



# REPORT

## THE CITY OF SAN DIEGO TO THE PARK AND RECREATION BOARD

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DATE ISSUED: September 9, 2011

REPORT NO. 202

ATTENTION: Park and Recreation Board, Agenda of September 15, 2011

SUBJECT: Municipal Golf Course Customer Satisfaction Survey

### SUMMARY

THIS IS AN INFORMATION ITEM ONLY. NO ACTION IS REQUIRED ON THE PART OF THE BOARD.

### BACKGROUND

In February 2009, the Golf Division staff reported to the City Council's Natural Resources and Culture Committee that an initiative to develop a comprehensive golf customer satisfaction survey would be beneficial to better assess golf customers' needs.

The survey was conducted in 2011 by an independent consulting firm (True North Research) that specializes in customer satisfaction studies. The survey evaluated many facets of golf course operations and conditions and the final results will assist staff in providing key data as the staff updates the Golf Division's Business Plan. It is anticipated the survey will be adopted into an annual survey to track progress on meeting key customer service needs.

### DISCUSSION

A representative sample of golfers who played on City-operated courses in calendar year 2010 was identified and these golfers were requested to participate in the customer satisfaction survey. True North Research contacted customers and obtained customer survey responses during the period April 29, 2011 to May 9, 2011.

Of the 9,468 golfers that were asked to participate in the survey (either online or by telephone), 1,306 completed the survey. The survey has a statistical margin of error due to sampling of +/- 2.68% at the 95% level of confidence.

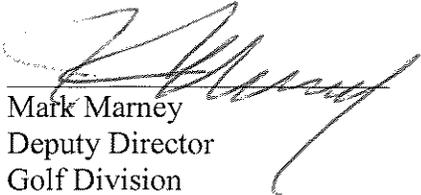
Overall the survey, found that 88% to 95% of golfers were satisfied with their overall golfing experiences when playing on City of San Diego operated courses. The combined weighted average for all three courses is 94%.

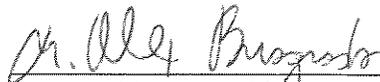
An overview of the general customer satisfaction results are shown here.

Golf Course Satisfaction	Excellent	Good	Fair	Poor	Very Poor	Not Sure	Satisfaction (Excellent, Good or Fair)
Balboa Park	16%	58%	21%	4%	3%	0%	95%
Mission Bay	11%	48%	29%	10%	3%	1%	88%
Torrey Pines	49%	39%	7%	4%	1%	0%	95%

More precise survey findings can be found across a range of subject areas within the consultant survey report.

Respectfully Submitted,

  
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MM/nab

Attachment: Customer Satisfaction Report Prepared for the City of San Diego,  
Golf Division, June 21, 2011 [Due to the size of the attachment an electronic copy  
of the attachment is available with this report at  
<http://www.sandiego.gov/parkandrecboard> ]

**CUSTOMER SATISFACTION SURVEY**  
RESEARCH REPORT

PREPARED FOR THE  
CITY OF SAN DIEGO  
GOLF OPERATIONS DIVISION



JUNE 21, 2011



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## INTRODUCTION

The City of San Diego Golf Operations Division is one of five operating divisions within the City's Park and Recreation Department. Currently, the City operates three municipal golf complexes: Torrey Pines, Balboa Park, and Mission Bay. 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 that 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. 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 those customers who are motivated enough to initiate the process. Because these customers tend to be *very* pleased or *very* displeased regarding 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 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 San Diego courses.
- Evaluate customer experiences with and perceptions of the three City golf courses.
- Establish benchmark performance indicators that can be tracked over time.
- Collect background and demographic data relevant to understanding customers' perceptions, and needs.

**OVERVIEW OF METHODOLOGY** A full description of the methodology employed in this study is included later in this report (see *Methodology* on page 40). In brief, a total of 1,306 randomly selected customers who played at least one round of golf at Torrey Pines, Balboa Park, or Mission Bay in 2010 participated in the study between April 29 and May 9, 2011. Respondents were recruited by phone and, when available in the customer database, email invitation, to complete the survey. The maximum margin of error for this study is  $\pm 2.68\%$  for questions answered by all 1,306 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 sections titled *Just the Facts* and *Conclusions*

are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. 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, and a complete set of crosstabulations for the survey results is contained in Appendix A, which is bound separately.

**ACKNOWLEDGEMENTS** True North thanks Alex Bragado and staff at the City of San Diego who contributed their 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 Research—and not necessarily those of the City of San Diego. Any errors and omissions are the responsibility of the authors.

**ABOUT TRUE NORTH** True North is a full-service survey research firm 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 600 survey research studies for public agencies, more than 300 of which were for California cities, including several for the City of San Diego.



## JUST THE FACTS

The following section outlines the main factual findings from the survey. For the reader's convenience, we have organized the findings according to the section titles used in the body of this report. To learn more about a particular finding, simply turn to the appropriate report section.

### RESIDENCY OF CUSTOMERS

- Approximately three-quarters (76%) of respondents' primary residences are located in the City of San Diego, 8% are located in San Diego County but outside the City of San Diego, 5% are in California but outside San Diego County, 10% are located elsewhere in the United States, and less than 2% are outside the United States.
- Roughly 10% of respondents identified in the customer database as *residents* provided a ZIP code for their current primary residence that is outside the City of San Diego.
- Of those identified in the customer database as a *non-resident*, roughly 3% provided a ZIP code that falls within the City of San Diego

### FREQUENCY & COURSES PLAYED

- Almost a quarter (23%) of golf customers surveyed indicated that they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds at City and non-City courses. Another 19% of customers played between 37 and 52 rounds, 17% had played between 25 and 36 rounds, 17% had played 13 to 24 rounds, 15% had played between 6 and 12 rounds, and 8% had played fewer than 6 rounds in the past year.
- San Diego golf customers played an average 42.3 rounds of golf at City and non-City courses in the past 12 months.
- When asked to indicate the course they played most often, customers provided names of more than 330 courses from all over the world, with the three City courses topping the list.
- Approximately one-fifth (19%) of customers surveyed cited Torrey Pines as the course they played most often, followed by Balboa Park (17%), and Mission Bay (6%). The Riverwalk Golf Club in Mission Valley (4%), and Coronado Golf Course (4%) were the next most commonly played courses.
- Location (32%) and affordability (32%) were the most common reasons mentioned for playing a particular course most often, followed by course quality (15%), being a member of the course (5%), and availability of tee times (4%).
- Torrey Pines was played most often because of the course quality (36%), followed by affordability (28%) and location (28%).
- Balboa Park was played most often because of affordability (40%) and location (37%), followed by tee-time availability (6%).
- For those who play Mission Bay most often, location was the overwhelming factor in that decision, mentioned by more than half (55%) of respondents, followed by affordability (17%) and membership of a local group by the respondent (9%).
- Of the three City courses, Torrey Pines was the most frequently played course, with over three quarters (77%) of San Diego customers playing at least one round in the past 12 months, followed by Balboa Park (61%) and Mission Bay (37%).
- In terms of average number of rounds played per customer, Torrey Pines (5.7) and Balboa Park (5.6) were quite similar, with Mission Bay (3.8) played somewhat less often by customers, on average.

## RATING OVERALL SAN DIEGO GOLF EXPERIENCES

### Torrey Pines Golf Course

- Eighty-eight percent (88%) of customers who had played at least one round at Torrey Pines Golf Course in the past 12 months rated their most recent experience as excellent (49%) or good (39%).
- More than a third of Torrey Pines customers (34%) desired no changes or could not think of anything specific to improve their golf experience.
- Top specific mentions for improving Torrey Pines Golf Course included reducing fees and costs in general (14%), enforcing the speed of play (10%), improving access to tee time scheduling information (8%), reducing visitor costs and greens fees (7%), improving customer service in general (7%), and maintaining roughs (6%).

### Balboa Park Golf Course

- Almost three quarters (73%) of customers rated their most recent experience at Balboa Park Golf Course as excellent or good with another 21% saying it was fair.
- Specific mentions for improvement of Balboa Park Golf Course included improving: the condition of greens (11%), overall course quality (10%), facility maintenance (8%), fairways (7%), and the clubhouse (5%).
- More than a third of Balboa Park customers (42%) desired no changes or could not think of anything specific to improve their golf experience.

### Mission Bay Golf Course

- Among those who had played at Mission Bay in the past year, 59% felt their most recent experience was excellent or good, with 30% saying it was fair, and 11% rating the experience as poor or very poor.
- More than a third of Mission Bay customers (36%) desired no changes or could not think of anything specific to improve their golf experience.
- Mission Bay Golf Course customers most desired improving overall course quality (14%), reducing fees and costs (12%), improving green conditions (11%) and facility maintenance (11%), and re-opening and renovating the restaurant (10%).

## RATING ASPECTS OF GOLF EXPERIENCE

### Torrey Pines Golf Course

- Torrey Pines Golf Course customers gave the most positive ratings for the layout of the course (98% excellent or good), overall condition of the course (93%), availability and condition of practice putting greens (91%), condition of fairways (91%), quality of the pro shop (90%), condition of tee boxes (90%), and condition of greens (90%).
- Torrey Pines customers were less pleased with the availability of tee-times when making phone reservations (44% excellent or good), availability of tee times for walk-up reservations (44%), and availability and condition of driving range facilities (47%). Ratings were only slightly higher regarding pace of play (52%), availability and condition of restrooms (53%), and quality of food and beverage services (55%).

### Balboa Park Golf Course

- Balboa Park Golf Course customers gave the most positive ratings for the layout of the course (89% excellent or good), courtesy of golf course starters, Marshals, and maintenance staff (80%), and availability of tee times when making phone reservations (77%), the value of the course for the fee (76%), and availability of tee times for walk-up reservations (74%).
- Only one-third (33%) of Balboa Park customers rated the availability and condition of driving range facilities as excellent or good, the quality of the pro shop (42%), availability and condition of restrooms (53%), condition of the bunkers (54%) and cart paths (55%), and the quality of food and beverage services (56%) were also rated relatively lower, overall.

### Mission Bay Golf Course

- Mission Bay Golf Course customers gave the most positive ratings for the availability of tee times when making a phone reservation (88% excellent or good), condition of golf carts (79%), availability of tee times for walk-up reservations (76%), and the courtesy of course starters, Marshals, and maintenance staff (75%).
- Only one-quarter (25%) of Mission Bay customers rated the availability and condition of restrooms as excellent or good. Quality of the pro shop (27%) and food and beverage services (35%) were also rated relatively lower. Just over half of customers rated as excellent or good the condition of the: bunkers (51%), cart paths (54%), tee boxes (56%), and rough (57%).

## CLUBHOUSE

- Approximately one-fifth (19%) of all customers said that having an enhanced clubhouse at Torrey Pines and Mission Bay would improve their golf experience *a lot*, and roughly a quarter (24%) said it would improve their experience *somewhat*. Another 18% felt it would improve their golfing experience *a little*, and 32% said *not at all*.
- Those who played Mission Bay most often were somewhat more inclined to feel that a clubhouse would improve their experience *a lot* than those who play Torrey Pines (29% vs. 17%).

## FUTURE EXPECTATIONS & RECOMMENDATIONS

- One-third (33%) of all customers anticipated that they would increase the frequency of their overall golf play in the next 12 months. Only 4% felt their frequency of play would decrease, while most (62%) said it would remain about the same.
- Nearly a third (32%) of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 19% for Balboa Park, and 9% for Mission Bay.
- The percentage of customers who plan to play *less often* was similar between Torrey Pines (11%), Balboa Park (13%), and Mission Bay (15%).
- The most commonly cited reasons for playing Torrey Pines less often in the next year were the cost of play (42%), not living near the course (32%), and difficulty getting a tee time (8%).
- The most common reasons for playing Balboa Park less often include concern about the condition of the course (25%), not living near the course (20%), and cost of play (16%).
- Top reasons for choosing to play Mission Bay less often were dissatisfaction with the course condition (30%), cost of play (21%), and not living near the course (14%).
- Nine in ten (90%) customers who had played Torrey Pines Golf Course in the past year were very (73%) or somewhat (17%) likely to recommend the course to a friend or colleague, compared with 83% of customers who had played Balboa Park Golf Course (44% very and 38% somewhat) and 70% who had played Mission Bay Golf Course (28% very and 42% somewhat).



## CONCLUSIONS

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 can provide 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 well is the City performing in meeting the needs of San Diego golf customers?*

The survey results indicate that the City of San Diego is performing quite well in providing golf services to San Diego residents and visitors to the area. Nearly nine out of ten customers rated their most recent golf experience at Torrey Pines Golf Course as excellent or good, and although ratings were less favorable for Balboa Park and Mission Bay, only one in ten rated their experience as less than *fair*. Furthermore, the majority of customers rated 19 out of 22 specific services as excellent or good at each of the three City courses. Torrey Pines received the highest overall ratings of the three courses, particularly regarding its course layout and condition. The Balboa Park Golf Course was rated as the best value for the fee. Mission Bay was rated highest of the three courses for availability of tee times, pace of play, and enforcement of rules and regulations.

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. When asked about their plans for future play, more than a quarter of customers who had played relatively few (between 6 and 12) rounds at any one of the three San Diego courses in the past year anticipated *increasing* their play at that course in the coming year. Perhaps most telling of the City's performance is customers' likelihood of recommending the San Diego courses to a friend or colleague, with seven in ten Mission Bay customers, eight in ten Balboa Park customers, and nine in ten Torrey Pines customers saying they are at least somewhat likely to recommend the course.

*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 three 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 thus be to do what it takes 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. The opportunities, grouped by golf course, are presented below.

### **Torrey Pines Golf Course**

Fewer than half of customers were pleased with the availability of tee-times when making phone reservations or walk-up reservations, as well as the availability and condition of driving range facilities. Obviously, these aspects of service are directly related to the significant volume of customers who play at Torrey Pines. Nevertheless, any efforts to increase the ease with which customers are able to reserve tee times and utilize the driving range would most certainly enhance their golfing experience and increase their overall satisfaction.

One of the key differentiators in opinion of those who rated their most recent experience at Torrey Pines as excellent or good compared with those who said it was fair, poor, or very poor, was their rating of the course's *value for the fee*. Non-residents were especially critical on this point, being more than twice as likely as residents to cite the course's value for the fee as fair, poor, or very poor. Cost of play was also the top factor mentioned among customers who intend to play Torrey Pines less frequently in the future. Despite exceptionally positive ratings for course condition, layout, and service, as well as having a customer base with more than half its members residing in households earning more than \$100,000 annually, the findings suggest a tension for some customers between the cost of play and the value at Torrey Pines Golf Course.

Other areas of focus for Torrey Pines as identified in this study include: increasing the pace of play, improving the availability and condition of restrooms, and improving the quality of food and beverage services.

### **Balboa Park Golf Course**

Facility upkeep and enhancements topped the improvements desired by Balboa Park Golf Course customers. Only a third of customers were pleased with the availability and condition of driving range facilities, and fewer than half rated the quality of the pro shop as excellent or good. When asked about specific changes to improve their overall golf experience, Balboa Park customers requested improving the condition of greens and fairways, as well as general facility maintenance. Improving the availability and condition of restrooms, the condition of bunkers and cart paths, and the quality of food and beverage services also surfaced as potential areas of focus for the future.

Although the availability of tee times at Balboa Park received favorable ratings, overall, tee-time availability by phone and by walk-up reservation were the top two differentiators in opinion of those who rated their most recent experience at Balboa Park as excellent or good compared with those who said it was fair, poor, or very poor. This finding suggests that while tee times are clearly more readily available at Balboa Park than Torrey Pines, there remains a significant number of customers frustrated with the process and prospect of scheduling a desired tee time.

**Mission Bay Golf Course**

Similar to Balboa Park Golf Course, facility upkeep and enhancements were the highest priorities for Mission Bay Golf Course customers. At the top of this list is the availability and condition of restrooms, with only one-quarter of customers rating it as excellent or good. The quality of the pro shop should also be a focus for attention, as more than half of customers rated it as poor or very poor. The quality of existing food and beverage services was a concern among customers as well, and a significant portion of customers made the specific request to re-open and renovate the vacant restaurant. Other candidates for improvement of the course itself included the condition of bunkers, cart paths, tee boxes, and the rough.

Although the condition of Mission Bay golf carts received favorable ratings among customers as a whole, this aspect of service was the top differentiator in opinion of those who rated their most recent experience at Mission Bay as excellent or good compared with those who said it was fair, poor, or very poor. This finding suggests an inconsistency in the quality, condition, and/or maintenance of the golf cart fleet—from cart to cart or from day to day—as only a small portion of customers surveyed took issue with this service aspect, but those who did were more likely to be displeased with Mission Bay Golf Course, overall.

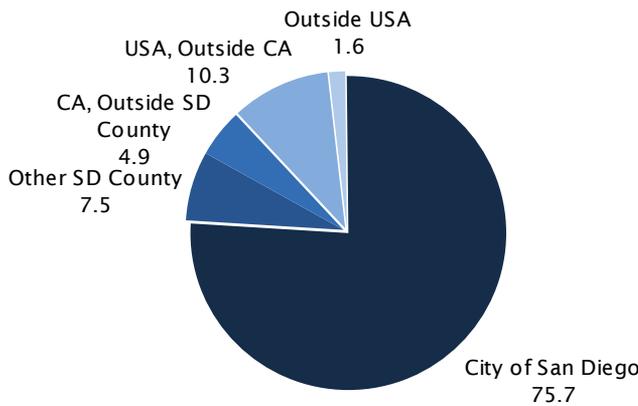
## RESIDENCY OF CUSTOMERS

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 reside 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?*

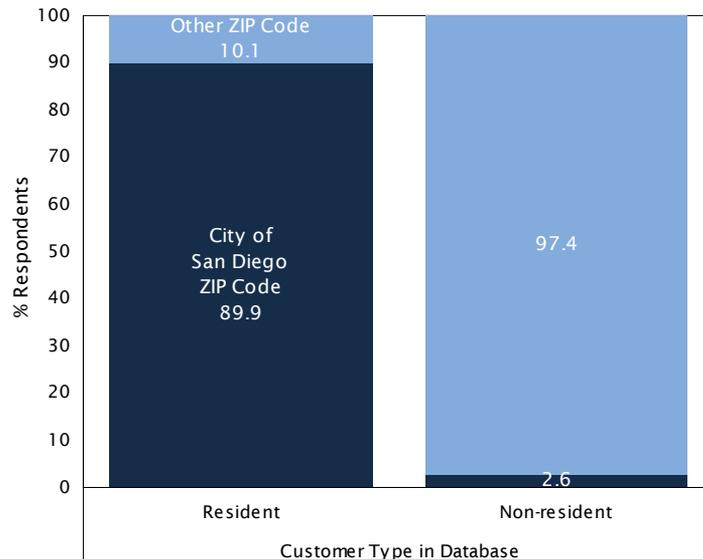
**FIGURE 1 AREA OF CURRENT RESIDENCE**



As shown in Figure 1, approximately three-quarters (76%) of customers’ primary residences are located in the City of San Diego, 8% are located in San Diego County but outside the City of San Diego, 5% are in California but outside San Diego County, 10% are located elsewhere in the United States, and less than 2% are outside the United States.

Approximately 10% of respondents identified in the customer database as *residents* provided a ZIP code for their current primary residence that is outside the City of San Diego. Conversely, of those identified in the customer database as a *non-resident*, roughly 3% provided a ZIP code that falls within the City of San Diego (see Figure 2 below).

