PURPOSE OF STUDY

- Profile customers’ frequency of golf play in general and at the three San Diego courses.
- Evaluate customer experiences with and perceptions of the three City golf courses.
- Track the findings of the 2015 customer opinion study against similar surveys conducted in 2011 and 2013.
- Collect background and demographic data relevant to understanding customers’ perceptions and needs.
METHODOLOGY OF STUDY

- Telephone and Web survey
- 1,464 customers who played at least one round at Torrey Pines, Balboa Park, Mission Bay during Fiscal Year 2015
- Recruited via telephone and email
- Surveys collected Aug 10 to Aug 24, 2015
- ± 2.53% overall margin of error
CURRENT RESIDENCE OF CUSTOMERS BY STUDY YEAR

<table>
<thead>
<tr>
<th>Study Year</th>
<th>Outside USA</th>
<th>USA, Outside CA</th>
<th>CA, Outside SD County</th>
<th>Other SD County</th>
<th>City of San Diego</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>2.4</td>
<td>12.0†</td>
<td>4.6</td>
<td>7.7†</td>
<td>73.3†</td>
</tr>
<tr>
<td>2013</td>
<td>3.1</td>
<td>9.0</td>
<td>4.4</td>
<td>5.2</td>
<td>78.3</td>
</tr>
<tr>
<td>2011</td>
<td>1.6</td>
<td>10.3</td>
<td>4.9</td>
<td>7.5</td>
<td>75.7</td>
</tr>
</tbody>
</table>
REASON FOR PLAYING SAN DIEGO COURSE MOST OFTEN

- **Location**: 18.7% (Torrey Pines), 36.6% (Balboa Park), 41.4% (Mission Bay)
- **Affordability**: 32.8% (Torrey Pines), 29.4% (Balboa Park), 22.1% (Mission Bay)
- **Course quality**: 9.6% (Torrey Pines), 3.1% (Balboa Park), 42.5% (Mission Bay)
- **Location, availability, cost**: 6.2% (Torrey Pines), 9.3% (Balboa Park), 3.7% (Mission Bay)
- **Tee-time availability**: 6.2% (Torrey Pines), 3.7% (Balboa Park), 0.4% (Mission Bay)
- **Member**: 2.5% (Torrey Pines), 3.1% (Balboa Park), 0.4% (Mission Bay)
- **Friend, family a member**: 2.5% (Torrey Pines), 3.1% (Balboa Park), 0.7% (Mission Bay)

% Respondents That Mentioned Aspect as the Main Reason for Playing Course
RATING CITY OF SAN DIEGO GOLF COURSES

<table>
<thead>
<tr>
<th>Course</th>
<th>Not sure</th>
<th>Very poor</th>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Torrey Pines South</td>
<td>1.4</td>
<td>5.6</td>
<td></td>
<td></td>
<td>35.0</td>
<td></td>
</tr>
<tr>
<td>Torrey Pines North</td>
<td>1.2</td>
<td>6.4</td>
<td></td>
<td></td>
<td>40.7</td>
<td></td>
</tr>
<tr>
<td>Balboa Park</td>
<td>9.3</td>
<td>13.9</td>
<td>53.3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mission Bay</td>
<td>9.1</td>
<td>21.4</td>
<td>52.9</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

% Respondents Who Played at Least One Round at Course
GOLF COURSE RATING BY STUDY YEAR

% Respondents Who Rated Course as Excellent or Good

<table>
<thead>
<tr>
<th>Course</th>
<th>2015</th>
<th>2013</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Torrey Pines North and South</td>
<td>92.3</td>
<td>92.1</td>
<td>88.3</td>
</tr>
<tr>
<td>Balboa Park</td>
<td>83.0</td>
<td>82.6</td>
<td>73.1</td>
</tr>
<tr>
<td>Mission Bay</td>
<td>74.2†</td>
<td>63.6</td>
<td>58.9</td>
</tr>
</tbody>
</table>

Bar chart showing the percentage of respondents who rated courses as excellent or good for Torrey Pines North and South, Balboa Park, and Mission Bay over the years 2011, 2013, and 2015.
SUGGESTIONS FOR IMPROVEMENT
TORREY PINES SOUTH

