

2024 Customer Satisfaction Survey SUMMARY REPORT

PREPARED FOR THE CITY OF SAN DIEGO GOLF OPERATIONS DIVISION







OCTOBER **2024**



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INTRODUCTION

The City of San Diego Golf Operations Division is one of ten operating divisions within the City's Park and Recreation Department. Currently, the City operates three municipal golf complexes: Balboa Park, Mission Bay, and Torrey Pines. The primary goal of the Golf Operations Division, highlighted in its mission statement, is to provide high quality golfing experiences to players of all ages and abilities and enhance their enjoyment of the game of golf.

As part of its commitment to provide high quality customer service and exceptional facility operations and maintenance at each golf complex, the City obtains public input by interacting regularly with golfers. Although this feedback mechanism is a valuable source of information for the City in that it provides timely, accurate information about the opinions of specific customers, it does not necessarily provide an accurate picture of the City's golf customer base *as a whole*. That is, most informal customer feedback mechanisms rely on the customer to initiate the feedback—which creates a self-selection bias—and thus the City receives feedback from customers motivated enough to initiate the process. Because these customers tend to be *very* pleased or *very* displeased with a particular aspect of service or their golfing experience, their collective opinions are not necessarily representative of the City's golf customers as a whole.

PURPOSE OF STUDY The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and thereby provide the City with a statistically reliable understanding of its customers' experiences, perceptions, and concerns as they relate to golf services and facilities provided by the City. Ultimately, the survey results and analyses presented in this report will provide the City with information that can be used to make sound, strategic decisions in a variety of areas including service improvements and facility enhancements, measuring and tracking internal performance, budgeting, policy, and planning. For assistance in this effort, the City selected True North Research (True North) to design the research plan and conduct the study. Broadly defined, the study was designed to:

- · Profile customers' frequency of golf play in general and at the three city-operated courses;
- Evaluate customer experiences with, and perceptions of, the three city-operated golf courses;
- Track the findings of the current 2024 customer opinion study against similar surveys conducted in 2011, 2013, 2015, 2017, 2019, 2020, and 2022; and
- Collect background and demographic data relevant to understanding customers' perceptions and needs.

As noted above, this is not the first statistically reliable customer opinion survey conducted for the City. Because there is interest in tracking the City's performance in meeting the evolving needs of its customers, where appropriate the results of the current study are compared with results of identical questions from the prior studies.

STATISTICAL SIGNIFICANCE Many figures and tables in this report present the results of questions asked in 2024 alongside the results found in prior surveys for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in customer opinion between the most recent prior survey (2022) and the current (2024)—as opposed to being due to chance associated with selecting

two samples independently and at random. Differences between the two studies are identified as *statistically significant* if we can be 95% confident that the differences reflect an actual change in public opinion. Statistically significant differences within response categories over time are denoted by the † symbol which appears in the figure next to the appropriate response value for 2024.

OVERVIEW OF METHODOLOGY A full description of the methodology employed is provided later in this report (see *Methodology* on page 48). In brief, a total of 1,122 randomly selected customers who played at least one round of golf at Torrey Pines, Balboa Park, or Mission Bay between July 1, 2023 and June 30, 2024 participated in the study between September 10 and September 26, 2024. The survey followed a mixed-method design that employed multiple recruiting methods (email, text, and telephone) and multiple data collection methods (online and telephone). The maximum margin of error for this study is \pm 2.9% at the 95% level of confidence for questions answered by all 1,122 respondents.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the section titled *Key Findings* is for you. It provides a summary of the most important factual findings of the survey in a Question & Answer format. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 51) and a complete set of crosstabulations can be found in Appendix A.

ACKNOWLEDGEMENTS True North thanks the staff at the City of San Diego who contributed valuable input during the design stage of this study. Their collective experience, local knowledge, and insight improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors—Dr. Timothy McLarney and Richard Sarles at True North—and not necessarily those of the City of San Diego. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH Founded in 2002, True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,500 survey research studies for public agencies, including more than 400 studies for California municipalities and 10 for the City of San Diego.

KEY FINDINGS

As noted in the *Introduction*, this study was designed to provide the City of San Diego with a statistically reliable understanding of its customers' experiences, perceptions, and concerns as they relate to golf services and facilities provided by the City. As such, it provides information that can be used to make sound, strategic decisions in a variety of areas including service improvements and facility enhancements, measuring and tracking internal performance, budgeting, and planning. Whereas subsequent sections of this report are devoted to conveying detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

How often are customers playing City of San Diego Courses in 2024? San Diego golf customers played an average of 48.2 rounds of golf in the 12 months preceding the interview, which is statistically higher than the 41.6 round-average recorded in 2022. Also higher, 30% of golf customers surveyed in 2024 said they played more than one round of golf per week over the past 12 months. Demographic subgroups that played the most rounds, on average, were those who live outside the United States or within California but outside San Diego County, individuals who have a golf club membership, and seniors 65 years and older (see *Frequency of Overall Play* on page 9 for more details).

When asked in an open-ended manner, 19% of customers surveyed said they play Balboa Park most often, followed by Torrey Pines (15%) and Mission Bay (10%) (see *Courses Played Most Frequently* on page 10). Torrey Pines was the most played City of San Diego course overall, however, with 73% having played at least one Torrey Pines Course (37% both courses, 20% South only, 15% North only). Sixty-two percent (62%) of golf customers reported playing Balboa Park at least once during the 12 months preceding the interview, whereas the corresponding figure for Mission Bay was 40%. Balboa Park had the highest average number of rounds played during this period (8.1, up from 2022's 6.0 rounds), followed by Torrey Pines (5.8 combined), and Mission Bay (4.1) (see *Frequency of Play at San Diego Courses* on page 13).

Torrey Pines was played most often because of the course quality, whereas affordability was the main factor for Balboa Park and location was the primary reason cited among those who played at Mission Bay (see *Reason For Playing Course Most Often* on page 12). Indeed, Torrey Pines South Course draws customers from outside the County, outside of California, and internationally at much higher rates than the other city courses, as well as golfers in the 35 to 44 year age group and customers who golf less than six rounds a year. Comparatively, Balboa Park draws a higher concentration of City of San Diego residents, customers with a household income under \$50k or \$75k to \$99k, renters, and weekly golfers (see *figures 11-13 beginning on page 15* for more details).

How well is the City performing in meeting the needs of San Diego golf customers? The current survey results indicate that the City of San Diego has continued to perform very well in providing golf services to San Diego residents and visitors alike. In 2024, approximately nine-in-ten customers rated their most recent golf experience at Torrey Pines Golf Course as excellent or good (92% South Course, 89% North Course), with the majority providing an excellent rating (60% South Course, 51% North Course).

Balboa Park Golf Course also received high marks, with eight-in-ten customers (82%) rating their most recent experience as excellent or good, which was statistically higher than 2022's 74%. Customers' experiences at the Mission Bay Golf Course continue to be somewhat less positive (71%) than at the other city courses, although the 2024 rating for Mission Bay increased substantially compared with the level recorded in 2022 during its large-scale improvement project (+8%), and is now back in line with the 2019 and 2020 findings (each 72%) and not too far from 2015's all-time high of 74% (see *Rating Overall San Diego Golf Experiences* on page 18).

Customers generally echoed the assessments they expressed about their overall golf experiences when asked about a variety of *specific* performance areas at each course. Of the 22 specific service aspects tested, a majority of customers provided ratings of excellent or good for at least 15 aspects at *each* of the City of San Diego courses. This is an area where the Torrey Pines South Course stood out for having the *most* positive ratings for many aspects of the course, holding the top spot for 14 of the 22 items, which was nearly three times the amount of any other course (see *Comparison of San Diego Golf Course Ratings* on page 35). Mission Bay Golf Course also stood out in the 2024 study, with positive improvements during the past two years in 18 of 22 performance aspects, 7 of which were statistically significant (see *Rating Aspects of Mission Bay* on page 33 for more details).

Additionally, when asked in an open-ended manner to identify what course managers could change to improve their overall experience, approximately four-in-ten customers at *each* course (Torrey Pines South: 38%, North: 39%, Balboa Park: 40%, and Mission Bay: 41%) desired no changes or could not think of anything specific to improve their golf experience (see *Suggested Improvements* on page 21).

Setting aside perceptions and looking at customers' past and intended future golf-related behaviors, we again find evidence for the City meeting the needs of its golf customers. Approximately three-in-ten customers (29%) expect to increase their frequency of play at Torrey Pines in the coming year, with 23% and 13% offering a similar response for Balboa Park and Mission Bay courses, respectively. The percentage that expect to decrease their frequency of play, on the other hand, was 11% or less for each course. Consistent with the overall results, the highest percent-

age of respondents in most subgroups anticipated increasing their play at Torrey Pines, followed by Balboa Park. Of note is that customers with a household income under \$50k were the most likely to indicate increased play at Balboa Park over the next 12 months (see *Frequency of Future Play at San Diego Courses* on page 38 for more details).

Perhaps most telling of the City's performance is customers' likelihood of recommending the San Diego courses to a friend or colleague, with 91% of Balboa Park customers, 90% of Torrey Pines customers, and 81% of Mission Bay customers saying they are likely to recommend the course. Although the magnitude of the change was not statistically significant, the percentage of Balboa Park customers likely to recommend the course increased from 2022 to 2024 (+3%), with Balboa Park edging out Torrey Pines for the top spot for the first time in the history of the survey. That said, Torrey Pines is still the overwhelming sentiment leader, with 72% of Torrey Pines customers *very* likely to recommend the course, compared with 58% for Balboa Park and 43% for Mission Bay (see *Likelihood of Recommending San Diego Golf Courses* on page 44).

Where should the City focus its efforts in the future?

Perhaps the most important recommendation, one often overlooked in customer satisfaction research, is for the City to recognize the things it does well and to focus on continuing to perform at a high level in these areas. As noted throughout this report, although the city golf courses differ with regard to customers' perceptions of the course, facilities, and services, the vast majority of customers were generally pleased. The top priority for the City should be to maintain the quality of services and facilities it currently provides. Nevertheless, in the spirit of constant improvement, the results of the study suggest several opportunities to increase customer satisfaction further. Each course's strengths as well as opportunities are presented below.

Torrey Pines Golf Course

Customers who played Torrey Pines South Course gave the most positive ratings for the layout of the course (97% excellent or good), quality of the pro shop (92%), condition of cart paths (91%), overall condition of the course (91%), and condition of fairways (91%). Considering the intensity of the positive rating, the condition of the greens (53% excellent) and courtesy of golf course starters, marshals, and maintenance staff (52% excellent) also received high marks from South Course customers.

Customers who had played the Torrey Pines North Course gave the most positive ratings for the layout of the course (96% excellent or good), quality of the pro shop (93%), directional signage to the golf course (90%), condition of cart paths (89%), condition of fairways (89%), and courtesy of golf course starters, marshals, and maintenance staff (88%). Considering the intensity of the positive rating, the value of the course

for the fee was also viewed quite positively (45% excellent) by many North Course customers.

Among customers who play Torrey Pines, improving availability of tee time reservations by phone and for walk-up customers stood out as the top candidates for service improvement on both the south and north courses. Improving the availability and condition of driving range facilities and improving the pace of play rounded out the bottom four (of 22 based on the percentage of positive ratings). Clearly, these service aspects are directly related to the significant volume of customers who play at Torrey Pines. It is worth noting that these are the same four priority areas for improvement identified by customers who play the north and/or south courses in past surveys.

Examining the key differentiators in opinion between those who rated their most recent overall experience at Torrey Pines as excellent or good versus those who said it was fair, poor, or very poor, the overall course condition and the value of the course for the fee stood out at both courses, as well as the condition of the fairways at the South Course and enforcement of golf course rules and regulations at the North Course. Indeed, customers who reported a fair, poor, or very poor overall experience with each course were two to four times more likely to offer negative ratings of these aspects than those with a positive experience.

Non-residents continue to be especially critical of the course's *value for the fee*, being almost twice as likely as residents to cite the course's value as fair, poor, or very poor. High cost of play was also among the top factors mentioned by customers who intend to play Torrey Pines less frequently in the future.

Balboa Park Golf Course

Balboa Park Course customers gave the most positive ratings to the layout of the course (89% excellent or good), value of the course for the fee (87%), condition of the greens (85%), overall course condition (83%), and courtesy of golf course starters, marshals, and maintenance staff (82%).

Improving the availability and condition of driving range facilities, availability of tee times when doing a walk-up reservation, and availability and quality of golf instructors were the top improvements desired by Balboa Park Golf Course customers in 2024 (based on the percentage of positive ratings). Isolating service areas that best separate customers who had an overall excellent or good experience versus those with less positive experiences, the City may also consider focusing on the overall course condition, condition of cart paths, enforcement of golf course rules and regulation, and condition of the rough. The condition of the course was also among the top factors mentioned by customers who

intend to play Balboa Park less often in the future. Notably, the 2024 survey results show that customers' perception of the overall course condition has improved since the 2022 survey (+7% excellent or good ratings). Another area highlighted in the 2022 survey as an opportunity for improvement—the condition of fairways—increased significantly over this time period (+13%) to the point that it is no longer a top differentiator of opinion between those who had an overall excellent or good experience at Balboa Park versus those with less positive experiences.

Mission Bay Golf Course

Mission Bay Golf Course customers gave the most positive ratings to the courtesy of course starters, marshals, and maintenance staff (88% excellent or good), the layout of the course (85%), quality of the pro shop (76%), the value of the course for the fee (76%), and condition of golf carts (75%). Comparing the courses, Mission Bay was rated the highest—by a sizeable margin—with regard to the availability of tee-times when making a phone or walk-up reservation and the availability and condition of driving range facilities. Mission Bay also tied Torrey Pines for the top spot for pace of play and courtesy of golf corse starters, marshals, and maintenance staff.

Nevertheless, Mission Bay continues to receive lower overall performance ratings when compared to the other city courses. Based on customers' ratings of 22 specific performance aspects, the best opportunities for improvement are the quality of food and beverage services, condition of the tee boxes, and condition of cart paths. Isolating the conditions that best separate customers who had an overall excellent or good experience from those with less positive experiences, the City may also consider improvements to the overall course condition, condition of the greens, condition of fairways, condition of the rough, and condition of the bunkers.

One of the recommendations of the last study was to asses whether the declines evidenced for Mission Bay from 2020 to 2022 were an artifact of its renovation project or a larger trend needing further examination. The 2024 survey results show that the dips recorded in 2022 in the midst of construction rebounded once the renovation was complete. Indeed, the Course's overall performance rating increased significantly as did 7 of the 22 specific performance aspects tested, with the quality of the pro shop (+49%) and availability and condition of restrooms (+26%) seeing the biggest jumps. Further, of the 14 statistically significant changes in specific aspects of performance found between the 2022 and 2024 studies across all four courses, 12 (86%) were in the positive direction, with more than half of those improvements recorded for Mission Bay.

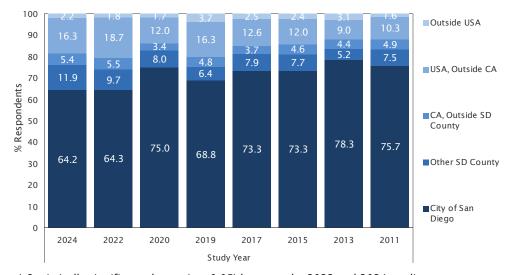
RESIDENCY OF CUSTOMERS

The golf customer survey opened with two questions regarding the location of the customer's residence. Specifically, customers were asked to provide the ZIP code of their current primary residence. Those who resided outside the City of San Diego were also asked to indicate the name of the City they live in or nearest to.

Question 1 To begin, what is the ZIP code at your primary residence?

Question 2 What is the name of the City you live in or live closest to?

FIGURE 1 AREA OF CURRENT RESIDENCE BY STUDY YEAR



 \dagger Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

As shown in Figure 1, among those surveyed in 2024, 64% of customers' primary residences were located in the City of San Diego, 12% were located in San Diego County but outside the City of San Diego, 5% were in California but outside San Diego County, 16% were located elsewhere in the United States, and about 2% were outside the United States. The 2024 study results tracked very closely with the 2022 survey, with no statistically significant changes.