**FIGURE 2 CURRENT ZIP CODE OF RESIDENTS AND NON-RESIDENTS AS IDENTIFIED IN CUSTOMER DATABASE**

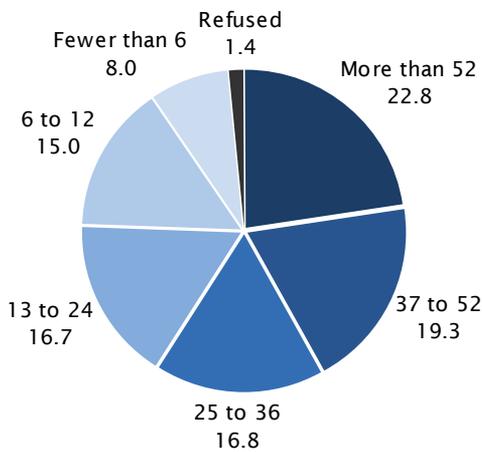


## FREQUENCY & COURSES PLAYED

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 total number of golf rounds they had played in the past 12 months. As shown below in Figure 3, almost a quarter (23%) of golf customers surveyed indicated that they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds. Another 19% played between 37 and 52 rounds, 17% had played between 25 and 36 rounds, 17% had played 13 to 24 rounds, 15% had played between 6 and 12 rounds, and 8% had played fewer than 6 rounds in the past year. Overall, San Diego golf customers played an average 42.3 rounds of golf in the past 12 months.

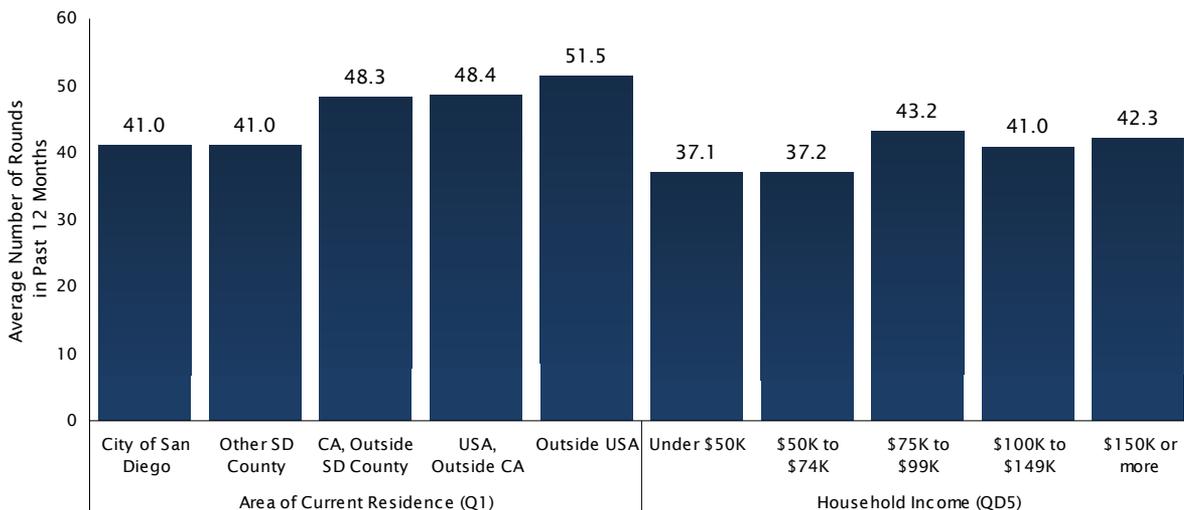
**FIGURE 3 TOTAL ROUNDS OF GOLF PLAYED IN PAST 12 MONTHS**



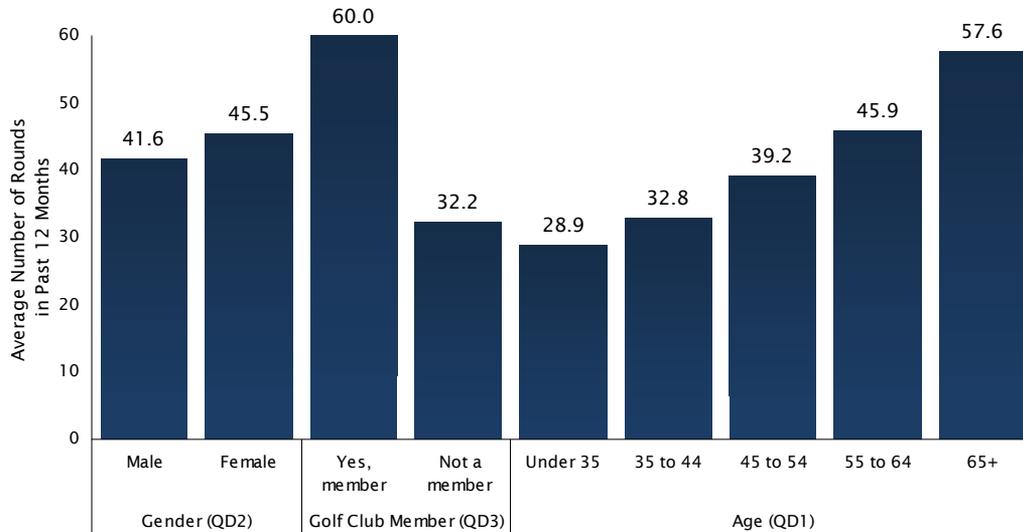
**Question 3** Including courses in San Diego and elsewhere, in the past 12 months approximately how many rounds of golf did you play?

Figures 4 and 5 below display the average number of all rounds played in the past year by a variety of demographics. Demographic subgroups that played the greatest number of rounds, on average, were those who live outside the County, those in households with higher incomes, women, those who are a golf club member, and seniors.

**FIGURE 4 AVERAGE NUMBER OF ROUNDS PLAYED IN PAST 12 MONTHS BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME**



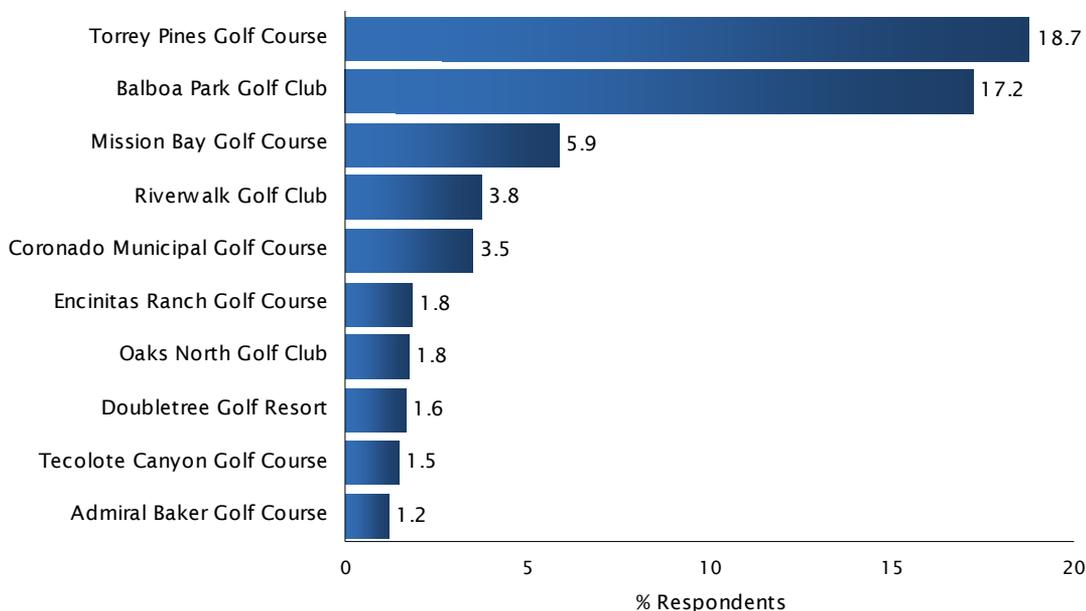
**FIGURE 5 AVERAGE NUMBER OF ROUNDS PLAYED IN PAST 12 MONTHS BY GENDER, GOLF CLUB MEMBER & AGE**



**COURSES PLAYED MOST FREQUENTLY** All respondents were next asked to indicate the name of the golf course they played most often. Customers provided names of more than 330 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 6 below presents the courses mentioned by at least 1% of respondents. Approximately one-fifth (19%) of customers surveyed cited Torrey Pines as the course they played most often, followed by Balboa Park (17%), and Mission Bay (6%). The Riverwalk Golf Club in Mission Valley (4%), and Coronado Golf Course (4%) were the next most commonly played courses.

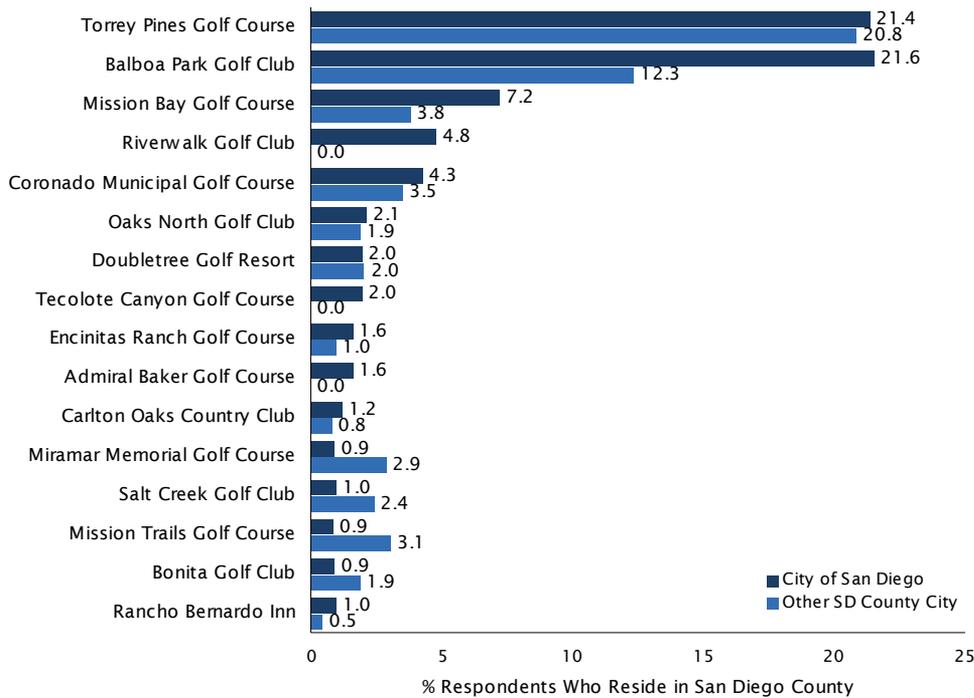
**Question 4** *What is the name of the golf course that you play most often?*

**FIGURE 6 COURSE PLAYED MOST OFTEN**



For the interested reader, Figure 7 looks at the *most commonly played* courses among residents of the City of San Diego as well as those who live elsewhere in San Diego County.

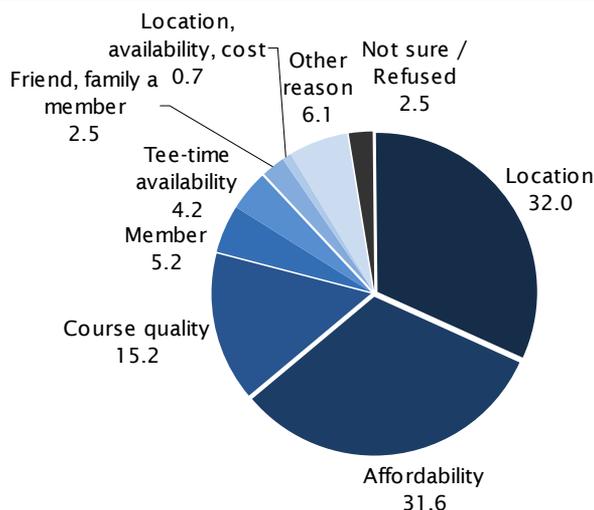
**FIGURE 7 COURSE PLAYED MOST OFTEN BY CITY OF RESIDENCE IN SAN DIEGO COUNTY**



**REASON FOR PLAYING COURSE MOST OFTEN**

There are a number of primary 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. Respondents were not provided with a list of answers from which to choose, although most responses fell into one of several categories presented in Figure 8.

**FIGURE 8 REASON FOR PLAYING COURSE MOST OFTEN**

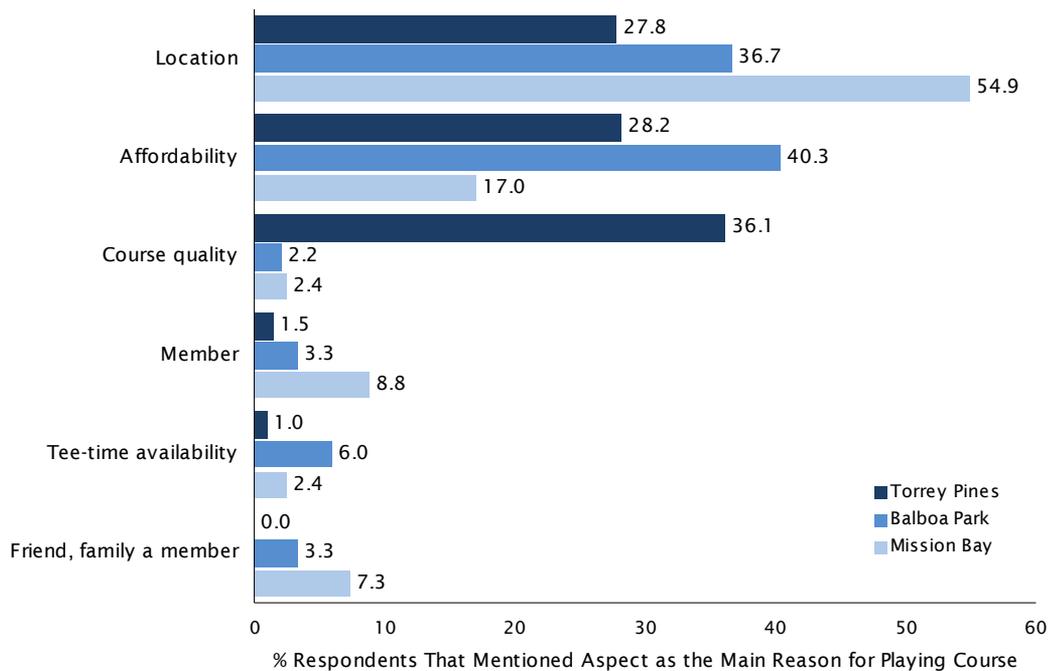


**Question 5** *Is there a particular reason why you play this course most often?*

Location (32%) and affordability (32%) were the most common reasons mentioned for playing a particular course most often, followed by course quality (15%), being a member of the course (5%), and availability of tee times (4%).

Figure 9 displays the responses to Question 5 among customers who mentioned one of the three City golf courses as the course they play most often, thus highlighting the primary factors in choosing to play each. As shown in the figure, the reasons for playing Torrey Pines, Balboa Park, and Mission Bay differed considerably. Torrey Pines was played most often because of the course quality (36%), followed by affordability (28%) and location (28%). Balboa Park was played most often because of affordability (40%) and location (37%), followed by tee-time availability (6%). For those who play Mission Bay most often, location was the overwhelming factor in that decision, mentioned by more than half (55%) of respondents, followed by affordability (17%) and club membership by the respondent (9%) or membership of a friend or family member (7%).

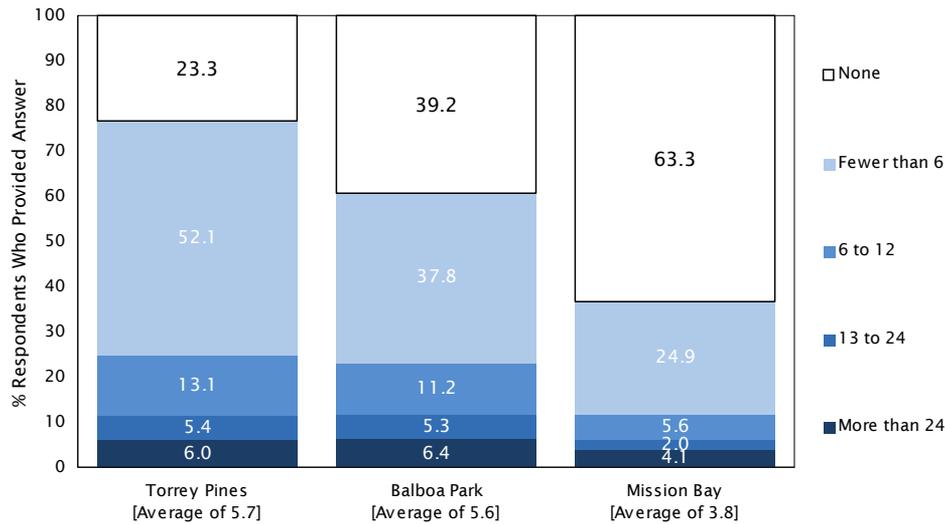
**FIGURE 9 REASON FOR PLAYING CITY OF SAN DIEGO COURSE MOST OFTEN**



**FREQUENCY OF PLAY AT SAN DIEGO COURSES** At this point in the survey, the questions became more specific about respondents’ experiences with and opinions of the three City of San Diego courses. The first question of this nature asked customers to indicate approximately how many rounds of golf they had played at each of the three City courses in the past 12 months. Figure 10 on the next page presents the results of this question and shows that Torrey Pines was the most frequently played course, with over three quarters (77%) of San Diego customers playing at least one round in the past 12 months, followed by Balboa Park (61%) and Mission Bay (37%). In terms of average number of rounds played per customer, Torrey Pines (5.7) and Balboa Park (5.6) were quite similar, with Mission Bay (3.8) played somewhat less often by customers, on average.

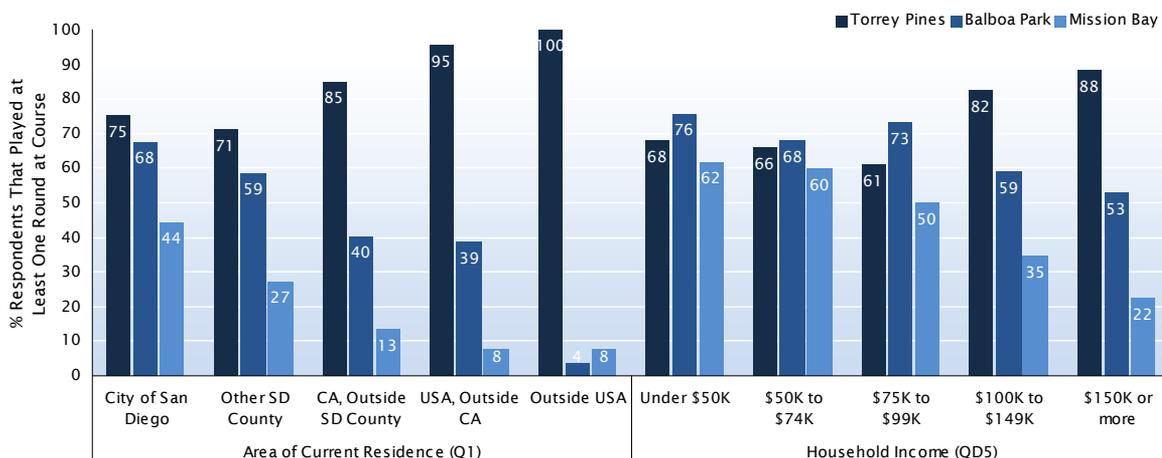
**Question 6** Thinking now of courses in the City of San Diego, in the past 12 months, approximately how many rounds of golf did you play at \_\_\_\_\_?