% Respondents That Played at Least One Round at Torrey Pines South

- No changes needed: 31.2%
- Not sure / Cannot think of anything: 15.8%
- Enforce speed of play: 11.0%
- Reduce fees, costs in general: 9.4%
- Maintain roughs: 5.2%
- Other (unique responses): 4.4%
- Maintain sand traps, bunkers: 2.6%
- Improve course quality: 2.6%
- Add, expand facilities: 2.4%
- Improve reservation system: 2.3%

Mentioned by at Least 5% of Customers
SUGGESTIONS FOR IMPROVEMENT
TORREY PINES NORTH

<table>
<thead>
<tr>
<th>Suggestion</th>
<th>% Respondents That Played at Least One Round at Torrey Pines North</th>
</tr>
</thead>
<tbody>
<tr>
<td>No changes needed</td>
<td>32.1</td>
</tr>
<tr>
<td>Not sure / Cannot think of anything</td>
<td>17.6</td>
</tr>
<tr>
<td>Enforce speed of play</td>
<td>14.1</td>
</tr>
<tr>
<td>Maintain roughs</td>
<td>6.2</td>
</tr>
<tr>
<td>Reduce fees, costs in general</td>
<td>4.2</td>
</tr>
<tr>
<td>Other (unique responses)</td>
<td>3.5</td>
</tr>
<tr>
<td>Improve green conditions</td>
<td>3.0</td>
</tr>
<tr>
<td>Improve fairways</td>
<td>2.8</td>
</tr>
<tr>
<td>Add, expand facilities</td>
<td>2.7</td>
</tr>
<tr>
<td>Improve course quality</td>
<td>2.6</td>
</tr>
</tbody>
</table>

Mentioned by at Least 5% of Customers
SUGGESTIONS FOR IMPROVEMENT
BALBOA PARK

Not sure / Cannot think of anything: 22.6%
No changes needed: 22.3%
Enforce speed of play: 8.8%
Improve course quality: 7.4%
Improve clubhouse: 6.9%
Improve fairways: 6.3%
Add, expand facilities: 5.8%
Improve green conditions: 4.9%
Improve, maintain specific holes: 4.2%
Other (unique responses): 4.1%

% Respondents That Played at Least One Round at Balboa Park

Mentioned by at Least 5% of Customers
SUGGESTIONS FOR IMPROVEMENT
MISSION BAY

- No changes needed: 25.0%
- Not sure / Cannot think of anything: 24.6%
- Improve facility maintenance: 9.2%
- Reopen, renovate restaurant: 6.1%
- Improve clubhouse: 5.6%
- Reduce fees, costs in general: 5.4%
- Improve course quality: 5.0%
- Improve green conditions: 4.5%
- Add, expand facilities: 3.5%
- Enforce speed of play: 3.1%

Mentioned by at Least 5% of Customers
### COURSE ASPECTS WITH HIGHEST RATINGS OF EXCELLENT OR GOOD

<table>
<thead>
<tr>
<th>Torrey Pines South</th>
<th>Torrey Pines North</th>
<th>Balboa Park</th>
<th>Mission Bay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Layout of the course (98%)</td>
<td>Layout of the course (95%)</td>
<td>Layout of the course (89%)</td>
<td>Availability of tee-times for walk-up reservation (89%)</td>
</tr>
<tr>
<td>Condition of fairways (92%)</td>
<td>Quality of the pro shop (93%)</td>
<td>Condition of the greens (86%)</td>
<td>Courtesy of staff, Marshals (87%)</td>
</tr>
<tr>
<td>Overall course condition (91%)</td>
<td>Overall course condition (92%)</td>
<td>Courtesy of staff, Marshals (85%)</td>
<td>Availability of tee-times for phone reservation (84%)</td>
</tr>
<tr>
<td>Condition of the greens (91%)</td>
<td>Condition of the greens (92%)</td>
<td>Condition of the greens (84%)</td>
<td>Condition of the rough (81%)</td>
</tr>
<tr>
<td>Quality of the pro shop (91%)</td>
<td>Availability &amp; condition of practice putting greens (91%)</td>
<td>Condition of fairways (83%)</td>
<td>Condition of fairways (81%)</td>
</tr>
</tbody>
</table>
## COURSE ASPECTS WITH LOWEST RATINGS OF EXCELLENT OR GOOD