FREQUENCY & COURSES PLAYED

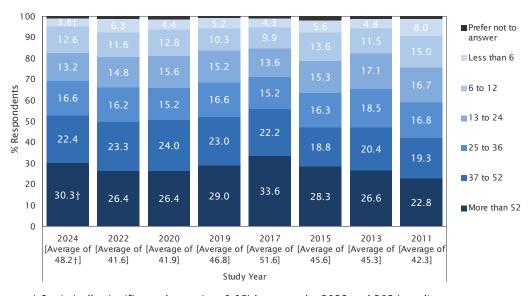
After the introduction and general inquiry regarding the customer's area of primary residence, the survey turned to the topic of golf with several questions about frequency of play, courses played in San Diego and elsewhere, and frequency of play on each of the City's three courses.

FREQUENCY OF OVERALL PLAY The first question in this series asked respondents to estimate the number of golf rounds they had played in the past 12 months. As shown below in Figure 2, 30% of golf customers surveyed in 2024 said they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds, which is statistically higher than the 2022 findings (+4%). Another 22% played between 37 and 52 rounds, 17% had played between 25 and 36 rounds, 13% had played 13 to 24 rounds, 13% had played between 6 and 12 rounds, and 4% had played fewer than 6 rounds in the past year (statistically lower than 2022's 6%).

Overall, San Diego golf customers played an average of 48.2 rounds of golf in the 12 months preceding the interview, which is statistically higher than the 41.6 round-average from 2022.

Question 3 Including courses in San Diego and elsewhere, in the past 12 months approximately how many rounds of golf did you play?

FIGURE 2 TOTAL ROUNDS OF GOLF PLAYED IN PAST 12 MONTHS BY STUDY YEAR



 \dagger Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

Figures 3 and 4 on the next page display the average number of rounds played in the past year by a variety of demographics. Demographic subgroups that played the most rounds, on average, were those who live outside the United States or within California but outside San Diego County, individuals who have a golf club membership, and seniors 65 years and older.

FIGURE 3 AVERAGE NUMBER OF ROUNDS PLAYED IN PAST 12 MONTHS BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME

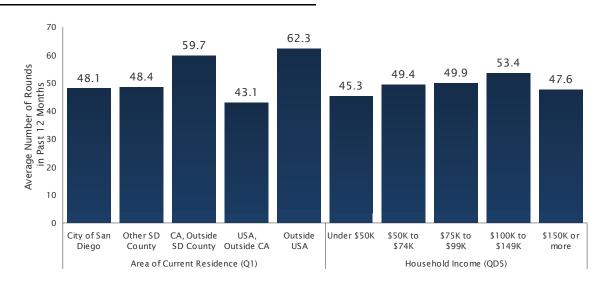
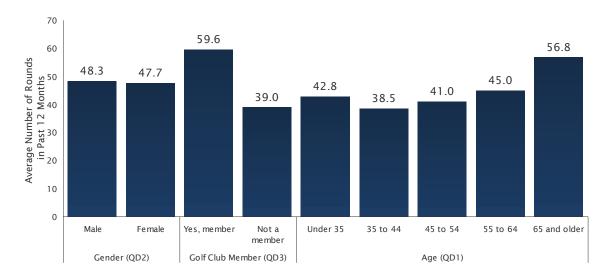


FIGURE 4 AVERAGE NUMBER OF ROUNDS PLAYED IN PAST 12 MONTHS BY GENDER, GOLF CLUB MEMBER & AGE



COURSES PLAYED MOST FREQUENTLY All respondents were next asked to indicate the name of the golf course they play most often. Customers provided names of hundreds of courses from all over the world, although the most commonly mentioned were located in San Diego County and, not surprisingly, within the City of San Diego. Figure 5 on the next page presents the courses mentioned by at least 0.7% of respondents. Approximately three-in-ten customers identified a course other than those shown in the figure (28%) or indicated that they were not sure or play multiple courses (4%). Among specific courses cited, 19% of customers surveyed played Balboa Park most often, followed by Torrey Pines (15%), Mission Bay (10%), and the Admiral Baker Golf Course (5%). For the interested reader, Figure 6 on the next page shows the *most commonly played* courses among residents of the City of San Diego as well as those who live elsewhere in San Diego County.

Question 4 What is the name of the golf course that you play most often?

FIGURE 5 COURSE PLAYED MOST OFTEN

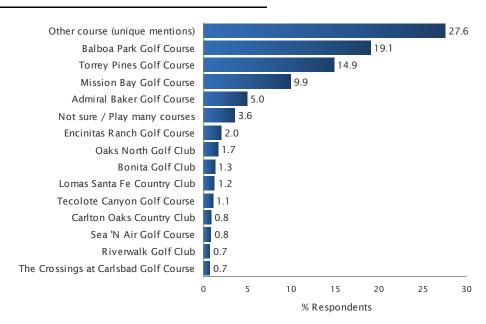
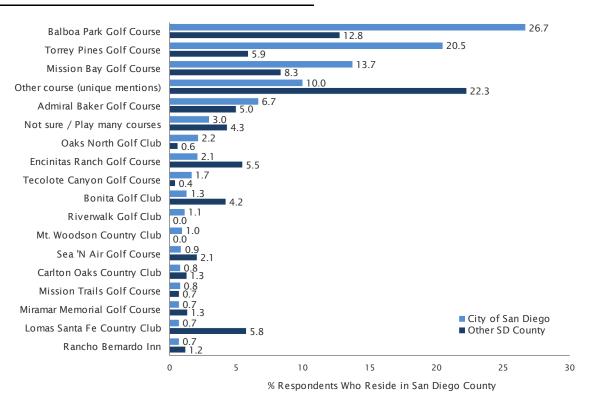


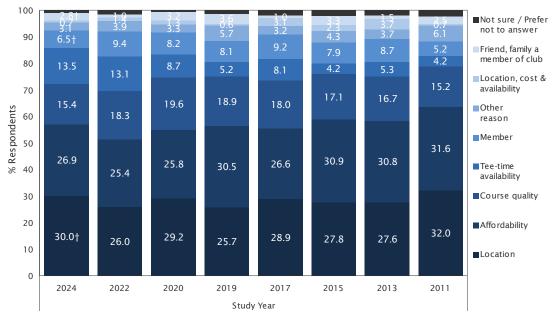
FIGURE 6 COURSE PLAYED MOST OFTEN BY CITY OF RESIDENCE IN SAN DIEGO COUNTY



REASON FOR PLAYING COURSE MOST OFTEN There are a number of motivators for playing a particular golf course most often, including location of the course relative to home and work, cost of play, and overall quality of the course. After customers provided the name of the course they play most often in Question 4, the survey next inquired about the primary reason for their choice.

Question 5 Is there a particular reason why you play this course most often?



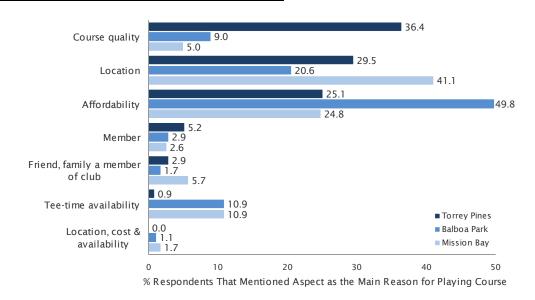


† Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

Location (30%) and affordability (27%) were the top reasons mentioned in 2024 for playing a particular course most often, followed by course quality (15%), tee-time availability (14%), and being a member of the course (7%). Compared with 2022, the percentage of golfers who mentioned location (+4%) or friend/family (+2%) were statistically higher in 2024, whereas the percentage who mentioned having a membership as their primary reason was lower (-3%).

Figure 8 on the next page displays responses to Question 5 among customers who mentioned that they play one of the three city golf courses most often, thus highlighting the primary factors in choosing to play each. As shown in the figure, the top reason for playing Torrey Pines was different than Balboa Park and Mission Bay. Torrey Pines was played most often because of the course quality, whereas affordability was the main factor for Balboa Park and location was the primary reason cited among those who play at Mission Bay.

FIGURE 8 REASON FOR PLAYING CITY OF SAN DIEGO COURSE MOST OFTEN



FREQUENCY OF PLAY AT SAN DIEGO COURSES At this point in the survey, the questions became more specific about customers' experiences with, and opinions of, the three City of San Diego courses. The first question of this nature asked respondents to indicate approximately how many rounds of golf they had played at each of the three city courses in the past 12 months, differentiating between the north and south courses at Torrey Pines. Figure 9 on the next page presents the results of this question and shows that Torrey Pines was the most frequently played course overall, with 73% having played at least one Torrey Pines Course. More specifically, 57% of customers had played at least one round on the South Course and 53% played at least one round on the North Course. Further, 37% of golfers had played both Torrey Pines Courses, 20% South only and 15% just the North Course (not shown in the figure). Sixty-two percent (62%) of golf customers reported playing Balboa Park at least once during the 12 months preceding the interview, whereas the corresponding figure for Mission Bay was 40%.

Also shown in Figure 9 are the average number of rounds per customer who had played each course in the past 12 months. Balboa Park had the highest average number of rounds played during this period (8.1), followed by Torrey Pines (5.8 combined, with North Course at 3.5 and South Course at 2.4), and Mission Bay (4.1).

In 2024, there was a statistically significant increase in the average number of rounds played at the Balboa Park course, up from 6.0 in the prior study to 8.1 (see Figure 10 on next page).

^{1.} Precise decimals used in the calculation of total rounds played, and not the rounded subcomponents.

Question 6 Thinking now of courses in the City of San Diego, in the past 12 months, approximately how many rounds of golf did you play at ____?

Question 7 Of the ____ <Q6a> times you played at Torrey Pines in past 12 months, how many times did you play the south course?

FIGURE 9 FREQUENCY OF PLAYING CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS

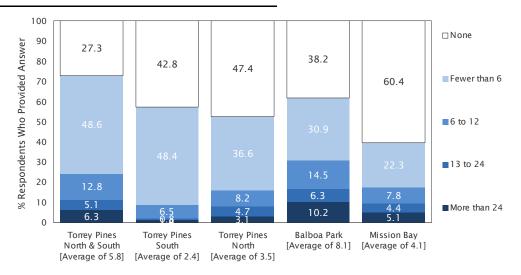
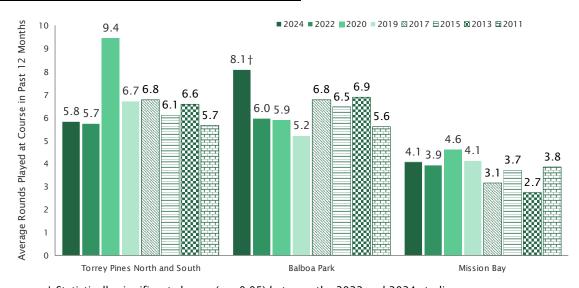


FIGURE 10 FREQUENCY OF PLAYING CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY STUDY YEAR



 \dagger Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

Figures 11 through 13 on the next page display the percentage of customers who played each city course across a variety of demographic subgroups. One pattern that jumps out from the figures is that the Torrey Pines South Course draws customers from outside the County, outside of California, and internationally at much higher rates than the other city courses, as well as golfers in the 35 to 44 year age group and customers who golf less than six rounds a year. Balboa Park draws a higher concentration of City of San Diego residents, customers with a household income under \$50k or \$75k to \$99k, renters, and weekly golfers.

Mission Bay golfers are much more likely to be female (i.e., 65% of female golfers play at Mission Bay vs. 35% of male golfers), Torrey Pines golfers are more likely to be male, and Balboa Park is an even split between male and female (61% of each play at Balboa).

FIGURE 11 PLAYED CITY COURSES IN PAST 12 MONTHS BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME

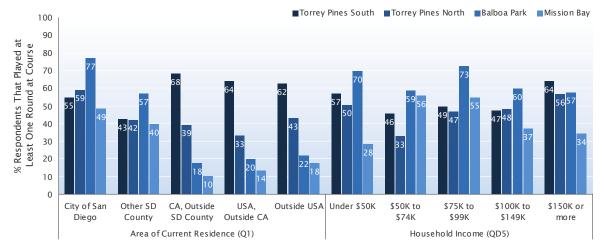


FIGURE 12 PLAYED CITY COURSES IN PAST 12 MONTHS BY GENDER & NUMBER OF ROUNDS IN PAST 12 MONTHS

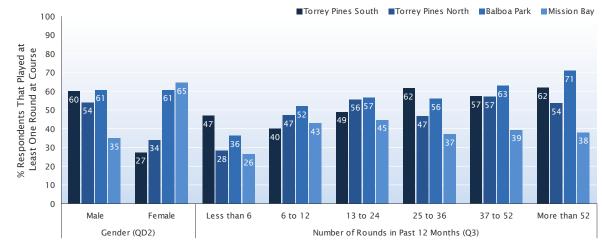
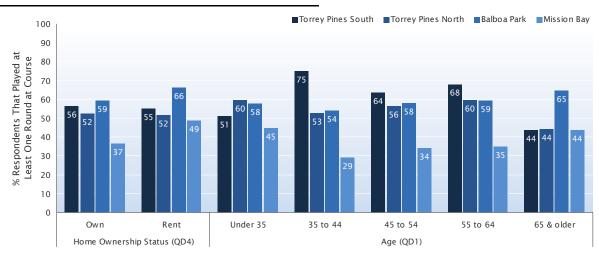


FIGURE 13 PLAYED CITY COURSES IN PAST 12 MONTHS BY HOME OWNERSHIP STATUS & AGE



Figures 14 through 16 display the percentage of customers within various demographic subgroups that played each of the courses *most often* in the past 12 months. When compared with the other courses, the tendency to play Torrey Pines South *most often* was higher among those living outside of San Diego County, golfers with a household income of \$150k or more, customers who played fewer than six rounds a year, and those 35 to 44 years of age. Torrey Pines North Course was the predominant choice for customers who played golf 6 to 12 times in the past year. Four-in-ten customers with a household income under \$50,000 per year identified Balboa Park as their go-to course as did three-in-ten renters and more than one-third of seniors and customers who live in San Diego County. Four-in-ten female golfers identified Mission Bay as the city course they play most often.

FIGURE 14 SAN DIEGO COURSE PLAYED MOST OFTEN BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME

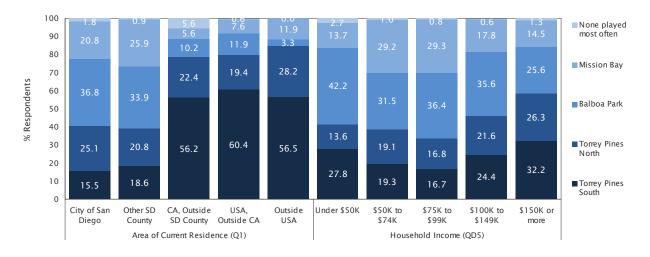
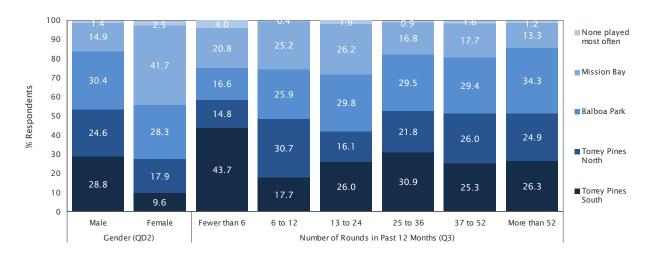


FIGURE 15 SAN DIEGO COURSE PLAYED MOST OFTEN BY GENDER & NUMBER OF ROUNDS IN PAST 12 MONTHS



100 None played 90 most often 80 ■ Mission Bay 70 % Respondents 60 20.2 Balboa Park 50 27.4 40 25.1 25.0 ■Torrey Pines 30 22.1 North 42.2 20 33.1 31.8 27.1 24.5 22.4 ■ Torrey Pines 10 18.0 South 0

35 to 44

45 to 54

Age (QD1)

55 to 64

65 & older

FIGURE 16 SAN DIEGO COURSE PLAYED MOST OFTEN BY HOME OWNERSHIP STATUS & AGE

Under 35

Rent

Home Ownership Status (QD4)

For the interested reader, Table 1 below provides the demographic distribution of survey respondents who played at least one round of golf at each San Diego course in the past 12 months, differentiating Torrey Pines into the north and south courses. This table is useful for providing perspective on the demographics pointed out on the prior pages. For example, although 65% of female customers have golfed at Mission Bay (Figure 12) and 42% identify it as their go-to-course (Figure 15), the table shows that just one-in-five Mission Bay golfers are female (20%).