**FIGURE 10 FREQUENCY OF PLAYING CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS**

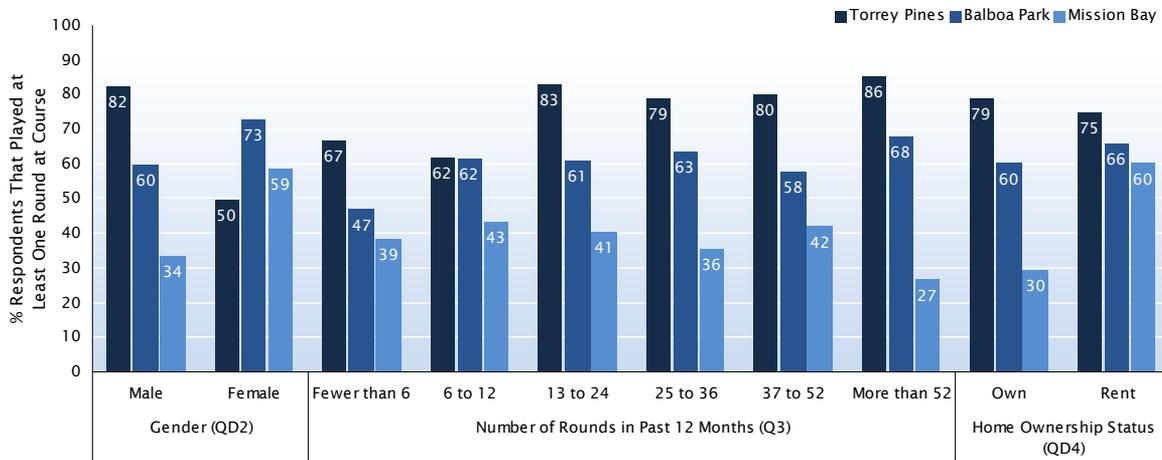


Figures 11 through 13 display the percentage of customers who played each City course across a variety of demographic subgroups. Play at the three courses varied considerably. Residents of San Diego County were more likely to have played at Balboa Park and Mission Bay, and less likely to have played at Torrey Pines than those customers who live outside the County. Those in households with incomes below \$75,000 were nearly equally as likely to have played any of the three courses, whereas those with household incomes of \$100,000 or more were considerably more likely to have played Torrey Pines than Mission Bay, and Mission Bay more than Balboa Park in the past 12 months. Men were much more likely to have played Torrey Pines than women. Those who played golf most frequently in the past year were more likely to have played Torrey Pines and less likely to have played Mission Bay than customers who play less often in general. Similarly, customers between the ages of 35 and 64 were more likely to have played Torrey Pines and less likely to have played Mission Bay than both seniors and those under 35.

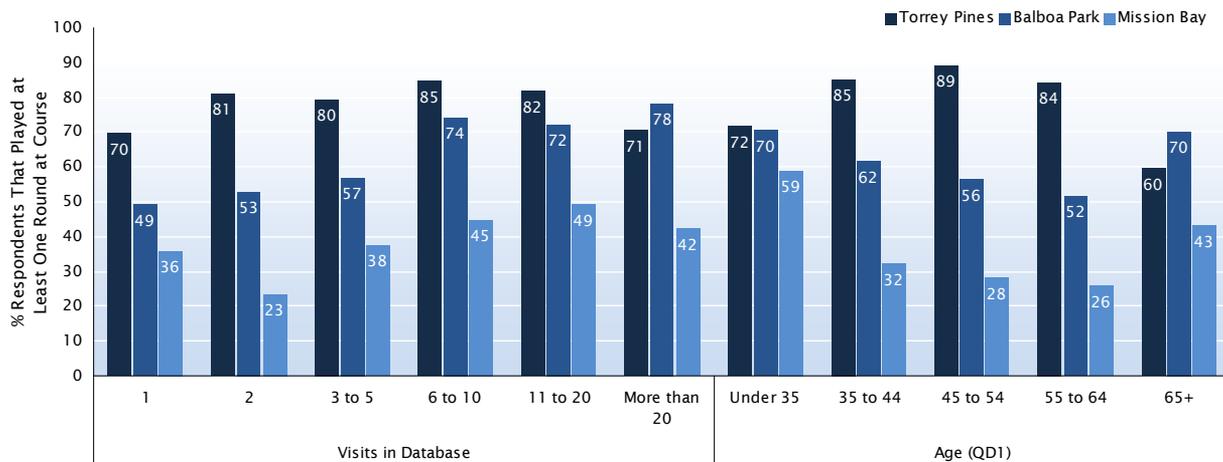
**FIGURE 11 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME**



**FIGURE 12 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY GENDER, NUMBER OF ROUNDS IN PAST 12 MONTHS & HOME OWNERSHIP STATUS**

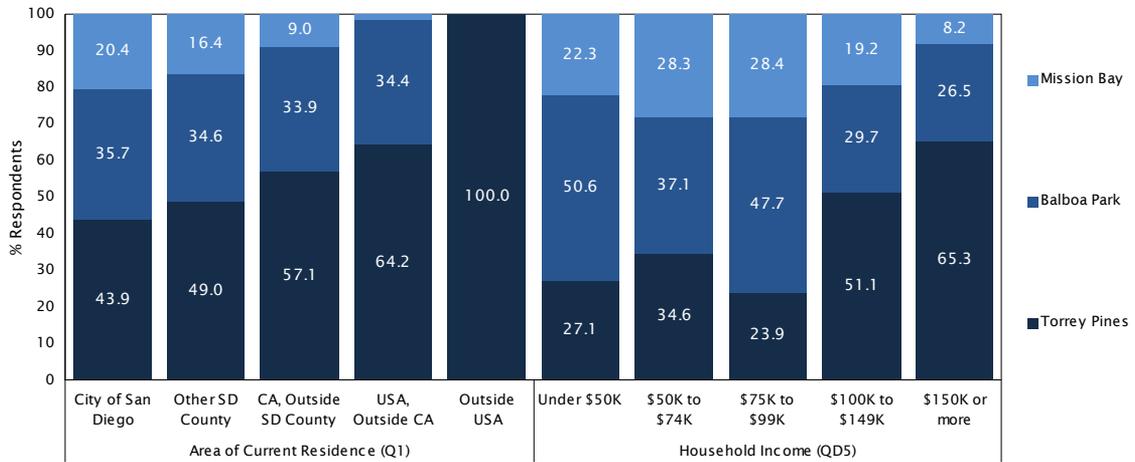


**FIGURE 13 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY NUMBER OF VISITS IN CITY RESERVATION DATABASE IN PAST 12 MONTHS & AGE**

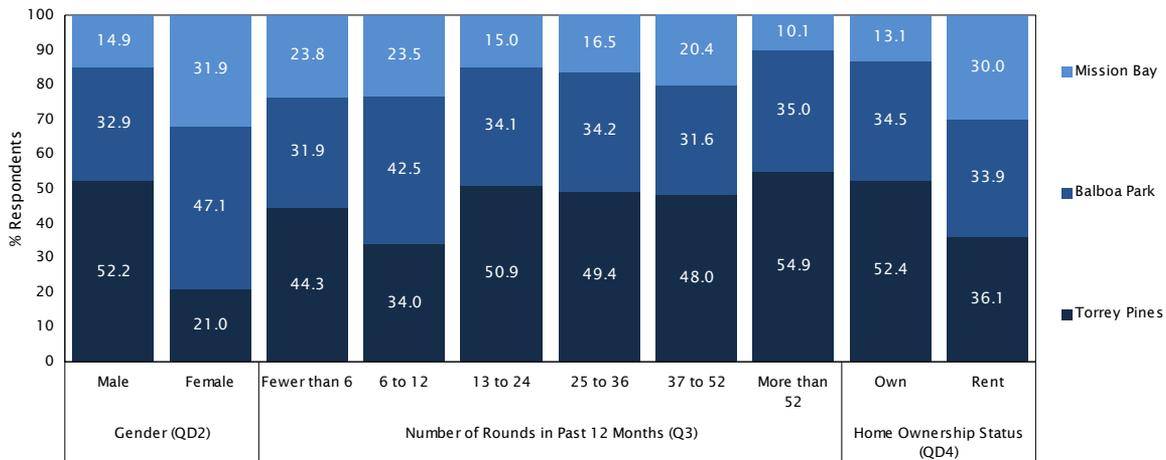


Figures 14 through 16 on the next page display the percentage of customers within various demographic subgroups who played each of the three courses *most often* in the past 12 months. Torrey Pines was the most often-played of the three courses for the majority of the subgroups, but most notably among those who live outside San Diego County, those in households with annual incomes of at least \$100,000, male customers, those who play golf more often in general, and those between the ages of 35 and 64.

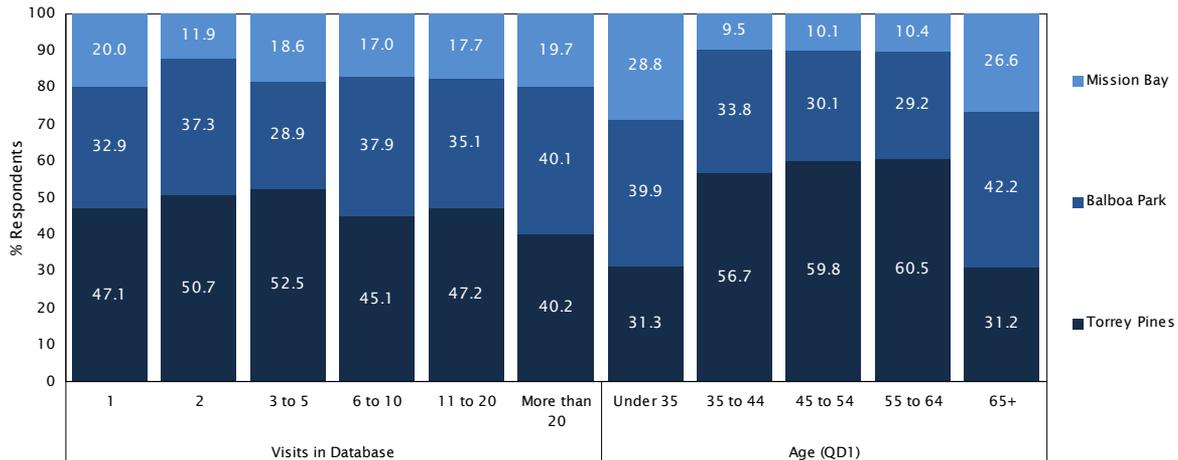
**FIGURE 14 SAN DIEGO COURSE PLAYED MOST OFTEN BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME**



**FIGURE 15 SAN DIEGO COURSE PLAYED MOST OFTEN BY GENDER, NUMBER OF ROUNDS IN PAST 12 MONTHS & HOME OWNERSHIP STATUS**



**FIGURE 16 SAN DIEGO COURSE PLAYED MOST OFTEN BY NUMBER OF VISITS IN CITY RESERVATION DATABASE IN PAST 12 MONTHS & AGE**



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

	Course Played in Past 12 Months		
	Torrey Pines	Balboa Park	Mission Bay
<b>Q1 Area of Current Residence</b>			
City of San Diego	73.3	83.3	89.4
Other SD County	7.0	6.9	5.6
CA, Outside SD County	5.2	3.2	2.1
USA, Outside CA	12.4	6.4	2.4
Outside USA	2.1	0.2	0.5
<b>QD1 Age</b>			
Under 35	17.0	21.3	28.2
35 to 44	16.6	15.0	13.0
45 to 54	23.3	18.6	15.8
55 to 64	21.2	16.8	13.8
65+	16.1	22.8	23.6
Refused	5.8	5.5	5.6
<b>QD2 Gender</b>			
Male	89.0	81.8	76.4
Female	9.6	16.9	21.7
Refused	1.4	1.3	1.9
<b>QD3 Golf club member</b>			
Yes	41.3	31.8	26.3
No	57.3	66.8	72.3
Refused	1.4	1.4	1.4
<b>QD4 Home ownership status</b>			
Own	73.5	71.3	58.5
Rent	20.1	22.1	33.1
Refused	6.3	6.6	8.3
<b>QD5 Household income</b>			
Under \$35K	2.4	3.7	6.0
\$35K to \$49K	3.9	4.9	5.8
\$50K to \$74K	8.2	10.8	15.6
\$75K to \$99K	9.3	14.1	16.1
\$100K to \$149K	19.7	17.7	17.4
\$150K or more	36.1	27.3	18.9
Not sure / Refused	20.4	21.5	20.2
<b>S1 Customer Type</b>			
Resident	81.4	90.7	96.3
Non-resident	18.6	9.3	3.7
<b>S2 Number of Visits in Database</b>			
1	16.8	15.4	17.8
2	21.5	17.8	13.6
3 to 5	22.7	20.6	21.9
6 to 10	15.6	17.2	17.6
11 to 20	11.6	12.6	14.2
More than 20	11.8	16.4	14.9

Table 1 provides the demographic distribution of survey respondents who played at least one round of golf at a San Diego course in the past 12 months. As shown in the table, one-fifth (20%) of Torrey Pines customers currently live outside San Diego County, compared with 10% of Balboa Park customers and only 5% of Mission Bay customers. Other notable findings include the age distribution across the three courses, with nearly half of Balboa Park and Mission Bay customers falling in either the youngest (under 35) or oldest (65 or older) age brackets, whereas 61% of Torrey Pines customers are between 35 and 64 years of age. Gender distribution also differs considerably, with women comprising only 10% of Torrey Pines customers, compared with 17% of Balboa Park customers and 22% of Mission Bay customers. Income was also a differentiator, with 56% of Torrey Pines customers residing in households that earn more than \$100,000 annually, compared with 45% of Balboa Park and 36% of Mission Bay customers.

## RATING OVERALL SAN DIEGO GOLF EXPERIENCES

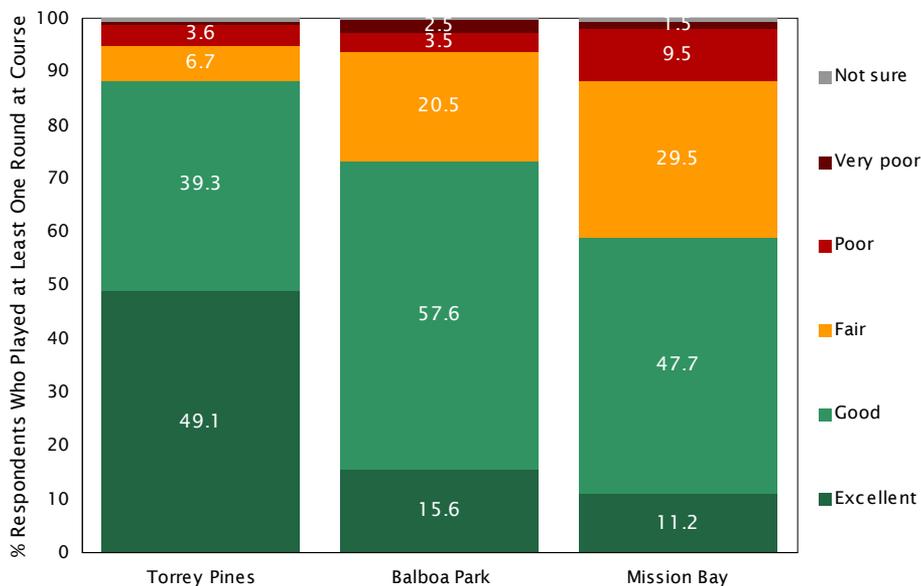
Having profiled the customer’s most often played golf courses, primary motivators in choosing to play a particular course most often, as well as the frequency of golf play in general and specifically at San Diego courses in the past 12 months, the survey turned to evaluate overall customer experiences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

Figure 17 presents the overall performance ratings for Torrey Pines, Balboa Park, and Mission Bay. Torrey Pines received the most positive ratings overall, with 88% of customers who had played at least one round there in the past 12 months citing their most recent experience as excellent (49%) or good (39%). Almost three quarters (73%) of customers rated their experience at Balboa Park Golf Course as excellent or good with another 21% saying it was fair, and of those who had played at Mission Bay in the past year, 59% felt their most recent experience was excellent or good, with 30% saying it was fair, and 11% rating the experience as poor or very poor.

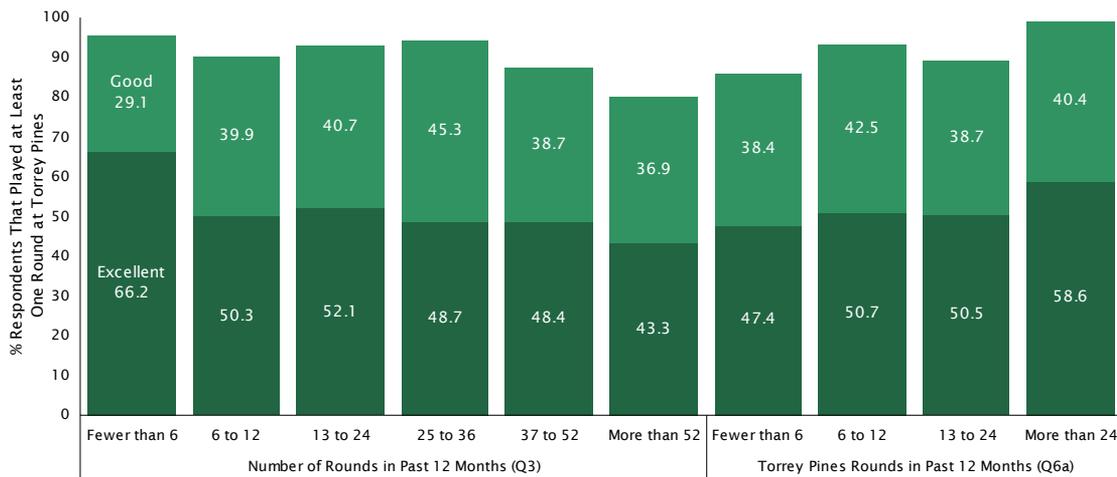
**Question 7** Overall, how would you rate your most recent golf experiences at \_\_\_\_\_? Would you rate them as excellent, good, fair, poor and very poor?

FIGURE 17 RATING CITY OF SAN DIEGO GOLF COURSES

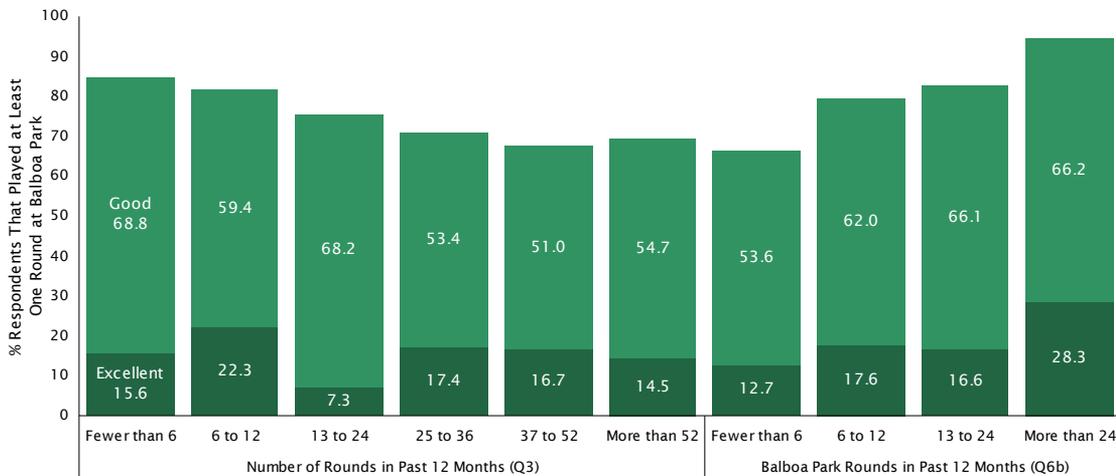


Figures 18, 19, and 20 look at performance ratings for each of the three San Diego golf courses by customers' frequency of golf play in general over the past 12 months, as well as their frequency of playing the City course for which they provided a rating. A similar trend appears for each of the three courses, although it is most obvious among customers of the Balboa Park and Mission Bay courses. That is, those who had played the course most often were the most likely to hold a positive assessment of that course, but at the same time, customers who play more golf *in general* were somewhat less likely to cite their most recent experience with a San Diego course as excellent or good.