<table>
<thead>
<tr>
<th>Torrey Pines South</th>
<th>Torrey Pines North</th>
<th>Balboa Park</th>
<th>Mission Bay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability &amp; condition of driving range facilities (41%)</td>
<td>Availability of tee-times for phone reservation (48%)</td>
<td>Availability &amp; condition of driving range facilities (33%)</td>
<td>Quality of pro shop (23%)</td>
</tr>
<tr>
<td>Availability of tee-times for walk-up reservation (50%)</td>
<td>Pace of play (53%)</td>
<td>Quality of pro shop (35%)</td>
<td>Quality of food &amp; beverages services (45%)</td>
</tr>
<tr>
<td>Availability of tee-times for phone reservation (54%)</td>
<td>Availability &amp; condition of driving range facilities (53%)</td>
<td>Availability &amp; condition of restrooms (48%)</td>
<td>Availability &amp; condition of restrooms (50%)</td>
</tr>
<tr>
<td>Pace of play (55%)</td>
<td>Availability of tee-times for walk-up reservation (53%)</td>
<td>Condition of golf carts (54%)</td>
<td>Condition of cart paths (50%)</td>
</tr>
<tr>
<td>The value of the course for the fee (62%)</td>
<td>Availability &amp; condition of restrooms (64%)</td>
<td>Pace of play (55%)</td>
<td>Condition of the bunkers (55%)</td>
</tr>
</tbody>
</table>
LIKELIHOOD OF RECOMMENDING COURSE

% Respondents That Played at Least One Round at Course

- Torrey Pines
  - Not sure: 76.4%
  - Not likely: 32.3%
  - Somewhat likely: 5.0%
  - Very likely: 18.1%

- Balboa Park
  - Not sure: 37.5%
  - Not likely: 42.5%
  - Somewhat likely: 8.4%
  - Very likely: 32.3%

- Mission Bay
  - Not sure: 42.5%
  - Not likely: 37.5%
  - Somewhat likely: 16.8%
  - Very likely: 18.1%

Legend:
- Not sure
- Not likely
- Somewhat likely
- Very likely
LIKELIHOOD OF RECOMMENDING COURSE BY STUDY YEAR

% Respondents Very or Somewhat Likely to Recommend Course

<table>
<thead>
<tr>
<th>Location</th>
<th>2011</th>
<th>2013</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Torrey Pines</td>
<td>94.5</td>
<td>93.7</td>
<td>89.7</td>
</tr>
<tr>
<td>Balboa Park</td>
<td>89.9</td>
<td>91.2</td>
<td>82.5</td>
</tr>
<tr>
<td>Mission Bay</td>
<td>80.0†</td>
<td>70.6</td>
<td>69.5</td>
</tr>
</tbody>
</table>
KEY CONCLUSIONS

- Customers continue to have a high level of satisfaction with the City of San Diego’s golf courses
  - More than 9 in 10 customers rated golf experience at Torrey Pines as excellent or good
  - More than 8 in 10 customers rated golf experience at Balboa Park as excellent or good
  - Approximately three-quarters of customers rated golf experience at Mission Bay as excellent or good (11% increase from 2013)

- Customers also provided strong ratings for various aspects/performance dimensions
  - A majority of customers provided ratings of excellent or good for 19 of 22 specific aspects tested at every City golf course

- Path of improvement: 15 of 17 significant changes were positive
- At least 8 in 10 customers indicated they would recommend each City golf course to a friend or colleague
AREAS OF IMPROVEMENT

- Torrey Pines North & South
  - Availability/condition of driving range facilities
  - Availability of tee time reservations by phone & walk-up
  - Pace of play
- Balboa Park
  - Availability/condition of driving range facilities
  - Quality of pro shop
  - Availability/condition of restrooms
  - Condition of golf carts
- Mission Bay
  - Quality of pro shop
  - Quality of food & beverage service
  - Availability/condition of restrooms
  - Cart paths
  - Condition of bunkers