TABLE 1 DEMOGRAPHIC BREAKDOWN OF TORREY PINES, BALBOA PARK & MISSION BAY CUSTOMERS

Course Played in Past 12 Months									
	Torrey Pines Torrey Pines								
	South	North	Balboa Park	Mission Bay					
Q1 Area of Current Residence									
City of San Diego	63.2	73.7	81.3	79.9					
Other SD County	9.0	9.7	11.1	12.1					
CA, Outside SD County	6.6	4.2	1.6	1.4					
USA, Outside CA	18.7	10.6	5.3	5.7					
Outside USA	2.4	1.8	0.8	1.0					
QD1 Age									
Under 35	5.5	7.1	5.7	7.0					
35 to 44	11.7	8.9	7.7	6.5					
45 to 54	15.9	15.3	13.3	12.2					
55 to 64	27.1	25.8	21.6	19.8					
65+	31.4	34.3	42.6	45.2					
Prefer not to answer	8.4	8.7	9.0	9.4					
QD2 Gender									
Male	92.5	90.0	85.8	77.1					
Female	5.9	8.1	12.2	20.3					
Prefer not to answer	1.5	1.9	2.1	2.6					
QD3 Golf Club Member									
Yes	50.0	49.2	41.5	35.3					
No	46.5	48.6	56.0	62.6					
Refused	3.5	2.2	2.5	2.1					
QD4 Home Ownership Status									
Own	77.9	78.4	74.9	72.2					
Rent	14.3	14.6	15.8	18.0					
Prefer not to answer	7.8	7.0	9.3	9.8					
QD5 Household Income									
Under \$35K	0.7	0.3	0.2	0.6					
\$35K to \$49K	1.2	1.5	1.9	0.7					
\$50K to \$74K	4.1	3.2	4.8	7.2					
\$75K to \$99K	5.8	5.9	7.8	9.2					
\$100K to \$149K	13.4	14.7	15.4	14.9					
\$150K or more	54.3	52.0	44.7	41.8					
Not sure / Prefer not to answer	20.6	22.3	25.1	25.6					
City of San Diego Resident									
Resident	63.2	73.7	81.3	79.9					
Non-resident	36.8	26.3	18.7	20.1					

RATING OVERALL SAN DIEGO GOLF EXPERIENCES

Having profiled customers' most often played golf courses, primary motivators in choosing to play a particular course most often, as well as the frequency of golf play in general and specifically at San Diego courses in the past 12 months, the survey turned to evaluate overall customer experiences with, and perceptions of, the three San Diego golf courses.

OVERALL PERFORMANCE RATINGS Respondents who had played at least one round at a city course in the past 12 months were asked whether they would describe their most recent experience at each as excellent, good, fair, poor, or very poor. Customers were asked to reflect on their *most recent* experience to ensure that the survey results reflect customers' most recent—rather than most memorable—experiences, thus providing timely feedback about the City's current performance. Furthermore, because these questions did not reference specific aspects of a course, facilities, or staff, the findings may be regarded as overall performance ratings for the City of San Diego Golf Operations Division regarding each of the courses.

Question 8 Overall, how would you rate your most recent golf experiences at ____? Would you rate them as excellent, good, fair, poor and very poor?

FIGURE 17 RATING CITY OF SAN DIEGO GOLF COURSES

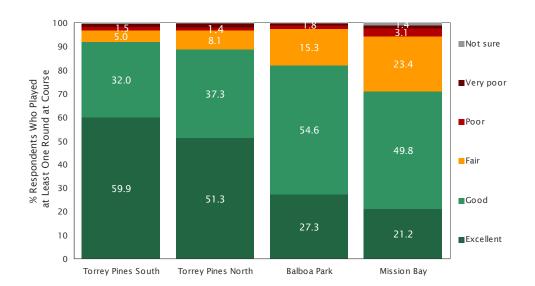
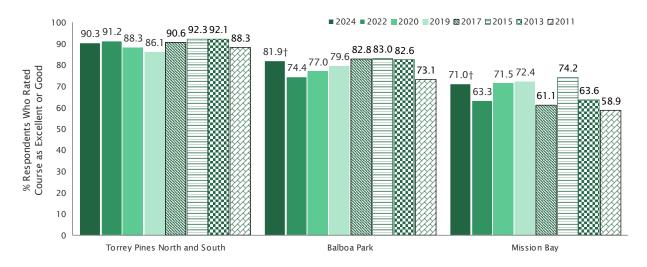


Figure 17 presents the overall performance ratings for Torrey Pines South, Torrey Pines North, Balboa Park, and Mission Bay. Torrey Pines South received the most positive ratings overall, with 92% of customers who had played at least one round there in the past 12 months citing their most recent experience as excellent (60%) or good (32%). Torrey Pines North also received high marks, with 89% of customers rating their most recent experience as excellent (51%) or good (37%). Eight-in-ten customers (82%) rated their experience at Balboa Park Golf Course as excellent (27%) or good (55%), while seven-in-ten customers (71%) rated their experience at Mission Bay as excellent (21%) or good (50%).

Figure 18 shows the percentage of customers who rated their recent experience at each course as excellent or good by study year. Over the past two years, there were statistically significant improvements in customer ratings for Balboa Park (+8%) and Mission Bay (+8%).

FIGURE 18 RATING CITY OF SAN DIEGO GOLF COURSES BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

Figures 19 through 22 display performance ratings for Torrey Pines South, Torrey Pines North, Balboa Park, and Mission Bay courses by customers' frequency of golf play in general over the past 12 months, as well as their frequency of playing the city course for which they provided a rating.

FIGURE 19 RATING TORREY PINES SOUTH BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & TORREY PINES SOUTH ROUNDS IN PAST 12 MONTHS



FIGURE 20 RATING TORREY PINES NORTH BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS

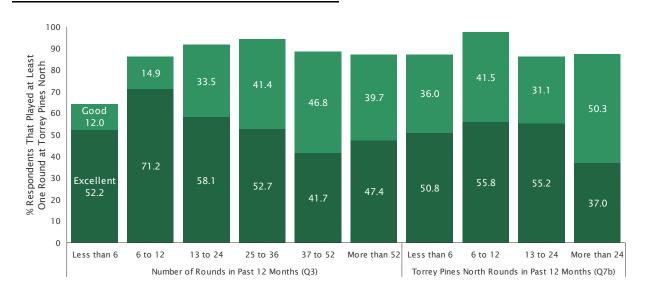
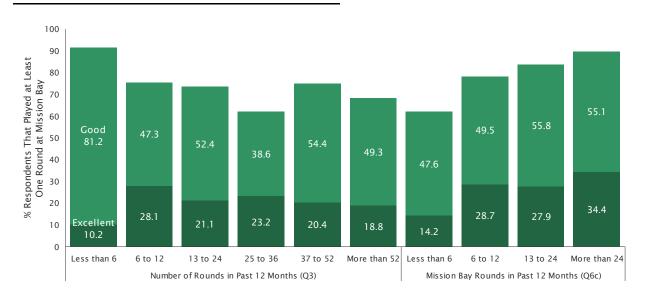


FIGURE 21 RATING BALBOA PARK BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & BALBOA PARK ROUNDS IN PAST 12 MONTHS



FIGURE 22 RATING MISSION BAY BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & MISSION BAY ROUNDS IN PAST 12 MONTHS



SUGGESTED IMPROVEMENTS For each of the City of San Diego courses a respondent had played in the past 12 months, the customer was asked to indicate what could be changed to improve the overall golf experience at that particular course. These questions were asked in an open-ended manner, allowing golfers to mention any improvement that came to mind without being prompted by or restricted to a list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in figures 23 through 26 on the next two pages.

Approximately four-in-ten customers at each course (Torrey Pines South: 38%, North: 39%, Balboa Park: 40%, and Mission Bay: 41%) desired no changes or could not think of anything specific to improve their golf experience.

Top specific mentions for improving Torrey Pines South Course were enforcing the speed of play (11%), reducing fees (8%), improving access to tee-time information (8%), increasing availability of tee times (7%), and improving the reservation system (7%), whereas for the North Course the specific improvements requested by at least 5% of customers were enforcing the speed of play (13%), increasing availability of tee times (9%), reducing fees (8%), improving access to tee-time information (7%), and improving green conditions (7%).

Specific mentions for improving the Balboa Park Golf Course included enforcing speed of play (11%), maintaining tee boxes (7%), improving fairways (5%), and improving green conditions (5%). Mission Bay Golf Course customers most desired maintaining tee boxes (9%), better lighting and extended hours for lighting (7%), improving the overall course quality (6%), improving green conditions (6%), and enforcing the speed of play (5%).

Question 9/10/11/12 If the course managers could change something about the Torrey Pines /Balboa Park/Mission Bay Golf Course to improve your overall golf experience, what change would you most like to see?

FIGURE 23 DESIRED CHANGES TO TORREY PINES SOUTH

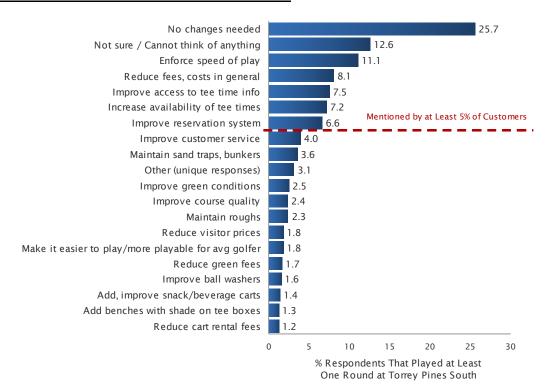


FIGURE 24 DESIRED CHANGES TO TORREY PINES NORTH

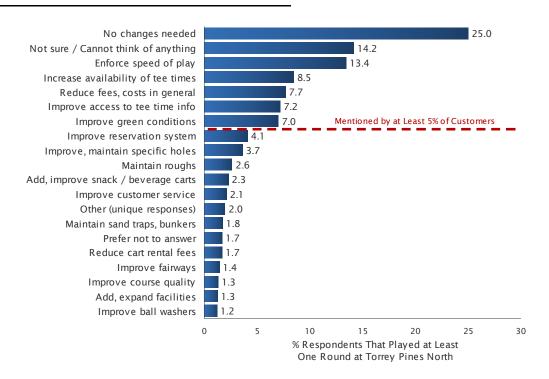


FIGURE 25 DESIRED CHANGES TO BALBOA PARK

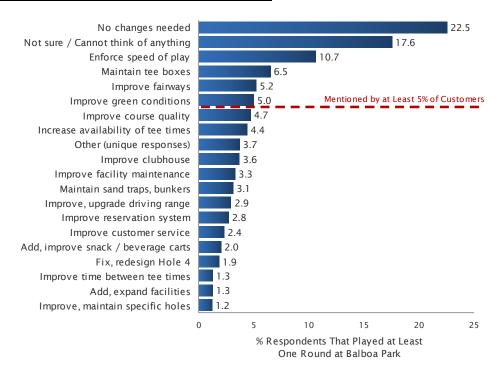
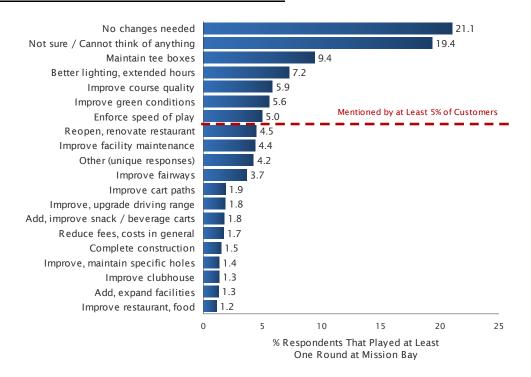


FIGURE 26 DESIRED CHANGES TO MISSION BAY



Figures 27 and 28 on the next page show how suggested improvements for each course varied by whether or not customers were City of San Diego residents.

FIGURE 27 DESIRED CHANGES TO TORREY PINES SOUTH BY CITY OF SAN DIEGO RESIDENT Vs. Non-Resident

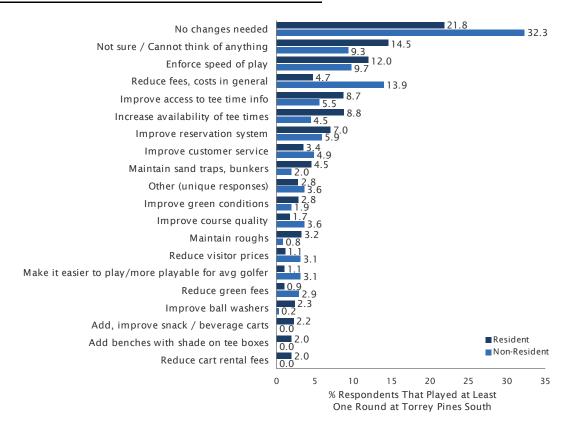


FIGURE 28 DESIRED CHANGES TO TORREY PINES NORTH BY CITY OF SAN DIEGO RESIDENT VS. NON-RESIDENT

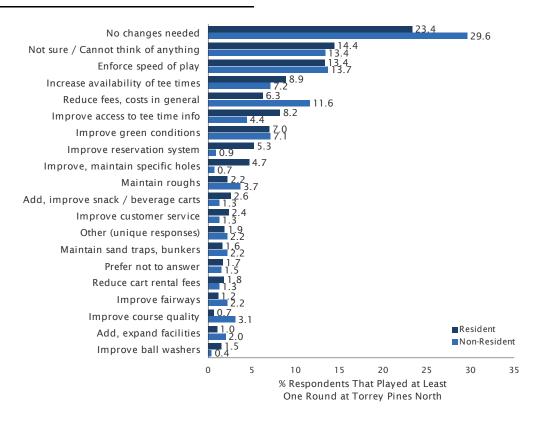


FIGURE 29 DESIRED CHANGES TO BALBOA PARK BY CITY OF SAN DIEGO RESIDENT Vs. NON-RESIDENT

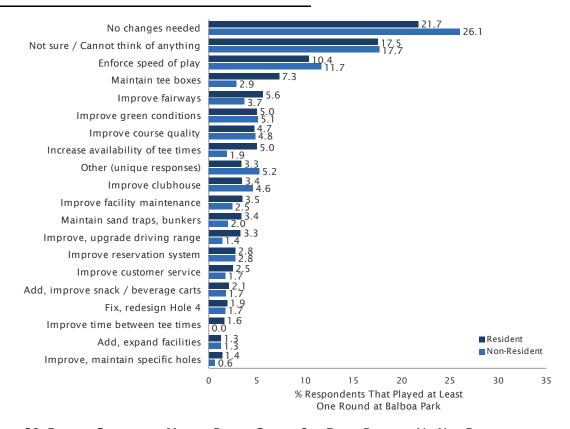
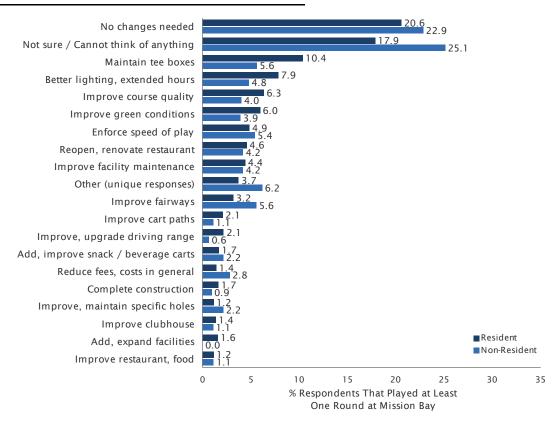


FIGURE 30 DESIRED CHANGES TO MISSION BAY BY CITY OF SAN DIEGO RESIDENT VS. NON-RESIDENT



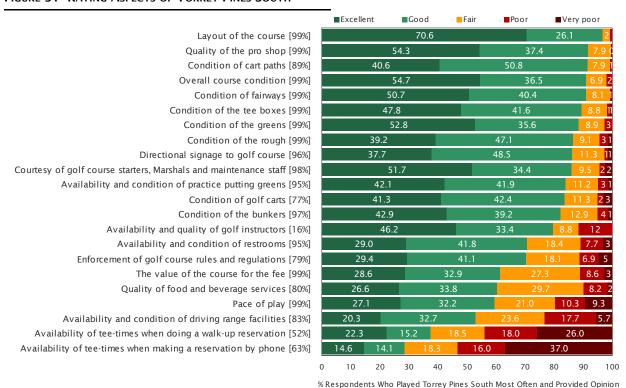
RATING ASPECTS OF EXPERIENCE

Whereas the previous section of the survey addressed customers' overall experiences with Torrey Pines, Balboa Park, and Mission Bay golf courses, the next several questions asked customers to rate *specific aspects* of their golf experience for the San Diego course they had played most often in the past 12 months. Using a five-point scale of excellent, good, fair, poor, or very poor, respondents rated each of the 22 aspects listed on the left side of figures 31 through 34.²

RATING ASPECTS OF TORREY PINES Torrey Pines Golf Course customers were divided by the course (south or north) they had played most often. Customers who played the South Course gave the most positive ratings for the layout of the course (97% excellent or good), quality of the pro shop (92%), condition of cart paths (91%), overall condition of the course (91%), and condition of fairways (91%). Considering the intensity of the positive rating, the condition of the greens (53% excellent) and courtesy of golf course starters, marshals, and maintenance staff (52% excellent) also received high marks from South Course customers. At the other end of the spectrum, Torrey Pines South Course customers were less pleased with the availability of tee times for reservations by phone (29%) or for walk-up reservations (38%).

