



# REPORT

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

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DATE ISSUED: October 13, 2021 REPORT NO. 201

ATTENTION: Park and Recreation Board  
Agenda for October 21, 2021

SUBJECT: 2021 GOLF DIVISION BUSINESS PLAN UPDATE

### SUMMARY

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

### BACKGROUND

Since 1919, the City has managed and operated a municipal golf program for residents of, and visitors to, San Diego. Currently, the City operates three golf complexes: Balboa Park Golf Course, Mission Bay Golf Course, and Torrey Pines Golf Course.

In November 2012, the City Council approved the [Golf Division Business Plan](#) (the "Plan") which provides a framework for operating and managing City-operated golf complexes. Since then, the Business Plan has served as the guiding document that Golf Division staff have used to improve customer service, effectively market City golf facilities, and place the Division on sound financial ground.

The Plan articulates the Golf Division's goals which include the following:

- Provide excellent playing opportunities to the public
- Ensure golf complexes are properly maintained
- Preserve the Golf Enterprise Fund's long-term financial sustainability

The Business Plan development process provides a mechanism for members of the Municipal Golf Committee to provide advisory input on a regular basis.

Once the Plan is updated and finalized, the Golf Division presents to the following entities: the Municipal Golf Committee, the City's Park and Recreation Board (via an annual update at a fall meeting), and the City Council's Environment Committee (via a triennial update).

DISCUSSION OF ITEM:

This report, in accordance with the adopted Business Plan, provides updates on the City's golf courses, industry and market news, customer satisfaction, golf rounds, the Division's financials, as well as the status of various Business Plan initiatives underway.

City Courses

*Balboa Park Golf Course:*

Operating since 1919, the 160-acre facility features a 6,281 yard, 18-hole championship course and a 2,175 yard, 9-hole executive course. The facility is the oldest municipal golf course in San Diego County and hosts the annual San Diego City Amateur Championship.

*Mission Bay Golf Course:*

Built in 1955 and turned over to the City in 2003, this 46-acre facility features a 2,706 yard, executive 18-hole course and practice facility with a driving range, putting green and short game area. The facility also offers an 18-hole Footgolf course and a Disc Golf course and is the only night-lit golf course in the county.

*Torrey Pines Golf Courses:*

Operating since 1957, this 220-acre facility features two internationally-renowned 18-hole championship courses that regularly rank as two of the best public courses in the country by *Golf Digest*. The facility currently hosts the Professional Golfers Association (PGA) Tour's annual Farmers Insurance Open event and has regularly hosted a PGA event since 1968. Torrey Pines South hosted the United States Golf Association's prestigious U.S. Open Golf Championship in 2008 and most recently in 2021.

Golf Industry

As reported in June 2021 by the National Golf Foundation (NGF), a leader in golf industry research and reporting, 2020 was a year of resurgence for the U.S. golf industry. Approximately 24 million people play at a golf course each year, a figure which continues to hold steady for its sixth consecutive year. Off-course participation in the game continues to grow by double-digits as a result of the increasing popularity in golf entertainment venues and other off-course outlets. With monthly rounds played surpassing historical averages, year-to-date, rounds of golf nationally are up over 22% from the previous year. Unlike the participation rate in most other sports, golf holds steady across all age demographics with most players playing well into their seventies, versus other sports that see a dramatic

decrease in participation at age 65.

The recent resurgence in golf can be directly correlated to the current COVID-19 global pandemic. In March 2020, more than half of all U.S. golf courses were temporarily closed due to the coronavirus, seasonality, or a combination of the two, leaving many businesses struggling to operate due to the high level of uncertainty. As information about the virus evolved, outdoor activities like golf were allowed to continue while most other hospitality and recreational venues remained closed for public safety reasons. As reported by NGF, more than 98% of facilities had reopened by June 2020.

As a result, with limited recreational options in which the public could socially distance and safely participate in, golf courses across the U.S. reported large increases in attendance and revenue. With the influx of new and existing customers, more than 75 million additional rounds of golf were played nationally than the same seven-month period in the second half of 2019. Today, the industry is continuing to see increases in rounds played, as well as in the retail sector.

### Regional Golf Market

The NGF reported that rounds in California have continued to see increases and if the current year-to-date performance remains consistent, then the State should close the year on a very positive note.

As with statewide trends, the Golf Division experienced a substantial increase in play in the past 18 months as evidenced by more than 10,000 new resident ID cards that have been issued over the past year. Rounds in the San Diego area continue to trend in a positive direction following these increases. Balboa Park and Mission Bay Golf Courses reported increases that exceeded national averages. Despite the dramatic increase in play, golf courses, like many local businesses, are experiencing extreme staff shortages and are struggling to balance operational needs with the reality of the current staffing crisis. Supervisors are working to fulfill these recruitment opportunities as expeditiously as possible, but these shortages may potentially impact the City's ability to provide quality customer service, optimal course conditions or both in the very near future.

### Customer Satisfaction

A new customer satisfaction survey was conducted by True North Research, Inc. in September 2020 (see Attachment #1). Invitations to the online survey were sent to all customers in the customer database maintained by the Golf Division. The survey

results and analyses 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, internal performance, budgeting, policy, and planning. The overall findings from the report are listed in the table below

	FY 2021	FY 2019	FY 2017
Balboa Park	95%	90%*	98%
Mission Bay	96%	93%*	91%
Torrey Pines North	98%	93%*	96%
Torrey Pines South	97%	93%*	98%

\*Storm damage, cart path restrictions, construction at Torrey Pines South and the timing of the report was conducted, affected survey results.

Table A – Customer Satisfaction Survey Comparison

Overall, customer satisfaction ranged between 95% and 98% for City-operated golf courses in Fiscal Year 2021. Customer rating choices for satisfaction were: Excellent, Good, Fair, Poor, Very Poor or Not Sure. Ratings of Excellent, Good or Fair were deemed satisfied customers. The next survey is scheduled to be completed in Fiscal Year 2023.

Golf Rounds

The 2012 Business Plan identified a target goal for the number of golf rounds to be played at each course, which was based on historical numbers. Play at each course has exceeded the number of targeted rounds which corresponds with golf industry trends.

	Target Rounds	Actual Rounds	Difference	% of Target Met
Balboa 9 - Hole	60,000	79,426	19,426	132%
Balboa 18 - Hole	70,000	83,015	13,015	119%
Mission Bay	75,000	102,025	27,025	136%
Torrey Pines North (1)	82,800	77,214	-5,586	93%

	Target Rounds	Actual Rounds	Difference	% of Target Met
Torrey Pines South	64,000	72,892	8,892	114%
Total	351,800	414,572	62,772	118%

(1) North Course closed May-June 2021 for U.S. Open Championship preparation

*Table B – Golf Division FY 2021 Annual Rounds*

These targets are based on an optimal number of rounds played while maintaining a quality golf experience. With an increased focus on quality course conditions, coupled with the surge in play at Balboa Park Golf Course and Mission Bay Golf Course, the Division has noticed a significant increase in activity at both facilities in Fiscal Year 2021.

As shown in Table C, rounds played at all City-operated courses increased from 305,524 in Fiscal Year 2020 to 414,572 in Fiscal Year 2021, an increase of 109,048 rounds or 36%. This increase can be attributed to the lack of recreational opportunities due to the COVID-19 pandemic. Surprisingly, the 36% increase was achieved despite the temporary closure of the South Course at Torrey Pines from June 7 to June 23, 2021 to host the U.S. Open and the closure of the North Course beginning April 28, 2021 to build infrastructure for the USGA event.

Management does not anticipate that the increased interest in golf will continue at its current pace, but the Division is focusing on strategies to retain customers and increase loyalty at City golf facilities by offering a quality product for the price.

	FY 2021	FY 2020	FY 2019
Balboa 9 - Hole	79,426	48,777	44,267
Balboa 18 - Hole	83,015	60,308	61,871
Mission Bay	102,025	60,918	66,404
Torrey Pines North (1)	77,214	75,080	84,876
Torrey Pines South	72,892	60,441	63,937
Total (2)	414,572	305,524	321,355
Percentage Change	35.69%		

(1) North Course closed May-June 2021 For U.S. Open Championship preparation  
 (2) FY 2020 golf courses closed March 21, 2020 to May 1, 2020 due to COVID-19 pandemic

*Table C – Annual Rounds Comparison*

Financial Position

The financial position of the Golf Enterprise Fund remains strong and is well positioned going into the next fiscal year. Based off revenue and expenses, the net income to the Golf Enterprise Fund for FY 2021 exceeded \$9.9 million.

Over the past three years, the Golf Division has averaged an annual net profit of \$6.8 million, which has been set aside for the funding of capital improvement projects at all three facilities. The \$9.9 million increase seen in FY 2021 is a result of the increase in fees at all three facilities and the increase in demand due to the COVID-19 global pandemic.

One area of concern is rising expenses. On an annual basis, the budget has been increasing at approximately 5%. When comparing Fiscal Year 2019 expenses to the Fiscal Year 2021 budget, expenses have increased approximately \$1.7 million over that time period. As supply chain issues plague the industry, the Division anticipates the need to increase the budget to maintain the current services levels in Fiscal Year 2022.

	Revenue	Expenses	Net Revenue
FY 2021	\$29,930,902	\$20,009,609	\$9,921,294
FY 2020 (1)	\$23,122,888	\$19,191,858	\$3,931,030
FY 2019	\$24,837,924	\$18,302,652	\$6,535,272

(1) Golf courses closed March 21, 2020 to May 1, 2020 due to COVID-19; The golf courses reopened with health and safety protocols in place due to COVID-19.

TABLE D – Golf Division Revenue vs. Expenses

Capital Improvements Program (CIP)

City golf courses continue to be assessed for improvements to help streamline operational expenses and improve the customer experience for all guests. Over the past three years, the Golf Division has invested over \$18.5 million in capital improvements on the golf courses which has directly impacted the quality of each of the facilities. The Golf Division will continue to invest in capital projects that focus on enhancing facility maintenance and upgrading infrastructure to improve golf course conditions. The following is an update of current key projects at City-operated golf courses:

- Mission Bay Golf Course – Golf Course Renovation & Reconstruction Improvements
  - This project went out to bid in May 2021, was awarded in August, and is set to commence in Fall 2021. This project will consist of a new state-

of-the-art irrigation system which will improve course conditions and provide a more efficient use of water at the course. This project also includes infrastructure improvements for the electrical system, demolition of the existing 60-year-old club house/restaurant, installation of modular buildings with restrooms, a café and clubhouse. These improvements will enhance the customer experience and provide a pleasant atmosphere that encourages customers to stay on property longer.

- Torrey Pines Clubhouse – Maintenance Building
  - The Division will begin the design phase by hiring an architect to develop plans for a new clubhouse and maintenance facility at Torrey Pines Golf Course. The project will consist of demolishing the current clubhouse and maintenance building, relocating the putting greens and creating a new clubhouse and maintenance facility. The new clubhouse will include the golf shop (currently operated by a lessee), a cart barn and office space for Golf Division management and administrative staff which are currently located in a temporary facility at Mission Bay Golf Course.
- Torrey Pines North Course – Repair Storm Drain Outfall
  - A draft Biological Technical Report and the Geotechnical Report are currently under review. The scope of work will consist of expanding the current storm drain to reduce the erosion of the cliff between 12 green and 13 tee boxes on the North Course. This work is scheduled to commence in March 2022.

#### Fee Increases

To maintain appropriate funding and reserves, and in accordance with the standards set forth in the 2012 Golf Division Business Plan, the Golf Division will be implementing fee increases for all City Operated Golf Courses on January 1, 2022 as detailed in Exhibit A. The increase will be capped at 3% (\$1-\$2) for residents and 5% (\$4 - \$13) for non-residents depending on the day of week. These increases are based on the improvements to the overall golf experience, as well as year over year expense increases.

#### Marketing and Business Development

The Division continued its successful strategy of utilizing internal marketing platforms, as well as traditional broadcast and social media to effectively promote each facility and provide customers with the latest information about general course and maintenance updates, new initiatives and upcoming events, among others.

The Division remained focused on improving customer service and engagement via its in-house marketing platforms including the “On the Tee” monthly e-newsletter, website, seven social media accounts, the [sdcitygolf@sandiego.gov](mailto:sdcitygolf@sandiego.gov) email for general inquiries, a mobile app, and the Division’s online reservation messaging system. Below is a synopsis of marketing initiatives implemented:

- **E-newsletter.** Debuting its inaugural 2015 edition, the monthly “On the Tee” e-newsletter, which informs the public about upcoming news and events, maintenance schedules, and programs offered by the Golf Division, remains the primary form of communication to both resident and non-resident golfers. To maximize the number of potential recipients, the Division switched from a previous e-newsletter provider to its online reservation provider’s email module in January 2019. The Division created targeted mailing lists specifically for residents and non-residents and streamlined mailing list accuracy. As a result, the Division was able to more than triple its total of email recipients with more than 60,000 people receiving the monthly e-newsletter. More encouraging, while the number of recipients increased substantially, the average open rate for Division communications remained over 30% on average.
- **Website.** The [sandiego.gov/golf](http://sandiego.gov/golf) website continues to be the primary destination for residents and non-residents to find information about each course, pricing, maintenance schedules, and the primary access to the ForeUp online reservation system to book available tee times. After a review of the page analytics and public input, the [sandiego.gov/torrey-pines](http://sandiego.gov/torrey-pines) page underwent an extensive redesign in 2021 resulting in a more streamlined, convenient, and more visually engaging user experience. The Division is also considering redesigns of both the Mission Bay and Balboa Park web pages and will work with the City’s IT Web Team as needed.
- **Social Media.** Launched in early 2016, the Division continues to maintain seven social media accounts for all three City-operated golf courses and has a combined total of more than 25,000 followers. Each course currently handles its own content for Facebook and Twitter while Torrey Pines also maintains an Instagram account. Each account is designed to promote and market the courses both at the local and national level, while building brand loyalty and engagement. After reviewing each account’s content and engagement, it was



determined that both Mission Bay and Balboa Park courses would suspend their Twitter accounts and replace them with Instagram accounts. This transfer is scheduled to occur once the City releases its official administrative regulations related to social media. The Division enjoyed a significant uptick in interest in the facility's social media accounts when the 2021 U.S. Open was held at Torrey Pines and experienced increased traffic and engagement. The Torrey Pines Instagram account is the most popular of the City's social media accounts. Recently it surpassed over 15,000 followers and was designated as an official account. The Division will continue to work toward increasing the frequency of content for all three facilities so it can capitalize on the increased interest in golf and build engagement and loyalty year-round.