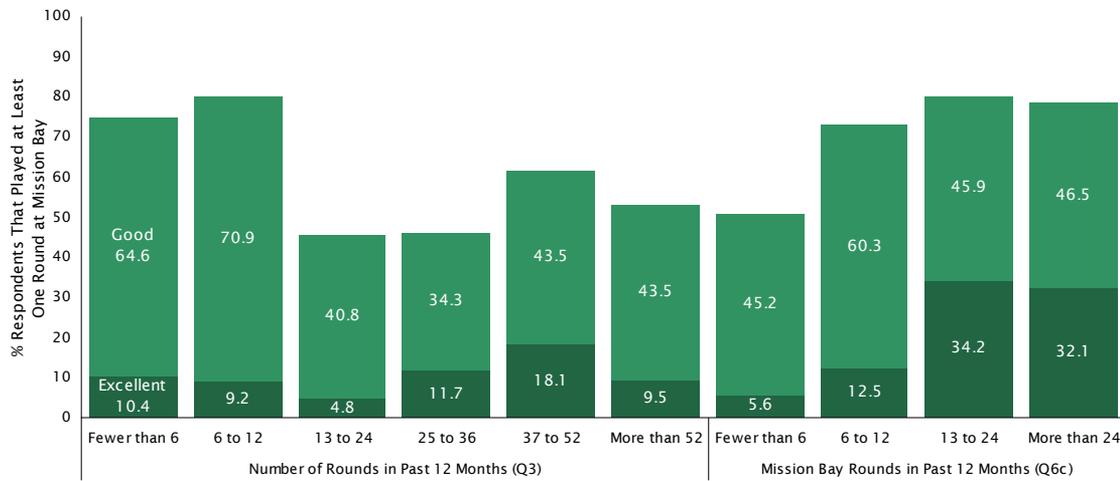
**FIGURE 18 RATING CITY TORREY PINES BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & TORREY PINES ROUNDS IN PAST 12 MONTHS**



**FIGURE 19 RATING CITY BALBOA PARK BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & BALBOA PARK ROUNDS IN PAST 12 MONTHS**



**FIGURE 20 RATING CITY MISSION BAY BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & MISSION BAY ROUNDS IN PAST 12 MONTHS**



**SUGGESTED IMPROVEMENTS** For each of the three City courses a respondent had played in the past 12 months, he or she was asked to indicate what could be changed to improve their overall golf experience at that particular course. These questions were asked in an open-ended manner, allowing customers to mention any improvement that came to mind without being prompted by or restricted to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in figures 21 through 23.

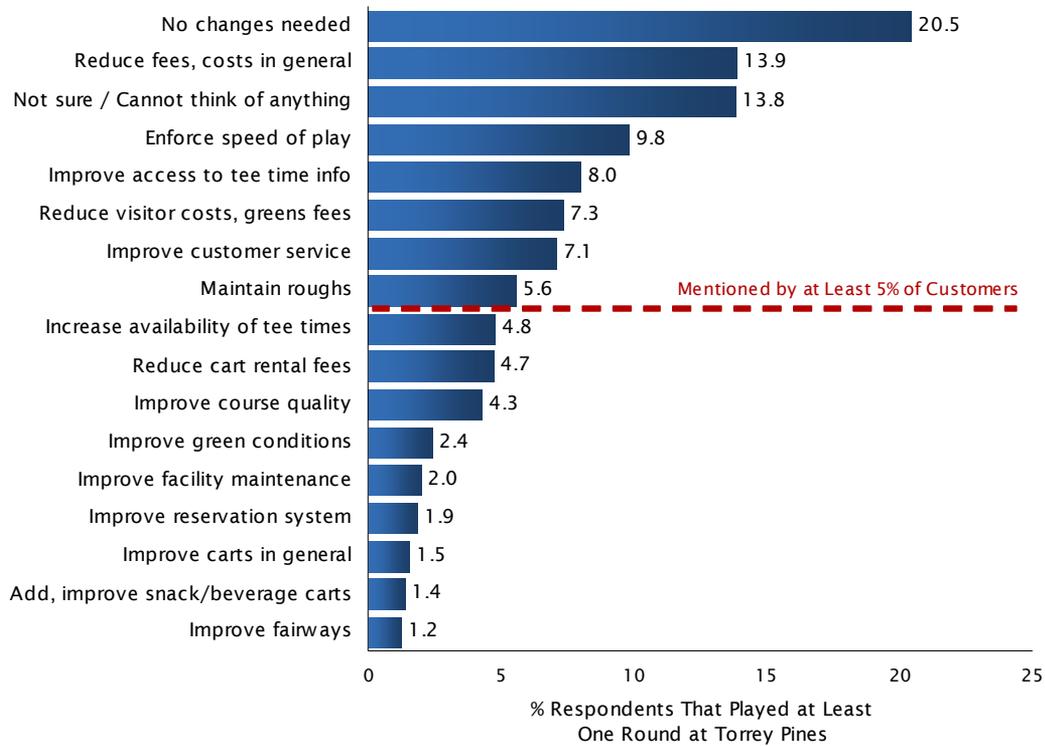
More than a third of Torrey Pines (34%), Balboa Park (42%), Mission Bay (36%) customers desired no changes or could not think of anything specific to improve their golf experience. Top specific mentions for improving Torrey Pines Golf Course included reducing fees and costs in general (14%), enforcing the speed of play (10%), improving access to tee time scheduling information (8%), reducing visitor costs and greens fees (7%), improving customer service in general (7%), and maintaining roughs (6%). Specific mentions for improvement of Balboa Park Golf Course included improving: the condition of greens (11%), overall course quality (10%), facility maintenance (8%), fairways (7%), and the clubhouse (5%). Mission Bay Golf Course customers most desired improving overall course quality (14%), reducing fees and costs (12%), improving green conditions (11%) and facility maintenance (11%), and re-opening and renovating the restaurant (10%).

For the interested reader, Figure 24 on page 22 looks at the responses from Torrey Pines customers<sup>1</sup> by residents and non-residents.

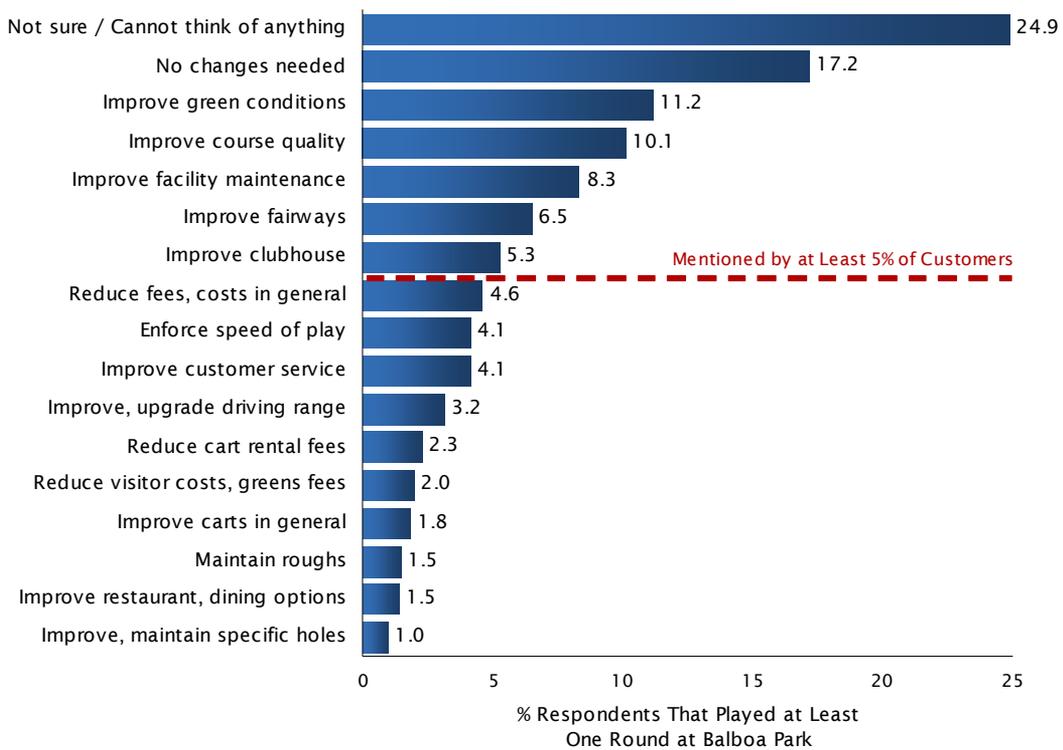
**Question 8/9/10** *If the course managers could change something about the Torrey Pines /Balboa Park/Mission Bay Golf Course to improve your overall golf experience, what change would you most like to see?*

1. Because of the limited sample size of Balboa Park and Mission Bay customers who are *not* residents of the City of San Diego, this additional analysis is only provided for Torrey Pines customers. Appendix A (bound separately) provides additional analyses for the interested reader.

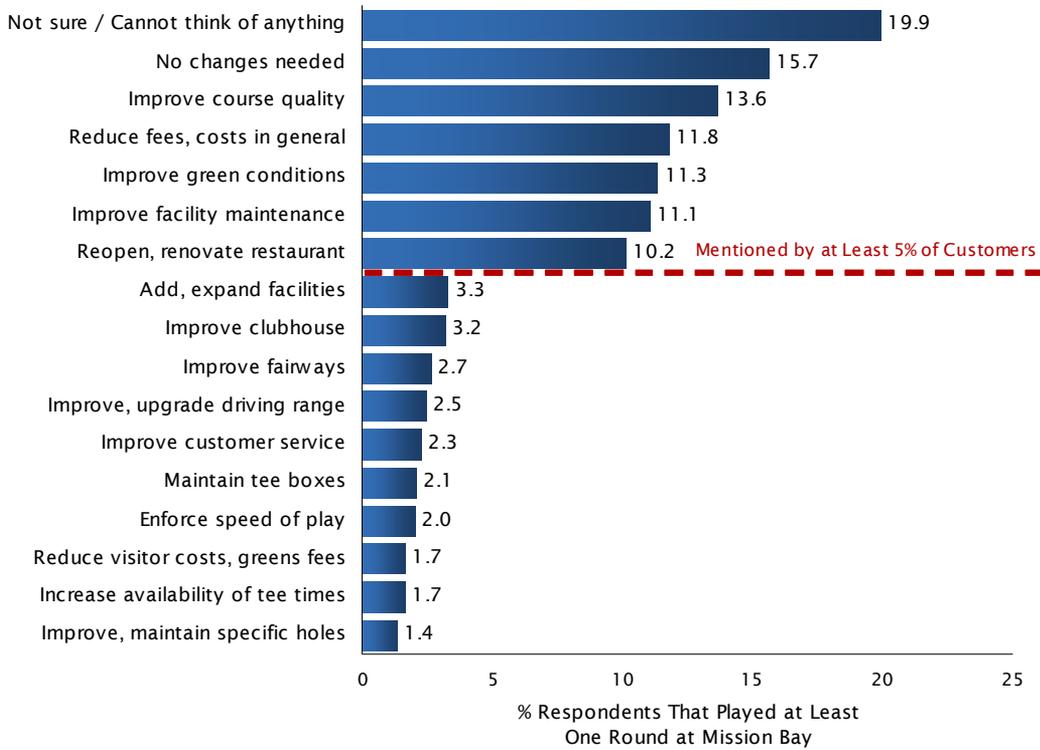
**FIGURE 21 DESIRED CHANGES TO TORREY PINES**



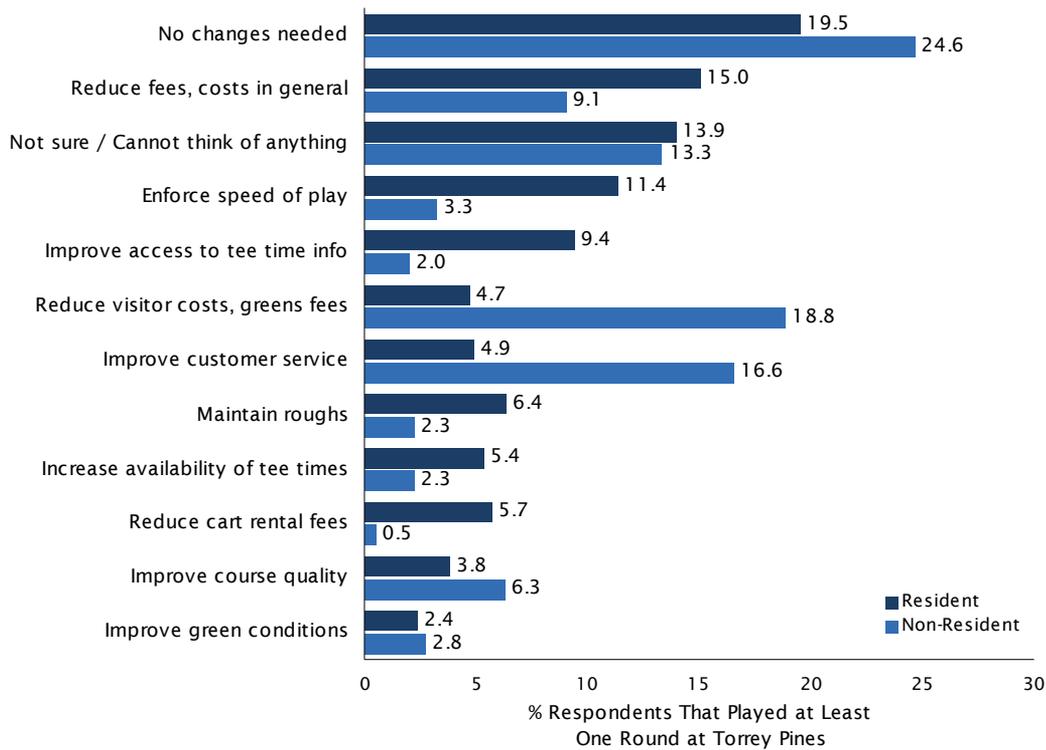
**FIGURE 22 DESIRED CHANGES TO BALBOA PARK**



**FIGURE 23 DESIRED CHANGES TO MISSION BAY**



**FIGURE 24 DESIRED CHANGES TO TORREY PINES BY RESIDENT VS. NON-RESIDENT IN RESERVATION DATABASE**



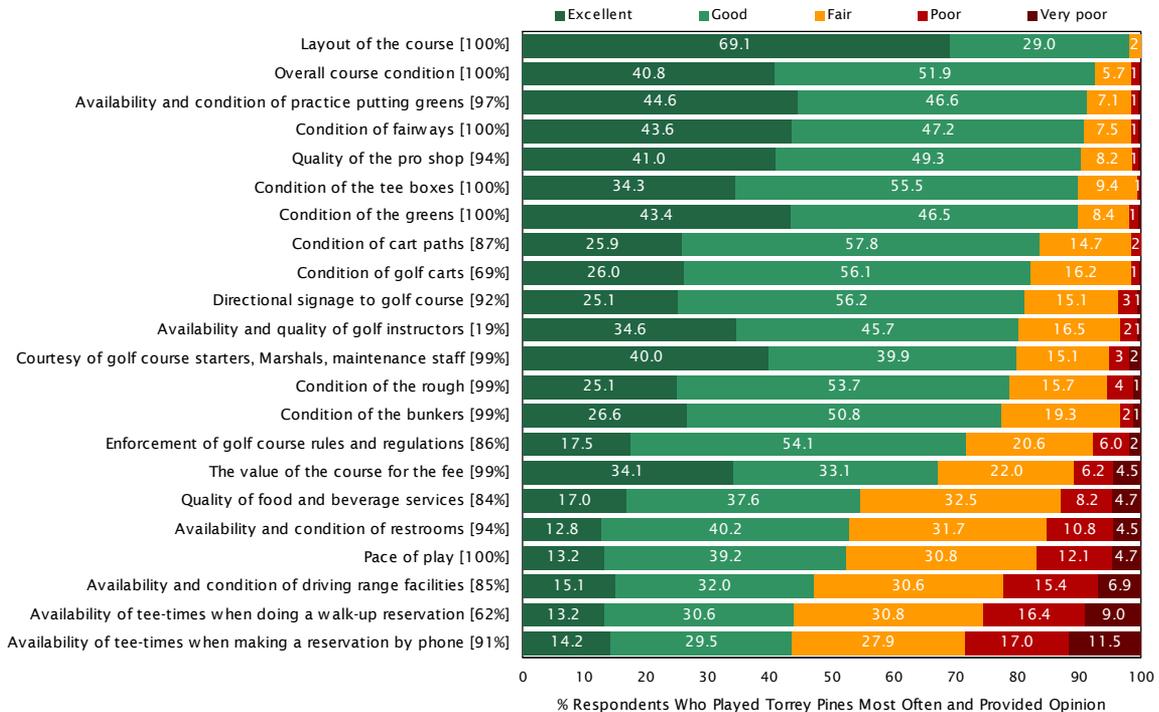
# RATING ASPECTS OF GOLF EXPERIENCE

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 respondents 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 25 through 27.

**RATING ASPECTS OF TORREY PINES** Torrey Pines Golf Course customers gave the most positive ratings for the layout of the course (98% excellent or good), overall condition of the course (93%), availability and condition of practice putting greens (91%), condition of fairways (91%), quality of the pro shop (90%), condition of tee boxes (90%), and condition of greens (90%). Fewer than half of Torrey Pines customers were pleased with the availability of tee-times when making phone reservations (44% excellent or good), availability of tee times for walk-up reservations (44%), and availability and condition of driving range facilities (47%). Ratings were only slightly higher regarding pace of play (52%), availability and condition of restrooms (53%), and quality of food and beverage services (55%).

**Question 11** *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 25 RATING ASPECTS OF TORREY PINES<sup>2</sup>**



2. For comparison purposes between aspects and courses, only customers who held an opinion are included in figures 25, 26, and 27. The percentage of those who held an opinion is shown in brackets to the right of the aspect label. The numbers shown within the bars are percentages of customers who provided an opinion.

**TORREY PINES ASPECT RATINGS BY SUBGROUP** For the interested reader, Table 2 displays how the rating of each aspect of Torrey Pines Golf Course tested (Question 11) varied by the customer's overall performance rating for the course (Question 7a). The table divides those who rated Torrey Pines 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 an *aspect* as excellent or good (far right column). Those with more positive overall ratings of Torrey Pines were more likely to rate specific aspects of the course from their most recent visit as excellent or good. The three aspects of the course for which there existed the greatest disparity between the two groups were: the overall condition of the course, the value of the course for the fee, and the courtesy of golf course starters, Marshals, and maintenance staff. Table 3 looks at the ratings by City resident vs. non-resident and shows that residents were considerably more likely than non-residents to rate the value of the course for the fee as excellent or good.