Question 13 Next, I'd like you to think back to your most recent golf experiences at <golf course played most often>. Would you say the ____ was excellent, good, fair, poor, or very poor?

FIGURE 31 RATING ASPECTS OF TORREY PINES SOUTH



^{2.} For comparison purposes, only customers who held an opinion are included in figures 31-34 and their corresponding tables. The percentage of those who held an opinion is shown in brackets to the right of the aspect label in each figure. Numbers shown within bars are percentages of customers who provided an opinion.

Customers who had played the North Course gave the most positive ratings for the layout of the course (96% excellent or good), quality of the pro shop (93%), directional signage to the golf course (90%), condition of cart paths (89%), condition of fairways (89%), and courtesy of golf course starters, marshals, and maintenance staff (88%). Considering the intensity of the positive rating, the value of the course for the fee was also viewed quite positively (45% excellent) by many North Course customers. At the other end of the spectrum, customers who had played the North Course most often assigned lower ratings to the availability of tee times for reservations by phone (12%) or for walk-up reservations (17%).

FIGURE 32 RATING ASPECTS OF TORREY PINES NORTH

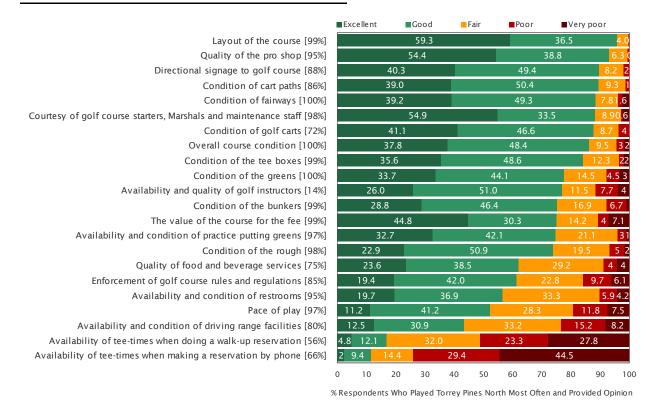


Table 2 on the next page shows the percentage who rated each aspect of Torrey Pines South Course as excellent or good by study year, as well as the difference between the two most recent studies. Table 3 provides the same analysis for the Torrey Pines North Course. When compared with the 2022 survey results, in 2024 there was one statistically significant improvement in performance ratings (availability and condition of practice putting greens) and one decline (quality of food and beverage services) for the South Course, whereas the North Course saw one statistically significant performance decline from customers during this period (condition of the greens). Nearly all of the 22 items tested remained statistically consistent for each Torrey Pines Course.

TABLE 2 RATING ASPECTS OF TORREY PINES SOUTH BY STUDY YEAR

				Study Year				Difference in Excellent + Good
	2024	2022	2020	2019	2017	2015	2013	'22 to '24
Availability and condition of practice putting greens	84.0	76.5	74.7	80.1	86.4	89.3	92.2	+7.5†
Availability and condition of driving range facilities	53.0	46.2	45.8	34.1	45.4	40.8	44.8	+6.8
Directional signage to golf course	86.2	80.6	83.7	82.2	83.2	84.3	83.5	+5.6
Enforcement of golf course rules and regulations	70.5	66.3	58.0	69.4	71.7	72.4	73.1	+4.2
Availability of tee-times when doing a walk-up reservation	37.4	33.5	36.7	47.2	42.7	50.2	57.6	+3.9
Condition of golf carts	83.7	81.9	79.3	81.2	85.7	79.2	81.6	+1.8
Availability and condition of restrooms	70.7	69.2	65.3	64.6	66.7	62.5	64.6	+1.5
Condition of fairways	91.1	89.6	85.9	87.3	91.2	91.6	93.5	+1.4
Condition of the tee boxes	89.4	88.3	80.3	82.6	90.0	89.4	91.2	+1.2
Layout of the course	96.8	95.7	96.2	92.9	98.1	97.7	97.1	+1.0
Condition of cart paths	91.4	90.9	83.3	85.6	89.6	81.5	87.0	+0.5
Overall course condition	91.1	90.7	82.2	85.5	91.4	91.1	94.1	+0.4
Pace of play	59.4	59.0	58.4	49.8	59.0	55.3	55.5	+0.4
Availability and quality of golf instructors	79.6	79.6	79.9	87.4	87.1	70.2	83.8	-0.0
Courtesy of golf course starters, Marshals and maintenance staff	86.1	86.2	80.6	84.5	85.8	84.9	84.9	-0.1
Availability of tee-times when making a reservation by phone	28.7	28.8	35.5	43.1	37.5	53.8	50.9	-0.1
Condition of the rough	86.4	86.9	71.5	69.1	80.8	80.3	83.4	-0.6
Quality of the pro shop	91.7	92.6	90.1	85.3	90.3	90.7	89.5	-0.8
Condition of the bunkers	82.1	83.0	72.6	62.8	72.1	76.1	77.9	-0.9
Condition of the greens	88.4	90.4	86.2	84.6	90.0	90.5	89.2	-2.0
The value of the course for the fee	61.4	65.3	69.9	54.2	64.7	61.6	68.0	-3.9
Quality of food and beverage services	60.4	70.8	68.9	60.8	64.9	65.7	66.1	-10.4†

 $[\]dagger$ Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

TABLE 3 RATING ASPECTS OF TORREY PINES NORTH BY STUDY YEAR³

Study Year								Difference in
								Excellent + Good
	2024	2022	2020	2019	2017	2015	2013	'22 to '24
Pace of play	52.4	44.3	46.3	43.9	53.4	52.5	50.1	+8.1
Enforcement of golf course rules and regulations	61.4	56.1	56.9	62.2	68.3	64.5	67.1	+5.2
The value of the course for the fee	75.1	70.6	83.6	77.5	78.0	81.2	79.4	+4.5
Directional signage to golf course	89.7	85.3	88.6	84.1	85.1	86.6	85.1	+4.4
Layout of the course	95.8	93.1	94.8	90.3	92.6	95.2	96.1	+2.7
Quality of the pro shop	93.1	92.2	90.2	91.5	88.9	93.2	88.5	+0.9
Condition of cart paths	89.4	88.8	93.8	92.8	91.3	82.6	82.9	+0.6
Condition of golf carts	87.7	87.2	79.4	82.9	83.3	85.3	78.2	+0.5
Courtesy of golf course starters, Marshals and maintenance staff	88.3	88.8	88.1	81.2	86.6	87.3	86.6	-0.4
Availability and condition of practice putting greens	74.8	75.3	76.8	83.9	84.4	91.2	87.2	-0.5
Condition of fairways	88.5	89.0	92.5	88.9	90.7	86.4	90.2	-0.6
Availability of tee-times when making a reservation by phone	11.6	12.6	19.0	38.9	32.5	47.5	47.0	-0.9
Availability and quality of golf instructors	77.0	78.2	88.5	80.8	82.4	77.9	78.0	-1.1
Condition of the tee boxes	84.2	85.5	84.6	89.0	92.4	87.7	83.8	-1.3
Condition of the bunkers	75.3	77.1	76.6	74.8	80.4	74.6	69.1	-1.9
Availability of tee-times when doing a walk-up reservation	16.9	19.1	30.9	44.8	40.2	53.5	50.3	-2.2
Overall course condition	86.2	88.4	91.6	91.2	92.4	91.5	91.6	-2.2
Availability and condition of driving range facilities	43.4	45.6	47.4	47.5	51.5	53.0	49.1	-2.2
Availability and condition of restrooms	56.6	59.2	69.6	66.9	63.0	64.2	64.7	-2.5
Condition of the rough	73.7	77.0	75.9	70.5	85.3	81.2	77.2	-3.3
Quality of food and beverage services	62.1	66.6	71.8	59.3	63.7	66.1	58.5	-4.4
Condition of the greens	77.8	84.7	81.5	86.7	86.1	91.8	89.6	-7.0†

[†] Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

^{3.} Since statistical testing takes into account the number of respondents who provided an opinion for each item by year, two items can have the same percentage change yet a different result for significance testing.

TORREY PINES ASPECT RATINGS BY SUBGROUP Tables 4 and 5 display how the rating of each aspect of the Torrey Pines courses (Question 13) varied by the customer's overall performance rating for the course (Question 8a or 8b). The tables divide those who rated the course as excellent or good into one group, and the minority of customers who rated it as fair, poor, or very poor into another group. Also displayed is the difference between the two groups as the percentage of customers who rated each specific *aspect* as excellent or good (far right column).

Compared with their counterparts, those who provided positive *overall* ratings of Torrey Pines were more likely to rate nearly all specific aspects tested as excellent or good. The three aspects of the South Course for which there existed the greatest disparity between the two groups were: the value of the course for the fee, the overall course condition, and the condition of the fairways (see Table 4). For the North Course, the three aspects with the largest disparity between the two customer groups were the overall course condition, the value of the course for the fee, and enforcement of golf course rules and regulations (see Table 5). Tables 6 and 7 show the ratings for the respective courses by city resident vs. non-resident.

TABLE 4 RATING ASPECTS OF TORREY PINES SOUTH BY OVERALL RATING OF TORREY PINES SOUTH (SHOWING % EXCELLENT + GOOD)

	Rating of Torrey Pi	ines South (Q8a) Fair, Poor,	Difference Between Groups
	Excellent, Good	Very Poor	for Each Aspect
The value of the course for the fee	67	14	-53
Overall course condition	95	49	-47
Condition of fairways	95	52	-43
Condition of the greens	91	56	-35
Courtesy of golf course starters, Marshals and maintenance staff	89	56	-33
Condition of the rough	89	57	-33
Quality of the pro shop	94	66	-28
Condition of golf carts	86	58	-28
Availability and quality of golf instructors	82	56	-26
Availability and condition of driving range facilities	55	33	-22
Pace of play	62	41	-21
Directional signage to golf course	88	70	-18
Availability and condition of restrooms	73	56	-17
Availability and condition of practice putting greens	86	70	-15
Layout of the course	98	85	-13
Condition of the tee boxes	91	79	-12
Enforcement of golf course rules and regulations	71	62	-10
Availability of tee-times when doing a walk-up reservation	38	32	-6
Condition of cart paths	92	86	-5
Condition of the bunkers	82	79	-3
Quality of food and beverage services	60	60	0
Availability of tee-times when making a reservation by phone	29	29	0

TABLE 5 RATING ASPECTS OF TORREY PINES NORTH BY OVERALL RATING OF TORREY PINES NORTH (SHOWING % EXCELLENT + GOOD)

	Rating of Torrey I	Pines North (O8h)	Difference
	itating or roney.	Fair, Poor,	Between Groups
	Excellent, Good	Very Poor	for Each Aspect
Overall course condition	95	38	-57
The value of the course for the fee	83	31	-52
Enforcement of golf course rules and regulations	68	26	-42
Condition of fairways	95	55	-40
Condition of the greens	84	44	-40
Availability and condition of practice putting greens	80	46	-34
Condition of the rough	79	46	-33
Condition of the bunkers	80	50	-30
Condition of the tee boxes	89	59	-30
Condition of cart paths	94	67	-27
Pace of play	56	34	-21
Availability and quality of golf instructors	81	60	-21
Courtesy of golf course starters, Marshals and maintenance staff	91	71	-21
Availability and condition of restrooms	59	39	-21
Quality of the pro shop	95	80	-16
Quality of food and beverage services	64	49	-15
Availability and condition of driving range facilities	46	31	-15
Layout of the course	98	83	-15
Condition of golf carts	90	77	-13
Directional signage to golf course	91	84	-7
Availability of tee-times when making a reservation by phone	12	9	-3
Availability of tee-times when doing a walk-up reservation	17	17	0

TABLE 6 RATING ASPECTS OF TORREY PINES SOUTH BY RESIDENT VS NON-RESIDENT (SHOWING % EXCELLENT + GOOD)

	City of San E	Diego Resident	Difference Between Groups
	Resident	Non-resident	for Each Aspect
The value of the course for the fee	84	48	-36
Overall course condition	93	90	-4
Condition of the greens	90	87	-3
Condition of fairways	92	90	-2
Layout of the course	98	96	-2
Quality of the pro shop	91	92	+1
Condition of the tee boxes	89	90	+1
Condition of cart paths	90	92	+2
Directional signage to golf course	84	87	+3
Condition of the rough	82	89	+8
Courtesy of golf course starters, Marshals and maintenance staff	81	89	+9
Condition of golf carts	78	87	+9
Condition of the bunkers	74	87	+13
Pace of play	50	65	+14
Quality of food and beverage services	51	66	+16
Availability and condition of driving range facilities	43	59	+16
Availability and condition of practice putting greens	74	90	+17
Availability of tee-times when doing a walk-up reservation	25	46	+21
Availability and condition of restrooms	58	79	+21
Availability of tee-times when making a reservation by phone	16	37	+21
Enforcement of golf course rules and regulations	56	79	+24
Availability and quality of golf instructors	62	92	+30

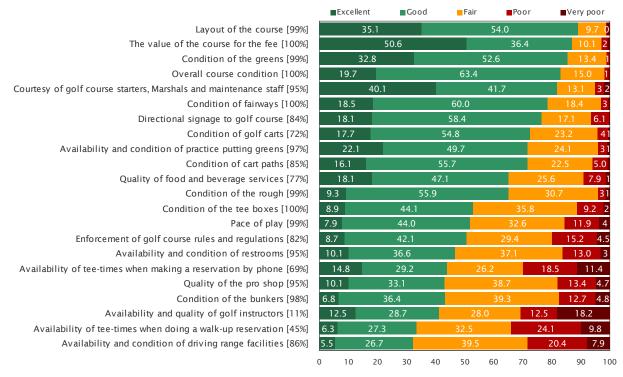
TABLE 7 RATING ASPECTS OF TORREY PINES NORTH BY RESIDENT VS NON-RESIDENT (SHOWING % EXCELLENT + GOOD)

	City of San [Diego Resident	Difference Between Groups
	Resident	Non-resident	for Each Aspect
The value of the course for the fee	87	49	-39
Quality of the pro shop	94	91	-4
Courtesy of golf course starters, Marshals and maintenance staff	89	86	-3
Overall course condition	87	85	-2
Layout of the course	96	95	-1
Condition of fairways	89	88	-1
Directional signage to golf course	90	90	+1
Condition of cart paths	89	90	+1
Condition of golf carts	87	89	+1
Condition of the tee boxes	83	86	+3
Condition of the greens	77	80	+4
Availability of tee-times when doing a walk-up reservation	16	20	+5
Availability and condition of driving range facilities	42	48	+6
Availability and condition of practice putting greens	73	80	+7
Condition of the rough	72	79	+7
Availability and quality of golf instructors	75	84	+9
Pace of play	49	60	+10
Availability of tee-times when making a reservation by phone	8	19	+11
Enforcement of golf course rules and regulations	58	70	+12
Condition of the bunkers	71	84	+13
Quality of food and beverage services	58	71	+13
Availability and condition of restrooms	52	67	+15

RATING ASPECTS OF BALBOA PARK As displayed in Figure 33 on the next page, Balboa Park Golf Course customers gave the most positive ratings for the layout of the course (89% excellent or good), value of the course for the fee (87%), condition of the greens (85%), overall course condition (83%), and courtesy of golf course starters, marshals, and maintenance staff (82%). At the other end of the spectrum, customers were less positive regarding the availability and condition of driving range facilities (32%), availability of tee times when doing a walk-up reservation (34%), and availability and quality of golf instructors (41%).