- **Dedicated Email Account.** A [SDCityGolf@sandiego.gov](mailto:SDCityGolf@sandiego.gov) general email account was created to provide golfers another outlet to ask any questions they have about City golf facilities. The account receives thousands of emails each year and provides another outlet for the public to reach Division staff when phone lines are full. This account was instrumental in assisting customers with the hundreds of refund requests that needed to be processed during the initial stages of the COVID-19 pandemic and continues to add value to public.
- **Mobile Application.** A new mobile app "San Diego City Golf" has provided golfers real time access to online reservations, resident card purchases and renewals, digital scorecard features complete with GPS function. To date, the app has received more than 38,000 downloads with more than 23,000 active users. The Division has been able to use the app to send push notifications to the public if there are unforeseen openings in the tee sheet to ensure openings are filled quickly. The Division continues to explore the possibility of incorporating additional features into the app for increased convenience including a food and beverage purchase options and green fee payment options and a digital resident card.
- **Undertow Classic.** In 2019, the Golf Division worked in partnership with the San Diego Parks Foundation nonprofit to create the Undertow Classic: a charity golf tournament held at Torrey Pines with the proceeds benefitting Parks and Recreation general fund programming. Now in its third successful year, the event has sold out each year (even in the midst of the COVID-19 pandemic) and has raised \$75,000 to help provide children in communities of concern with access to parks programming they may not otherwise be able to afford.
- **Media Outreach.** The Golf Division continues to secure several significant local, national and international media placements as the result of a successful U.S. Open and the annual Farmers Insurance Open. The Division helped staff and

assisted local and national outlets in providing access to the course to secure aerial coverage of Torrey Pines North and South courses, as well as interviews with Division staff. Some examples include:

- Worked with Barstool Sports to create a 45-minute “Behind the Greens – U.S. Open” video spotlighting the intense amount of preparation needed to host a major championship. The video features interviews with Division staff and covers the creation of the driving range on the North Course and the work done to get the South Course in optimal condition for the U.S. Open.  
<https://www.youtube.com/watch?v=P77o7nb6Y98>
- Worked with ESPN to create an hour long “America’s Caddie” featuring television personality Michael Collins as he toured the course prior to the U.S. Open and highlighted iconic moments from the last time Torrey Pines hosted in tournament in 2008.  
[https://www.espn.com/golf/insider/story/\\_/id/31677155/america-caddie-grades-us-open](https://www.espn.com/golf/insider/story/_/id/31677155/america-caddie-grades-us-open)
- Facilitated several U.S. Open related interviews and photo shoots for magazines and podcasts including:
  - Golf Digest
  - Golf Magazine
  - PGA Tour Radio Show
  - Fried Egg Podcast
  - Bunkered
  - Sirius XM Radio

A front-page story in the San Diego Union-Tribune Sports section celebrating the centennial anniversary of the opening of Balboa Park Golf Course- the oldest municipal golf course in San Diego County.  
<https://www.sandiegouniontribune.com/sports/golf/story/2019-04-04/san-diego-golf-balboa-park-100-anniversary>

### Youth Golf

Research shows that exposing kids to golf at an early age in schools or through structured programs positively influences their receptiveness and interest in the game. These methods of introduction are found to be equally as effective as introducing children to golf at an actual golf facility. The City has several low-cost initiatives designed to encourage youth participation and interest in the game to

help create future generations of golfers in San Diego. Some of these initiatives include the following:

- **Junior Monthly Ticket Program.** Junior residents, with a valid resident ID card, can purchase a ticket for \$10.50 and play free of charge during certain times of the day at each of the Golf Division courses on a standby basis.
- **Player Development Academy.** The City contracted with Game of Life First Inc./Lions Golf Academy to hold a full-time player development academy that focuses on families with an emphasis on juniors. Classes are offered year-round at Balboa Park and Mission Bay Golf Course and are conducted by certified PGA Professionals with some of the lowest class student/instructor ratios in the country. As an additional consideration to the City, Lions Golf Academy will actively participate in the development and growth of the Golf Division's growth-of-the-game initiatives such as PLAY Golf, Women's Golf Day, and additional programs by providing the City with at least 200 hours per calendar year of staff time towards these efforts.

As part of the Torrey Pines Club Corporation agreement with the City, they will also be providing 200 hours of per calendar year of staff time for the development and growth of the Golf Division's growth-of-the-game initiative PLAY Golf.

- **IMG Junior World Golf Championships.** The Golf Division has hosted this prestigious youth golf event at its facilities over the past 54 years. The championship is the largest international event in the world and is unique for its representation and cultural diversity. This year, the tournament boasted approximately 1,250 participants in ages ranging from under 6 to 18 representing 56 countries and 42 states. Many of the former champions (including Tiger Woods, Craig Stadler, Phil Mickelson, Ernie Els, Amy Alcott, Jason Day and others) have gone on to successful careers on the PGA and LPGA Tour.
- **PGA Junior Golf League.** All three Golf Division courses have supported this national PGA Program by fielding teams and holding matches in a Citywide league. Leagues have currently been postponed due to COVID-19 and are anticipated to resume pending participation and operational needs.
- **High School Play.** The Golf Division allows access for local high schools to play each of the three facilities and hosts an average of 16 different high schools for both the boys' and girls' seasons.

- **Collegiate Golf.** The Golf Division continues to support local college teams by making Balboa Park Golf Course and Mission Bay Golf Course available for their team matches and practice needs. In addition to demonstrating the City's willingness to be positive civic partners, offering City facilities to local colleges increases exposure of these lesser known facilities to a younger demographic while encouraging increased play.
- **Local/Regional Outreach.** The Division continues to collaborate with local golf organizations including San Diego Junior Golf Association and Southern California Golf Association to expand outreach to younger audiences to generate interest in golf.

### Farmers Insurance Open

For nearly 60 years, the PGA Tour has held an annual golf tournament in San Diego. Though it has been played at many different golf courses throughout the years, in 1968, the San Diego Open made its home at Torrey Pines Golf Course. The Century Club, a local nonprofit organization founded in 1961, partnered with the City of San Diego to host the tournament. Over the years, they have used the game of golf as the platform to showcase San Diego to an international audience, generate revenue for the City, and make a difference in our community by creating programs that benefit at-risk and underserved youth charities, first responders, and military members.

The tournament is currently the largest annual sporting event held in San Diego. It helps bolster the City's hotel and tourism industry by bringing in crowds that average over 100,000 attendees over the course of the four-day event. The Farmers Insurance Open kicks off the PGA TOUR's national broadcast schedule with a telecast on CBS and Golf Channel. The broadcast averages 60+ hours of coverage with more than 20 million viewers tuning in each year. As San Diego's only annual event with a national and international broadcast, the Farmers Insurance Open serves as a valuable marketing asset for the local economy. Each year, the tournament infuses revenue into the local economy by (typically) hiring more than 200 vendors, recruiting more than 1,100 volunteers, and attracting fans from all 50 states and 17 countries, thereby generating \$34.3 million to the economy of the City of San Diego.

The 2022 tournament will mark the 55th time the event is being held at Torrey Pines Golf Course and the 13th year of Farmers Insurance sponsorship of the tournament. With defending champion Patrick Reed, the Farmers Insurance Open consistently attracts a world-class field. Other past champions include Justin Rose, Phil Mickelson (three-time winner), Jason Day, Jon Rahm, and seven-time champion Tiger Woods.

### 2021 U.S. Open Championship

The U.S. Open Championship is one of golf's four major events of the year. In June 2021, Torrey Pines South, hosted another successful event that with a memorable finish when Jon Rahm sank a putt on the 18th green to take the lead and ultimately win his first U.S. Open title. The event, played at 7,698 yards, marked the second longest layout in U.S. Open history.

Praise from players and organizers alike were given for the exceptional playing conditions provided by City staff and volunteers from around the country. Due to various challenges related to the pandemic, the event was limited to an average attendance of 11,000 people per day. Even with the reduced attendance, the City of San Diego received major national and international attention. The approximately 150 hours of television coverage that were broadcasted to over 175 countries and territories helped increase interest from golfers around the world who wanted to come and play the South Course. It was estimated that the telecast reached over 25.6 million viewers in the U.S. alone. It is anticipated many of them will ultimately visit the greater San Diego region providing further economic impact.

The Division will continue to partner with the United States Golf Association (USGA) in the hopes of host another U.S. Open in the near future.

### Significant Accomplishments (FY2019 to FY2021)

The following have been accomplished in accordance with the Business Plan since the 2018 plan update:

- Balboa Park Golf Course
  - The entire parking lot was regraded, resurfaced, and striped, resulting in improved traffic flow and wider parking spaces. New surfaces and accessibility improvements were made around the clubhouse, addressing safety hazards for staff and guests alike.
  - A wash rack was installed to help staff maintain and protect equipment.
  - A Request for Proposal was done to procure a new state-of-the-art, lithium-powered golf cart fleet. Club Car delivered the 84-cart fleet in May 2021 to replace the aged, lead acid battery, club car fleet. The new fleet will require less time to charge, less maintenance and provide longer use

- A new contract for junior and adult golf instruction with Lion Golf Academy has been developed and implemented.  
  
A new driving range ball machine and software was procured to improve customer service by providing contactless dispensing and purchasing range balls without the need to wait in line. This also created improved controls and increased loss prevention efficiencies.
- Workspaces were modified to adhere to new safety protocols due to COVID-19 which allowed for appropriate social distancing.
- Credit card terminals were updated to allow for contactless processing.
- Mission Bay Golf Course
  - Disc golf was incorporated into the Golf Division App, allowed for a “first of its kind” digital GPS Scorecard and created a new avenue to connect with new customers.
  - An outside lighting vendor has been retained to use on an as-needed basis, allowing the Division to make repairs much sooner when an unexpected outage occurs.
  - A Request for Proposal (RFP) was completed to procure a new state-of-the-art, lithium-powered golf cart fleet. Club Car delivered the 35-cart fleet in May 2021 Replacing the aged Yamaha lead acid battery, cart fleet. The new fleet will require less time to charge, less maintenance and provide longer use.
  - A new contract with Lion Golf Academy for junior and adult golf instruction was secured.
  - A new driving range ball machine and software has been purchased in order to improve customer service by providing contactless dispensing and purchasing range balls without waiting in line. This also created improved controls and increased loss prevention efficiencies.
  - In August 2021, the driving range at Mission Bay was enhanced by extending the perimeter fence and grading the range to allow for new netting to be installed. This presents a much more pleasant view from

the hitting line and provides a clearer view for golfers looking to study their golf shots.

- Credit card terminals were updated to allow for contactless processing.
  
- Torrey Pines Golf Course
  - In January 2019, the Golf Division hosted the inaugural Undertow Classic golf tournament. The Golf Division partnered with the newly-formed San Diego Parks and Recreation Foundation, a non-profit organization, to host a charity event at Torrey Pines North with all proceeds benefitting future Parks and Recreation Department initiatives.
  
  - In Fiscal Year 2019, the Division implemented an Online Advance Reservation Portal allowing resident and non-resident golfers the option of securing tee times up to 90 days in advance and allowing for payment of booking fees online via a secure payment gateway. Customers may take advantage of this tool and book 24 hours a day, 7 days a week from anywhere in the world. In FY2021, booking fees accounted for over \$2.6 million in revenue, which was a 37% year over year. (<https://www.sandiego.gov/park-and-recreation/golf>)
  
  - In June 2019, the Division introduced a mobile app “San Diego City Golf” for the three City-operated courses to continue to improve the customer experience. The app offers users the opportunity to make advance reservations, renew resident ID cards, provide GPS functionality at all three facilities, request a golf tournament and provide push notifications to customers with the latest updates and maintenance news from each course. After its initial launch, the app had approximately 7,000 downloads. Currently, the app has been downloaded more than 38,000 times with an active user base of over 23,000.
  
  - To streamline the residency verification process, the Division partnered with ID.me to allow residents to enter their resident information online and receive verification 24 hours a day from their own home. This tool was invaluable to residents and staff members during the COVID-19 pandemic and accounted for nearly 30,000 confirmed residency verifications without having to visit a City facility in person. It also

helped to reduce potential mistakes and fraud by using a third-party verification system to assess a person's residency.

- The \$17 million South Course infrastructure project that focused on the installation of a state-of-the-art irrigation system and incorporated several strategic changes by famed golf course architect, Rees Jones, was completed. The project relined and refreshed bunkers, improved drainage throughout the property, created new tee boxes while realigning existing ones and restored the greens edges to their original design.
- Golf operations moved into the golf shop to improve the customer experience when checking in for tee times.
- Torrey Pines South Course successfully hosted its second U.S. Open tournament. Players and officials alike were extremely impressed with the course conditions and event management in the midst of the COVID-19 pandemic.

### Future Outlook

Over the next year, efforts to enhance overall customer service and improve the guest experience will be made to retain our current patrons, as well as increase the number of new golfers at each of the City's three golf facilities.

With the substantial increase in play seen in Fiscal Year 2021, management does not anticipate that interest in golf will be sustainable at these current levels. As more recreational options become available, we anticipate a reduction in play. Over the next twelve-month period, the Division will monitor play, continue to improve customer service, and adjust to market trends as necessary.

Future priorities include the following:

- Continue to maintain the Golf Enterprise Fund's strong financial position after hosting the 2021 U.S. Open. The Golf Division will continue to responsibly manage the resources to ensure no General Fund obligations will be necessary to operate municipal golf facilities. The City of San Diego has submitted a formal invitation to the USGA in hopes to secure an opportunity to host a future U.S. Open event.
- Improve and invest in upgrading facility infrastructure to ensure staff has the tools necessary to provide exceptional customer service and quality golf course conditions at an affordable price.



- Continue to invest in our employees. The Golf Division created a new rewards and recognition program known as the “Ace Awards.” This program allows employees to nominate their colleagues and peers to recognize exemplary work.
- Improve communication with staff by continuing to create, develop and distribute an internal newsletter (“Bunker Bulletin”) to recognize staff accomplishments and establish camaraderie between the Operations and Maintenance divisions at each course. This newsletter will provide Golf Division employees with important updates, interesting stories, acknowledgements, contest opportunities, and rewards.
- Continue completing planned capital improvement projects at all golf course facilities.
- Issue a new long-term contract for a new food and beverage operation at both the Balboa Park Golf Course and Mission Bay Golf Course, resulting in improvements in the restaurant and club house areas of both courses.
- Research potential opportunities for salary adjustments to help with the current employee recruitment and retention challenges.
- Increase the number of social media followers and/or re-position its accounts for more engagement and effectiveness in the future.

Conclusion:

The framework and flexibility of the Plan has been effective in allowing the Division to adapt to market changes in a much more efficient manner. Participation from the various user groups continues to strengthen as market corrections in the supply of regional golf courses find the right balance. Long-range annual golf rounds projections over the next five years remain at 351,800 rounds across the Division which reflects the stability created from the Plan.

Most telling, all three courses continue to enjoy high overall customer satisfaction. The most recent 2020 customer satisfaction survey continues to show that the overall experience at all three courses is very good and most customers are generally pleased. This is evident in the high amount of play, the increased demand the courses receive and the revenue they continue to generate despite increased maintenance costs.

courses receive and the revenue they continue to generate despite increased maintenance costs.

The Golf Division continues to seek opportunities to make capital investments to improve course conditions and efficiencies, as well upgrade course facilities to enhance the customer experience. When each of the components comes together, it allows us to reach our potential to be able to service clients like the PGA TOUR and the USGA, which keeps Torrey Pines Golf Course, and ultimately the City of San Diego, on the map as a tourist and golfing destination.