**TABLE 2 RATING ASPECTS OF TORREY PINES BY OVERALL RATING OF TORREY PINES (SHOWING % EXCELLENT + GOOD)**

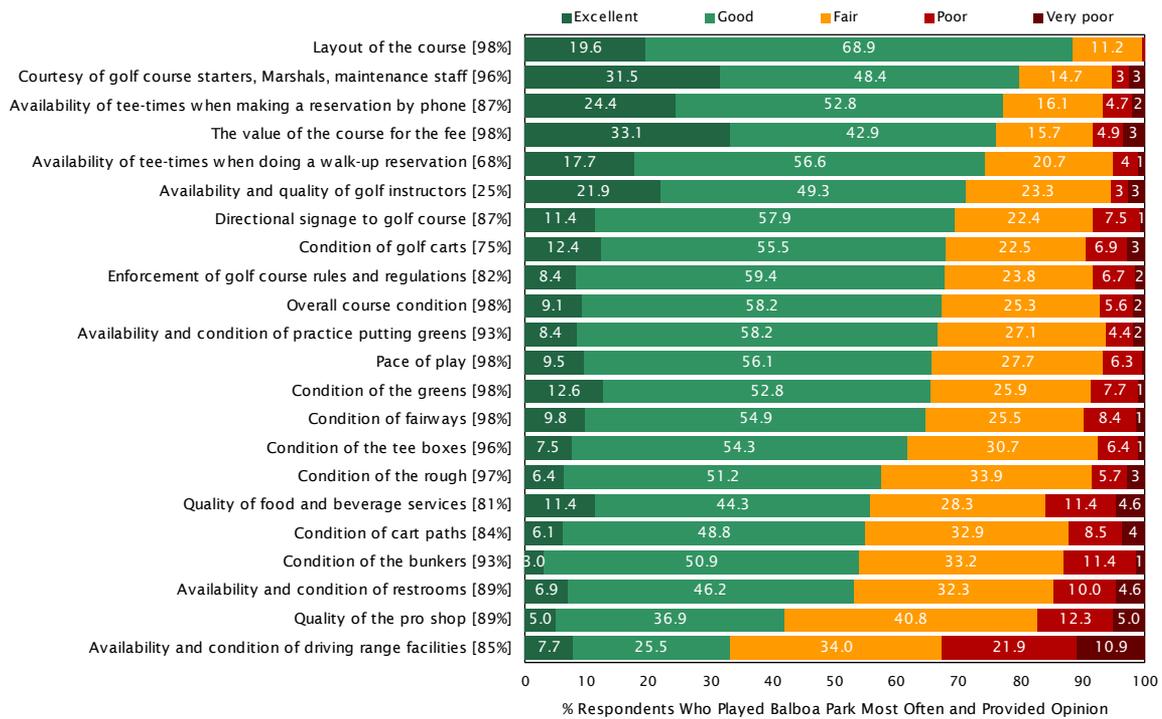
	Rating of Torrey Pines (Q.7a)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Overall course condition	84	52	-32
The value of the course for the fee	71	41	-30
Courtesy of golf course starters, Marshals, maintenance staff	81	52	-30
Condition of the bunkers	67	44	-23
Condition of fairways	81	61	-20
Availability and quality of golf instructors	75	55	-20
Availability of tee-times when making a reservation by phone	58	37	-20
Condition of cart paths	73	53	-19
Quality of the pro shop	72	54	-18
Quality of food and beverage services	53	36	-17
Condition of the rough	71	54	-16
Availability and condition of driving range facilities	43	27	-16
Pace of play	57	42	-15
Condition of the tee boxes	79	65	-14
Availability and condition of practice putting greens	83	69	-14
Directional signage to golf course	76	63	-13
Enforcement of golf course rules and regulations	70	57	-13
Condition of golf carts	78	66	-12
Condition of the greens	79	68	-11
Layout of the course	92	83	-9
Availability and condition of restrooms	51	47	-4
Availability of tee-times when doing a walk-up reservation	55	61	+5

**TABLE 3 RATING ASPECTS OF TORREY PINES BY RESIDENT VS NON-RESIDENT IN RESERVATION DATABASE (SHOWING % EXCELLENT + GOOD)**

	Customer Type in Database		Difference Between Groups
	Resident	Non-resident	
The value of the course for the fee	75	40	-34
Availability and condition of driving range facilities	50	38	-12
Directional signage to golf course	84	73	-11
Availability and condition of practice putting greens	93	83	-10
Overall course condition	94	86	-8
Condition of the greens	91	85	-7
Condition of fairways	92	87	-5
Quality of the pro shop	91	87	-5
Condition of the tee boxes	91	87	-4
Courtesy of golf course starters, Marshals, maintenance staff	81	77	-3
Condition of the rough	79	77	-2
Layout of the course	99	97	-2
Availability of tee-times when doing a walk-up reservation	44	42	-2
Condition of cart paths	83	85	+1
Availability and quality of golf instructors	80	84	+4
Condition of the bunkers	76	81	+5
Enforcement of golf course rules and regulations	70	77	+7
Condition of golf carts	80	88	+8
Quality of food and beverage services	52	64	+12
Availability of tee-times when making a reservation by phone	41	53	+12
Availability and condition of restrooms	49	67	+17
Pace of play	47	71	+24

**RATING ASPECTS OF BALBOA PARK** As displayed in Figure 26 on the next page, Balboa Park Golf Course customers gave the most positive ratings for the layout of the course (89% excellent or good), courtesy of golf course starters, Marshals, and maintenance staff (80%), and availability of tee times when making phone reservations (77%), the value of the course for the fee (76%), and availability of tee times for walk-up reservations (74%). Only one-third (33%) of customers were pleased with the availability and condition of driving range facilities, and fewer than half (42%) rated the quality of the pro shop as excellent or good. Availability and condition of restrooms (53%), condition of the bunkers (54%) and cart paths (55%), and the quality of food and beverage services (56%) were also rated relatively lower, overall.

**FIGURE 26 RATING ASPECTS OF BALBOA PARK**



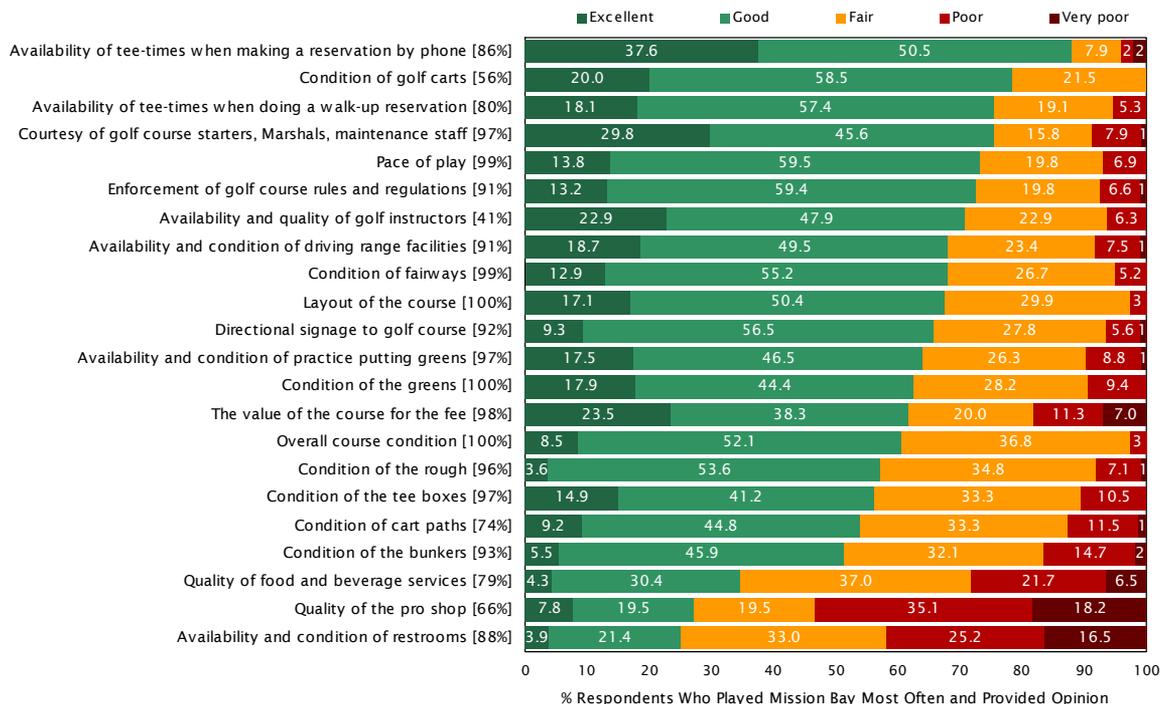
**BALBOA PARK ASPECT RATINGS BY SUBGROUP** Table 4 on the next page displays how the rating of each aspect of Balboa Park Golf Course tested (Question 11) varied by the customer's overall performance rating for the course (Question 7b). As with Table 2, this table divides those who rated Balboa Park Golf 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 in the far right column. As one might expect, those with more positive overall ratings of Balboa Park were 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 availability of tee times when trying to make a phone or walk-up reservation, the quality of food and beverage services, availability and condition of the driving range facilities, and enforcement of rules and regulations.

**TABLE 4 RATING ASPECTS OF BALBOA PARK BY OVERALL RATING OF BALBOA PARK (SHOWING % EXCELLENT + GOOD)**

	Rating of Balboa Park (Q7b)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Availability of tee-times when making a reservation by phone	78	44	-34
Availability of tee-times when doing a walk-up reservation	71	45	-26
Quality of food and beverage services	57	33	-24
Availability and condition of driving range facilities	49	24	-24
Enforcement of golf course rules and regulations	74	50	-24
The value of the course for the fee	79	55	-23
Pace of play	68	45	-23
Availability and quality of golf instructors	75	55	-20
Availability and condition of restrooms	51	32	-19
Overall course condition	78	60	-18
Condition of golf carts	77	60	-17
Condition of the greens	77	61	-16
Condition of the tee boxes	73	57	-16
Condition of fairways	77	61	-16
Courtesy of golf course starters, Marshals, maintenance staff	83	68	-15
Condition of the rough	67	53	-14
Condition of the bunkers	62	49	-13
Condition of cart paths	65	53	-12
Layout of the course	91	80	-11
Availability and condition of practice putting greens	75	66	-9
Directional signage to golf course	74	67	-7
Quality of the pro shop	54	53	-1

**RATING ASPECTS OF MISSION BAY** Mission Bay Golf Course customers gave the most positive ratings for the availability of tee times when making a phone reservation (88% excellent or good), condition of golf carts (79%), availability of tee times for walk-up reservations (76%), and the courtesy of course starters, Marshals, and maintenance staff (75%). At the other end of the spectrum, only one-quarter (25%) of customers rated the availability and condition of restrooms as excellent or good. Quality of the pro shop (27%) and food and beverage services (35%) were also rated considerably lower, overall. Just over half of customers rated as excellent or good the condition of: the bunkers (51%), cart paths (54%), tee boxes (56%), and rough (57%).

**FIGURE 27 RATING ASPECTS OF MISSION BAY**



**MISSION BAY ASPECT RATINGS BY SUBGROUP** Table 5 displays how the rating of each aspect of Mission Bay Golf Course tested (Question 11) varied by the customer’s overall performance rating for the course (Question 7c). 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 with more positive overall ratings of Mission Bay were 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 condition of the carts, availability and condition of driving range facilities, and pace of play.

**TABLE 5 RATING ASPECTS OF MISSION BAY BY OVERALL RATING OF MISSION BAY (SHOWING % EXCELLENT + GOOD)**

	Rating of Mission Bay (Q7c)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Condition of golf carts	88	60	-28
Availability and condition of driving range facilities	65	39	-26
Pace of play	82	56	-26
Availability and quality of golf instructors	77	53	-24
Availability of tee-times when making a reservation by phone	89	66	-23
Overall course condition	82	59	-23
Availability of tee-times when doing a walk-up reservation	81	61	-20
Condition of fairways	83	63	-19
Condition of the rough	73	54	-19
Enforcement of golf course rules and regulations	84	66	-18
Condition of the bunkers	66	48	-18
Courtesy of golf course starters, Marshals, maintenance staff	88	71	-17
The value of the course for the fee	80	63	-17
Directional signage to golf course	76	59	-17
Condition of cart paths	70	55	-16
Condition of the tee boxes	74	59	-15
Condition of the greens	77	62	-15
Availability and condition of practice putting greens	77	64	-13
Layout of the course	87	75	-12
Quality of food and beverage services	52	42	-11
Quality of the pro shop	54	48	-6
Availability and condition of restrooms	44	39	-5

**COMPARISON OF SAN DIEGO GOLF COURSE RATINGS** Table 6 below 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 aspect as excellent or good. The course (or courses) with the highest combined percentage per aspect are highlighted green. Torrey Pines received the highest overall ratings of the three courses, particularly regarding its course layout and condition. The Balboa Park Golf Course was rated as the best value for the fee. Mission Bay was rated highest of the three courses for availability of tee times, pace of play, and enforcement of rules and regulations.

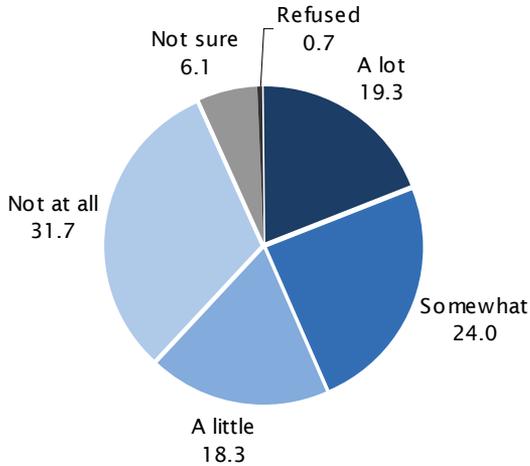
**TABLE 6 COMPARISON OF CITY OF SAN DIEGO GOLF COURSE RATINGS (SHOWING % EXCELLENT + GOOD)**

	Torrey Pines	Balboa Park	Mission Bay
Layout of the course	98	88	68
Courtesy of golf course starters, Marshals, maintenance staff	80	80	75
Condition of golf carts	82	68	78
Condition of fairways	91	65	68
Availability and quality of golf instructors	80	71	71
Availability and condition of practice putting greens	91	67	64
Overall course condition	93	67	61
Condition of the greens	90	65	62
Directional signage to golf course	81	69	66
Enforcement of golf course rules and regulations	72	68	73
Availability of tee-times when making a reservation by phone	44	77	88
Condition of the tee boxes	90	62	56
The value of the course for the fee	67	76	62
Availability of tee-times when doing a walk-up reservation	44	74	76
Condition of the rough	79	58	57
Condition of cart paths	84	55	54
Pace of play	52	66	73
Condition of the bunkers	77	54	51
Quality of the pro shop	90	42	27
Availability and condition of driving range facilities	47	33	68
Quality of food and beverage services	55	56	35
Availability and condition of restrooms	53	53	25

# CLUBHOUSE

The Torrey Pines and Mission Bay golf courses do not currently have a clubhouse. Question 12 of the survey addressed whether or not the addition of a clubhouse at these courses would improve customers' golfing experience. The question was presented to all San Diego golf customers, including those who had not played at Torrey Pines or Mission Bay in the past 12 months. The results are presented below in Figure 28.

**FIGURE 28 CLUBHOUSE AT TORREY PINES, MISSION BAY IMPROVING GOLF EXPERIENCE**

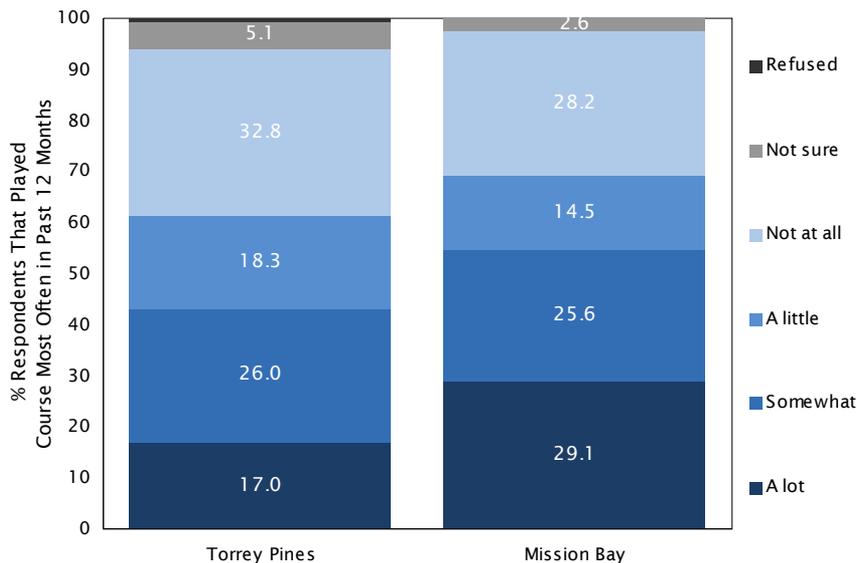


**Question 12** As you may know, the Torrey Pines and Mission Bay Golf Courses do not have a clubhouse. How much would having a clubhouse at these courses improve your overall golfing experience? Would it improve your experience a lot, somewhat, a little, or not at all?

Approximately one-fifth (19%) of all customers said that having a clubhouse at Torrey Pines and Mission Bay would improve their golf experience *a lot*, and roughly a quarter (24%) said it would improve their experience *somewhat*. Another 18% felt it would improve their golfing experience *a little*, and 32% said *not at all*.

Figure 29 looks at responses to Question 12 among customers who played Torrey Pines or Mission Bay *most often* of the three City courses in the past year. Opinions of these customers did not differ dramatically from the overall responses presented in the previous figure, although those who played Mission Bay most often were slightly more inclined to feel that a clubhouse would improve their experience *a lot* compared with those who play Torrey Pines (29% vs. 17%).

**FIGURE 29 CLUBHOUSE AT TORREY PINES, MISSION BAY IMPROVING GOLF EXPERIENCE BY SAN DIEGO CITY COURSE PLAYED MOST OFTEN**

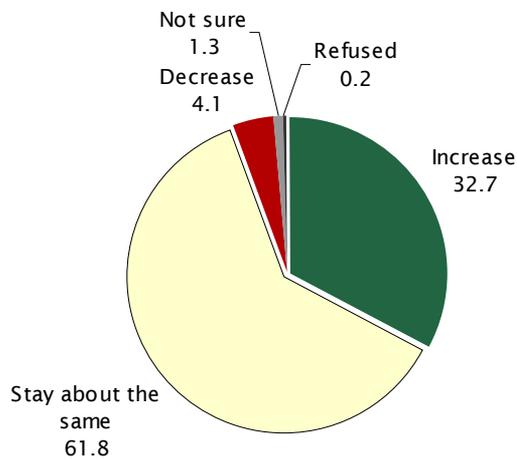


# FUTURE EXPECTATIONS & RECOMMENDATIONS

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 will increase, decrease, or stay about the same over the next 12 months.

**FIGURE 30 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS**

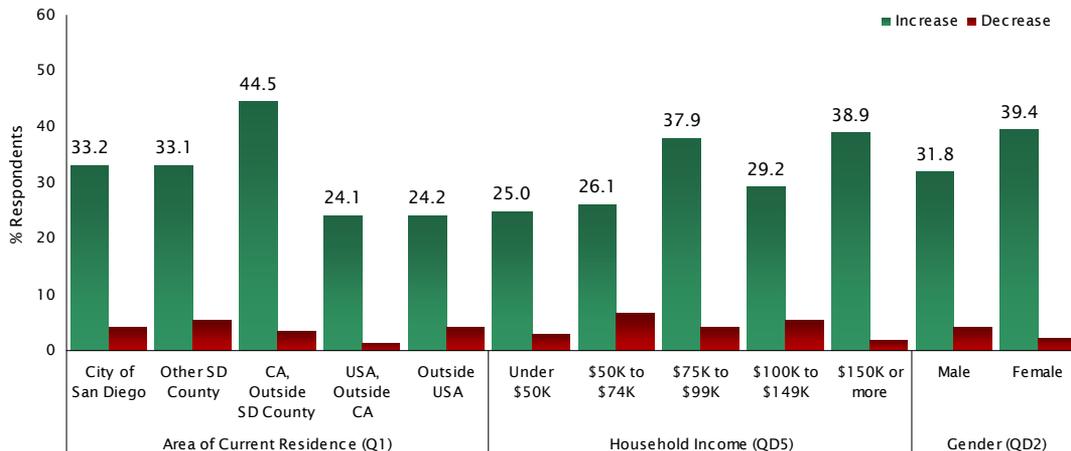


**Question 13** Including all courses that you may play, in the next 12 months do you anticipate that the frequency with which you play golf will increase, decrease or stay about the same as now?

