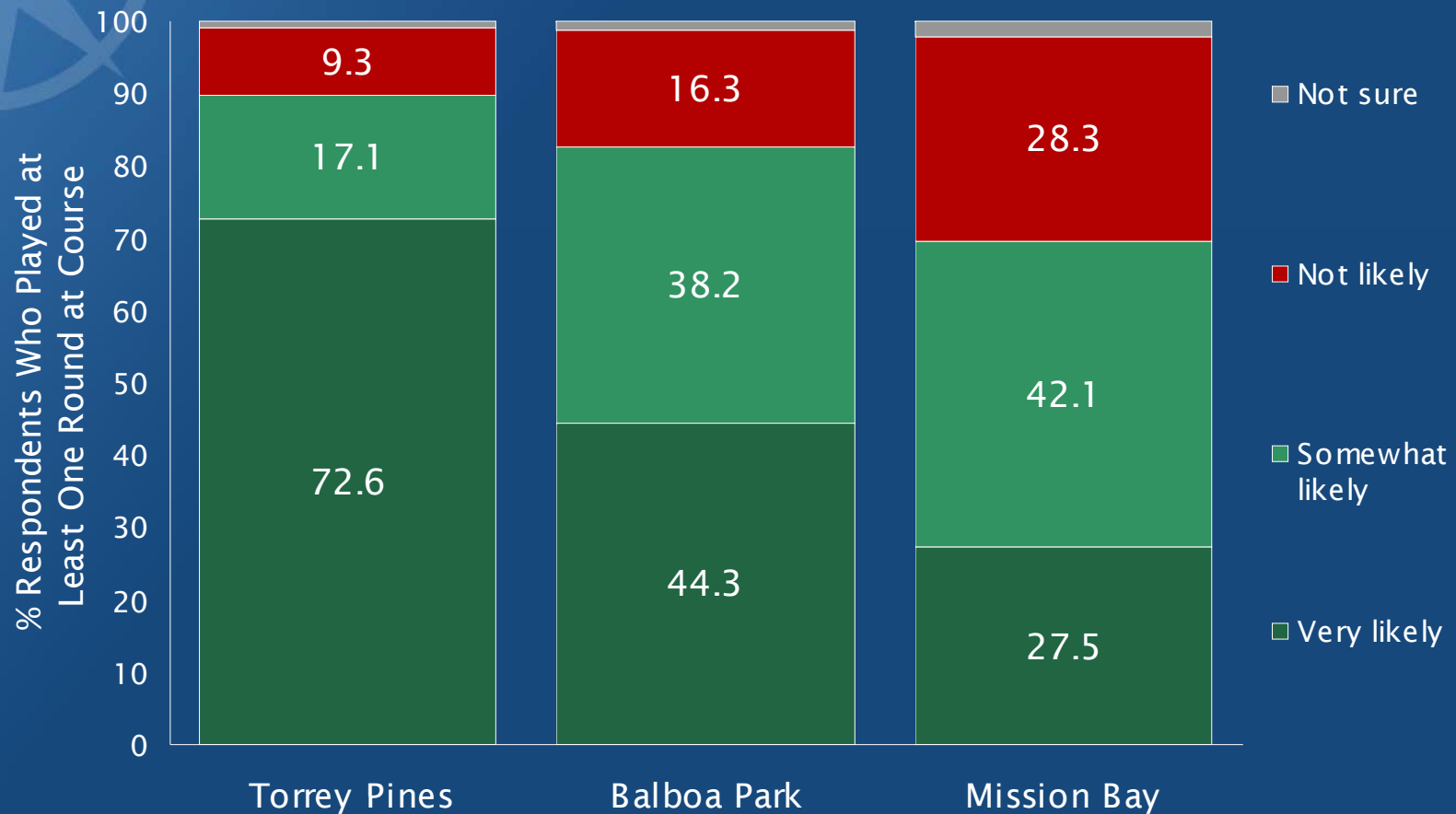
Course Aspects With Highest Ratings of Excellent or Good

Torrey Pines	Balboa Park	Mission Bay
Layout of the course (98%)	Layout of the course (88%)	Availability of tee-times when making a reservation by phone (88%)
Overall course condition (93%)	Courtesy of golf course starters, Marshals, maintenance staff (80%)	Condition of golf carts (78%)
Availability and condition of practice putting greens (91%)	Availability of tee-times when making a reservation by phone (77%)	Availability of tee-times when doing a walk-up reservation (76%)
Condition of fairways (91%)	The value of the course for the fee (76%)	Courtesy of golf course starters, Marshals, maintenance staff (75%)
Quality of the pro shop (90%)	Availability of tee-times when doing a walk-up reservation (74%)	Pace of play (73%)

Course Aspects With Lowest Ratings of Excellent or Good

Torrey Pines	Balboa Park	Mission Bay
Availability of tee-times when making a reservation by phone (44%)	Availability and condition of driving range facilities (33%)	Availability and condition of restrooms (25%)
Availability of tee-times when doing a walk-up reservation (44%)	Quality of the pro shop (42%)	Quality of the pro shop (27%)
Availability and condition of driving range facilities (47%)	Availability and condition of restrooms (53%)	Quality of food and beverage services (35%)
Pace of play (52%)	Condition of the bunkers (54%)	Condition of the bunkers (51%)
Availability and condition of restrooms (53%)	Condition of cart paths (55%)	Condition of cart paths (54%)

Likelihood of Recommending Course





Key Conclusions

- 9 in 10 Torrey Pines customers rated their experience as *excellent* or *good*
- Only 1 in 10 Balboa Park and Mission Bay customers rated their experience as less than *fair*
- Majority of customers at all three courses rated at least 19 of 22 specific services as *excellent* or *good*



Key Conclusions

- 9 in 10 Torrey Pines customers at least *somewhat likely* to recommend course
- 8 in 10 Balboa Park customers at least *somewhat likely* to recommend course
- 7 in 10 Mission Bay customers at least *somewhat likely* to recommend course



Areas for Improvement

➤ Torrey Pines

- Availability of tee times, driving range
- Pace of play

➤ Balboa Park

- Course conditions, maintenance
- Driving range availability, conditions

➤ Mission Bay

- Course conditions, maintenance
- Restrooms, food & beverage, pro shop