The Division will continue to implement Business Plan recommendations in its continuing effort to provide a world-class golf experience that caters to golfers of all ages and skill levels.

Respectfully submitted,

  
\_\_\_\_\_  
Scott Bentley  
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Attachments:      1. Customer Satisfaction Survey 2020  
                          2. Fee Increases

CUSTOMER SATISFACTION SURVEY  
SUMMARY REPORT

PREPARED FOR THE  
CITY OF SAN DIEGO  
GOLF OPERATIONS DIVISION



SEPTEMBER 28, 2020



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# TABLE OF CONTENTS

<b>Table of Contents</b> .....	<b>i</b>
<b>List of Tables</b> .....	<b>iii</b>
<b>List of Figures</b> .....	<b>iv</b>
<b>Introduction</b> .....	<b>1</b>
Purpose of Study.....	1
Statistical Significance.....	1
Overview of Methodology.....	2
Organization of Report.....	2
Acknowledgements.....	2
Disclaimer.....	2
About True North.....	2
<b>Just the Facts</b> .....	<b>3</b>
Residency of Customers.....	3
Frequency & Courses Played.....	3
Rating Overall San Diego Golf Experiences.....	4
Torrey Pines - South Course.....	4
Torrey Pines - North Course.....	4
Balboa Park Golf Course.....	4
Mission Bay Golf Course.....	4
Rating Aspects of Golf Experience.....	5
Torrey Pines - South Course.....	5
Torrey Pines - North Course.....	5
Balboa Park Golf Course.....	5
Mission Bay Golf Course.....	5
Future Expectations & Recommendations.....	6
<b>Conclusions</b> .....	<b>7</b>
Torrey Pines Golf Course.....	9
Balboa Park Golf Course.....	9
Mission Bay Golf Course.....	10
<b>Residency of Customers</b> .....	<b>12</b>
Question 1.....	12
Question 2.....	12
<b>Frequency &amp; Courses Played</b> .....	<b>13</b>
Frequency of Overall Play.....	13
Question 3.....	13
Courses Played Most Frequently.....	14
Question 4.....	15
Reason For Playing Course Most Often.....	16
Question 5.....	16
Frequency of Play at San Diego Courses.....	17
Question 6.....	18
Question 7.....	18
<b>Rating Overall San Diego Golf Experiences</b> .....	<b>22</b>
Overall Performance Ratings.....	22
Question 8.....	22
Suggested Improvements.....	25
Question 9/10/11/12.....	26
<b>Rating Aspects of Experience</b> .....	<b>29</b>
Rating Aspects of Torrey Pines.....	29
Question 13.....	29
Torrey Pines Aspect Ratings by Subgroup.....	32
Rating Aspects of Balboa Park.....	34

Balboa Park Aspect Ratings by Subgroup . . . . . 35

Rating Aspects of Mission Bay . . . . . 36

Mission Bay Aspect Ratings by Subgroup . . . . . 38

Comparison of San Diego Golf Course Ratings . . . . . 38

**Future Expectations & Recommendations. . . . . 40**

    Frequency of Future Play in General . . . . . 40

        Question 14 . . . . . 40

    Frequency of Future Play at San Diego Courses. . . . . 41

        Question 15 . . . . . 42

    Reduced Future Play at San Diego Courses . . . . . 45

        Question 16/17/18 . . . . . 46

    Likelihood of Recommending San Diego Golf Courses . . . . . 47

        Question 19 . . . . . 48

**Background & Demographics . . . . . 50**

**Methodology . . . . . 51**

    One-On-One Interviews . . . . . 51

    Questionnaire Development . . . . . 51

    Programming & Pre-Test. . . . . 51

    Sample. . . . . 51

    Recruitment and Data Collection . . . . . 52

    Statistical Margin of Error . . . . . 52

    Data Processing . . . . . 53

    Rounding . . . . . 53

**Questionnaire & Toplines. . . . . 54**



# LIST OF TABLES

Table 1	Demographic Breakdown of Torrey Pines, Balboa Park & Mission Bay Customers .....	21
Table 2	Rating Aspects of Torrey Pines South by Study Year .....	31
Table 3	Rating Aspects of Torrey Pines North by Study Year .....	31
Table 4	Rating Aspects of Torrey Pines by Overall Rating of Torrey Pines South (Showing % Excellent + Good) .....	32
Table 5	Rating Aspects of Torrey Pines by Overall Rating of Torrey Pines North (Showing % Excellent + Good) .....	33
Table 6	Rating Aspects of Torrey Pines South by Resident Vs Non-Resident (Showing % Excellent + Good) .....	33
Table 7	Rating Aspects of Torrey Pines North by Resident Vs Non-Resident (Showing % Excellent + Good) .....	34
Table 8	Rating Aspects of Balboa Park by Study Year .....	35
Table 9	Rating Aspects of Balboa Park by Overall Rating of Balboa Park (Showing % Excellent + Good) .....	36
Table 10	Rating Aspects of Mission Bay by Study Year .....	37
Table 11	Rating Aspects of Mission Bay by Overall Rating of Mission Bay (Showing % Excellent + Good) .....	38
Table 12	Comparison of City of San Diego Golf Course Ratings (Showing % Excellent + Good) .....	39
Table 13	Demographics of Sample .....	50



# LIST OF FIGURES

Figure 1	Area of Current Residence by Study Year . . . . .	12
Figure 2	Total Rounds of Golf Played in Past 12 Months by Study Year . . . . .	13
Figure 3	Average Number of Rounds Played in Past 12 Months by Area of Current Residence & Household Income . . . . .	14
Figure 4	Average Number of Rounds Played in Past 12 Months by Gender, Golf Club Member & Age . . . . .	14
Figure 5	Course Played Most Often . . . . .	15
Figure 6	Course Played Most Often by City of Residence in San Diego County . . . . .	15
Figure 7	Reason for Playing Course Most Often by Study Year . . . . .	16
Figure 8	Reason for Playing City of San Diego Course Most Often . . . . .	17
Figure 9	Frequency of Playing City of San Diego Courses in Past 12 Months . . . . .	18
Figure 10	Frequency of Playing City of San Diego Courses in Past 12 Months by Study Year . . . . .	18
Figure 11	Played City of San Diego Courses in Past 12 Months by Area of Current Residence & Household Income . . . . .	19
Figure 12	Played City of San Diego Courses in Past 12 Months by Gender & Number of Rounds in Past 12 Months . . . . .	19
Figure 13	Played City of San Diego Courses in Past 12 Months by Home Ownership Status & Age . . . . .	19
Figure 14	San Diego Course Played Most Often by Area of Current Residence & Household Income . . . . .	20
Figure 15	San Diego Course Played Most Often by Gender & Number of Rounds in Past 12 Months . . . . .	20
Figure 16	San Diego Course Played Most Often by Home Ownership Status & Age . . . . .	21
Figure 17	Rating City of San Diego Golf Courses . . . . .	22
Figure 18	Rating City of San Diego Golf Courses by Study Year . . . . .	23
Figure 19	Rating Torrey Pines South by Number of All Rounds in Past 12 Months & Torrey Pines South Rounds in Past 12 Months . . . . .	23
Figure 20	Rating Torrey Pines North by Number of All Rounds in Past 12 Months & Torrey Pines North Rounds in Past 12 Months . . . . .	24
Figure 21	Rating Balboa Park by Number of All Rounds in Past 12 Months & Balboa Park Rounds in Past 12 Months . . . . .	24
Figure 22	Rating Mission Bay by Number of All Rounds in Past 12 Months & Mission Bay Rounds in Past 12 Months . . . . .	25
Figure 23	Desired Changes to Torrey Pines South . . . . .	26
Figure 24	Desired Changes to Torrey Pines North . . . . .	26
Figure 25	Desired Changes to Balboa Park . . . . .	27
Figure 26	Desired Changes to Mission Bay . . . . .	27
Figure 27	Desired Changes to Torrey Pines South by Resident Vs. Non-Resident . . . . .	28
Figure 28	Desired Changes to Torrey Pines North by Resident Vs. Non-Resident . . . . .	28
Figure 29	Rating Aspects of Torrey Pines South . . . . .	29
Figure 30	Rating Aspects of Torrey Pines North . . . . .	30
Figure 31	Rating Aspects of Balboa Park . . . . .	35
Figure 32	Rating Aspects of Mission Bay . . . . .	37
Figure 33	Frequency of Golf Play Over Next 12 Months by Study Year . . . . .	40
Figure 34	Frequency of Golf Play Over Next 12 Months by Area of Current Residence, Household Income & Gender . . . . .	41
Figure 35	Frequency of Golf Play Over Next 12 Months by Number of All Rounds in Past 12 Months & Age . . . . .	41
Figure 36	Frequency of Play Expected Over Next 12 Months . . . . .	42
Figure 37	Frequency of Play Expected Over Next 12 Months by Study Year . . . . .	42



Figure 38	Frequency of Play Expected Over Next 12 Months by Area of Residence & Household Income . . . . .	43
Figure 39	Frequency of Play Expected Over Next 12 Months by Gender & Number of All Rounds in Past 12 Months. . . . .	43
Figure 40	Frequency of Play Expected Over Next 12 Months by Home Ownership Status & Age . . . . .	43
Figure 41	Plan to Play Torrey Pines More Often by Torrey Pines South Rounds in Past 12 Months & Rating of Torrey Pines South . . . . .	44
Figure 42	Plan to Play Torrey Pines More Often by Torrey Pines North Rounds in Past 12 Months & Rating of Torrey Pines North . . . . .	44
Figure 43	Plan to Play Balboa Park More Often by Balboa Park Rounds in Past 12 Months & Rating of Balboa Park. . . . .	45
Figure 44	Plan to Play Mission Bay More Often by Mission Bay Rounds in Past 12 Months & Rating of Mission Bay. . . . .	45
Figure 45	Plan to Play Golf More Often or About the Same But Anticipate Playing San Diego Courses Less Often in Next 12 Months by Study Year . . . . .	46
Figure 46	Reasons for Planning to Play Torrey Pines Less Often . . . . .	46
Figure 47	Reasons for Planning to Play Balboa Park Less Often . . . . .	47
Figure 48	Reasons for Planning to Play Mission Bay Less Often . . . . .	47
Figure 49	Likelihood of Recommending Courses . . . . .	48
Figure 50	Likelihood of Recommending Courses by Study Year. . . . .	48
Figure 51	Likelihood of Recommending Courses by Area of Residence & Household Income . . . . .	49
Figure 52	Likelihood of Recommending Courses by Gender & Number of All Rounds in Past 12 Months. . . . .	49
Figure 53	Likelihood of Recommending Courses by Home Ownership Status & Age . . . . .	49
Figure 54	Maximum Margin of Error Due to Sampling. . . . .	52

## 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*. That is, most informal customer feedback mechanisms rely on the customer to initiate the feedback—which creates a self-selection bias—and thus the City receives feedback from customers motivated enough to initiate the process. Because these customers tend to be *very* pleased or *very* displeased with a particular aspect of service or their golfing experience, their collective opinions are not necessarily representative of the City's golf customers as a whole.

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

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

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

**STATISTICAL SIGNIFICANCE** Many figures and tables in this report present the results of questions asked in 2020 alongside results found in the 2019 survey for identical questions. In such cases, True North conducted the appropriate tests of statistical significance to identify changes that likely reflect actual changes in customer opinion during this period. Differences between the two studies are identified as *statistically significant* if one can be 95% confident that the differences reflect an actual change in customer opinion between the two studies. Statisti-

cally significant differences within response categories over time are denoted by the † symbol, which appears in the figure next to the appropriate response value for 2020.

**OVERVIEW OF METHODOLOGY** A full description of the methodology employed is provided later in this report (see *Methodology* on page 51). In brief, a total of 1,207 randomly selected customers who played at least one round of golf at Torrey Pines, Balboa Park, or Mission Bay between August 2019 and July 2020 participated in the study between September 1 and September 16, 2020. Respondents were recruited to participate in the survey using a combination of email invitations and phone calls, and completed the survey either online at a secure, password protected website or with an interviewer by phone. The maximum margin of error for this study is  $\pm 2.79\%$  at the 95% level of confidence for questions answered by all 1,207 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 the staff at the City of San Diego who contributed valuable input during the design stage of this study. Their collective experience, local knowledge, and insight improved the overall quality of the research presented here.

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

**ABOUT TRUE NORTH** Founded in 2002, True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,000 survey research studies for public agencies, including more than 400 studies for California municipalities, and several for the City of San Diego.

## J U S T   T H E   F A C T S

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

- Three quarters (75%) of customers' primary residences among those surveyed were located in the City of San Diego, 8% were located in San Diego County but outside the City of San Diego, 3% were in California but outside San Diego County, 12% were located elsewhere in the United States, and about 2% were outside the United States.

### FREQUENCY & COURSES PLAYED

- Twenty-six percent (26%) of golf customers surveyed said they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds. Another 24% played between 37 and 52 rounds, 15% had played between 25 and 36 rounds, 16% had played 13 to 24 rounds, 13% had played between 6 and 12 rounds, and 4% had played fewer than 6 rounds in the past year.
- Overall, San Diego golf customers played an average of 41.9 rounds of golf in the 12 months preceding the interview.
- When asked to indicate the course they played most often, 24% of customers surveyed played Torrey Pines most often, followed by Balboa Park and Mission Bay at 12% each. The Admiral Baker Golf Course (3%) and the Bonita Golf Club (2%) were the next most commonly played courses.
- Location (29%) and affordability (26%) were the most common reasons mentioned for playing a particular course most often, followed by course quality (20%), tee-time availability (9%) and being a member of the course (8%).
- Torrey Pines was played most often because of the course quality (41%), followed by affordability and location (each 27%).
- Balboa Park was played most often because of affordability (47%) and then location (32%).
- For those who played Mission Bay most often, location was the main factor in that decision, mentioned by 40% of respondents, followed by affordability (30%).
- Among the three City of San Diego golf courses, Torrey Pines was the most frequently played course, with 65% of customers playing at least one round on the south course and 67% playing at least one round on the north course. Sixty-four percent (64%) of golf customers also reported playing Balboa Park at least once during the 12 months preceding the interview, whereas the corresponding figure for Mission Bay was 38%.
- In terms of average number of rounds played per customer who had played each course in the past 12 months, Balboa Park had the highest average (5.9), followed by Torrey Pines north course (5.6), Mission Bay (4.6), and Torrey Pines south course (3.9).

## RATING OVERALL SAN DIEGO GOLF EXPERIENCES

### Torrey Pines - South Course

- Eight-seven percent (87%) of customers who had played at least one round at Torrey Pines south course in the past 12 months rated their most recent experience as excellent (51%) or good (36%).
- Thirty-nine percent (39%) of Torrey Pines south course customers desired no changes or could not think of anything specific to improve their golf experience.
- Top specific mentions for improving Torrey Pines south course were enforcing the speed of play (12%), better maintenance of roughs (10%), and increasing availability of tee times (7%).