Table 8 on the next page shows the percentage of customers who rated each aspect of Balboa Park as excellent or good by study year, as well as the difference between the two most recent studies. Compared with the 2022 survey results, there were four statistically significant performance improvements among Balboa Park customers during this period. More specifically, Balboa Park customers provided higher ratings for the condition of fairways (+13%), condition of the rough (+12%), value of the course for the fee (+9%), and the overall course condition (+7%) in 2024.

FIGURE 33 RATING ASPECTS OF BALBOA PARK



 $\%\,\mbox{Respondents}$ Who Played Balboa Park Most Often and Provided Opinion

TABLE 8 RATING ASPECTS OF BALBOA PARK BY STUDY YEAR

				Study	Year				Difference in Excellent + Good
	2024	2022	2020	2019	2017	2015	2013	2021	'22 to '24
Condition of fairways	78.5	65.1	70.1	66.3	74.9	75.0	79.7	64.7	+13.4†
Condition of the rough	65.2	53.4	63.2	64.0	64.6	63.7	71.0	57.6	+11.8†
The value of the course for the fee	87.0	77.8	84.4	86.7	82.3	83.2	81.1	76.0	+9.2†
Overall course condition	83.1	76.0	75.4	81.0	83.9	85.7	85.8	67.4	+7.1†
Enforcement of golf course rules and regulations	50.8	46.8	49.3	54.2	55.0	61.4	61.7	67.8	+4.0
Quality of food and beverage services	65.3	61.6	61.6	65.6	57.5	59.4	57.7	55.7	+3.7
Directional signage to golf course	76.5	72.8	77.4	74.1	78.4	74.5	75.1	69.3	+3.7
Layout of the course	89.1	85.7	90.1	88.2	88.2	88.7	88.4	88.5	+3.4
Availability and condition of practice putting greens	71.8	69.2	65.3	75.5	71.5	76.6	75.5	66.7	+2.5
Quality of the pro shop	43.3	41.4	42.9	53.1	33.7	34.5	38.8	41.9	+1.8
Condition of the greens	85.4	83.7	77.4	87.1	90.6	83.6	85.9	65.4	+1.7
Courtesy of golf course starters, Marshals and maintenance staff	81.8	80.7	82.7	89.6	89.7	85.4	78.6	79.9	+1.1
Availability and condition of restrooms	46.8	45.9	37.4	44.1	42.2	47.9	49.8	53.1	+0.8
Availability and condition of driving range facilities	32.2	32.2	35.8	33.8	21.6	33.3	36.3	33.2	+0.0
Condition of the tee boxes	52.9	53.2	60.1	63.9	64.8	65.6	61.6	61.8	-0.2
Condition of the bunkers	43.2	43.8	46.4	48.1	49.8	55.7	53.2	53.9	-0.6
Condition of cart paths	71.8	72.5	75.5	75.0	85.6	82.1	60.9	54.9	-0.7
Pace of play	51.9	55.1	52.4	52.0	53.4	55.5	55.5	65.6	-3.2
Availability of tee-times when doing a walk-up reservation	33.6	37.2	43.0	75.2	77.8	73.2	72.8	74.2	-3.6
Condition of golf carts	72.5	77.1	56.8	75.1	79.4	53.5	61.8	67.9	-4.5
Availability and quality of golf instructors	41.2	46.5	40.4	57.4	64.5	64.4	70.9	71.2	-5.3
Availability of tee-times when making a reservation by phone	44.0	49.3	54.2	82.2	81.2	79.2	78.3	77.2	-5.3

† Statistically significant change (p < 0.05) between the 2022 and 2022 studies.

BALBOA PARK ASPECT RATINGS BY SUBGROUP Table 9 displays how ratings of each aspect of the Balboa Park Golf Course (Question 13) varied by the customer's overall performance rating for the course (Question 8c). As with Table 4, the table divides those who rated Balboa Park Golf Course as excellent or good into one group, and customers who rated it as fair, poor, or very poor into another. Also displayed is the difference between the two groups in the far right column. As one might expect, those who provided positive overall ratings for Balboa Park were also more likely to rate specific aspects of the course as excellent or good. Aspects of the course for which there existed the greatest disparity between the two groups were: the overall course condition, condition of cart paths, enforcement of golf course rules and regulation, and condition of the rough.

TABLE 9 RATING ASPECTS OF BALBOA PARK BY OVERALL RATING OF BALBOA PARK (SHOWING % EXCELLENT + GOOD)

	Rating of Balbo	Rating of Balboa Park (Q8c) Di			
		Fair, Poor,	Between Groups		
	Excellent, Good	Very Poor	for Each Aspect		
Overall course condition	90	30	-60		
Condition of cart paths	78	26	-51		
Enforcement of golf course rules and regulations	57	9	-47		
Condition of the rough	71	24	-47		
Condition of the greens	91	45	-46		
Courtesy of golf course starters, Marshals and maintenance staff	87	42	-45		
Availability and condition of practice putting greens	76	35	-41		
The value of the course for the fee	92	51	-41		
Condition of golf carts	78	37	-41		
Condition of fairways	83	43	-41		
Pace of play	56	18	-38		
Condition of the tee boxes	57	21	-36		
Directional signage to golf course	81	45	-36		
Availability of tee-times when making a reservation by phone	48	14	-34		
Quality of food and beverage services	69	35	-34		
Quality of the pro shop	47	15	-32		
Condition of the bunkers	47	16	-30		
Availability and condition of restrooms	50	22	-28		
Availability of tee-times when doing a walk-up reservation	38	10	-28		
Layout of the course	92	66	-26		
Availability and condition of driving range facilities	35	11	-24		
Availability and quality of golf instructors	44	20	-24		

RATING ASPECTS OF MISSION BAY Customers who played the Mission Bay Course most often during the past year gave the highest ratings for the courtesy of course starters, marshals, and maintenance staff (88% excellent or good), the layout of the course (85%), quality of the pro shop (76%), the value of the course for the fee (76%), and condition of golf carts (75%). Mission Bay customers provided the lowest ratings for the quality of food and beverage services (34%), condition of the tee boxes (37%), and condition of cart paths (44%).

Table 10 on the next page shows the percentage of customers who rated each aspect of Mission Bay as excellent or good by study year, as well as the difference between the two most recent studies. From 2022 to 2024, there was positive movement in 18 of the 22 items tested, and significant improvements in seven areas. Likely related to the completion of the renovations that were in progress at the time of the 2022 survey, the quality of the pro shop (+49%) and availability and condition of restrooms (+26%) saw big jumps in ratings in 2024.

FIGURE 34 RATING ASPECTS OF MISSION BAY

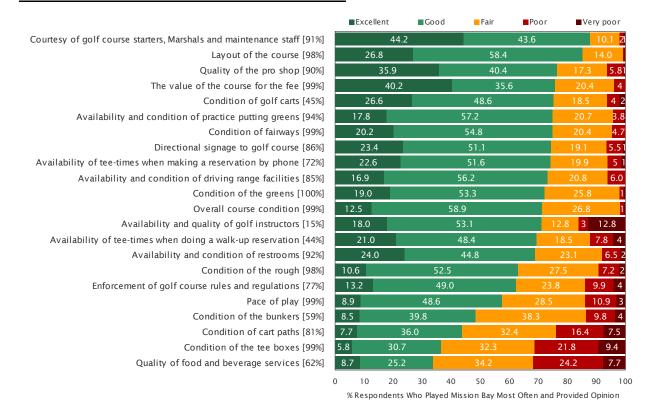


TABLE 10 RATING ASPECTS OF MISSION BAY BY STUDY YEAR

									Difference in
				Study '	Year				Excellent + Good
	2024	2022	2020	2019	2017	2015	2013	2011	'22 to '24
Quality of the pro shop	76.3	27.3	29.1	37.6	32.5	22.6	14.7	27.3	+49.0†
Availability and condition of restrooms	68.9	42.6	44.5	38.3	36.9	49.9	46.2	25.2	+26.3†
Availability of tee-times when doing a walk-up reservation	69.4	57.2	67.0	84.9	86.8	89.4	78.8	75.5	+12.2†
Condition of the rough	63.1	51.8	71.1	67.6	71.8	80.6	68.2	57.1	+11.3†
Availability and quality of golf instructors	71.1	59.8	58.8	73.7	73.3	71.0	48.0	70.8	+11.3†
Directional signage to golf course	74.5	66.0	77.5	74.4	68.6	65.9	65.0	65.7	+8.5†
Layout of the course	85.2	76.8	84.5	82.5	79.5	75.2	70.5	67.5	+8.4†
Condition of fairways	74.9	67.0	79.0	73.9	74.4	77.9	77.7	68.1	+7.9
Enforcement of golf course rules and regulations	62.2	54.6	67.9	60.3	71.7	73.6	48.9	72.6	+7.7
Condition of the bunkers	48.3	41.7	51.9	52.2	41.7	55.1	49.2	51.4	+6.6
Availability and condition of practice putting greens	75.0	70.0	69.6	87.1	86.9	73.3	60.6	64.0	+5.0
Availability and condition of driving range facilities	73.1	68.1	72.5	82.2	81.1	69.5	60.5	68.2	+5.0
Overall course condition	71.4	67.0	74.1	76.8	75.6	78.9	69.1	60.7	+4.3
Condition of cart paths	43.7	39.5	52.7	56.8	54.3	50.1	54.0	54.0	+4.2
Condition of the greens	72.3	70.9	75.9	81.2	88.3	76.2	76.7	62.4	+1.4
Courtesy of golf course starters, Marshals and maintenance staff	87.8	86.7	86.4	91.6	88.9	86.7	76.7	75.4	+1.2
Condition of golf carts	75.2	74.9	76.8	81.7	85.9	75.8	79.2	78.5	+0.3
The value of the course for the fee	75.8	75.6	74.8	77.4	67.8	76.2	60.4	61.7	+0.2
Quality of food and beverage services	33.9	35.1	36.9	35.9	32.1	44.9	27.5	34.8	-1.2
Availability of tee-times when making a reservation by phone	74.1	76.5	75.4	93.1	93.4	83.6	78.6	88.1	-2.4
Pace of play	57.5	61.3	63.9	73.3	66.6	72.8	63.0	73.3	-3.8
Condition of the tee boxes	36.6	42.9	54.5	57.3	49.0	59.9	54.2	56.1	-6.3

 $[\]dagger$ Statistically significant change (p < 0.05) between the 2022 and 2024 studies.

MISSION BAY ASPECT RATINGS BY SUBGROUP Table 11 displays how the ratings of each aspect of Mission Bay Golf Course tested (Question 13) varied by the customer's overall performance rating for the course (Question 8d). The table divides those who rated Mission Bay Golf Course as excellent or good into one group, and customers who rated it as fair, poor, or very poor into another group. The difference between the two groups appears in the far right column. Those providing positive overall ratings for Mission Bay were also more likely to rate specific aspects of the course from their most recent visit as excellent or good. Aspects of the course for which there existed the greatest disparity between the two groups were: the overall course condition, condition of the greens, condition of fairways, condition of the rough, and condition of the bunkers.

TABLE 11 RATING ASPECTS OF MISSION BAY BY OVERALL RATING OF MISSION BAY (SHOWING % EXCELLENT + GOOD)

	Rating of Missi	on Bay (Q8d)	Difference
		Fair, Poor,	Between Groups
	Excellent, Good	Very Poor	for Each Aspect
Overall course condition	81	20	-62
Condition of the greens	81	29	-51
Condition of fairways	83	35	-47
Condition of the rough	71	24	-46
Condition of the bunkers	57	11	-46
Pace of play	65	21	-44
Condition of golf carts	81	38	-43
The value of the course for the fee	83	40	-43
Layout of the course	92	51	-41
Enforcement of golf course rules and regulations	68	33	-35
Availability and condition of driving range facilities	79	44	-35
Condition of the tee boxes	42	8	-35
Condition of cart paths	48	20	-29
Directional signage to golf course	79	53	-25
Availability and condition of practice putting greens	79	55	-24
Quality of the pro shop	80	58	-22
Availability and condition of restrooms	72	51	-21
Courtesy of golf course starters, Marshals and maintenance staff	90	72	-18
Availability of tee-times when making a reservation by phone	76	61	-15
Quality of food and beverage services	35	25	-10
Availability of tee-times when doing a walk-up reservation	71	61	-10
Availability and quality of golf instructors	70	*	N/A

^{*}Results not shown due to the very small sample size of respondents in this category who provided a response.

COMPARISON OF SAN DIEGO GOLF COURSE RATINGS Table 12 on the next page presents the 22 course, facility, and service aspects tested for each of the three courses, along with the combined percentage of customers who provided an opinion that rated the specific aspect as excellent or good. The course (or courses) with the highest combined percentage per aspect are highlighted green. In cases where two courses had similarly high ratings (within 1%), both are highlighted in green. As shown in the table, Torrey Pines South held the top spot for 14 of the 22 aspects tested.

TABLE 12 COMPARISON OF CITY OF SAN DIEGO GOLF COURSE RATINGS (SHOWING % EXCELLENT + GOOD)

	Torrey Pines	Torrey Pines		
	South	North	Balboa Park	Mission Bay
Layout of the course	97	96	89	85
Courtesy of golf course starters, Marshals and maintenance staff	86	88	82	88
Condition of fairways	91	88	79	75
Overall course condition	91	86	83	71
Directional signage to golf course	86	90	76	74
Condition of the greens	88	78	85	72
Condition of golf carts	84	88	73	75
Availability and condition of practice putting greens	84	75	72	75
Quality of the pro shop	92	93	43	76
The value of the course for the fee	61	75	87	76
Condition of cart paths	91	89	72	44
Condition of the rough	86	74	65	63
Availability and quality of golf instructors	80	77	41	71
Condition of the tee boxes	89	84	53	37
Condition of the bunkers	82	75	43	48
Enforcement of golf course rules and regulations	70	61	51	62
Availability and condition of restrooms	71	57	47	69
Quality of food and beverage services	60	62	65	34
Pace of play	59	52	52	58
Availability and condition of driving range facilities	53	43	32	73
Availability of tee-times when making a reservation by phone	29	12	44	74
Availability of tee-times when doing a walk-up reservation	37	17	34	69

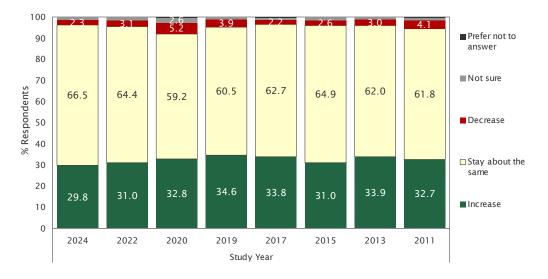
FUTURE EXPECTATIONS & RECOMMENDATIONS

Whereas the previous sections focused on customers' golf play in the past 12 months, the final section of the survey asked respondents to think ahead to the coming 12 months in terms of the anticipated frequency of their golf play in general, expected frequency of play on San Diego courses, and their likelihood of recommending these courses to their friends and colleagues.

FREQUENCY OF FUTURE PLAY IN GENERAL The first question of this section asked respondents about anticipated future golf play in general. Specifically, customers were asked if they anticipate the frequency of their play to increase, decrease, or stay about the same over the next 12 months.

Question 14 Including all courses that you may play, in the next 12 months do you anticipate that the frequency with which you play golf will increase, decrease or stay about the same as now?

FIGURE 35 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY STUDY YEAR



As shown in Figure 35, three-in-ten customers (30%) in 2024 anticipated that they would increase the frequency of their golf play over the next 12 months. Only 2% felt their frequency of play would decrease, while most (67%) said it would remain about the same (and 1% were unsure). The 2024 results tracked very closely with 2022.

The next two figures display the percentage of customers who anticipate increasing or decreasing their frequency of play over the next year by various subgroups. A much higher than average percentage of customers with a household income under \$50,000 expected to play less often over the next year (9% vs. 2%). Also of note is the strong inverse relationship between number of rounds played over the last year and the expectation of increased play, with 48% of those who played less than six rounds in the past 12 months expecting to play more often compared with 18% of those who played at least once a week. Golfers who lived outside the City of San Diego but within the County, those with a household income of \$150k or more, female customers, and

respondents under 35 years of age or 45 to 64 years of age also expected to play more frequently over the next year.