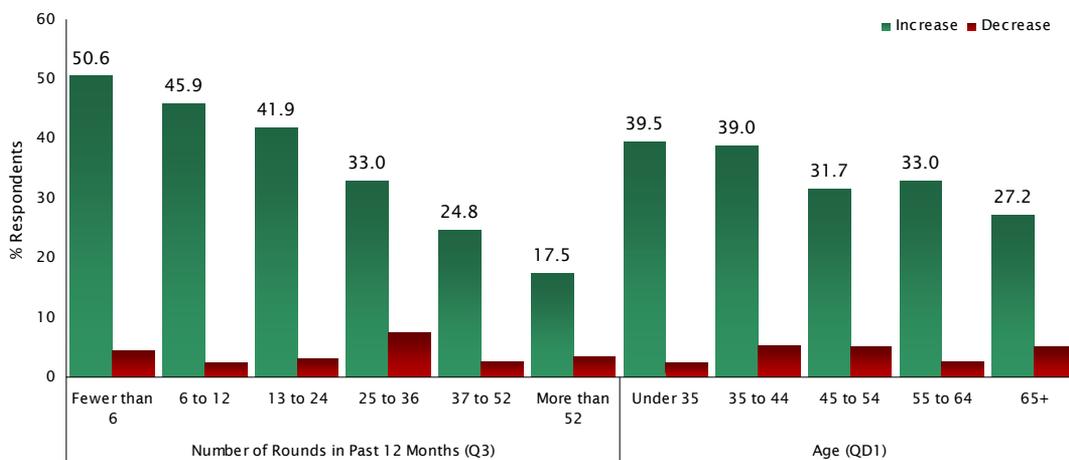
As shown in Figure 30, approximately one-third (33%) of all customers anticipated that they would increase the frequency of their golf play in the next 12 months. Only 4% felt their frequency of play would decrease, while most (62%) said it would remain about the same.

The next two figures display the percentage of customers who anticipate increasing or decreasing their frequency of play over the next year. Those who live in California outside of San Diego County, those with annual household incomes of \$150,000 or more, female customers, customers who golfed the least frequently in the past year, and younger customers were most likely anticipate increasing the frequency of their play in the coming year.

**FIGURE 31 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY AREA OF CURRENT RESIDENCE, HOUSEHOLD INCOME & GENDER**



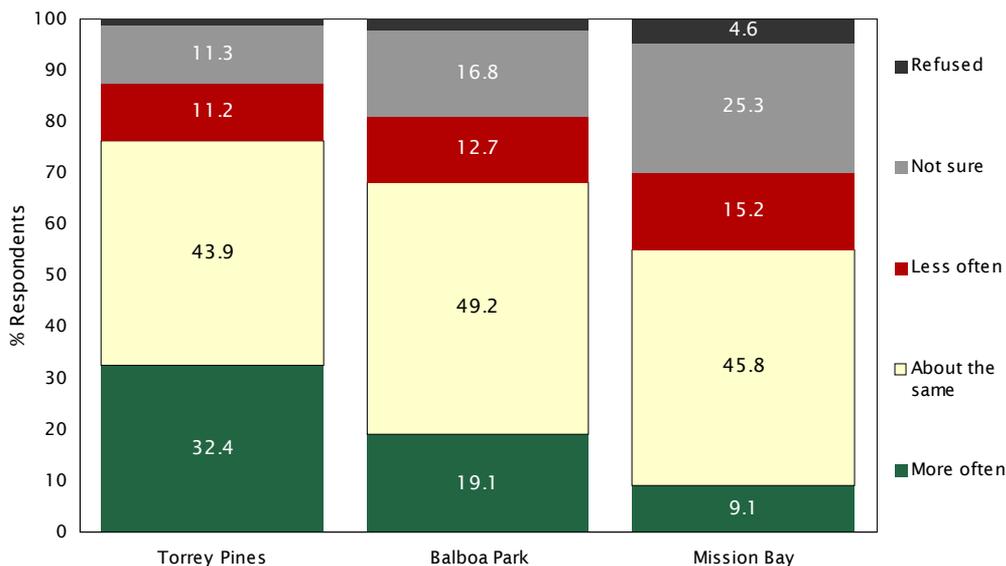
**FIGURE 32 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & AGE**



**FREQUENCY OF FUTURE PLAY AT SAN DIEGO COURSES** All respondents were next asked if, over the next 12 months, they plan to play more, less, or about the same that they currently do at each of the three San Diego courses. Figure 33 shows that nearly a third (32%) of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 19% for Balboa Park, and 9% for Mission Bay. The percentage of customers who plan to play *less often* was similar between Torrey Pines (11%), Balboa Park (13%), and Mission Bay (15%).

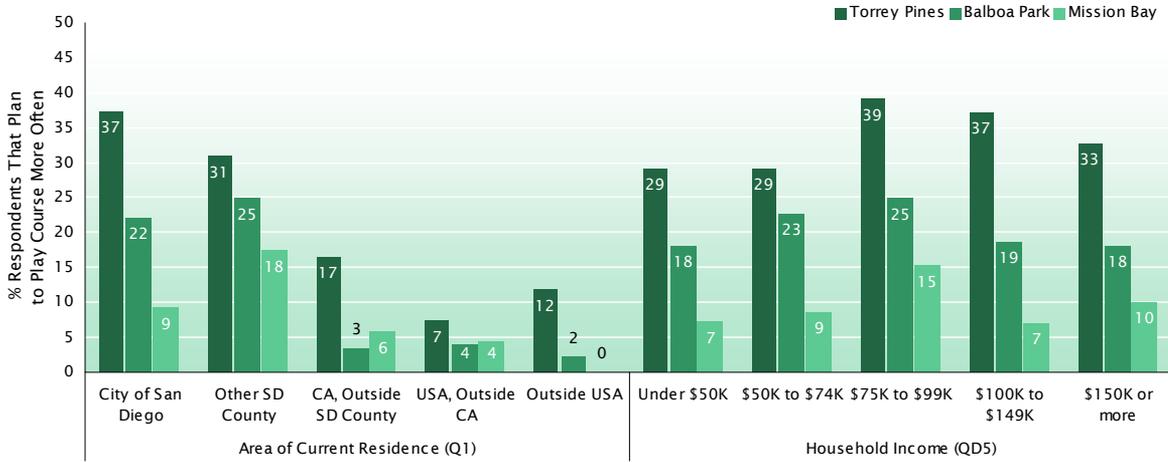
**Question 14** *Looking forward to the next 12 months, do you anticipate that you will play golf at the \_\_\_\_\_ more often, less often, or about the same as you do now?*

**FIGURE 33 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS**

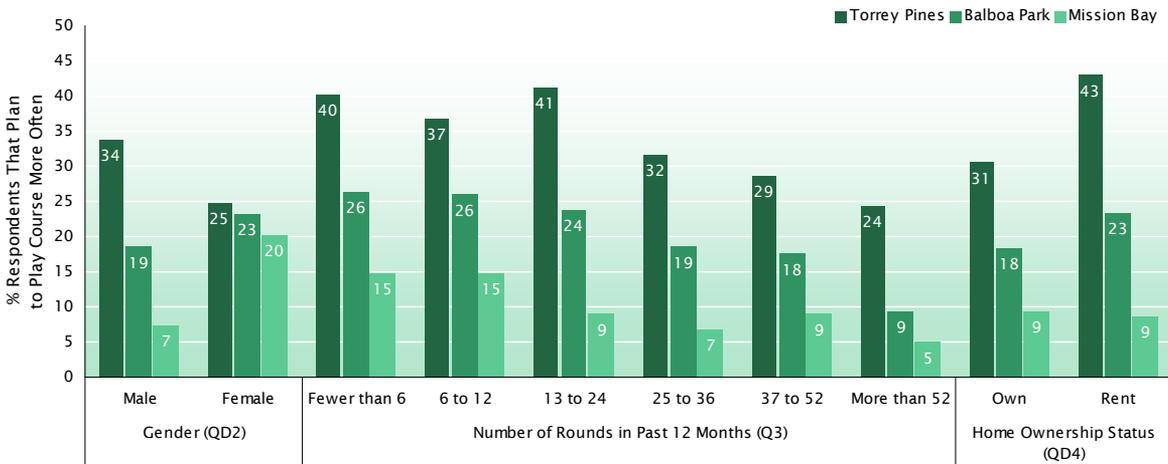


Figures 34 through 36 display the percentage of customers at each of the three San Diego courses that expect to increase their play over the next 12 months by a variety of demographic subgroups. Virtually all subgroups were most likely to increase their play at Torrey Pines, although for some subgroups (e.g., female customers) a significant portion of customers sought to increase their play at the Balboa Park and Mission Bay courses as well.

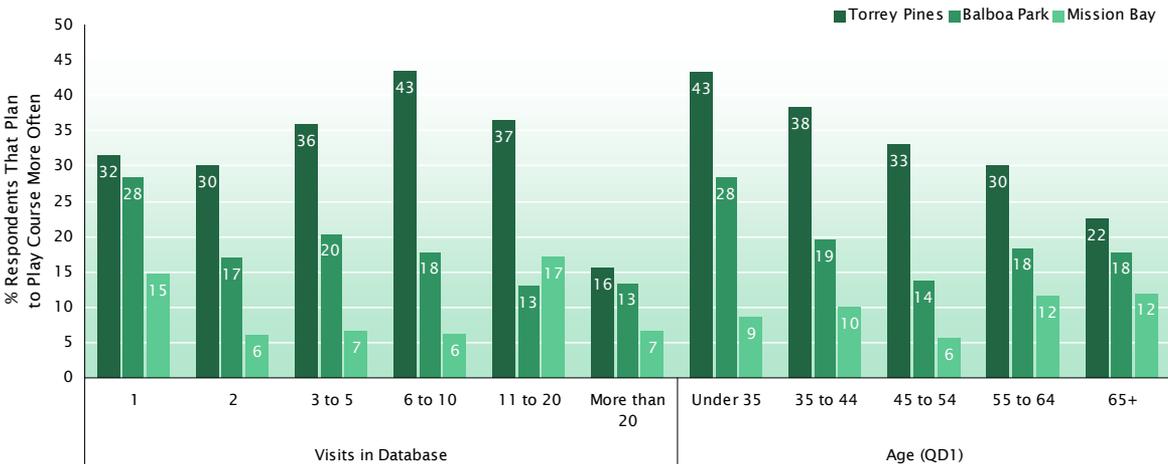
**FIGURE 34 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY AREA OF RESIDENCE & HOUSEHOLD INCOME**



**FIGURE 35 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY GENDER, NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & HOME OWNERSHIP STATUS**

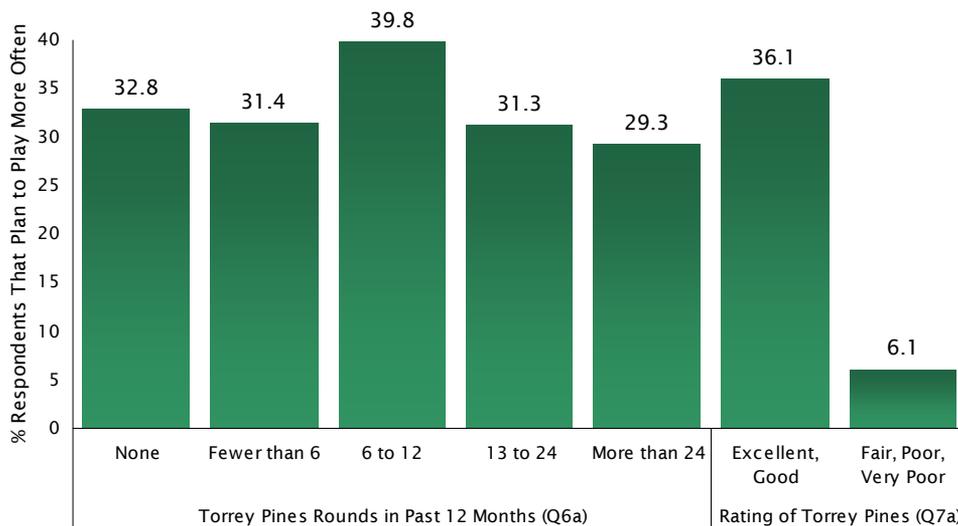


**FIGURE 36 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY NUMBER OF VISITS IN CITY RESERVATION DATABASE IN PAST 12 MONTHS & AGE**

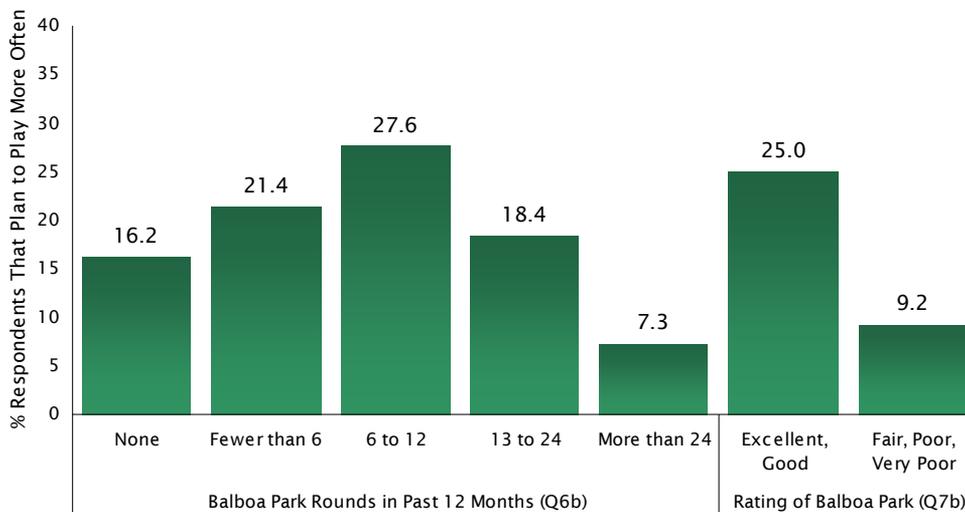


Figures 37 through 39 display the percentage of customers at the three San Diego courses that expect to increase their play over the next 12 months by their frequency of play at that particular course in the *past* 12 months as well as the overall performance rating they assigned to the same course. For all three courses, customers who had played between 6 and 12 rounds in the past year were the most likely to anticipate playing more often in the coming year. And as one would expect, customers who rated a course as excellent or good were substantially more likely to plan on playing that course more often in the future.

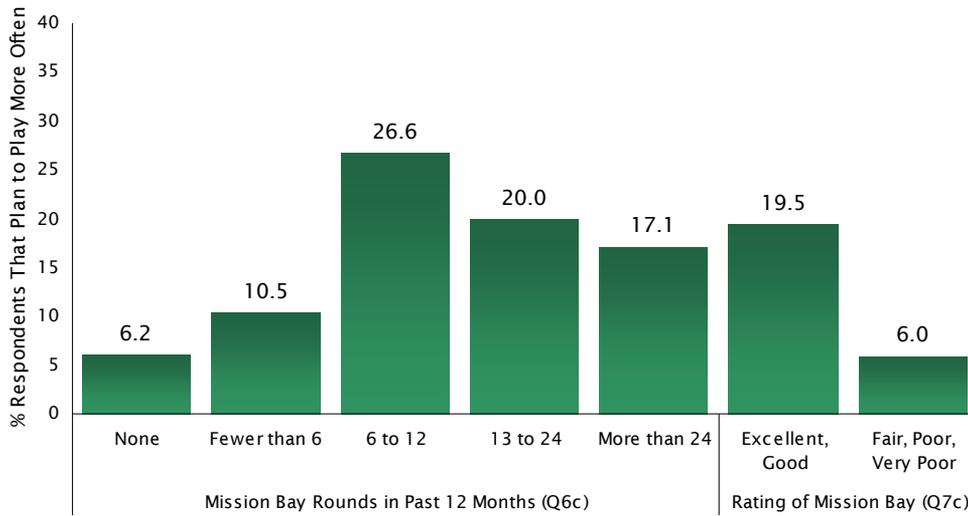
**FIGURE 37 PLAN TO PLAY TORREY PINES MORE OFTEN BY TORREY PINES ROUNDS IN PAST 12 MONTHS & RATING OF TORREY PINES**



**FIGURE 38 PLAN TO PLAY BALBOA PARK MORE OFTEN BY BALBOA PARK ROUNDS IN PAST 12 MONTHS & RATING OF BALBOA PARK**

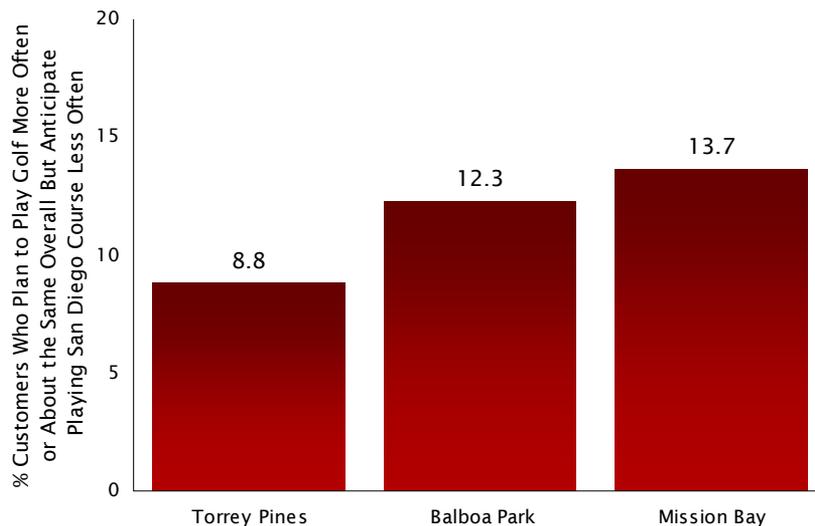


**FIGURE 39 PLAN TO PLAY MISSION BAY MORE OFTEN BY MISSION BAY ROUNDS IN PAST 12 MONTHS & RATING OF MISSION BAY**



**REDUCED FUTURE PLAY AT SAN DIEGO COURSES** Customers who previously indicated that they intend to play golf more frequently or at about the same frequency they currently play (Question 13) and yet anticipated playing one or more San Diego courses *less often* in the coming year (Question 14) 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 41 through 43. 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 40 below displays the percentage of customers from each course that anticipate playing less often and thus received a follow-up question as to why.