### Torrey Pines - North Course

- Nine-in-ten (90% of) customers who had played at least one round at Torrey Pines north course in the past 12 months rated their most recent experience as excellent (49%) or good (41%).
- Forty-one percent (41%) of Torrey Pines north course customers desired no changes or could not think of anything specific to improve their golf experience.
- Top-mentioned improvements for Torrey Pines north course were enforcing the speed of play (15%), increasing availability of tee times (8%), improving green conditions (6%), better maintenance of roughs (5%), and reversing the order of the nines (5%).

### Balboa Park Golf Course

- Approximately eight-in-ten (77% of) customers rated their most recent experience at Balboa Park Golf Course as excellent (20%) or good (57%).
- Forty-two percent (42%) of Balboa Park customers desired no changes or could not think of anything specific to improve their golf experience at that course.
- Specific mentions for improvement of the Balboa Park Golf Course included enforcing speed of play (12%), improving overall course quality (10%), improving fairways (6%), improving the green conditions (5%), and repairing or redesigning Hole 4 (5%).

### Mission Bay Golf Course

- Among those who had played at Mission Bay in the past year, just over seven-in-ten (72% of) customers rated their most recent experience as excellent (21%) or good (50%).
- Forty-two percent (42%) of Mission Bay customers desired no changes or could not think of anything specific to improve their golf experience.
- Mission Bay Golf Course customers most desired improving the overall course quality (7%), maintaining tee boxes (6%), improving facility maintenance (6%), improving green conditions (6%), enforcing speed of play (5%), and adding/improving lighting for extended hours (5%).

## RATING ASPECTS OF GOLF EXPERIENCE

### Torrey Pines - South Course

- Customers who played the south course most often gave the highest ratings for the layout of the course (96% excellent or good), quality of the pro shop (90%), condition of greens (86%), condition of fairways (86%), and directional signage (84%).
- Considering the intensity of the positive rating, the courtesy of golf course starters, Marshals and maintenance staff also received high marks (50% excellent) from south course customers.
- At the other end of the spectrum, Torrey Pines south course customers were less pleased with the availability of tee times for reservations by phone (36%) or for walk-up reservations (37%), the availability and condition of driving range facilities (46%), enforcement of golf course rules and regulations (58%), and pace of play (58%).

### Torrey Pines - North Course

- Customers who had played the north course most often gave the most positive ratings for the layout of the course (95% excellent or good), condition of cart paths (94%), condition of fairways (93%), overall condition of the course (92%), and quality of the pro shop (90%).
- Considering the intensity of the positive rating, the value of the course for the fee was also viewed quite positively (54% excellent) by many north course customers.
- At the other end of the spectrum, customers who had played the north course most often assigned lower ratings to the availability of tee times for reservations by phone (19%) or for walk-up reservations (31%), the pace of play (46%), availability and condition of driving range facilities (48%), and enforcement of golf course rules and regulations (57%).

### Balboa Park Golf Course

- Balboa Park Golf Course customers gave the most positive ratings for the layout of the course (90% excellent or good), value of the course for the fee (84%), courtesy of golf course starters, Marshals, and maintenance staff (83%), directional signage to the golf course (77%), and condition of the greens (77%).
- At the other end of the spectrum, customers were less positive regarding the availability and condition of driving range facilities (36%), availability and condition of restrooms (37%), and the availability and quality of golf instructors (40%) at the Balboa Park Golf Course.

### Mission Bay Golf Course

- Customers who played the Mission Bay course most often during the past year gave the highest ratings for the courtesy of course starters, Marshals, and maintenance staff (86% excellent or good), the layout of the course (84%), condition of fairways (79%), directional signage to the golf course (78%), and condition of golf carts (77%).
- Customers provided substantially lower ratings for the quality of the pro shop (29%), quality of the food and beverage services (37%), availability and condition of restrooms (45%), condition of the bunkers (52%), and condition of cart paths (53%).

## FUTURE EXPECTATIONS & RECOMMENDATIONS

- Approximately one-third (33%) of all customers anticipated that they would increase the frequency of their golf play in the next 12 months. Only 5% felt their frequency of play would decrease, while most (59%) said it would remain about the same.
- Thirty-four percent (34%) of customers surveyed plan to play Torrey Pines Golf Course more often in the coming year, compared with 20% for Balboa Park and 12% for Mission Bay.
- The percentage of customers who plan to play *less often* was similar between Torrey Pines (13%), Balboa Park (13%), and Mission Bay (12%).
- The most commonly mentioned reasons for playing Torrey Pines less often in the next year were difficulties getting a tee time (28%), not living near the course (25%), and concerns about cost of play (22%).
- The most common specific reasons for playing Balboa Park less often included concerns about the condition of the course (18%) not living near the course (16%), and a preference for other courses (10%).
- The top specific reasons for choosing to play Mission Bay less often were that they don't live near the course (14%), concerns about the condition of the course (13%), and dislike of the course in general (11%).
- Ninety-four percent (94%) of customers who played Torrey Pines were very (76%) or somewhat (18%) likely to recommend the course to a friend or colleague, compared with 89% of customers who played Balboa Park (50% very and 39% somewhat) and 80% who played Mission Bay (45% very and 35% 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 provides information that can be used to make sound, strategic decisions in a variety of areas including service improvements and facility enhancements, measuring and tracking internal performance, budgeting, and planning. Whereas subsequent sections of this report are devoted to conveying detailed results of the survey, in this section we attempt to 'see the forest through the trees' and note how the collective results of the survey answer some of the key questions that motivated the research.

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

The arrival of coronavirus in California triggered a statewide shelter-in-place mandate in March 2020, effectively shuttering many sectors of the world's fifth largest economy for several months and sending ripple effects through most aspects of daily life. In addition to the direct economic impacts including job losses, salary cuts, and reduced spending, the threat of COVID-19 and the closure of non-essential businesses dramatically altered how and where people work, play, shop, and travel.

Among these changes were the closure of the City's golf courses between March and early May 2020, as well as a series of modified procedures and regulations once play resumed in May that impacted many aspects of course operations—including arrival times, group sizes, social distancing, departure times, access to the pro Pro Shop, availability of the driving-range and practice areas, and removal or changes to on-course amenities including bunker rakes, ball washers, benches, and flagsticks. These steps, taken to protect the health and safety of customers, can nevertheless also impact golfer's experiences when trying to secure a tee-time and while playing on the course.

Against this backdrop of challenges, the current survey results indicate that the City of San Diego has continued to perform very well in providing golf services to San Diego residents and visitors alike. In 2020, approximately nine-in-ten customers rated their most recent golf experience at Torrey Pines Golf Course as excellent or good (87% south course, 90% north course). Balboa Park Golf Course also received high marks, with 77% of customers rating their most recent experience as excellent or good. Although customers' experiences at the Mission Bay Golf Course continue to be somewhat less positive (72%) than at the other city courses, they remained similar to the 2019 study (prior to COVID-19) and were similar to the all-time high of 74% recorded in 2015.

Customers generally echoed the positive assessments they expressed about their overall golf experiences when asked about a variety of *specific* performance areas at each course. Of the 22 specific service aspects tested, a majority of customers provided ratings of excellent or good for at least 15 aspects at *each* of the City of San Diego courses. This is an



area where the Torrey Pines north course stood out for having the *most* positive ratings for many aspects of the course (see *Comparison of San Diego Golf Course Ratings* on page 38). It is also an area where Torrey Pines south course stood out with the highest ratio of positive to negative changes that were statistically significant between 2019 and 2020 (see *Rating Aspects of Torrey Pines* on page 29 for more details).

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. More than one-third (34%) of customers expected to increase their frequency of play at Torrey Pines in the coming year, with 20% and 12% offering a similar response for Balboa Park and Mission Bay courses, respectively. The percentage that indicated they expected to decrease their frequency of play at the courses, on the other hand, was approximately 12% for each course.

Among the strongest indicators of the performance is customers' likelihood of recommending City courses to a friend or colleague, with 94% of Torrey Pines customers, 89% of Balboa Park customers, and 80% of Mission Bay customers saying they are likely to recommend the course.

*Has the City improved its performance in providing golf services during the past two years?*

By comparing the 2020 survey data with the results of identical questions asked in 2019, we can identify changes in customers' opinions during the past two years that are statistically significant—meaning that we can be 95% confident that the changes reflect an actual change in customer opinion as opposed to being an artifact of independently selected random samples.

Of the 26 statistically significant changes in specific aspects of performance found between the 2019 and 2020 studies, 18 (69%) were in the negative direction, with 14 of those 18 declines recorded for Balboa Park (8) and Mission Bay (6). Torrey Pines south course, which has undergone a large-scale improvement project that began in early 2019, saw four significant gains from the prior study, which was conducted around that same time. Worth noting also is that in the current study, Torrey Pines north and south courses recorded significant gains from 2019 with customers' perceptions of *the value of the course for the fee*, both reaching all-time highs in that category.

*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 be to maintain the quality of services and facilities it currently provides. Nevertheless, in the spirit of

constant improvement, the results of the study suggest several opportunities to increase customer satisfaction further. The opportunities, grouped by golf course, are presented below.

### **Torrey Pines Golf Course**

Among customers who play Torrey Pines, several areas stood out as the top candidates for service improvement on both the south and north courses: improving availability of tee time reservations by phone and for walk-up customers, improving the availability and condition of driving range facilities, and improving the pace of play. Clearly, these service aspects are directly related to the significant volume of customers who play at Torrey Pines—in fact, these are the same four priority areas for improvement identified in 2013, 2015, 2017, and 2019 by customers who play the north and/or south courses. One additional priority area identified by customers for the first time in this study was *enforcing golf course rules and regulations*. Despite a majority of customers continuing to provide positive ratings for this category at the south (58% excellent or good) and north (56%) courses, the south course saw a statistically significant drop from 2019, and the scores recorded for both courses were all-time lows for this aspect.

Examining the key differentiators in opinion of those who rated their most recent overall experience at Torrey Pines as excellent or good versus those who said it was fair, poor, or very poor, improving the condition of the overall course, greens, roughs, and fairways stand out for both courses. Indeed, customers who reported a fair, poor, or very poor overall experience with each course were 2 to 3 times more likely to offer negative ratings of these four aspects than those with a generally positive overall experience.

Finally, it is worth mentioning that despite significant gains recorded regarding customers' perceptions of *the value of the course for the fee*, non-residents continue to be especially critical of this area, being almost twice as likely as residents to cite the course's value as fair, poor, or very poor. High cost of play was also among the top factors mentioned by customers who intend to play Torrey Pines less frequently in the future.

### **Balboa Park Golf Course**

Improving the availability of tee-times by phone and for walk-up reservations, quality of the pro shop, availability and quality of golf instructors, availability and condition of restrooms, and availability and condition of driving range facilities were the top improvements desired by Balboa Park Golf Course customers in 2020. Of note, availability of tee-times via phone and walk-up both saw substantial declines from 2019, with both reaching all-time lows in the current study. One other specific improve-

ment requested by a significant number of customers included changes to Hole 4. To quote one respondent: *It's time to get creative with a new green and layout, maybe make it a par 3, move up the tee box, something to make it fairer and play faster.*

Isolating service areas that best separate customers who had an overall excellent or good experience versus those with less positive experiences, the City may also consider focusing on the general course condition, as well as the condition of roughs, fairways, and tee boxes. Additionally, despite a majority of customers rating the pace of play as excellent or good, improvement in this area was the top mention from customers when asked in an open-ended manner to name the change that would improve their overall golf experience.

### **Mission Bay Golf Course**

Of the four city courses, Mission Bay was rated the highest with regard to the availability of tee-times when making a phone or walk-up reservation, availability and condition of driving range facilities, enforcement of golf course rules and regulations, and pace of play. Nevertheless, Mission Bay continues to receive lower performance ratings than the other city courses. Based on customers' ratings of 22 specific performance aspects, the best opportunities for improvement are the condition of cart paths, condition of bunkers, availability and condition of restrooms, quality of food and beverage services, and quality of the pro shop. These top five improvement areas for the Mission Bay Golf Course in 2020 are the same as those identified in 2019.

Isolating the conditions that best separate customers who had an overall excellent or good experience from those with less positive experiences, the City may also consider improvements to the overall course condition, directional signage, and condition of greens, golf carts, and roughs.

When deciding on priorities for the Mission Bay Golf Course, it can also be helpful to hear the opinions of customers who spend the most time on the course. Below are quotes from several golfers who played at least one time per week on average in the past year. When asked if course managers could change something to improve their overall golf experience, here's what they had to say:

- *I'd love to see a higher-end food and beverage service facility with clubhouse/seating. Maybe offer wedding and other entertainment venues.*
- *Overall things are fine except for the ladies restroom, it's unacceptable!*
- *Just one thing: redo the tee boxes, they're in sore shape.*
- *Keep an eye on Hole 10 to ensure people don't tee off without checking for the through group coming off Hole 9.*

- *Can you do anything to improve the appearance of the areas around the course, outside of the fairways and general field of play?*
- *Need to figure out the Junior PGA Program. It's in disarray after staffing changes and no one knows what's going on.*
- *Improve the lighting, and allow golf later into the evening.*
- *Work on eradicating the disease that's taken over most of the greens, their appearance makes the course look really run down and neglected.*

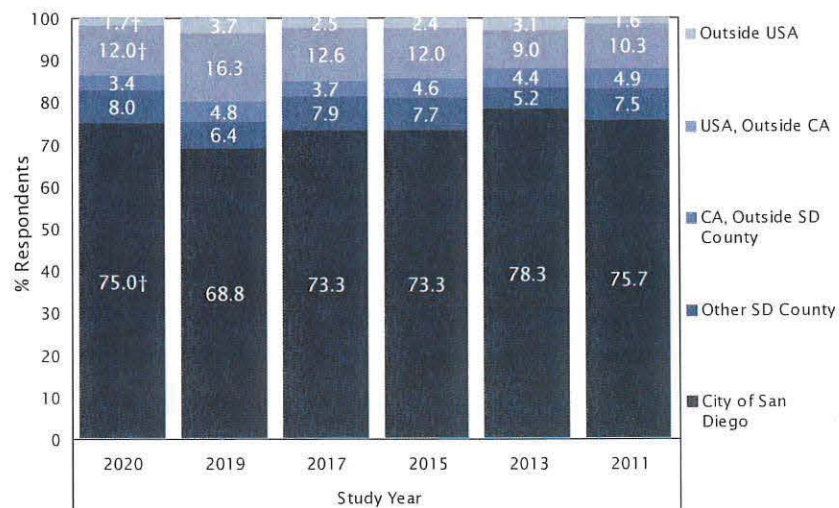
## RESIDENCY OF CUSTOMERS

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

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

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

**FIGURE 1 AREA OF CURRENT RESIDENCE BY STUDY YEAR**



† Statistically significant change ( $p < 0.05$ ) between the 2019 and 2020 studies.

As shown in Figure 1, among those surveyed in 2020, three quarters (75%) of customers' primary residences were located in the City of San Diego, 8% were located in San Diego County but outside the City of San Diego, 3% were in California but outside San Diego County, 12% were located elsewhere in the United States, and about 2% were outside the United States. Compared with the 2019 study, there was a statistically significant increase in the percentage of customers who reside in the City of San Diego (+6%) and a decrease in those from outside California (-4%) and the United States (-2%).