FIGURE 36 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY AREA OF CURRENT RESIDENCE, HOUSEHOLD INCOME & GENDER

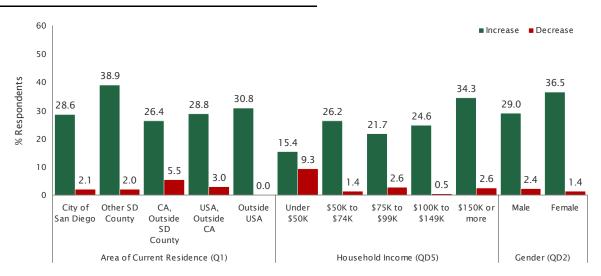
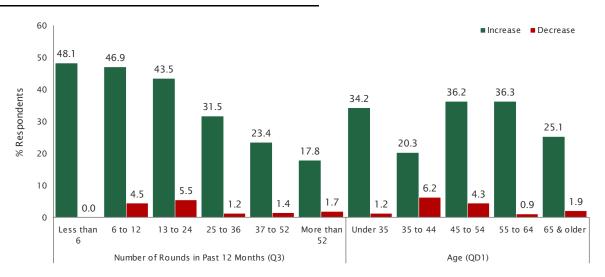


FIGURE 37 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & AGE



FREQUENCY OF FUTURE PLAY AT SAN DIEGO COURSES All survey respondents were next asked if, over the next 12 months, they plan to play more, less, or about the same than they currently do at each of the three San Diego courses. Figure 38 on the next page shows that 29% of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 23% for Balboa Park and 13% for Mission Bay. The percentage of customers who plan to play *less often* was reasonably similar between Torrey Pines (10%), Balboa Park (8%), and Mission Bay (11%). Responses to this question showed little movement from 2022 to 2024 (see Figure 39 on next page).

Question 15 Looking forward to the next 12 months, do you anticipate that you will play golf at the _____ more often, less often, or about the same as you do now?

FIGURE 38 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS

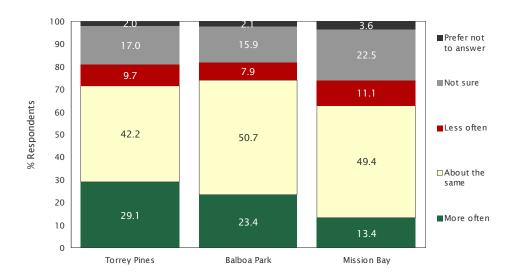
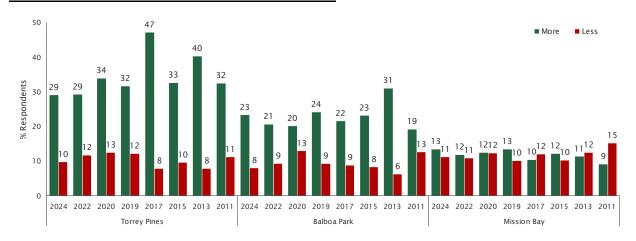


FIGURE 39 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY STUDY YEAR



Figures 40 through 42 on the next page display the percentage of customers at each of the three San Diego courses that expect to increase their play over the next 12 months by a variety of demographic subgroups. The highest percentage of respondents in most subgroups anticipated increasing their play at Torrey Pines, followed by Balboa Park. Of note is that customers with a household income less than \$50k were much more likely to indicate increased play at Balboa Park over the next 12 months.

FIGURE 40 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY AREA OF RESIDENCE & HOUSEHOLD INCOME

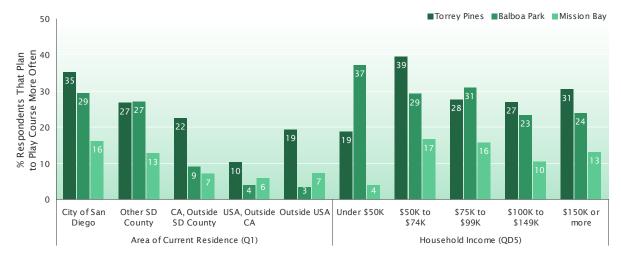


FIGURE 41 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS

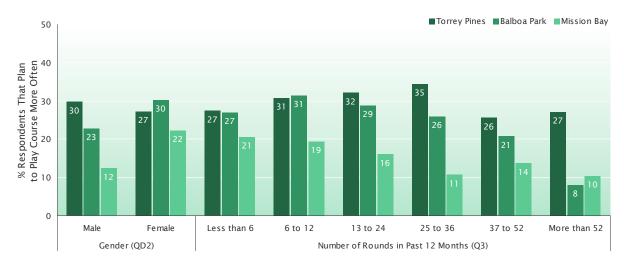
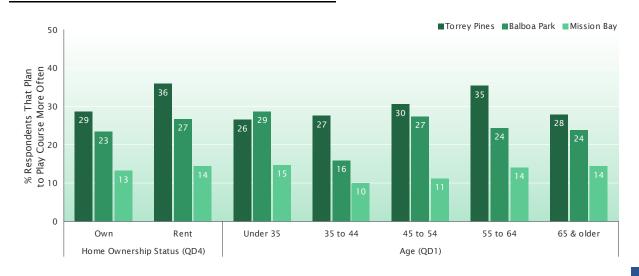


FIGURE 42 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY HOME OWNERSHIP STATUS & AGE



Figures 43 through 46 display the percentage of customers at each course that expected to increase their play over the next 12 months by their frequency of play at that particular course in the *past* 12 months as well as the overall performance rating they assigned to the same course. As one would expect, customers who rated a course as excellent or good were generally more likely to plan on playing that course more often in the future.

FIGURE 43 PLAN TO PLAY TORREY PINES MORE OFTEN BY TORREY PINES SOUTH ROUNDS IN PAST 12 MONTHS & RATING OF TORREY PINES SOUTH

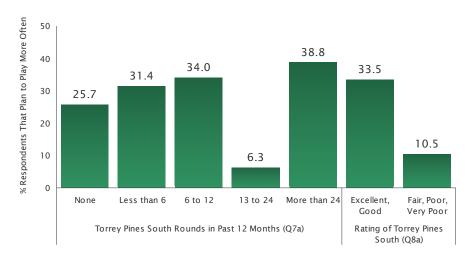


FIGURE 44 PLAN TO PLAY TORREY PINES MORE OFTEN BY TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS & RATING OF TORREY PINES NORTH

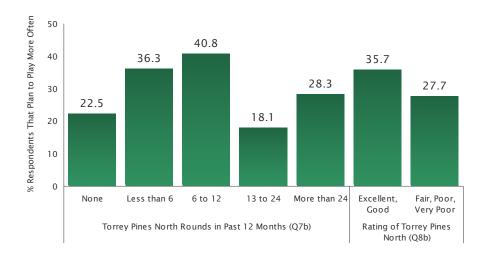


FIGURE 45 PLAN TO PLAY BALBOA PARK MORE OFTEN BY BALBOA PARK ROUNDS IN PAST 12 MONTHS & RATING OF BALBOA PARK

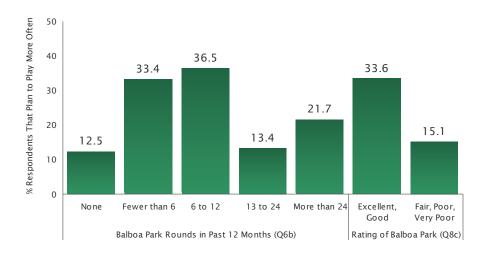
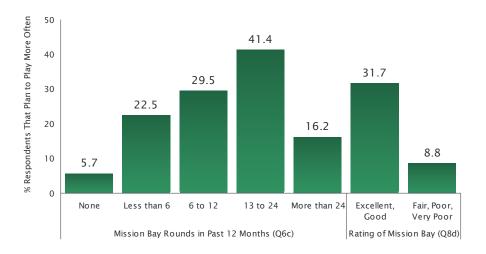


FIGURE 46 PLAN TO PLAY MISSION BAY MORE OFTEN BY MISSION BAY ROUNDS IN PAST 12 MONTHS & RATING OF MISSION BAY

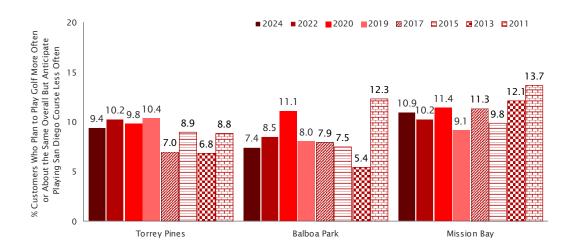


cated that they intend to play golf more frequently or at about the same frequency they currently play (Question 14) yet anticipated playing one or more San Diego courses *less often* in the coming year (Question 15) were asked the reason for their expected reduction in play. These guestions

REDUCED FUTURE PLAY AT SAN DIEGO COURSES Customers who previously indi-

ing year (Question 15) were asked the reason for their expected reduction in play. These questions were asked in an open-ended manner, allowing customers to mention any reason that came to mind. True North later grouped the verbatim responses into the categories shown on the next pages in figures 48 through 50. It must be noted that the percentages shown in these three figures are among the *minority* of customers who plan to play a city course *less often* in the coming year. Figure 47 displays the percentage of customers from each course that anticipate playing less often and thus received the follow-up question as to why (7% for Balboa Park, 9% Torrey Pines, and 11% Mission Bay). The figure also shows that the 2024 results were statistically consistent with 2022.

FIGURE 47 PLAN TO PLAY GOLF MORE OFTEN OR ABOUT THE SAME BUT ANTICIPATE PLAYING SAN DIEGO COURSES LESS OFTEN IN NEXT 12 MONTHS BY STUDY YEAR



The most commonly mentioned reasons for anticipating to play Torrey Pines less often were concerns about cost of play (40%), not living near the course (38%), and difficulties getting a tee time (23%). The most common specific reasons for playing Balboa Park less often included concerns about the condition of the course (24%), not living near the course (18%), difficulties getting a tee time (13%), and the pace of play (13%). The top specific reasons for choosing to play Mission Bay less often were concerns about the condition of the course (28%), that they don't live near the course (14%), and a preference for other courses (8%). Three-in-ten (30%) indicated they were not sure why they planned to play Mission Bay less often (top response), 16% said the same for Balboa Park (third most frequent response), while the corresponding figure for Torrey Pines was 4%.

Question 16/17/18 Is there a particular reason why you expect to play golf less frequently at Torrey Pines /Balboa Park/Mission Bay Golf Course in the future?

FIGURE 48 REASONS FOR PLANNING TO PLAY TORREY PINES LESS OFTEN

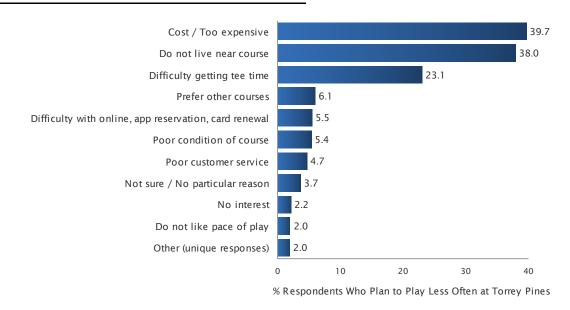


FIGURE 49 REASONS FOR PLANNING TO PLAY BALBOA PARK LESS OFTEN

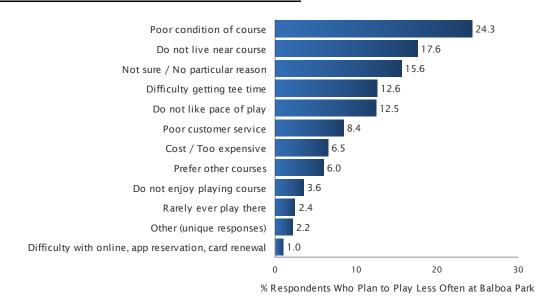
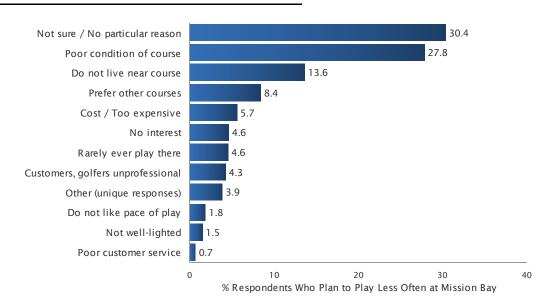


FIGURE 50 REASONS FOR PLANNING TO PLAY MISSION BAY LESS OFTEN



LIKELIHOOD OF RECOMMENDING SAN DIEGO GOLF COURSES The final substantive question of the survey examined customers' likelihood of recommending San Diego golf courses to their friends and colleagues. The question was asked for each of the three city golf courses a customer had played in the past 12 months, offering the respondent options of very likely, somewhat likely, or not likely. The results are presented in Figure 51 on the next page.

Nine-in-ten customers who played Balboa Park (91%) or Torrey Pines (90%) indicated they were likely to recommend the course to a friend or colleague, compared with 81% for Mission Bay. Further, 72% of Torrey Pines customers were *very* likely to recommend the course, 58% expressed the same sentiment for Balboa Park and the corresponding figure was 43% for Mission Bay. There were no statistically significant changes from 2022 (see Figure 52 on the next page).

Question 19 Overall, how likely are you to recommend the ____ to a friend or colleague who is interested in playing golf in San Diego County?

FIGURE 51 LIKELIHOOD OF RECOMMENDING COURSES

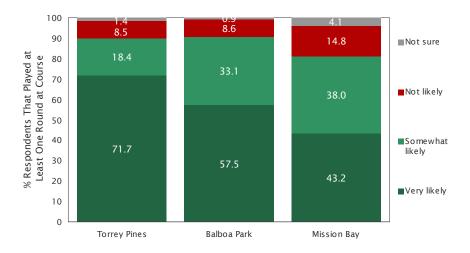
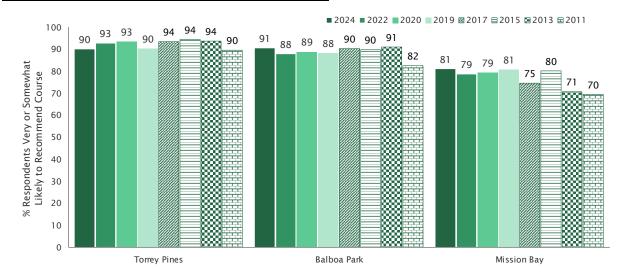


FIGURE 52 LIKELIHOOD OF RECOMMENDING COURSES BY STUDY YEAR



Figures 53 through 55 display the percentage of customers at each of the three San Diego courses that would be *very likely* to recommend the course by a variety of demographic subgroups. The most obvious finding is that the majority of *all* subgroups indicated they would be very likely to recommend Torrey Pines Golf Course to a friend or colleague, ranging from a low of 61% among customers with a household income of \$100k to \$149k to a high of 88% among those who live outside the United States. Balboa Park Golf Course exhibited the most variation among customers very likely to recommend the course, ranging from a low of 38% among those who live outside the United States to a high of 86% among California residents who live outside San Diego County. The percentage of customers who were very likely to recommend Mission Bay Golf Course varied from a low of 32% among customers 35 to 54 years of age to a high of 62% among California residents who live outside San Diego County.