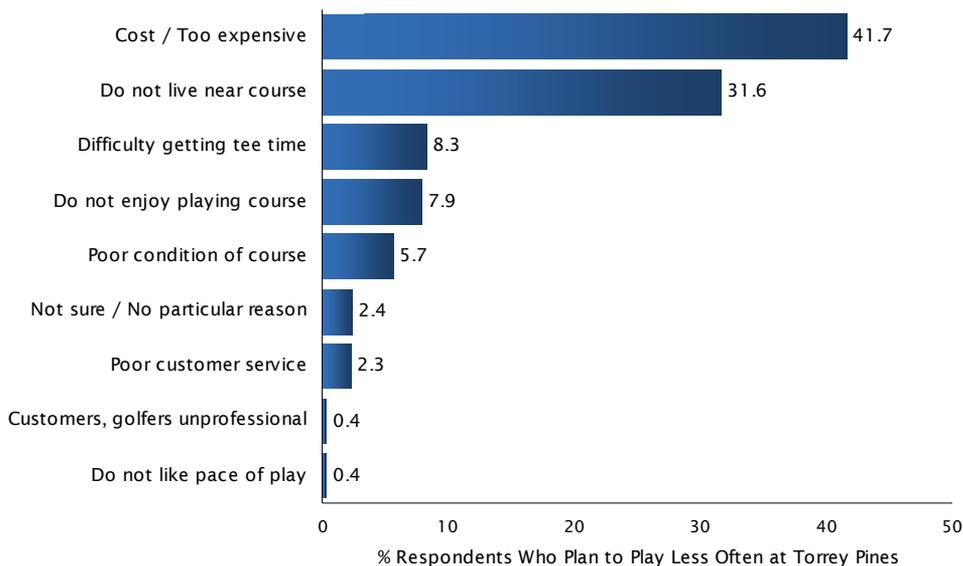
**FIGURE 40 PLAN TO PLAY GOLF MORE OFTEN OR ABOUT THE SAME BUT ANTICIPATE PLAYING SAN DIEGO COURSES LESS OFTEN IN NEXT 12 MONTHS**



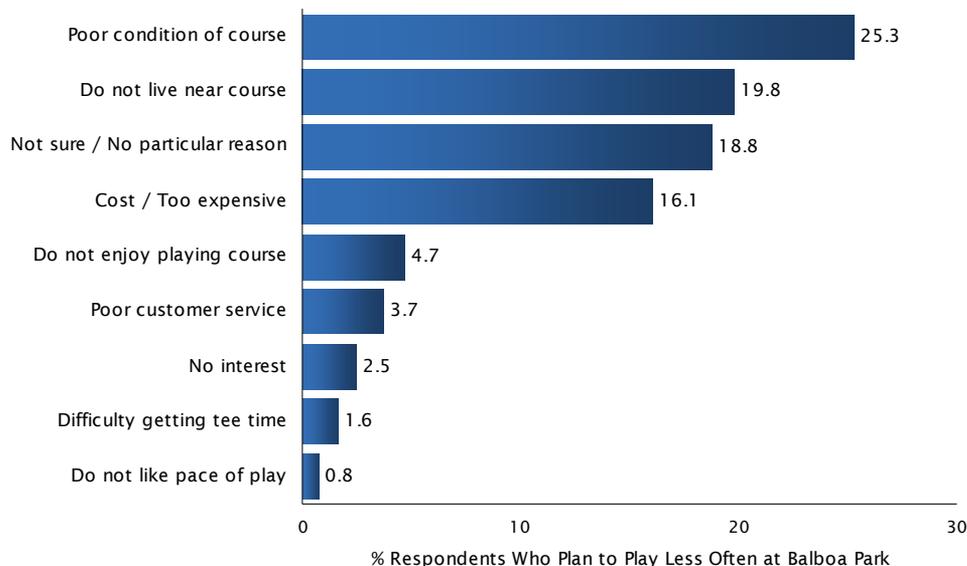
The most commonly mentioned specific reasons for playing Torrey Pines less often in the next year were concerns about cost of play (42%), not living near the course<sup>3</sup> (32%), and difficulty in getting a tee time (8%). The most common reasons for playing Balboa Park less often include concern about the condition of the course (25%), not living near the course<sup>4</sup> (20%), and cost of play (16%). The top specific reasons for choosing to play Mission Bay less often were dissatisfaction with the course condition (30%), cost of play (21%), and not living near the course<sup>5</sup> (14%).

**Question 15/16/17** *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 41 REASONS FOR PLANNING TO PLAY TORREY PINES LESS OFTEN**

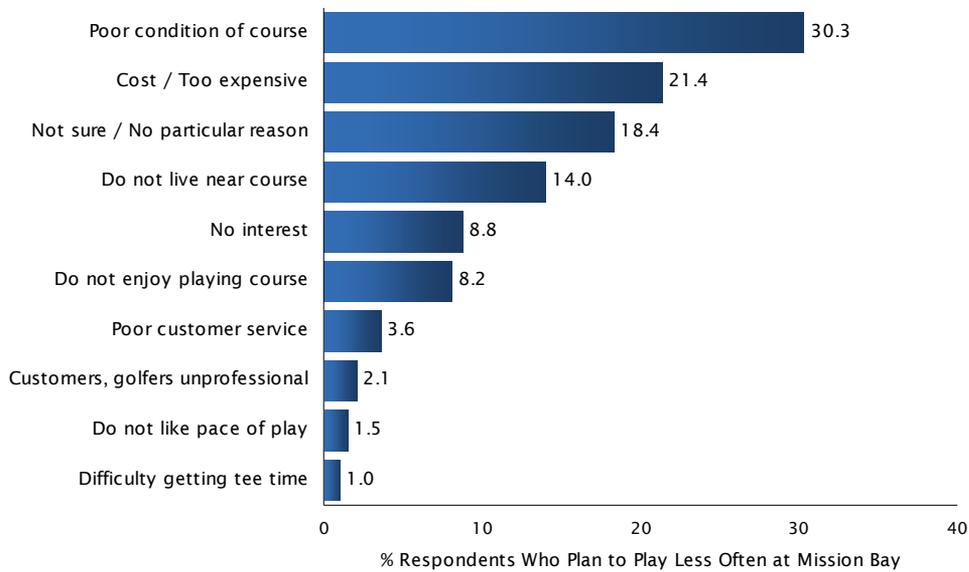


**FIGURE 42 REASONS FOR PLANNING TO PLAY BALBOA PARK LESS OFTEN**



3. Table 1 on page 17 shows that 20% of Torrey Pines customers live outside San Diego County.  
 4. Approximately 17% of Balboa Park customers live outside the City of San Diego (see Table 1 on page 17).  
 5. Approximately 11% of Mission Bay customers live outside the City of San Diego (see Table 1 on page 17).

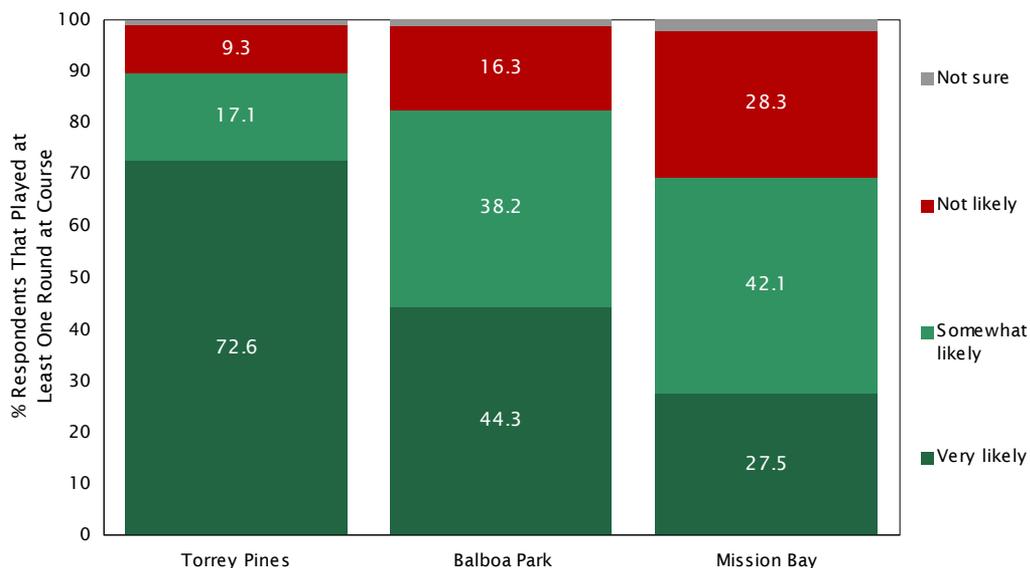
**FIGURE 43 REASONS FOR PLANNING TO PLAY MISSION BAY LESS OFTEN**



**LIKELIHOOD OF RECOMMENDING SAN DIEGO GOLF COURSES** The final substantive question of the survey looked at 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 44. Nine in ten (90%) customers who played Torrey Pines were very (73%) or somewhat (17%) likely to recommend the course to a friend or colleague, compared with 83% of customers who played Balboa Park (44% very and 38% somewhat) and 70% who played Mission Bay (28% very and 42% somewhat).

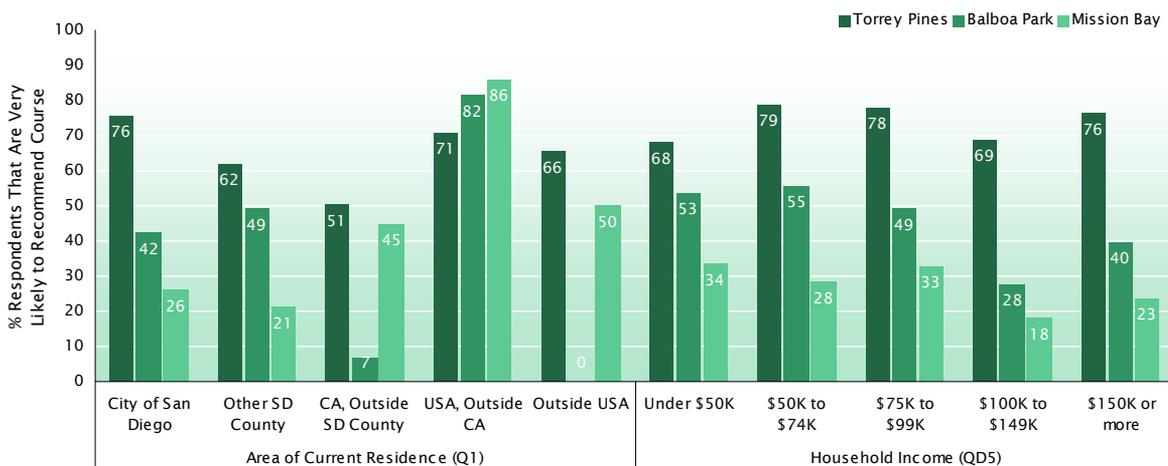
**Question 18** Overall, how likely are you to recommend the \_\_\_\_\_ to a friend or colleague who is interested in playing golf in San Diego County?

**FIGURE 44 LIKELIHOOD OF RECOMMENDING COURSES**

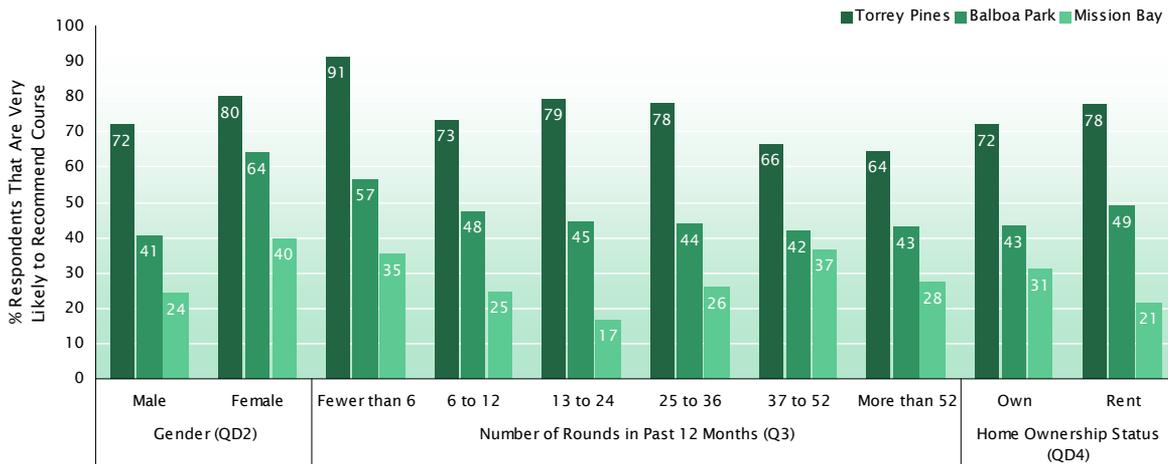


Figures 45 through 47 display the percentage of customers at each of the three San Diego courses that would be *very likely* to recommend the course by a variety of demographic subgroups. The most obvious finding is that the vast majority of all subgroups indicated they would be very likely to recommend Torrey Pines Golf Course to a friend or colleague. More than half of the following subgroups indicated they would be very likely to recommend Balboa Park Golf Course: those who live in a state outside California, customers in households that earn less than \$75,000 annually, female customers, those who play golf relatively infrequently, and seniors. And at least half of those who live in a state outside California and those aged 65 or older said they would be very likely to recommend Mission Bay Golf Course.

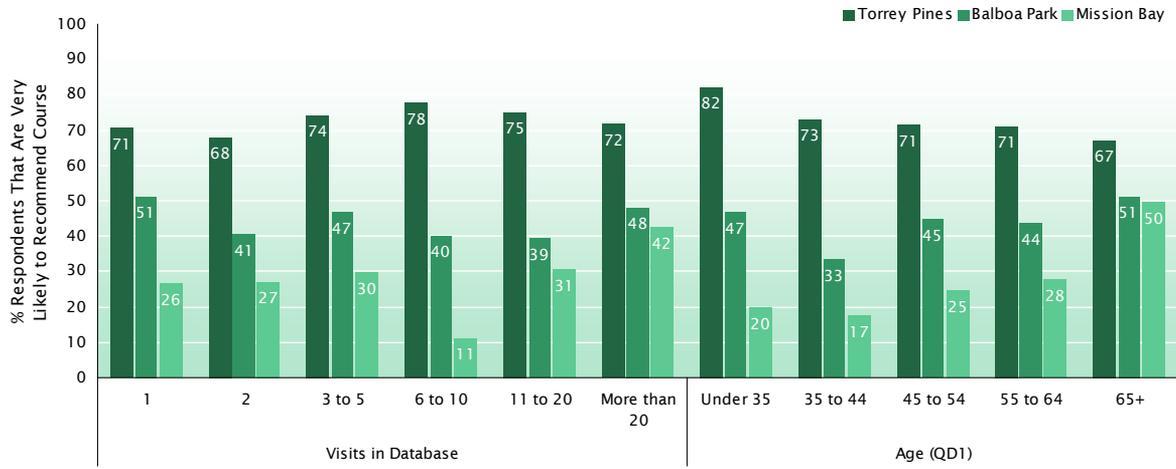
**FIGURE 45 LIKELIHOOD OF RECOMMENDING COURSES BY AREA OF RESIDENCE & HOUSEHOLD INCOME**



**FIGURE 46 LIKELIHOOD OF RECOMMENDING COURSES BY GENDER, NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & HOME OWNERSHIP STATUS**



**FIGURE 47 LIKELIHOOD OF RECOMMENDING COURSES BY NUMBER OF VISITS IN CITY RESERVATION DATABASE IN PAST 12 MONTHS & AGE**





## BACKGROUND & DEMOGRAPHICS

**TABLE 7 DEMOGRAPHICS OF SAMPLE**

<i>Total Respondents</i>	<i>1,306</i>
<b>Q1 Area of Current Residence</b>	
City of San Diego	75.7
Other SD County	7.5
CA, Outside SD County	4.9
USA, Outside CA	10.3
Outside USA	1.6
<b>QD1 Age</b>	
Under 35	18.1
35 to 44	15.2
45 to 54	20.5
55 to 64	20.2
65+	19.9
Refused	6.1
<b>QD2 Gender</b>	
Male	84.5
Female	14.1
Refused	1.5
<b>QD3 Golf club member</b>	
Yes	36.1
No	62.5
Refused	1.4
<b>QD4 Home ownership status</b>	
Own	72.9
Rent	20.6
Refused	6.4
<b>QD5 Household income</b>	
Under \$35K	3.0
\$35K to \$49K	4.1
\$50K to \$74K	9.7
\$75K to \$99K	12.1
\$100K to \$149K	18.6
\$150K or more	31.6
Not sure / Refused	20.9
<b>S1 Customer Type in Database</b>	
Resident	83.7
Non-resident	16.3
<b>S2 Number of Visits in Database</b>	
1	19.2
2	20.8
3 to 5	22.0
6 to 10	14.4
11 to 20	10.7
More than 20	12.8

Table 7 presents the key demographic and background information that was collected during the survey of San Diego golf customers. Most of the information was gathered during the interview, although number of visits and customer type were gathered from the customer database. 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 January 1, 2010 and December 31, 2010. 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.



## M E T H O D O L O G Y

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 design stage of the study, Dr. McLarney conducted seven one-on-one interviews with individuals who are familiar with the golf operations at Torrey Pines, Balboa, and/or Mission Bay courses through their association with local golf clubs and/or frequency of play. The interviews were informal, open-ended discussions designed to identify the various factors that customers value when assessing the overall quality of their golfing experiences. This information was helpful for structuring the questionnaire.

**QUESTIONNAIRE DEVELOPMENT** Dr. McLarney of True North Research 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.

Many questions asked in this study were presented only to a subset of respondents. For example, only respondents who had played at one or more San Diego courses (Question 6) were asked about their perceptions of and experiences with each course at which they had played (Questions 7 and 8). The questionnaire included with this report (see *Questionnaire & Toplines* on page 43) identifies the skip patterns that were used during the interview to ensure that 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 telephone 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, Balboa Park, or Mission Bay Golf Course. All customers who played at least one round of golf at one of the three City courses between January 1, 2010 and December 31, 2010 comprised the universe for the study, but because the City's database is organized by individual rounds of golf played, and because many customers played multiple rounds and thus appeared in the database multiple times, True North reorganized the data by customer identity (rather than by round). The resulting sample was a list of 55,607 unique customers who had played at least one round of golf in 2010 (identified from 208,979 individual rounds of golf in the database for 2010), along with a derived variable representing the total number of rounds played during that time period, as well as the course played most often. Finally, the universe of customers was stratified by the number of rounds a customer had played, the most frequently played course, and whether or not the customer was identified as a resident of San Diego in the City's database.

**RECRUITMENT AND DATA COLLECTION** True North used multiple methods to recruit and encourage participation in the survey. Customer records in the database that contained email contact information were sent email invitations to participate in the study. The invitations contained a hyperlink to the survey website, and each link contained a unique personal identification number (PIN). Using PINs in the invitation links ensured that only customers formally invited to participate in the survey could access the survey site. It also ensured that once a customer completed a survey, he or she could not do so again.

In coordination with this effort, telephone interviews were conducted on weekday evenings and weekends, with the average interview lasting 12 minutes. The online and telephone data collection period lasted from April 29 to May 9, 2011, and resulted in a total of 1,306 completed surveys (1,106 online and 200 phone). Survey response/cooperation rates were comparable between residents (17%) and non-residents (14%).