## FREQUENCY & COURSES PLAYED

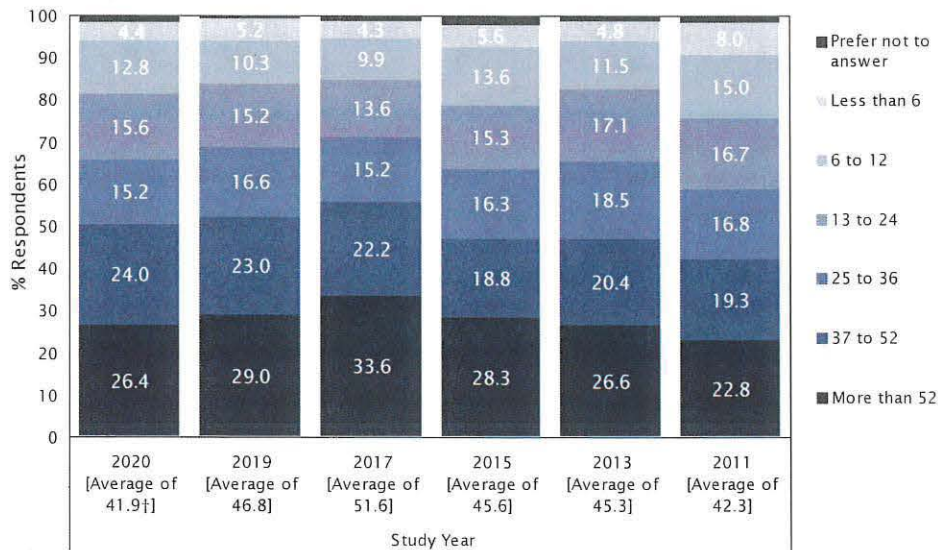
After the introduction and general inquiry regarding the customer's area of primary residence, the survey turned to the topic of golf with several questions about frequency of play, courses played in San Diego and elsewhere, and frequency of play on each of the City's three courses.

**FREQUENCY OF OVERALL PLAY** The first question in this series asked respondents to estimate the number of golf rounds they had played in the past 12 months. As shown below in Figure 2, 26% of golf customers surveyed in 2020 said they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds. Another 24% played between 37 and 52 rounds, 15% had played between 25 and 36 rounds, 16% had played 13 to 24 rounds, 13% had played between 6 and 12 rounds, and 4% had played fewer than 6 rounds in the past year.

Overall, San Diego golf customers played an average of 41.9 rounds of golf in the 12 months preceding the interview. Compared with 2019, there was a statistically significant decrease in the frequency of playing golf among customers of San Diego's courses (41.9 vs 46.8).

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

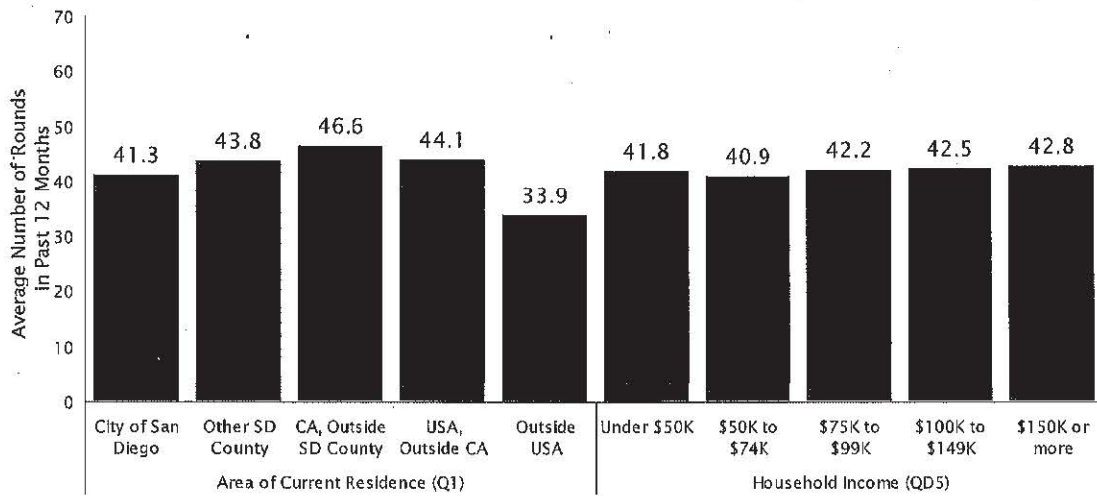
**FIGURE 2 TOTAL ROUNDS OF GOLF PLAYED IN PAST 12 MONTHS BY STUDY YEAR**



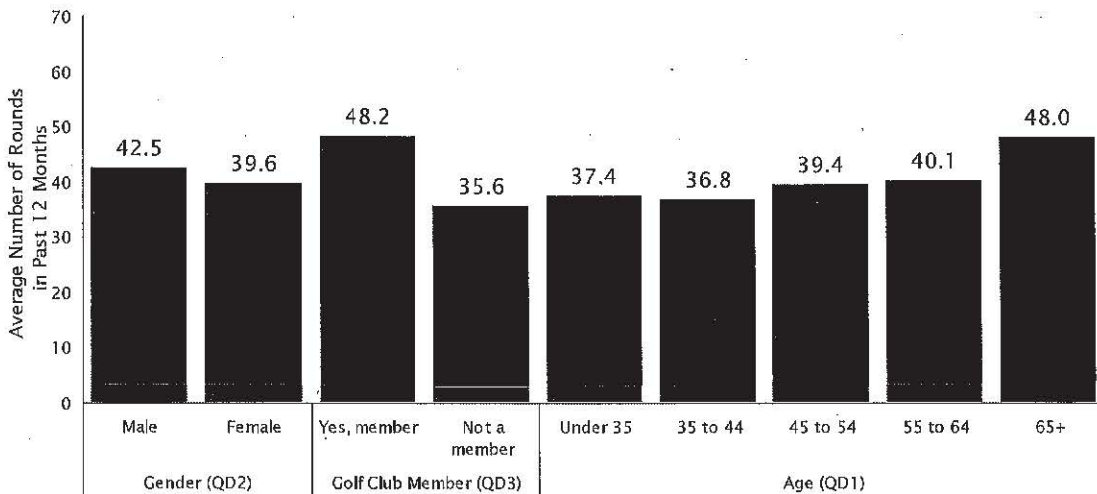
† Statistically significant change (p < 0.05) between the 2019 and 2020 studies.

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

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



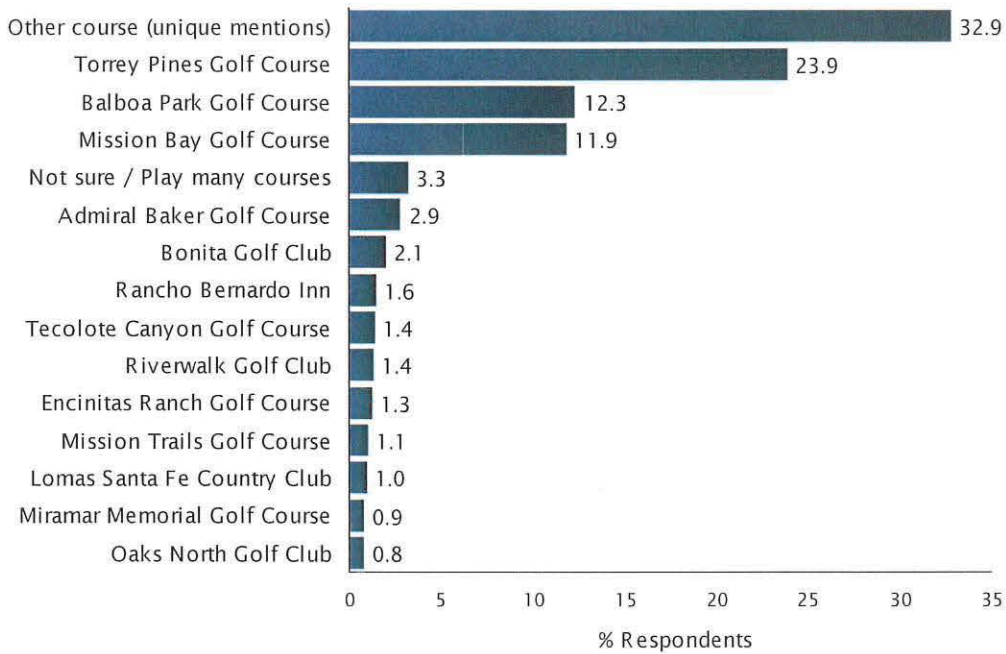
**FIGURE 4 AVERAGE NUMBER OF ROUNDS PLAYED IN PAST 12 MONTHS BY GENDER, GOLF CLUB MEMBER & AGE**



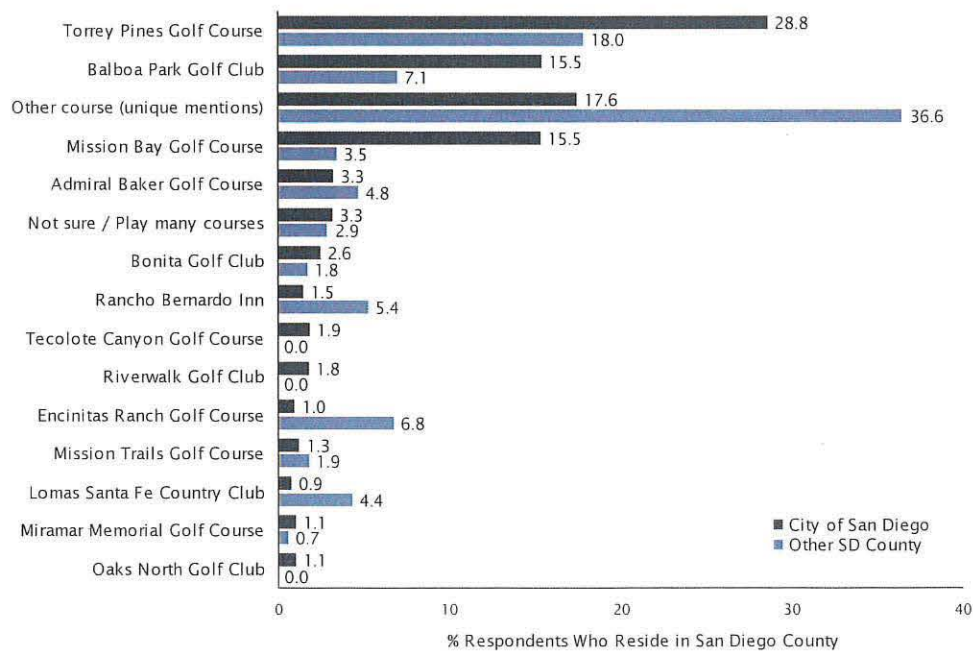
**COURSES PLAYED MOST FREQUENTLY** All respondents were next asked to indicate the name of the golf course they played most often. Customers provided names of hundreds of courses from all over the world, although the most commonly mentioned were located in San Diego County and, not surprisingly, within the City of San Diego. Figure 5 on the next page presents the courses mentioned by at least 0.8% of respondents. More than one-third of customers identified a course other than those shown in the figure (33%) or indicated that they were not sure or play multiple courses (3%). Among specific courses cited, 24% of customers surveyed played Torrey Pines most often, followed by Balboa Park and Mission Bay at 12% each. The Admiral Baker Golf Course (3%) and the Bonita Golf Club (2%) were the next most commonly played courses. For the interested reader, Figure 6 shows the *most commonly played* courses among residents of the City of San Diego as well as those who live elsewhere in San Diego County.

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

**FIGURE 5 COURSE PLAYED MOST OFTEN**



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





**REASON FOR PLAYING COURSE MOST OFTEN** There are a number of motivators for playing a particular golf course most often, including location of the course relative to home and work, cost of play, and overall quality of the course. After customers provided the name of the course they play most often in Question 4, the survey next inquired about the primary reason for their choice. 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 7.

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

**FIGURE 7 REASON FOR PLAYING COURSE MOST OFTEN BY STUDY YEAR**

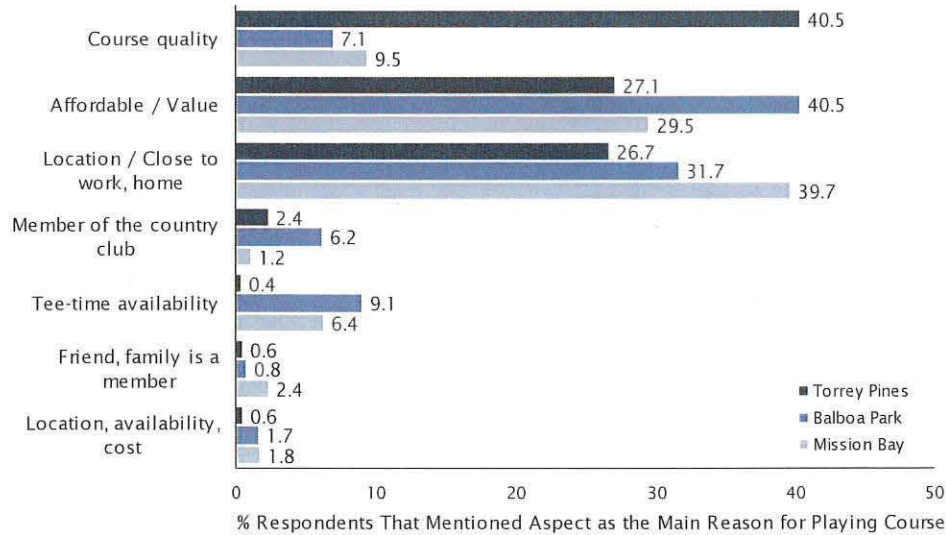


† Statistically significant change ( $p < 0.05$ ) between the 2019 and 2020 studies.

Location (29%) and affordability (26%) were the most common reasons mentioned in 2020 for playing a particular course most often, followed by course quality (20%), tee-time availability (9%) and being a member of the course (8%). Compared with 2019, the percentage of golfers who mentioned location or tee-time availability increased significantly, whereas the percentage who mentioned some *other reason* decreased significantly.

Figure 8 on the next page displays responses to Question 5 among customers who mentioned one of the three city golf courses where they play most often, thus highlighting the primary factors in choosing to play each. As shown in the figure, the top reason for playing Torrey Pines, Balboa Park, and Mission Bay differed for each course. Torrey Pines was played most often because of the course quality (41%), followed by affordability and location (each 27%). Balboa Park was played most often because of affordability (47%) and then location (32%). For those who played Mission Bay most often, location was the main factor in that decision, mentioned by 40% of respondents, followed by affordability (30%).