FIGURE 53 VERY LIKELY TO RECOMMEND COURSES BY AREA OF RESIDENCE & HOUSEHOLD INCOME

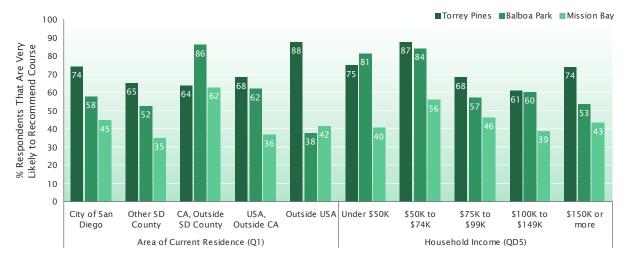


FIGURE 54 VERY LIKELY TO RECOMMEND COURSES BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS

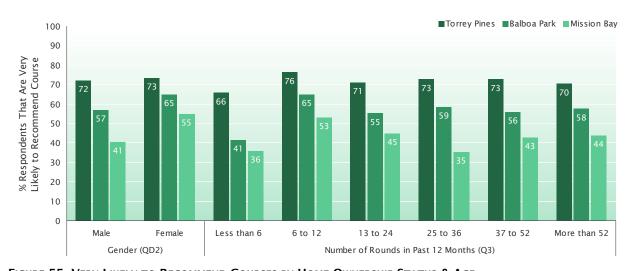
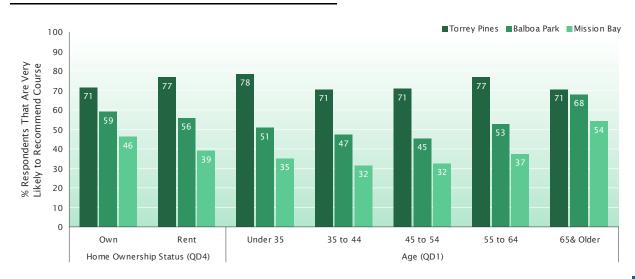


FIGURE 55 VERY LIKELY TO RECOMMEND COURSES BY HOME OWNERSHIP STATUS & AGE



BACKGROUND & DEMOGRAPHICS

Table 13 presents the key demographic and background information collected in the survey of San Diego golf customers. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of customers who played at least one round of golf at Torrey Pines, Balboa Park, and/or Mission Bay golf courses between July 1, 2023 and June 30, 2024. The primary motivation for collecting background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics as presented in this report.

TABLE 13 DEMOGRAPHICS OF SAMPLE

	Study Year							
	2024	2022	2020	2019	2017	2015	2013	2011
Total Respondents	1,121	1,247	1,207	1,228	1,874	1,464	1,444	1,306
Q1 Area of Current Residence	,	,	Í	Í	Í	,	,	,
City of San Diego	64.2	64.3	75.0	68.8	73.3	73.3	78.3	75.7
Other SD County	11.9	9.7	8.0	6.4	7.9	7.7	5.2	7.5
CA, Outside SD County	5.4	5.5	3.4	4.8	3.7	4.6	4.4	4.9
USA, Outside CA	16.3	18.7	12.0	16.3	12.6	12.0	9.0	10.3
Outside USA	2.2	1.8	1.7	3.7	2.5	2.4	3.1	1.6
QD1 Age								
Under 35	6.1	6.0	5.2	9.1	8.1	7.9	14.3	18.1
35 to 44	8.7	10.7	13.2	10.6	14.2	14.5	18.1	15.2
45 to 54	14.0	16.7	17.0	14.3	16.6	20.2	19.6	20.5
55 to 64	22.3	23.1	21.8	27.3	24.2	25.6	26.1	20.2
65+	40.2	33.2	32.1	36.3	30.5	31.3	20.9	19.9
Prefer not to answer	8.8	10.3	10.6	2.4	6.4	0.5	1.0	6.1
QD2 Gender								
Male	85.9	85.0	87.1	84.3	89.2	88.3	90.0	84.5
Female	12.2	11.7	9.9	14.0	9.0	10.8	8.5	14.1
Prefer not to answer	1.9	3.4	3.0	1.7	1.8	1.0	1.6	1.5
QD3 Golf Club Member								
Yes	43.3	44.8	48.1	49.5	47.9	41.2	39.5	36.1
No	54.2	52.0	49.4	48.4	50.0	57.1	59.2	62.5
Prefer not to answer	2.5	3.2	2.6	2.1	2.1	1.8	1.3	1.4
QD4 Home Ownership Status								
Own	77.2	80.9	77.1	81.7	77.3	77.0	74.6	72.9
Rent	14.5	12.0	14.3	11.1	15.9	16.0	18.5	20.6
Prefer not to answer	8.4	7.1	8.6	7.2	6.8	7.1	6.9	6.4
QD5 Household Income								
Under \$35K	0.7	0.6	1.6	0.9	1.6	1.6	1.4	3.0
\$35K to \$49K	1.2	8.0	1.6	2.6	2.5	2.1	2.8	4.1
\$50K to \$74K	5.0	4.8	5.0	7.1	5.6	6.1	7.9	9.7
\$75K to \$99K	6.5	9.7	7.9	7.7	9.5	9.8	10.7	12.1
\$100K to \$149K	15.8	16.5	17.2	16.9	16.9	18.0	22.0	18.6
\$150K or more	47.4	42.9	42.7	38.6	40.1	38.8	35.9	31.6
Not sure / Prefer not to answer	23.4	24.9	24.0	26.3	23.8	23.5	19.3	20.9
City of San Diego Resident								
Resident	64.2	64.3	75.0	68.8	73.3	73.3	78.3	75.7
Non-resident	35.8	35.7	25.0	31.2	26.7	26.7	21.7	24.3

METHODOLOGY

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

ONE-ON-ONE INTERVIEWS During the initial design stage of the study, which occurred prior to the 2011 study, Dr. McLarney of True North conducted interviews with individuals familiar with golf operations at Torrey Pines, Balboa, and/or Mission Bay courses through their association with local golf clubs and frequency of play. The interviews were informal, open-ended discussions designed to identify various factors that customers value when assessing the overall quality of their golfing experiences. This information was helpful in developing the 2011 questionnaire, which formed the basis for the 2013, 2015, 2017, 2019, 2020, 2022, and 2024 tracking studies.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney worked closely with the City of San Diego to develop a questionnaire that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias, the items were asked in a random order for each respondent. The 2024 questionnaire was identical to the 2022 questionnaire, which differed very little from the original survey developed for the 2011 study to allow for direct comparisons in customer responses over time.

Many questions asked in this study were presented only to a subset of respondents. For example, only those who had played at one or more San Diego courses (Question 6) were asked about their perceptions of and experiences with each course they had played (Question 8). The questionnaire included with this report (see *Questionnaire & Toplines* on page 51) identifies skip patterns used during the interview to ensure each respondent received the appropriate questions.

PROGRAMMING & PRE-TEST Prior to fielding the survey, the questionnaire was programmed into a password-protected online survey application hosted by True North as well as CATI (Computer Assisted Telephone Interviewing) programmed to assist the interviewers when conducting phone interviews. Both the web and CATI programs automatically navigate the skip patterns, randomize the appropriate question items, and alert the interviewer or respondent to certain types of keypunching mistakes should they happen during the interview. The integrity of the programs was pre-tested internally by True North prior to formally beginning the survey.

SAMPLE The sample for this study was drawn from the City's golf reservation database, which contains records representing each round of golf played at Torrey Pines North, Torrey Pines South, Balboa Park, and/or Mission Bay Golf Course. All customers who played at least one round of golf at one of the city courses between July 1, 2023 and June 30, 2024 comprised the universe for the study. The database was organized by customer and included the number of rounds played at each course for each customer. Finally, the universe of customers was stratified by the number of rounds a customer had played and their most frequently-played course.

RECRUITMENT AND DATA COLLECTION True North used multiple methods to recruit and encourage participation in the survey. Using a combination of email and text invitations, customers were initially invited to participate in the survey online at a secure, passcode-protected website designed and hosted by True North. The invitations included a hyperlink to the survey website, and each link contained a unique passcode. The passcode ensured that only customers invited to participate in the survey could participate, and that they could do so only once. In coordination with this effort, phone interviews were conducted on weekday evenings and weekends, with the average interview lasting 14 minutes. The data collection period lasted from September 10 to September 26, 2024, resulting in a total of 1,122 completed surveys.

STATISTICAL MARGIN OF ERROR By using a probability-based sampling design and monitoring sample characteristics as data collection proceeded, True North ensured that the final sample was representative of the universe of San Diego golf customers who played at least one round between July 1, 2023 and June 30, 2024. The results of the survey can thus be used to estimate the opinions of *all* City of San Diego golf course customers who played during that time period. Because not all customers participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in this survey of 1,122 respondents for a particular question and what would have been found if all customers had participated.

FIGURE 56 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING

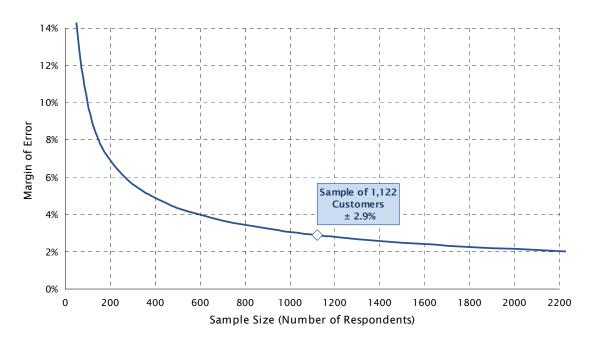


Figure 56 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is $\pm 2.9\%$ for questions answered by all 1,122 respondents.

Within this report, figures and tables show how responses to certain questions varied by subgroups such as area of current residence, household income, and age. Figure 56 above is useful

for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing open-ended responses, and preparing frequency analyses and cross-tabulations. Where appropriate, tests of statistical significance were conducted to evaluate changes in responses between the 2022 and 2024 studies. The final data were weighted to match the distribution of customers across the courses, according to the City's reservation database.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that add to more than or less than 100%.

QUESTIONNAIRE & TOPLINES



City of San Diego Golf Customer Survey Final Toplines (n = 1,122) October 2024

Section 1: Introduction to Study

Hi, may I please speak to ____. Hi, my name is ____ and I'm calling on behalf of TNR, an independent public opinion research firm. We're conducting a survey of people who have played golf in San Diego and I'd like to get your opinions.

If needed: This is a survey about your experiences playing golf in San Diego - I'm NOT trying to sell anything and I won't ask for a donation.

If needed: The survey should take about 10 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If needed: This survey is being funded by the City of San Diego's Golf Program to measure customer's opinions. The results will be used by City staff for planning and management purposes.

Sect	Section 2: ZIP Code & Residency						
Q1	Q1 To begin, what is the ZIP code at your primary residence? ZIP code recorded and later grouped into categories shown below.						
	1 City of San Diego 64%						
	2	Other San Diego County city	12%				
	3 California, outside San Diego County		5%				
	4	USA, outside California	16%				
	5	Outside USA	2%				
		Ask Q2 if Q1	= 2.				
Q2 What is the name of the City you live in or live closest to?							
	City name recorded Data on file						

Section 3: Frequency & Courses Played

Next, I'd like to ask you a few general questions about your golfing experiences.

Q3	In the past 12 months, approximately how many rounds of golf did you play? Number of rounds recorded and later grouped into categories shown below.						
	Less than 6	4%					
	6 to 12	13%					
	13 to 24	13%					
	25 to 36	17%					
	37 to 52	22%					
	More than 52	30%					
	Prefer not to answer	1%					

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Q4	and		play most often? Verbatim names recorded below. Categories mentioned by at least 1%				
		oa Park Golf Course	19%				
	Torr	ey Pines Golf Course	15%				
	Miss	ion Bay Golf Course	10%				
	Adm	niral Baker Golf Course	5%				
	Not	sure / Play many courses	4%				
	Enci	nitas Ranch Golf Course	2%				
	Oak	s North Golf Club	2%				
	Pref	er not to answer	2%				
	Avia	ra Golf Club	1%				
	Boni	ta Golf Club	1%				
	Carl	ton Oaks Country Club	1%				
	Lom	as Santa Fe Country Club	1%				
	Miss	ion Trails Golf Course	1%				
	Mt.	Woodson Country Club	1%				
	Rand	cho Bernardo Inn	1%				
	Rive	rwalk Golf Club	1%				
	Teco	olote Canyon Golf Course	1%				
	The	Crossings at Carlsbad Golf Course	1%				
	Cott	onwood Golf Club	1%				
	Mira	mar Memorial Golf Course	1%				
	Sea	'N Air Golf Course	1%				
	Othe	er course (unique mentions)	28%				
Q5		ere a particular reason why you play this rded and later grouped into the categori					
	1	Location/Close to home or work	30%				
	2	Affordable fees/Good value	27%				
	3	Course quality	15%				
	4	Tee-time availability	14%				
	6	Member	7%				
	7	Friend, family member	3%				
	8	Location, availability, cost	1%				
	5	Other reason	3%				
	98	Not sure	0%				
	99	Prefer not to answer	1%				

Q6	Thinking now of courses in the City of San approximately how many rounds of golf did	Diego In the past 12 months, d you play at:?
Ran	domize	
Α	Torrey (Torr-ee) Pines Golf Course	
	None	27%
	Fewer than 6	48%
	6 to 12	13%
	13 to 24	5%
	More than 24	6%
	Prefer not to answer	1%
В	Balboa (Bal-BOW-uh) Park Golf Course	
	None	38%
	Fewer than 6	30%
	6 to 12	14%
	13 to 24	6%
	More than 24	10%
	Prefer not to answer	2%
С	Mission Bay Golf Course	
	None	60%
	Fewer than 6	22%
	6 to 12	8%
	13 to 24	4%
	More than 24	5%
	Prefer not to answer	1%
	Only ask Q7	if Q6a > 0.
Q7	Of the < <pre>epipe Q6a #>> times you play months, how many times did you play the second for south course.</pre>	ed at Torrey (Torr-ee) Pines in past 12 south course? Constrain to max = # in Q6a
Ran	domize	
Α	South Course	
	None	42%
	Fewer than 6	47%
	6 to 12	6%
	13 to 24	1%
	More than 24	1%
	Prefer not to answer	2%

В	North Course	
	None	46%
	Fewer than 6	36%
	6 to 12	8%
	13 to 24	5%
	More than 24	3%
	Prefer not to answer	2%

Section 4: Rating Overall SD Golf Experiences										
Only ask Q8 for courses where respondent played in past year (Q6 or $Q7 > 0$).										
Q8	Overall, how would you rate your most recent golf experiences at:? Would you rate them as excellent, good, fair, poor and very poor?									
Randomize		Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer		
Α	Torrey Pines South Golf Course	60%	32%	5%	1%	1%	0%	0%		
В	Torrey Pines North Golf Course	51%	37%	8%	1%	2%	0%	0%		
С	Balboa Park Golf Course	27%	55%	15%	2%	1%	0%	0%		
D	Mission Bay Golf Course	21%	50%	23%	3%	1%	1%	0%		
	Only ask Q9 if C	Q7a > 0).	•			•			
Q9	If the course managers could change somethi Course to improve your overall golf experienc see? Verbatim responses recorded and later g	e, wha	t chan	ge wo	uld yo	u most	like to	0		
	No changes needed				26%					
	Not sure / Cannot think of anything				13%					
	Enforce speed of play				11%					
	Reduce fees, costs in general				8%					
	Improve access to tee time info				8%					
	Increase availability of tee times				7%					
	Improve reservation system				7%					
	Improve customer service				4%					
	Maintain sand traps, bunkers				4%					
	Improve green conditions				3%					
	Reduce green fees				2%					
	Reduce visitor prices				2%					
	Improve course quality				2%					

y of San Diego Golf Customer Survey	October 2
Maintain roughs	2%
Improve ball washers	2%
Make it easier to play / more playable for average golfer	2%
Reduce cart rental fees	1%
Maintain tee boxes	1%
Improve facility maintenance	1%
Reopen, renovate restaurant	1%
Improve, upgrade driving range	1%
Improve cart paths	1%
Add trees	1%
Add, improve snack / beverage carts	1%
Extend twilight tee times	1%
Add, expand facilities	1%
Improve, maintain specific holes	1%
Enforce handicap rule	1%
Make it more accessible	1%
Improve, provide more restrooms	1%
Only ask Q10 i	fQ7b > 0.
If the course managers could change someth Course to improve your overall golf experier see? Verbatim responses recorded and later	nce, what change would you most like to
No changes needed	25%
Not sure / Cannot think of anything	1 4%
Enforce speed of play	13%
Reduce fees, costs in general	8%
Increase availability of tee times	8%
Improve access to tee time info	7%
Improve green conditions	7%
Improve reservation system	4%
Improve, maintain specific holes	4%
Maintain roughs	3%
Reduce cart rental fees	2%
Improve customer service	2%
Add, improve snack / beverage carts	2%
Maintain sand traps, bunkers	2%
Reduce visitor prices	1%
Maintain tee boxes	1%
Maintain tee boxes	1%