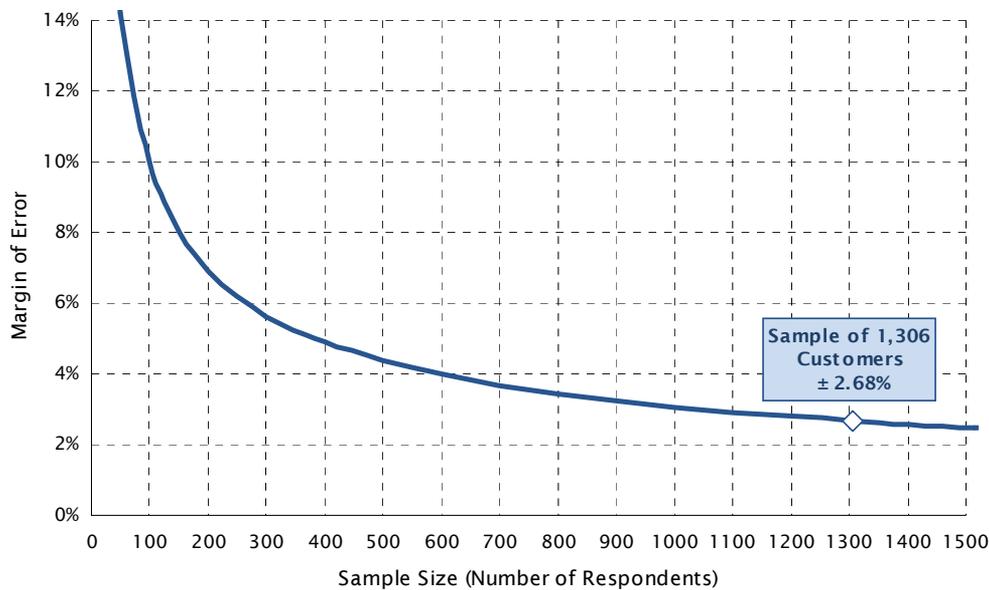
**STATISTICAL MARGIN OF ERROR** By using a probability-based sampling design and monitoring the sample characteristics as data collection proceeded, True North ensured that the resulting sample was representative of the universe of San Diego golf customers who played at least one round of golf in the City in 2010. The results of the survey can thus be used to estimate the opinions of *all* customers who played in 2010. 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 the survey of 1,306 respondents for a particular question and what would have been found if all of the estimated 55,607 customers had been interviewed.

For example, in estimating the percentage of customers who anticipate they will increase the frequency of their golf play in the next 12 months (Question 13), the margin of error can be calculated if one knows the size of the population, the size of the sample, a desired confidence level, and the distribution of responses to the question. The appropriate equation for estimating the margin of error, in this case, is shown below:

$$\hat{p} \pm t \sqrt{\left(\frac{N-n}{N}\right) \frac{\hat{p}(1-\hat{p})}{n-1}}$$

where  $\hat{p}$  is the proportion of survey respondents who said they will increase the frequency of their golf play in the next 12 months (0.33 for 33% in this example),  $N$  is the population size of all customers (55,607),  $n$  is the sample size that received the question (1,306), and  $t$  is the upper  $\alpha/2$  point for the t-distribution with  $n-1$  degrees of freedom (1.96 for a 95% confidence interval). Solving the equation using these values reveals a margin of error of  $\pm 2.52\%$ . This means that with 33% of survey respondents indicating they plan to increase their frequency of golf play in the next 12 months, we can be 95% confident that the actual percentage of *all* customers who plan to increase their frequency is between 30% and 36%.

Figure 48 on the next page 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 (i.e.,  $\hat{p} = 0.5$ ). For this survey, the maximum margin of error is  $\pm 2.68\%$  for questions answered by all 1,306 respondents.

**FIGURE 48 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING**

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 48 above is thus 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. The final data were weighted to match the distribution of resident and non-resident customers across the three courses, according to the City's reservation database.

**ROUNDING** In this report and Appendix A, 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 charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and pie charts for a given question.

# QUESTIONNAIRE & TOPLINES



City of San Diego  
Golf Customer Survey  
Final Toplines (n = 1,306)  
May 2011

## 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.

*If the person asks why you need to speak to the listed person or if they ask to participate instead, explain:* For statistical purposes, this survey must only be completed by this particular individual.

## Section 2: ZIP Code & Residency

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 76%
	2	Other San Diego County city 7%
	3	California, outside San Diego County 5%
	4	USA, outside California 10%
	5	Outside USA 2%
<i>Ask Q2 if Q1 = (2,3,4).</i>		
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 questions about your golfing experiences in general.

Q3	Including courses in San Diego and elsewhere, in the past 12 months approximately how many rounds of golf did you play? <i>If unsure, ask to estimate.</i> Number of rounds recorded and later grouped into categories shown below.	
	Less than 6	8%
	6 to 12	15%
	13 to 24	17%
	25 to 36	17%
	37 to 52	19%
	More than 52	23%
	Prefer not to answer	1%

Q4	What is the name of the golf course that you play most often? Verbatim names recorded and later grouped into the categories shown below. Categories mentioned by at least 1% of respondents shown.	
	Torrey Pines Golf Course	19%
	Balboa Park Golf Club	17%
	Other course (unique mentions)	16%
	Not sure / Play many courses	7%
	Mission Bay Golf Course	6%
	Riverwalk Golf Club	4%
	Coronado Municipal Golf Course	3%
	Encinitas Ranch Golf Course	2%
	Oaks North Golf Club	2%
	Doubletree Golf Resort	2%
	Tecolote Canyon Golf Course	1%
	Admiral Baker Golf Course	1%
	Carlton Oaks Country Club	1%
	Miramar Memorial Golf Course	1%
	Salt Creek Golf Club	1%
	Mission Trails Golf Course	1%
	Bonita Golf Club	1%
	Rancho Bernardo Inn	1%
	Vineyard at Escondido	1%
	Sycuan Golf Resort	1%
	Sail Ho Golf Club	1%
	Sea 'N Air Golf Course	1%
	Steele Canyon Golf Club	1%
	Chula Vista Municipal Golf Course	1%
	Maderas Golf Club	1%
Q5	Is there a particular reason why you play this course most often?	
	Location / Close to work, home	32%
	Affordable / Value	32%
	Course quality	15%
	Tee-time availability	4%
	Member of the country club	5%
	Friend, family is a member	3%
	Combo of location, availability, cost	1%

	Other reason (unique responses)	6%
	Not sure	2%
	Prefer not to answer	1%
Q6	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 _____?	
	<i>Randomize Courses</i>	
A	Torrey (Torr-ee) Pines Golf Course	
	None	23%
	Fewer than 6	51%
	6 to 12	13%
	13 to 24	5%
	More than 24	6%
	Prefer not to answer	2%
B	Balboa (Bal-BOW-uh) Park Golf Course	
	None	38%
	Fewer than 6	37%
	6 to 12	11%
	13 to 24	5%
	More than 24	6%
	Prefer not to answer	2%
C	Mission Bay Golf Course	
	None	62%
	Fewer than 6	24%
	6 to 12	6%
	13 to 24	2%
	More than 24	4%
	Prefer not to answer	2%

#### Section 4: Rating Overall SD Golf Experiences

*Only ask Q7 for courses where respondent played in past year (Q6 = 1-997).*

**Q7** Overall, how would you rate your most recent golf experiences at \_\_\_\_\_? Would you rate them as excellent, good, fair, poor and very poor?

<i>Randomize</i>		Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
A	Torrey Pines Golf Course (1,105 respondents)	49%	39%	7%	4%	1%	0%	0%
B	Balboa Park Golf Course (604 respondents)	16%	58%	21%	4%	3%	0%	0%
C	Mission Bay Golf Course (334 respondents)	11%	48%	29%	10%	1%	1%	0%

*Only ask Q8 if Q6a = (1-997).*

**Q8** If the course managers could change something about the Torrey Pines Golf Course to improve your overall golf experience, what change would you most like to see? Verbatim responses recorded and later grouped into categories shown below.

No changes needed	20%
Reduce fees, costs in general	14%
Not sure / Cannot think of anything	14%
Enforce speed of play	10%
Improve access to tee time info	8%
Improve customer service	7%
Maintain roughs	6%
Reduce cart rental fees	5%
Increase availability of tee times	5%
Reduce visitor prices	4%
Improve course quality	4%
Reduce green fees	3%
Improve green conditions	2%
Improve facility maintenance	2%
Improve carts in general	2%
Improve reservation system	2%
Improve fairways	1%
Improve clubhouse	1%
Reopen, renovate restaurant	1%
Improve, upgrade driving range	1%
Add GPS on golf carts	1%
Improve ball washers	1%

	Add, improve snack/beverage carts	1%
	Extend twilight tee times	1%
<i>Only ask Q9 if Q6b = (1-997).</i>		
Q9	If the course managers could change something about the Balboa Park Golf Course to improve your overall golf experience, what change would you most like to see? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything	25%
	No changes needed	17%
	Improve green conditions	11%
	Improve course quality	10%
	Improve facility maintenance	8%
	Improve fairways	6%
	Reduce fees, costs in general	5%
	Improve clubhouse	5%
	Enforce speed of play	4%
	Improve customer service	4%
	Improve, upgrade driving range	3%
	Reduce cart rental fees	2%
	Improve carts in general	2%
	Reduce green fees	1%
	Maintain tee boxes	1%
	Improve access to tee time info	1%
	Maintain roughs	1%
	Reopen, renovate restaurant	1%
	Add GPS on golf carts	1%
	Improve cart paths	1%
	Add, improve snack/beverage carts	1%
	Add, expand facilities	1%
	Improve, maintain specific holes	1%
<i>Only ask Q10 if Q6c = (1-997).</i>		
Q10	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? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / Cannot think of anything	20%
	No changes needed	16%
	Improve course quality	14%
	Reduce fees, costs in general	12%
	Improve green conditions	11%

Improve facility maintenance	11%
Reopen, renovate restaurant	10%
Improve fairways	3%
Improve clubhouse	3%
Add, expand facilities	3%
Maintain tee boxes	2%
Increase availability of tee times	2%
Improve, upgrade driving range	2%
Enforce speed of play	2%
Improve customer service	2%
Reduce green fees	1%
Improve access to tee time info	1%
Maintain roughs	1%
Add trees	1%
Improve, maintain specific holes	1%

#### Section 5: Ratings for Specific Aspects of Golf Experience

Q11 Next, I'd like you to think back to your most recent golf experiences at <golf course used most often from Q6>. Would you say the \_\_\_\_\_ was excellent, good, fair, poor, or very poor?

		Excellent	Good	Fair	Poor	Very poor	Not sure	Prefer not to answer
	<i>Randomize</i>							
Torrey Pines Golf Course (890 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	40%	40%	15%	3%	2%	1%	0%
B	Directional signage to golf course	23%	51%	14%	3%	1%	8%	1%
C	Availability of tee-times when doing a walk-up reservation	8%	19%	19%	10%	6%	34%	4%
D	Availability of tee-times when making a reservation by phone	13%	27%	25%	15%	11%	8%	1%
E	The value of the course for the fee	34%	33%	22%	6%	5%	0%	0%
F	Overall course condition	41%	52%	6%	1%	0%	0%	0%
G	Condition of the tee boxes	34%	55%	9%	1%	0%	0%	0%
H	Condition of fairways	44%	47%	7%	1%	0%	0%	0%
I	Condition of the rough	25%	53%	16%	4%	1%	0%	0%
J	Condition of the bunkers	26%	50%	19%	2%	1%	1%	0%
K	Condition of the greens	43%	46%	8%	1%	0%	0%	0%
L	Layout of the course	69%	29%	2%	0%	0%	0%	0%

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M	Pace of play	13%	39%	31%	12%	5%	0%	0%
N	Quality of the pro shop	38%	46%	8%	1%	0%	4%	2%
O	Quality of food and beverage services	14%	32%	27%	7%	4%	14%	2%
P	Availability and quality of golf instructors	6%	8%	3%	0%	0%	70%	12%
Q	Condition of cart paths	23%	50%	13%	1%	0%	11%	2%
R	Condition of golf carts	18%	39%	11%	1%	0%	26%	5%
S	Availability and condition of restrooms	12%	38%	30%	10%	4%	5%	1%
T	Enforcement of golf course rules and regulations	15%	46%	18%	5%	2%	13%	2%
U	Availability and condition of driving range facilities	13%	27%	26%	13%	6%	13%	2%
V	Availability and condition of practice putting greens	43%	45%	7%	1%	0%	2%	0%
<b>Balboa Park Golf Course (260 respondents)</b>								
A	Courtesy of golf course starters, Marshals and maintenance staff	30%	46%	14%	3%	2%	2%	2%
B	Directional signage to golf course	10%	50%	19%	6%	1%	10%	3%
C	Availability of tee-times when doing a walk-up reservation	12%	38%	14%	3%	1%	29%	3%
D	Availability of tee-times when making a reservation by phone	21%	46%	14%	4%	2%	11%	2%
E	The value of the course for the fee	32%	42%	15%	5%	3%	0%	2%
F	Overall course condition	9%	57%	25%	5%	2%	0%	2%
G	Condition of the tee boxes	7%	52%	29%	6%	1%	2%	2%
H	Condition of fairways	10%	54%	25%	8%	1%	0%	2%
I	Condition of the rough	6%	50%	33%	5%	3%	1%	2%
J	Condition of the bunkers	3%	47%	31%	11%	1%	5%	2%
K	Condition of the greens	12%	52%	26%	8%	1%	0%	2%
L	Layout of the course	19%	68%	11%	0%	0%	0%	2%
M	Pace of play	9%	55%	27%	6%	0%	1%	2%
N	Quality of the pro shop	4%	33%	36%	11%	4%	8%	3%
O	Quality of food and beverage services	9%	36%	23%	9%	4%	15%	4%
P	Availability and quality of golf instructors	5%	12%	6%	1%	1%	67%	9%
Q	Condition of cart paths	5%	41%	28%	7%	3%	12%	4%
R	Condition of golf carts	9%	41%	17%	5%	2%	21%	4%
S	Availability and condition of restrooms	6%	41%	29%	9%	4%	9%	2%
T	Enforcement of golf course rules and regulations	7%	49%	19%	5%	1%	15%	3%
U	Availability and condition of driving range facilities	6%	22%	29%	18%	9%	13%	2%
V	Availability and condition of practice putting greens	8%	55%	25%	4%	2%	4%	2%

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Mission Bay Golf Course (117 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	29%	44%	15%	8%	1%	3%	0%
B	Directional signage to golf course	9%	52%	26%	5%	1%	6%	2%
C	Availability of tee-times when doing a walk-up reservation	15%	46%	15%	4%	0%	18%	2%
D	Availability of tee-times when making a reservation by phone	32%	44%	7%	2%	2%	12%	2%
E	The value of the course for the fee	23%	38%	20%	11%	7%	1%	1%
F	Overall course condition	9%	52%	37%	3%	0%	0%	0%
G	Condition of the tee boxes	15%	40%	32%	10%	0%	2%	1%
H	Condition of fairways	13%	55%	26%	5%	0%	1%	0%
I	Condition of the rough	3%	51%	33%	7%	1%	3%	1%
J	Condition of the bunkers	5%	43%	30%	14%	2%	5%	2%
K	Condition of the greens	18%	44%	28%	9%	0%	0%	0%
L	Layout of the course	17%	50%	30%	3%	0%	0%	0%
M	Pace of play	14%	59%	20%	7%	0%	1%	0%
N	Quality of the pro shop	5%	13%	13%	23%	12%	32%	3%
O	Quality of food and beverage services	3%	24%	29%	17%	5%	18%	3%
P	Availability and quality of golf instructors	9%	20%	9%	3%	0%	55%	4%
Q	Condition of cart paths	7%	33%	25%	9%	1%	22%	3%
R	Condition of golf carts	11%	32%	12%	0%	0%	42%	3%
S	Availability and condition of restrooms	3%	19%	29%	22%	15%	9%	3%
T	Enforcement of golf course rules and regulations	12%	54%	18%	6%	1%	8%	2%
U	Availability and condition of driving range facilities	17%	45%	21%	7%	1%	9%	0%
V	Availability and condition of practice putting greens	17%	45%	26%	9%	1%	2%	1%

#### Section 6: Clubhouse

Q12	As you may know, the Torrey Pines and Mission Bay Golf Courses do not have a clubhouse. How much would having a clubhouse at these courses improve your overall golfing experience? Would it improve your experience a lot, somewhat, a little, or not at all?	
	1 A lot	19%
	2 Somewhat	24%
	3 A little	18%
	4 Not at all	32%
	98 Not sure	6%
	99 Prefer not to answer	1%

Section 7: Future Expectations & Recommendations								
Q13	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?							
	1	Increase			33%			
	2	Decrease			4%			
	3	Stay about the same			62%			
	98	Not sure			1%			
	99	Prefer not to answer			0%			
Q14	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?							
	<i>Randomize</i>			More often	Less often	About the same	Not sure	Prefer not to answer
A	Torrey Pines Golf Course		32%	11%	44%	11%	1%	
B	Balboa Park Golf Course		19%	13%	49%	17%	2%	
C	Mission Bay Golf Course		9%	15%	46%	25%	5%	
<i>Ask Q15 if Q13 = (1,3) and Q14a = (2).</i>								
Q15	Is there a particular reason why you expect to play golf less frequently at Torrey Pines Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.							
	Cost / Too expensive		42%					
	Do not live near course		32%					
	Do not enjoy playing course		8%					
	Difficulty getting tee time		8%					
	Poor condition of course		6%					
	Poor customer service		2%					
	Not sure / No particular reason		2%					
<i>Ask Q16 if Q13 = (1,3) and Q14b = (2).</i>								
Q16	Is there a particular reason why you expect to play golf less frequently at Balboa Park Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.							
	Poor condition of course		25%					
	Do not live near course		20%					
	Not sure / No particular reason		19%					
	Cost / Too expensive		16%					
	Do not enjoy playing course		5%					
	Poor customer service		4%					
	Difficulty getting tee time		2%					

	No interest	2%
	Do not like pace of play	1%
<i>Ask Q17 if Q13 = (1,3) and Q14c = (2).</i>		
Q17	Is there a particular reason why you expect to play golf less frequently at Mission Bay Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.	
	Poor condition of course	30%
	Cost / Too expensive	21%
	Not sure / No particular reason	18%
	Do not live near course	14%
	No interest	9%
	Do not enjoy playing course	8%
	Poor customer service	4%
	Customers, golfers unprofessional	2%
	Difficulty getting tee time	1%
	Do not like pace of play	1%
<i>Only ask Q18 for courses where respondent played in past year (Q6 = 1-997).</i>		
Q18	Overall, how likely are you to recommend the _____ to a friend or colleague who is interested in playing golf in San Diego County?	
	<i>Randomize</i>	
		Very likely Somewhat likely Not likely Not sure Prefer not to answer
A	Torrey Pines Golf Course	73% 17% 9% 1% 0%
B	Balboa Park Golf Course	44% 38% 16% 1% 0%
C	Mission Bay Golf Course & Practice Center	27% 42% 28% 1% 1%

#### Section 8: Background & Demographics

Thank you so much for your participation. I have just a few background questions for statistical purposes.

D1	In what year were you born? Year coded into age categories shown below.	
	Under 35	18%
	35 to 44	15%
	45 to 54	21%
	55 to 64	20%
	65 or older	20%
	Prefer not to answer	6%

D2	Gender		
	1	Male	84%
	2	Female	14%
	99	Prefer not to answer	1%
D3	Are you a member of a golfing club?		
	1	Yes	36%
	2	No	63%
	99	Prefer not to answer	1%
D4	Do you own or rent your home?		
	1	Own	73%
	2	Rent	21%
	99	Prefer not to answer	6%
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	3%
	2	\$35,000 to \$49,999	4%
	3	\$50,000 to \$74,999	10%
	4	\$75,000 to \$99,999	12%
	5	\$100,000 to \$149,999	19%
	6	\$150,000 or more	32%
	99	Not sure / Prefer not to answer	21%
Thank you so much for your participation. This survey was conducted for the City of San Diego's Golf Program.			

#### Sample Items

S1	Customer Type in Database		
	1	Resident	84%
	2	Non-Resident	16%

S2	Number of Visits in Database	
	1	19%
	2	21%
	3 to 5	22%
	6 to 10	14%
	11 to 20	11%
	More than 20	13%