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



**FREQUENCY OF PLAY AT SAN DIEGO COURSES** At this point in the survey, the questions became more specific about customers' experiences with, and opinions of, the three City of San Diego courses. The first question of this nature asked respondents to indicate approximately how many rounds of golf they had played at each of the three city courses in the past 12 months, differentiating between the north and south courses at Torrey Pines. Figure 9 on the next page presents the results of this question and shows that Torrey Pines was the most frequently played course, with 65% of customers playing at least one round on the south course and 67% playing at least one round on the north course. Sixty-four percent (64%) of golf customers also reported playing Balboa Park at least once during the 12 months preceding the interview, whereas the corresponding figure for Mission Bay was 38%.

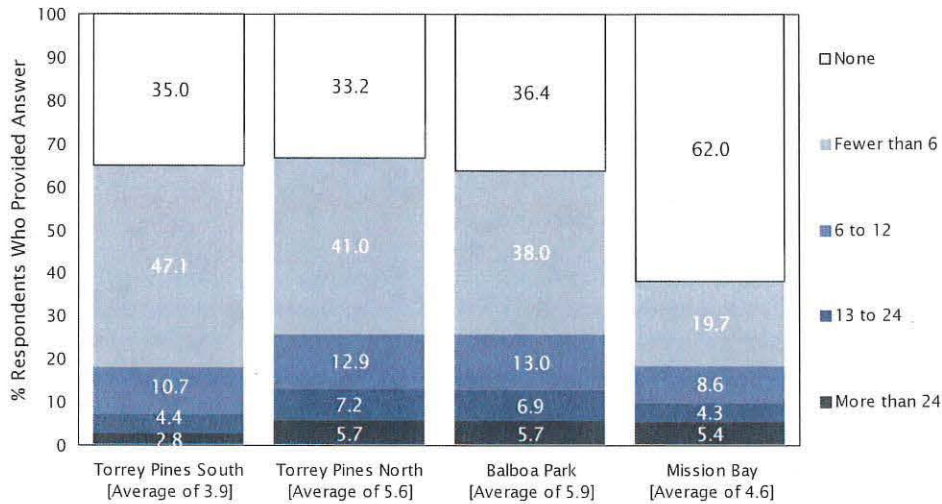
Also shown in Figure 9 are the average number of rounds per customer who had played each course in the past 12 months. Balboa Park had the highest average number of rounds played during this period (5.9), followed by Torrey Pines north course (5.6), Mission Bay (4.6), and Torrey Pines south course (3.9).

Compared with 2019, there was a statistically significant increase in the average number of rounds played at the combined north and south courses of Torrey Pines with 9.4, up from 6.7 in the prior study (see Figure 10 on next page).

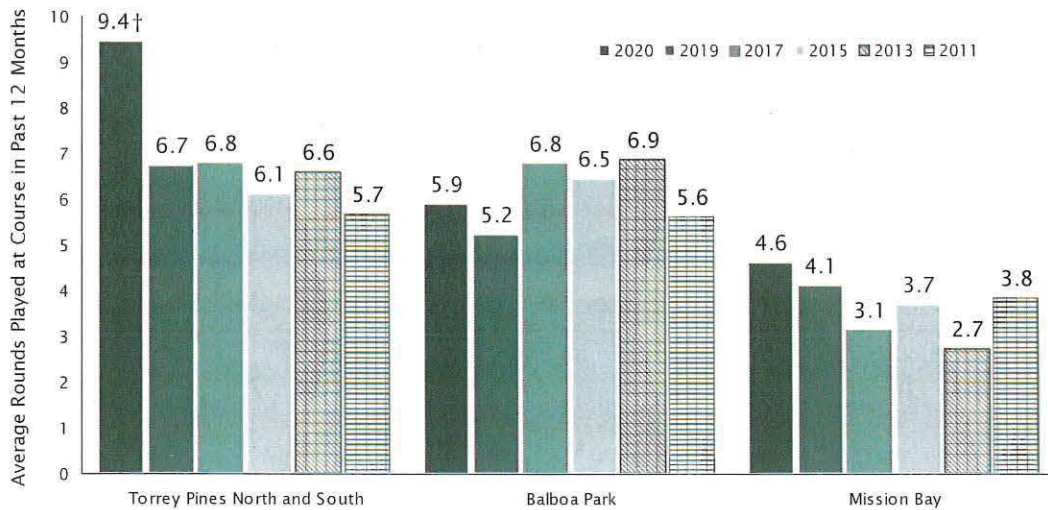
**Question 6** Thinking now of courses in the City of San Diego, in the past 12 months, approximately how many rounds of golf did you play at \_\_\_\_\_?

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

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



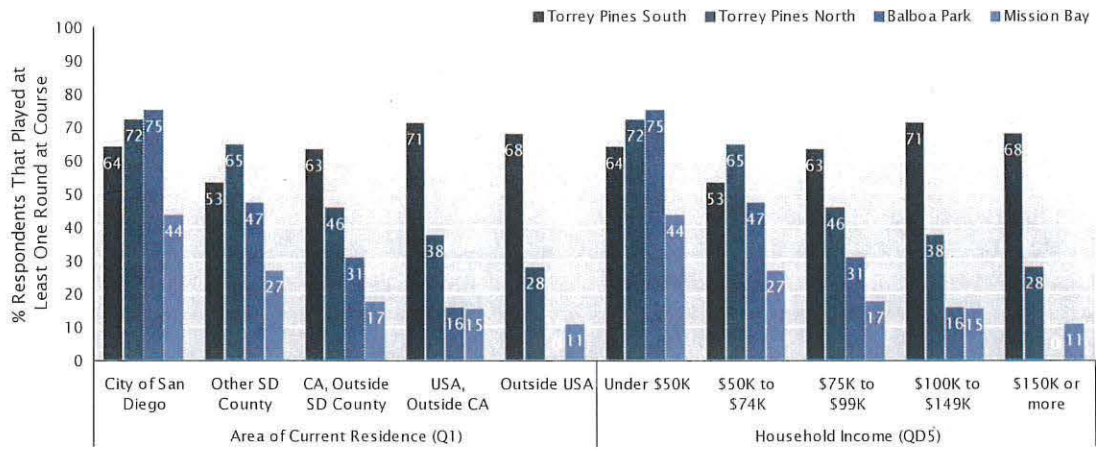
**FIGURE 10 FREQUENCY OF PLAYING CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY STUDY YEAR**



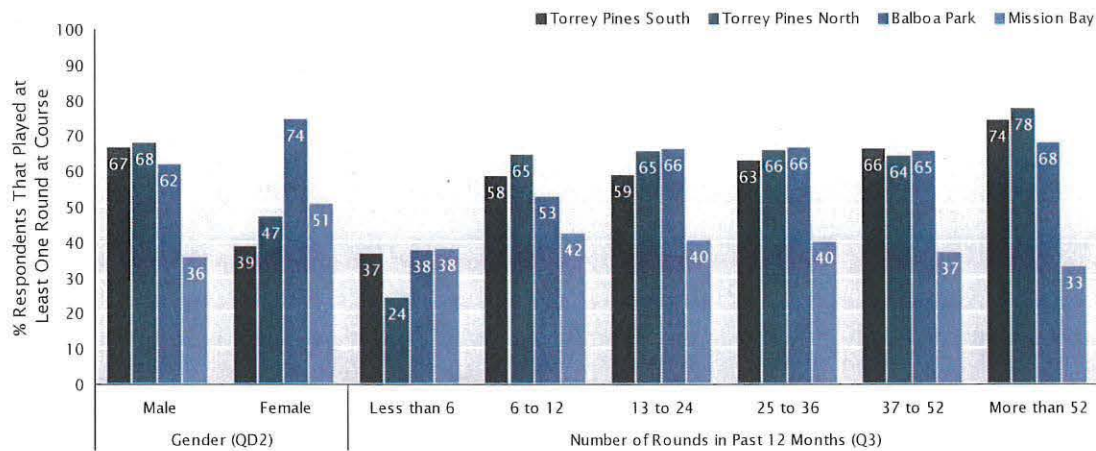
† Statistically significant change (p < 0.05) between the 2019 and 2020 studies.

Figures 11 through 13 on the next page display the percentage of customers who played each city course across a variety of demographic subgroups. Play at the three courses varied considerably across demographic subgroups. One thing that stands out from the figures is that the Torrey Pines south course draws high-income customers and those from outside the County, outside of California, and internationally at much higher rates than the other city courses.

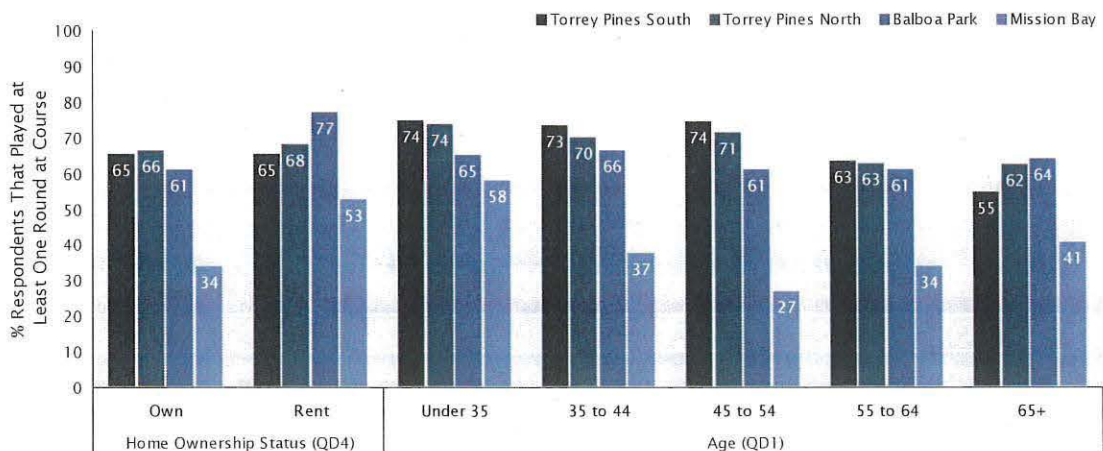
**FIGURE 11 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME**



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

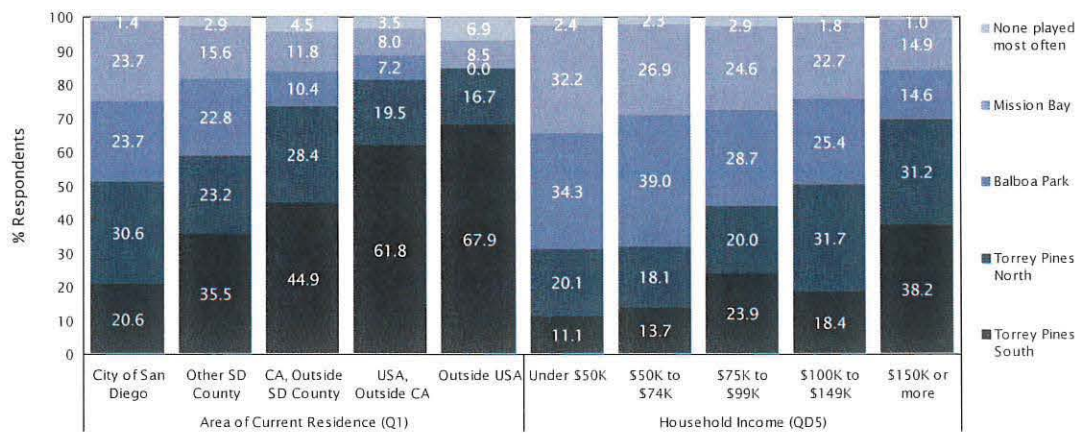


**FIGURE 13 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY HOME OWNERSHIP STATUS & AGE**

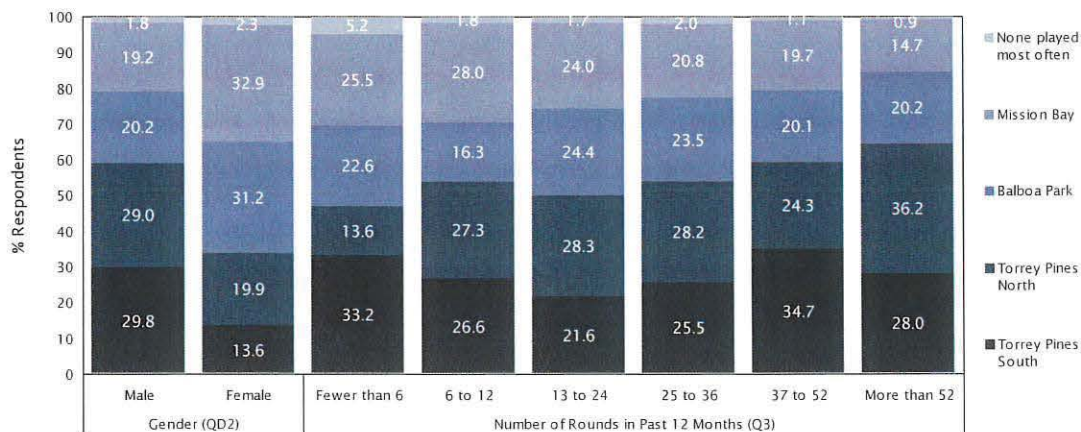


Figures 14 through 16 display the percentage of customers within various demographic sub-groups that played each of the courses *most often* in the past 12 months. When compared with the other courses, the tendency to play Torrey Pines south *most often* increased the farther away from the City of San Diego a customer resided, generally increased with household income, and was higher among male customers, homeowners, and customers between 45 to 54 years of age. Torrey Pines north course was the dominant course of choice for those who live in the City of San Diego and customers who played golf on average at least once per week in the past year. More than one-third of customers with a household income under \$75,000 per year identified Balboa Park as their go-to course. Renters, women, and those under 35 years of age were most likely to choose Mission Bay as the city course they play most often.

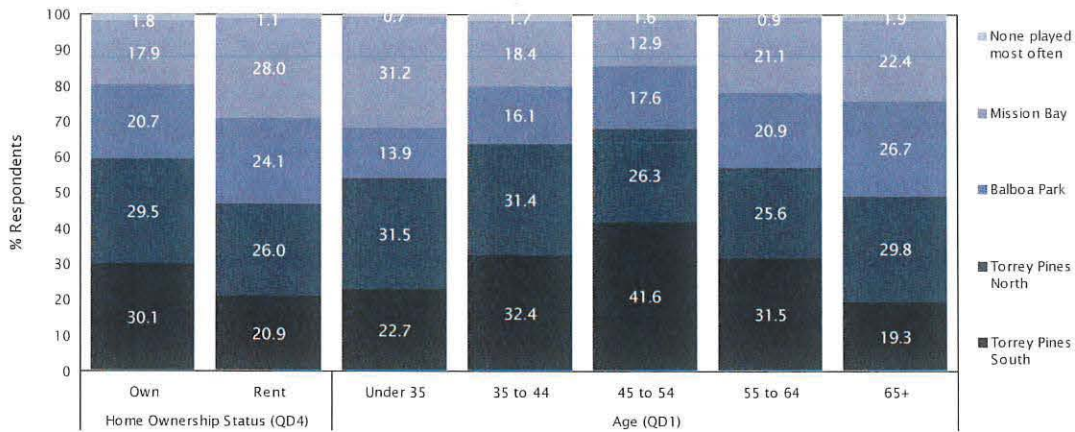
**FIGURE 14 SAN DIEGO COURSE PLAYED MOST OFTEN BY AREA OF CURRENT RESIDENCE & HOUSEHOLD INCOME**



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



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



For the interested reader, Table 1 below provides the demographic distribution of survey respondents who played at least one round of golf at each San Diego course in the past 12 months, differentiating Torrey Pines into the north and south courses.