Page 5

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Improve course quality	1%
Improve fairways	1%
Improve facility maintenance	1%
Improve, upgrade driving range	1%
Improve cart paths	1%
Improve ball washers	1%
Offer earlier tee times	1%
Add, expand facilities	1%
Make it more accessible	1%
Improve scheduling	1%
Reduce cost, of food, beverages	1%
Improve intervals between tee times	1%
Improve, provide more restrooms	1%
Add benches with shade on tee boxes	1%
Put holes on putting greens	1%
Only ask Q11 if Q6b >	0.
improve your overall golf experience, what change versponses recorded and later grouped into categories. No changes needed	
Not sure / Cannot think of anything	18%
Enforce speed of play	11%
Maintain tee boxes	
Manitani ree noxes	6%
Improve course quality	<u> </u>
	6%
Improve course quality	6% 5%
Improve course quality Improve green conditions	6% 5% 5%
Improve course quality Improve green conditions Improve fairways	6% 5% 5% 5%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times	6% 5% 5% 5% 4%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times Improve clubhouse	6% 5% 5% 5% 4% 4%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times Improve clubhouse Improve facility maintenance	6% 5% 5% 5% 4% 4% 3%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times Improve clubhouse Improve facility maintenance Improve, upgrade driving range	6% 5% 5% 5% 4% 4% 3% 3%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times Improve clubhouse Improve facility maintenance Improve, upgrade driving range Improve reservation system	6% 5% 5% 5% 4% 4% 3% 3% 3%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times Improve clubhouse Improve facility maintenance Improve, upgrade driving range Improve reservation system Maintain sand traps, bunkers	6% 5% 5% 5% 4% 4% 3% 3% 3% 3%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times Improve clubhouse Improve facility maintenance Improve, upgrade driving range Improve reservation system Maintain sand traps, bunkers Improve customer service	6% 5% 5% 5% 4% 4% 3% 3% 3% 3% 3%
Improve course quality Improve green conditions Improve fairways Increase availability of tee times Improve clubhouse Improve facility maintenance Improve, upgrade driving range Improve reservation system Maintain sand traps, bunkers Improve customer service Add, improve snack / beverage carts	6% 5% 5% 5% 4% 4% 3% 3% 3% 2%

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ity of	San Diego Golf Customer Survey	October 20				
г						
	Maintain roughs	1%				
	Improve cart paths	1%				
	Improve ball washers	1%				
	Add, expand facilities	1%				
	Improve, maintain specific holes	1%				
	Add signage, markers	1%				
	Create additional set of tees	1%				
	Improve practice area	1%				
Ī	Improve pro shop	1%				
Ī	Improve time between tee times	1%				
	Improve chipping and putting area	1%				
	Improve, expand parking, allow carts	1%				
	Provide more golf carts	1%				
	Only ask Q12 if	Q6c > 0.				
Q12	If the course managers could change something about the Mission Bay Golf Course to improve your overall golf experience, what change would you most like to see? Verbating responses recorded and later grouped into categories shown below.					
	No changes needed	21%				
İ	Not sure / Cannot think of anything	19%				
İ	Maintain tee boxes	9%				
İ	Better lighting, extended hours	7%				
İ	Improve course quality	6%				
İ	Improve green conditions	6%				
İ	Reopen, renovate restaurant	5%				
İ	Enforce speed of play	5%				
İ	Improve fairways	4%				
Ī	Improve facility maintenance	4%				
İ	Reduce fees, costs in general	2%				
Ī	Improve, upgrade driving range	2%				
Ī	Improve cart paths	2%				
Ī	Add, improve snack / beverage carts	2%				
İ	Complete construction	2%				
f	Maintain roughs	1%				
İ	Improve clubhouse	1%				
f	Improve ball washers	1%				
f	Add, expand facilities	1%				
+	X Production of the	***				

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Improve, maintain specific holes

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Maintain sand traps, bunkers	1%
Improve restaurant, food	1%
Add signage, markers	1%
Improve course capacity, too crowded	1%
Remove foot / soccer golf	1%
Improve practice area	1%
Lower / Lesser cost, prices for food, beverages	1%
Improve intervals between tee times	1%
Course, fairways too narrow, needs fences	1%

Sect	Section 5: Ratings for Specific Aspects of Golf Experience										
Q13	Next, I'd like you to think back to your most recent golf experiences at <golf between="" choose="" course="" courses="" from="" if="" most="" multiple="" often="" or="" q6="" q7,="" random="" tie="" used="">. Would you say the was excellent, good, fair, poor, or very poor?</golf>										
	Randomize	Excellent	рооО	Fair	Poor	Very poor	Not sure	Prefer not to answer			
Torr	ey Pines South Golf Course (295 respondents)										
Α	Courtesy of golf course starters, Marshals and maintenance staff	51%	34%	9%	2%	2%	2%	0%			
В	Directional signage to golf course	36%	46%	11%	1%	1%	4%	0%			
С	Availability of tee-times when doing a walk- up reservation	12%	8%	10%	9%	14%	47%	1%			
D	Availability of tee-times when making a reservation by phone	9%	9%	11%	10%	23%	36%	2%			
E	The value of the course for the fee	28%	33%	27%	9%	3%	0%	0%			
F	Overall course condition	54%	36%	7%	2%	0%	0%	0%			
G	Condition of the tee boxes	47%	41%	9%	1%	1%	1%	0%			
Н	Condition of fairways	50%	40%	8%	1%	0%	1%	0%			
I	Condition of the rough	39%	46%	9%	3%	1%	1%	0%			
J	Condition of the bunkers	42%	38%	13%	4%	1%	2%	0%			
K	Condition of the greens	52%	35%	9%	3%	0%	1%	0%			
L	Layout of the course	70%	26%	2%	1%	0%	0%	0%			
М	Pace of play	27%	32%	21%	10%	9%	0%	0%			
N	Quality of the pro shop	54%	37%	8%	0%	0%	1%	0%			
0	Quality of food and beverage services	21%	27%	24%	7%	1%	17%	3%			
Р	Availability and quality of golf instructors	8%	5%	1%	2%	0%	80%	3%			
Q	Condition of cart paths	36%	45%	7%	1%	0%	10%	1%			

	T		I				I	
R	Condition of golf carts	32%	33%	9%	2%	2%	22%	1%
S	Availability and condition of restrooms	28%	40%	18%	7%	3%	4%	0%
Т	Enforcement of golf course rules and regulations	23%	32%	14%	5%	4%	21%	0%
U	Availability and condition of driving range facilities	17%	27%	19%	15%	5%	15%	2%
٧	Availability and condition of practice putting greens	40%	40%	11%	3%	1%	4%	1%
Torr	ey Pines North Golf Course (265 respondents)							
Α	Courtesy of golf course starters, Marshals and maintenance staff	54%	33%	9%	1%	2%	2%	1%
В	Directional signage to golf course	35%	43%	7%	2%	0%	12%	1%
С	Availability of tee-times when doing a walk- up reservation	3%	7%	18%	13%	15%	43%	1%
D	Availability of tee-times when making a reservation by phone	2%	6%	10%	20%	30%	32%	1%
E	The value of the course for the fee	44%	30%	14%	4%	7%	0%	1%
F	Overall course condition	38%	48%	9%	3%	2%	0%	0%
G	Condition of the tee boxes	35%	48%	12%	2%	2%	1%	1%
Н	Condition of fairways	39%	49%	8%	2%	2%	0%	0%
I	Condition of the rough	22%	50%	19%	5%	2%	1%	1%
J	Condition of the bunkers	29%	46%	17%	7%	1%	0%	1%
K	Condition of the greens	34%	44%	14%	5%	3%	0%	0%
L	Layout of the course	59%	36%	4%	0%	0%	0%	1%
М	Pace of play	11%	40%	27%	11%	7%	3%	0%
N	Quality of the pro shop	52%	37%	6%	1%	0%	4%	1%
0	Quality of food and beverage services	18%	29%	22%	3%	3%	23%	2%
Р	Availability and quality of golf instructors	4%	7%	2%	1%	1%	80%	6%
Q	Condition of cart paths	34%	43%	8%	1%	0%	13%	1%
R	Condition of golf carts	29%	33%	6%	3%	0%	28%	1%
S	Availability and condition of restrooms	19%	35%	32%	6%	4%	4%	1%
Т	Enforcement of golf course rules and regulations	16%	36%	19%	8%	5%	15%	1%
U	Availability and condition of driving range facilities	10%	25%	27%	12%	7%	19%	1%
V	Availability and condition of practice putting greens	32%	41%	21%	3%	1%	3%	0%
Balb	oa Park Golf Course (339 respondents)							
Α	Courtesy of golf course starters, Marshals and maintenance staff	38%	40%	12%	3%	2%	5%	0%
В	Directional signage to golf course	15%	49%	14%	5%	0%	16%	0%
С	Availability of tee-times when doing a walk- up reservation	3%	12%	15%	11%	4%	53%	1%

D	Availability of tee-times when making a reservation by phone	10%	20%	18%	13%	8%	30%	1%
Е	The value of the course for the fee	50%	36%	10%	2%	1%	0%	0%
F	Overall course condition	20%	63%	15%	1%	0%	0%	0%
G	Condition of the tee boxes	9%	44%	36%	9%	2%	0%	0%
Н	Condition of fairways	18%	60%	18%	3%	0%	0%	0%
1	Condition of the rough	9%	55%	30%	3%	1%	1%	0%
J	Condition of the bunkers	7%	36%	39%	12%	5%	2%	0%
K	Condition of the greens	33%	52%	13%	1%	0%	1%	0%
L	Layout of the course	35%	53%	10%	0%	1%	1%	0%
М	Pace of play	8%	43%	32%	12%	4%	1%	0%
N	Quality of the pro shop	10%	32%	37%	13%	4%	4%	0%
0	Quality of food and beverage services	14%	36%	20%	6%	1%	23%	0%
Р	Availability and quality of golf instructors	1%	3%	3%	1%	2%	86%	2%
Q	Condition of cart paths	14%	47%	19%	4%	1%	14%	1%
R	Condition of golf carts	13%	39%	17%	3%	0%	27%	1%
S	Availability and condition of restrooms	10%	35%	35%	12%	3%	5%	0%
Т	Enforcement of golf course rules and regulations	7%	35%	24%	13%	4%	17%	0%
U	Availability and condition of driving range facilities	5%	23%	34%	17%	7%	14%	0%
V	Availability and condition of practice putting greens	21%	48%	23%	3%	1%	3%	0%
Miss	sion Bay Golf Course (204 respondents)							
Α	Courtesy of golf course starters, Marshals and maintenance staff	40%	39%	9%	1%	0%	8%	1%
В	Directional signage to golf course	20%	44%	16%	5%	1%	13%	1%
С	Availability of tee-times when doing a walk- up reservation	9%	21%	8%	3%	2%	54%	2%
D	Availability of tee-times when making a reservation by phone	16%	37%	14%	3%	1%	27%	1%
E	The value of the course for the fee	40%	35%	20%	4%	0%	0%	0%
F	Overall course condition	12%	58%	27%	1%	0%	0%	1%
G	Condition of the tee boxes	6%	30%	32%	22%	9%	0%	0%
Н	Condition of fairways	20%	54%	20%	5%	0%	0%	0%
I	Condition of the rough	10%	51%	27%	7%	2%	1%	1%
J	Condition of the bunkers	5%	24%	23%	6%	2%	38%	3%
K	Condition of the greens	19%	53%	26%	1%	0%	0%	0%
L	Layout of the course	26%	57%	14%	0%	0%	1%	0%
М	Pace of play	9%	48%	28%	11%	3%	0%	0%

N	Quality of the pro shop	32%	36%	16%	5%	0%	9%	1%
0	Quality of food and beverage services	5%	16%	21%	15%	5%	37%	1%
Р	Availability and quality of golf instructors	3%	8%	2%	0%	2%	81%	4%
Q	Condition of cart paths	6%	29%	26%	13%	6%	17%	1%
R	Condition of golf carts	12%	22%	8%	2%	1%	55%	0%
S	Availability and condition of restrooms	22%	41%	21%	6%	1%	7%	1%
Т	Enforcement of golf course rules and regulations	10%	38%	18%	8%	3%	22%	1%
U	Availability and condition of driving range facilities	14%	48%	18%	5%	0%	14%	1%
٧	Availability and condition of practice putting greens	17%	54%	19%	4%	0%	6%	0%

Sect	ion 6	: Future Expectations & Recommendatio	ns							
Q14	Including <u>all</u> courses that you may play, in the next 12 months do you anticipate that the frequency with which you play golf will increase, decrease or stay about the same as now?									
	1	Increase			30%					
	2	Decrease			2%					
	3	Stay about the same			67%					
	98	Not sure			1%					
	99	Prefer not to answer			0%					
Q15	Looking forward to the next 12 months, do you anticipate that you will play golf at the more often, less often, or about the same as you do now?									
Rand	Randomize			Less often	About the same	Not sure	Prefer not to answer			
Α	Torr	ey Pines Golf Course	29%	10%	42%	17%	2%			
В	Balb	oa Park Golf Course	23%	8%	51%	16%	2%			
С	Miss	ion Bay Golf Course	13%	11%	49%	22%	4%			
		Ask Q16 if Q14 = $(1,3)$ a	ind Q15a	a = (2).						
Q16	Golf	ere a particular reason why you expect to Course in the future? Verbatim responses gories shown below.					Pines			
	Cost	: / Too expensive			40%					
	Do r	not live near course			38%					
	Diffi	culty getting tee time	23%							
	Prefe	er other courses	6%							
	Diffi rene	culty with online, app reservation, card wal			6%					
	Poor	condition of course	5%							

	Poor customer service	5%		
	Not sure / No particular reason	4%		
	No interest	2%		
	Do not like pace of play	2%		
	Ask Q17 if Q14 = (1,3)	and Q15b = (2).		
Q17	Is there a particular reason why you expect to play golf <u>less</u> frequently at Balboa Park Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.			
	Poor condition of course	24%		
	Do not live near course	1 8%		
	Not sure / No particular reason	16%		
	Difficulty getting tee time	1 3%		
	Do not like pace of play	13%		
	Poor customer service	8%		
	Cost / Too expensive	7%		
	Prefer other courses	6%		
	Do not enjoy playing course	4%		
	Rarely ever play there	2%		
	Difficulty with online, app reservation, card renewal	1%		
	Ask $Q18 \text{ if } Q14 = (1,3)$	and Q15c = (2).		
Q18	Is there a particular reason why you expect to Golf Course in the future? Verbatim responses categories shown below.			
	Not sure / No particular reason	30%		
	Poor condition of course	28%		
	Do not live near course	1 4%		
	Prefer other courses	8%		
	Cost / Too expensive	6%		
	No interest	5%		
	Rarely ever play there	5%		
	Customers, golfers unprofessional	4%		
		201		
	Do not like pace of play	2%		
	Poor customer service	2% 1%		

Only ask Q19 for courses where respondent played in past year (Q6 > 0).							
Q19	Overall, how likely are you to recommend the to a friend or colleague who is interested in playing golf in San Diego County?						
Rand	domize	Very likely	Somewhat Iikely	Not likely	Not sure	Prefer not to answer	
Α	Torrey Pines Golf Course	72%	18%	8%	1%	0%	
В	Balboa Park Golf Course	57%	33%	9%	1%	0%	
С	Mission Bay Golf Course & Practice Center	43%	38%	15%	3%	1%	

Section 8: Background & Demographics							
Than stati	Thank you so much for your participation. I have just a few background questions for statistical purposes.						
D1	In w	In what year were you born? Year coded into age categories shown below.					
	Und	er 35	6%				
	35 to 44 9%						
	45 t	o 54	1 4%				
	55 t	o 64	22% 40%				
	65 c	or older					
	Pref	er not to answer	9%				
D2	2 Gender						
	1	Male	86%				
	2	Female	12%				
	3	Non-binary	2%				
	99	Prefer not to answer	0%				
D3	D3 Are you a member of a golfing club?						
	1	Yes	43%				
	2	No	54%				
	99	Prefer not to answer	3%				

D4	Do y	Do you own or rent your home?					
	1	Own	77%				
	2	Rent	1 4%				
	99	Prefer not to answer	8%				
D5	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes.						
	1	Under \$35,000	1%				
	2	\$35,000 to \$49,999	1%				
	3	\$50,000 to \$74,999	5%				
	4	\$75,000 to \$99,999	7%				
	5	\$100,000 to \$149,999	16%				
	6	\$150,000 or more	47%				
	98	No Opinion/Not Sure	23%				
	99	Prefer not to answer	1%				

Thank you so much for your participation. This survey was conducted for the City of San Diego's Golf Program.

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