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

	Course Played in Past 12 Months			
	Torrey Pines South	Torrey Pines North	Balboa Park	Mission Bay
<b>Q1 Area of Current Residence</b>				
City of San Diego	75.0	82.3	89.4	87.4
Other SD County	6.6	7.8	6.0	5.7
CA, Outside SD County	3.3	2.3	1.6	1.6
USA, Outside CA	13.3	6.8	3.0	4.9
Outside USA	1.8	0.7	0.0	0.5
<b>QD1 Age</b>				
Under 35	6.1	5.8	5.4	8.1
35 to 44	15.1	14.0	13.8	13.2
45 to 54	19.8	18.5	16.4	12.1
55 to 64	21.5	20.7	21.1	19.7
65+	27.4	30.4	32.7	34.7
Prefer not to answer	10.2	10.5	10.6	12.1
<b>QD2 Gender</b>				
Male	90.6	89.5	85.5	82.6
Female	6.0	7.1	11.7	13.4
Prefer not to answer	3.4	3.4	2.8	4.0
<b>QD3 Golf Club Member</b>				
Yes	55.8	51.7	45.3	38.3
No	41.1	45.2	52.2	59.1
Refused	3.2	3.0	2.4	2.6
<b>QD4 Home Ownership Status</b>				
Own	78.7	77.6	74.4	69.2
Rent	14.6	14.7	17.4	20.0
Prefer not to answer	6.8	7.7	8.1	10.8
<b>QD5 Household Income</b>				
Under \$35K	0.8	0.8	1.4	2.0
\$35K to \$49K	1.1	1.3	2.5	2.8
\$50K to \$74K	4.3	4.2	6.7	6.9
\$75K to \$99K	6.6	6.8	8.1	9.9
\$100K to \$149K	16.9	16.7	18.8	16.4
\$150K or more	50.3	47.5	39.9	35.0
Not sure / Prefer not to answer	20.1	22.5	22.7	27.0
<b>City of San Diego Resident</b>				
Resident	75.0	82.3	89.4	87.4
Non-resident	25.0	17.7	10.6	12.6

# 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 each as excellent, good, fair, poor, or very poor. Customers were asked to reflect on their *most recent* experience to ensure that the survey results reflect customers’ most recent—rather than most memorable—experiences, thus providing timely feedback about the City’s current performance. Furthermore, because these questions did not reference specific aspects of a course, facilities, or staff, the findings may be regarded as overall performance ratings for the City of San Diego Golf Operations Division regarding each of the courses.

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

FIGURE 17 RATING CITY OF SAN DIEGO GOLF COURSES

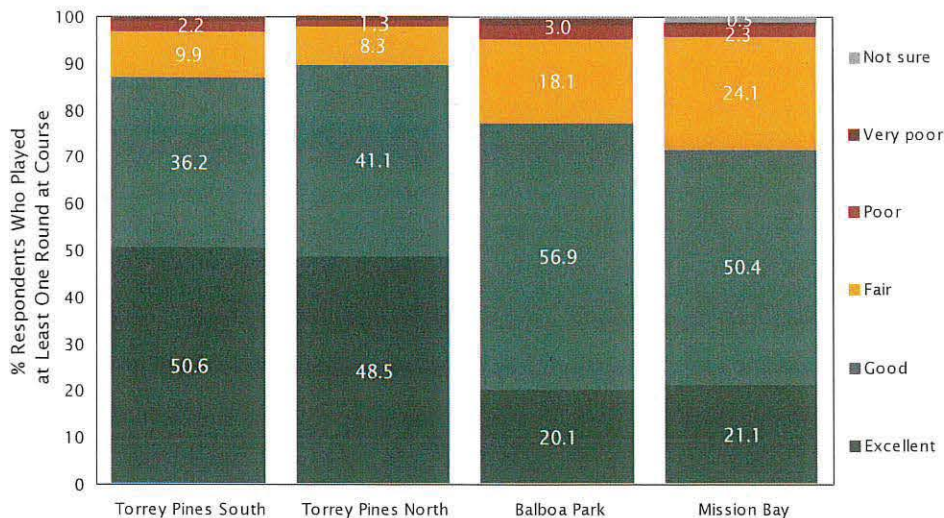
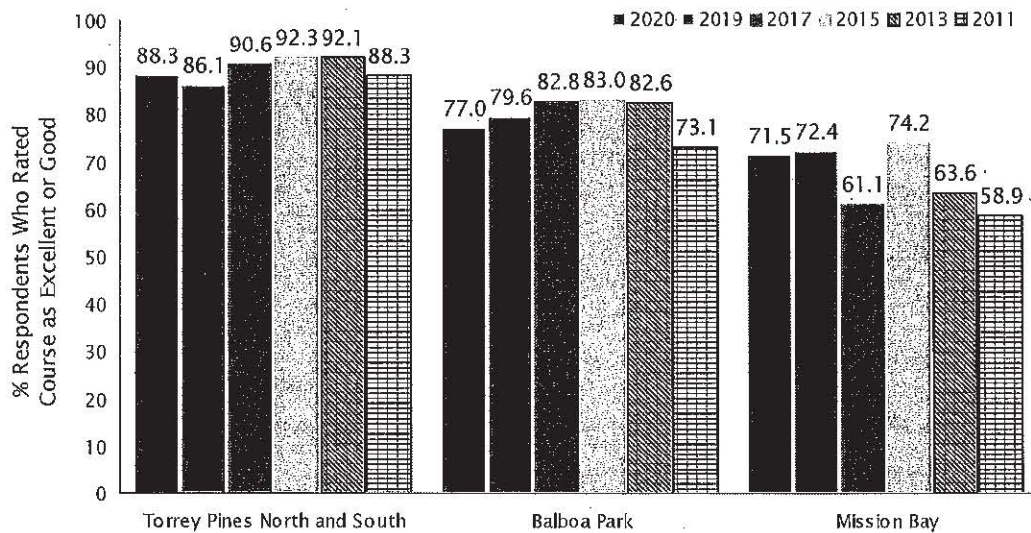


Figure 17 presents the overall performance ratings for Torrey Pines south, Torrey Pines north, Balboa Park, and Mission Bay. Torrey Pines north received the most positive ratings overall, with 90% of customers who had played at least one round there in the past 12 months citing their most recent experience as excellent (49%) or good (41%). Torrey Pines south received similarly positive ratings, with 87% of customers rating their most recent experience as excellent (51%) or good (36%). Approximately eight-in-ten customers (77%) rated their experience at Balboa Park Golf Course as excellent (20%) or good (57%), while just over seven-in-ten customers (72%) rated their experience at Mission Bay as excellent (21%) or good (50%).

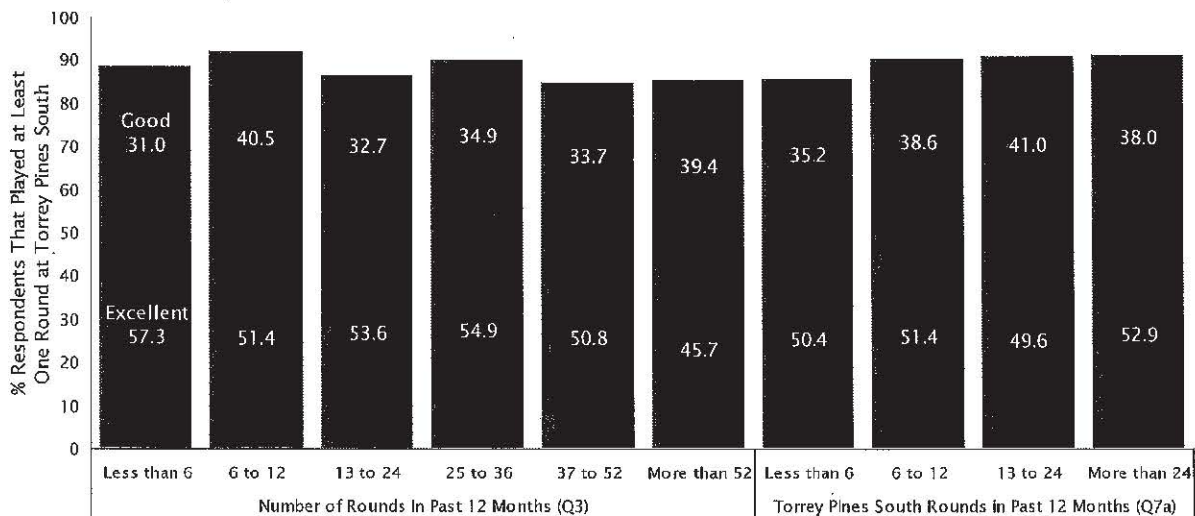
Figure 18 shows the percentage of customers who rated their recent experience at each course as excellent or good in 2020 and the prior five studies. There were no statistically significant changes from the 2019 study.

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



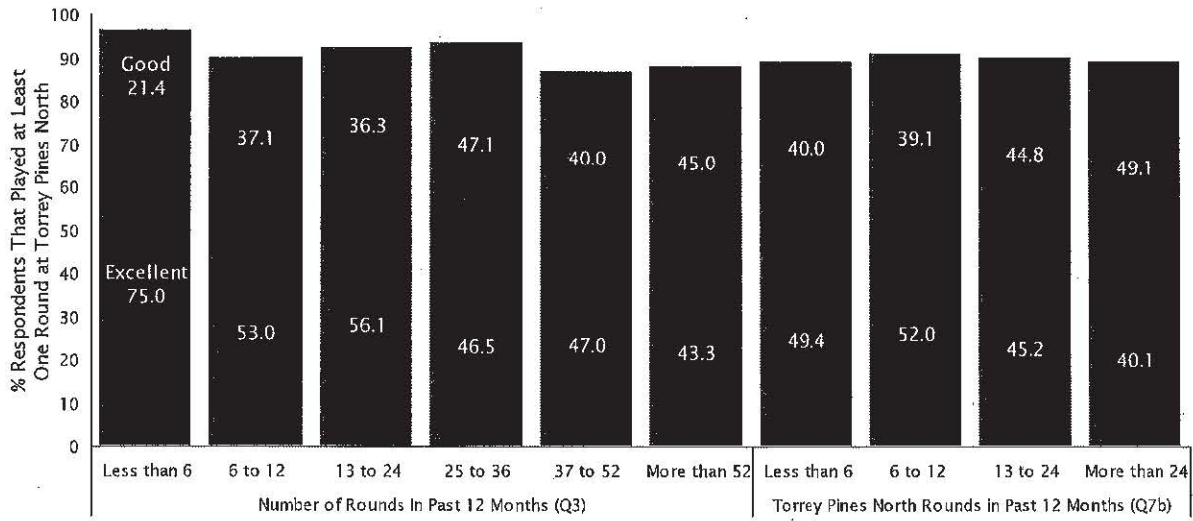
Figures 19 through 22 display performance ratings for Torrey Pines south and north courses, Balboa Park, and Mission Bay, by customers' frequency of golf play in general over the past 12 months, as well as their frequency of playing the city course for which they provided a rating.

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

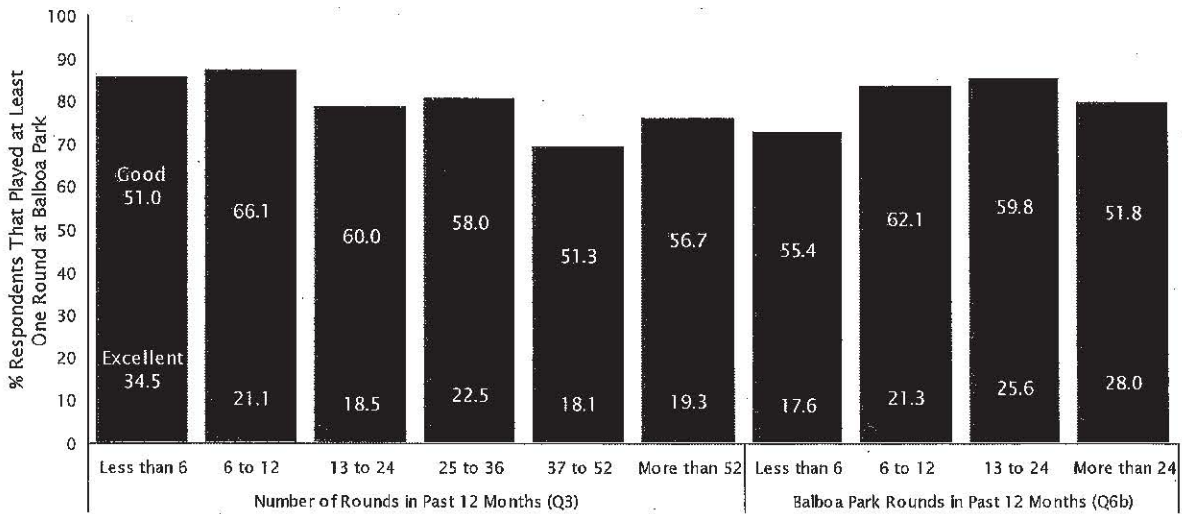




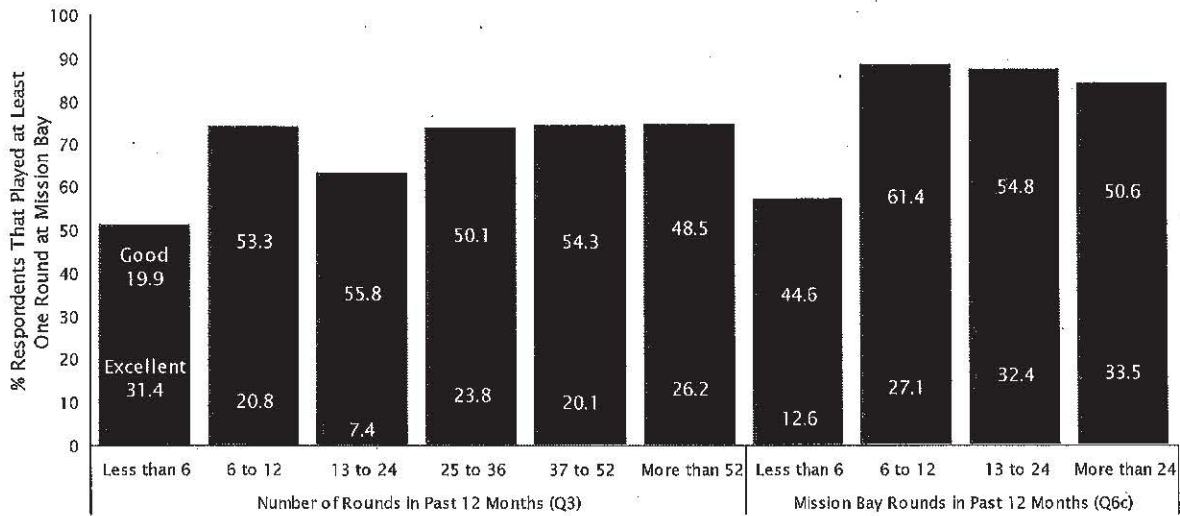
**FIGURE 20 RATING TORREY PINES NORTH BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS**



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



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



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

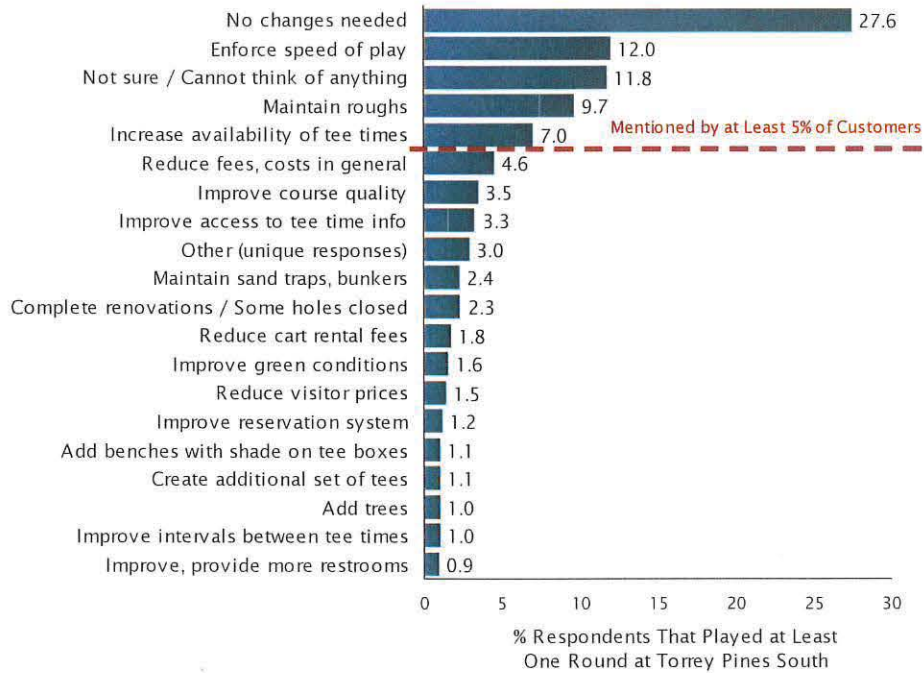
Approximately four-in-ten customers of Torrey Pines south (39%) and north (41%), Balboa Park (42%), and Mission Bay (42%) desired no changes or could not think of anything specific to improve their golf experience.

Top specific mentions for improving Torrey Pines south course were enforcing the speed of play (12%), better maintenance of rougths (10%), and increasing availability of tee times (7%), whereas for the north course the specific improvements requested by at least 5% of customers were enforcing the speed of play (15%), increasing availability of tee times (8%), improving green conditions (6%), better maintenance of rougths (5%), and reversing the order of the nines (5%).

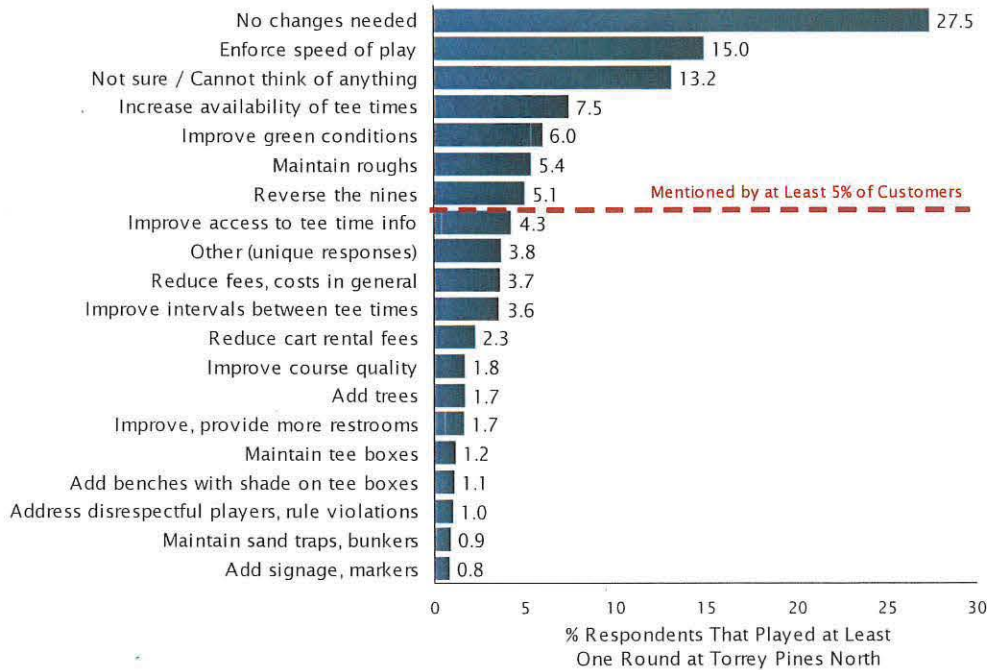
Specific mentions for improvement of the Balboa Park Golf Course included enforcing speed of play (12%), improving overall course quality (10%), improving fairways (6%), improving the green conditions (5%), and repairing or redesigning Hole 4 (5%). Mission Bay Golf Course customers most desired improving the overall course quality (7%), maintaining tee boxes (6%), improving facility maintenance (6%), improving green conditions (6%), enforcing speed of play (5%), and adding/improving lighting for extended hours (5%).

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

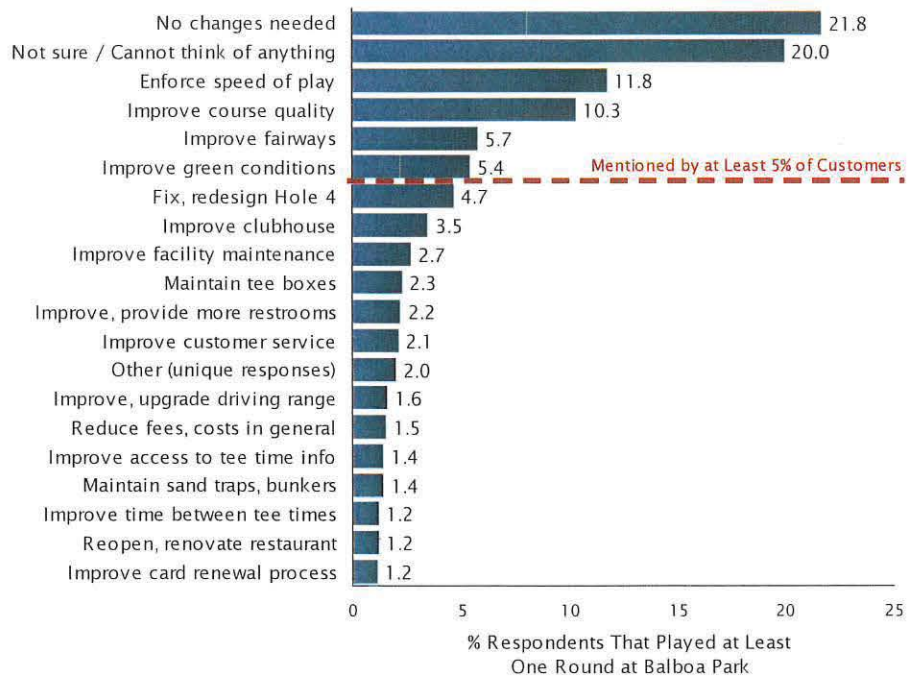
**FIGURE 23 DESIRED CHANGES TO TORREY PINES SOUTH**



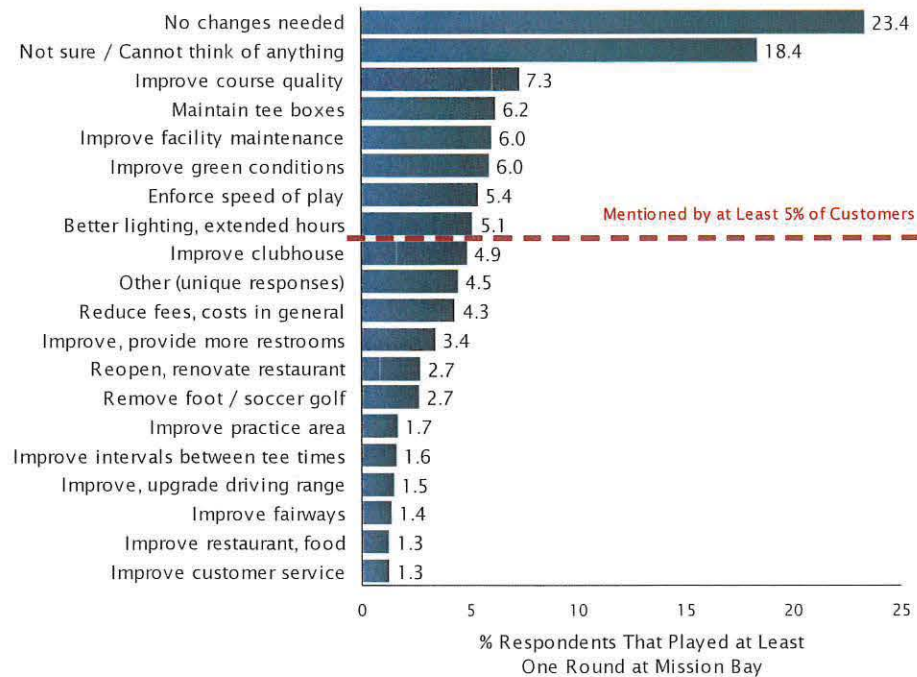
**FIGURE 24 DESIRED CHANGES TO TORREY PINES NORTH**



**FIGURE 25 DESIRED CHANGES TO BALBOA PARK**



**FIGURE 26 DESIRED CHANGES TO MISSION BAY**



Figures 27 and 28 on the next page show how suggested improvements for Torrey Pines south and north customers varied by whether customers were residents or non-residents. 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.

FIGURE 27 DESIRED CHANGES TO TORREY PINES SOUTH BY RESIDENT VS. NON-RESIDENT

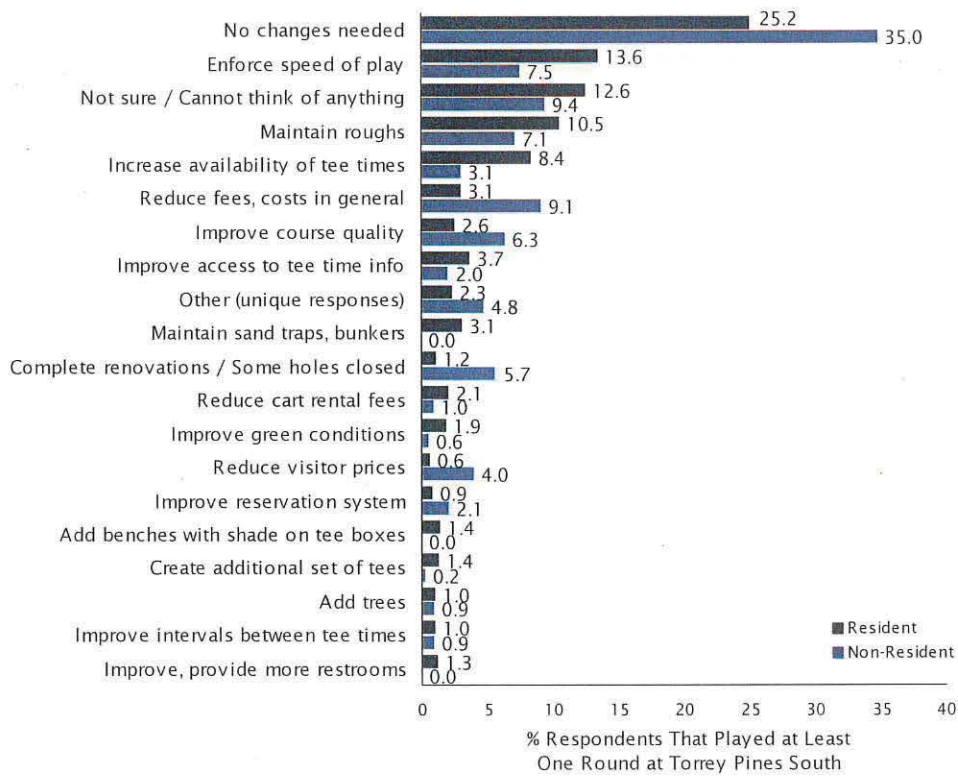
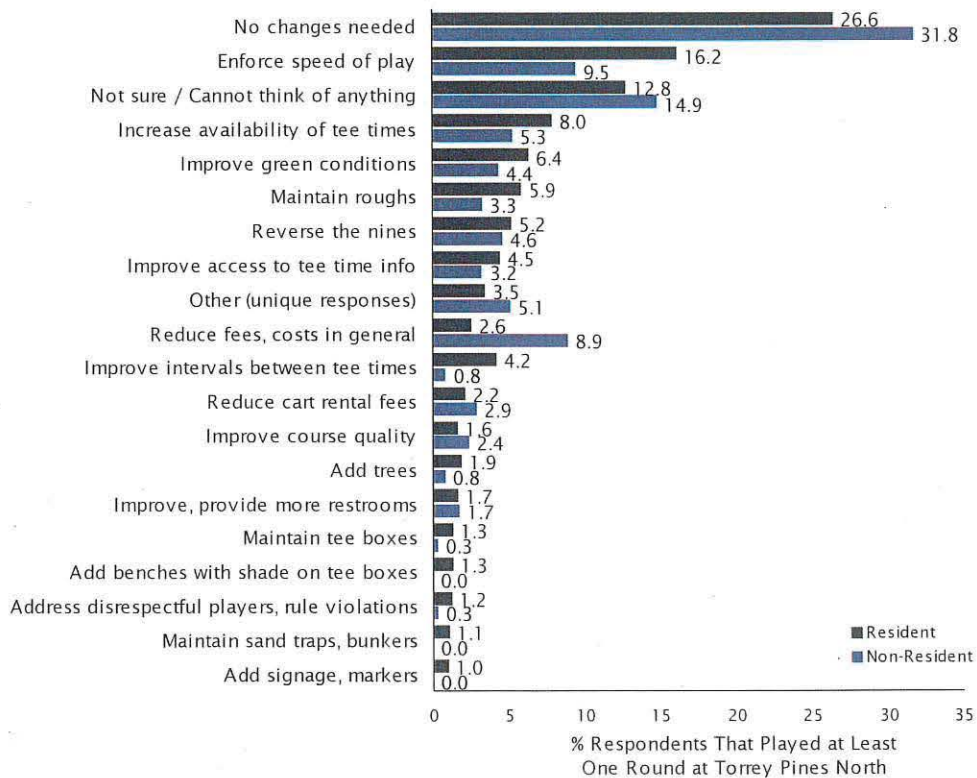


FIGURE 28 DESIRED CHANGES TO TORREY PINES NORTH BY RESIDENT VS. NON-RESIDENT



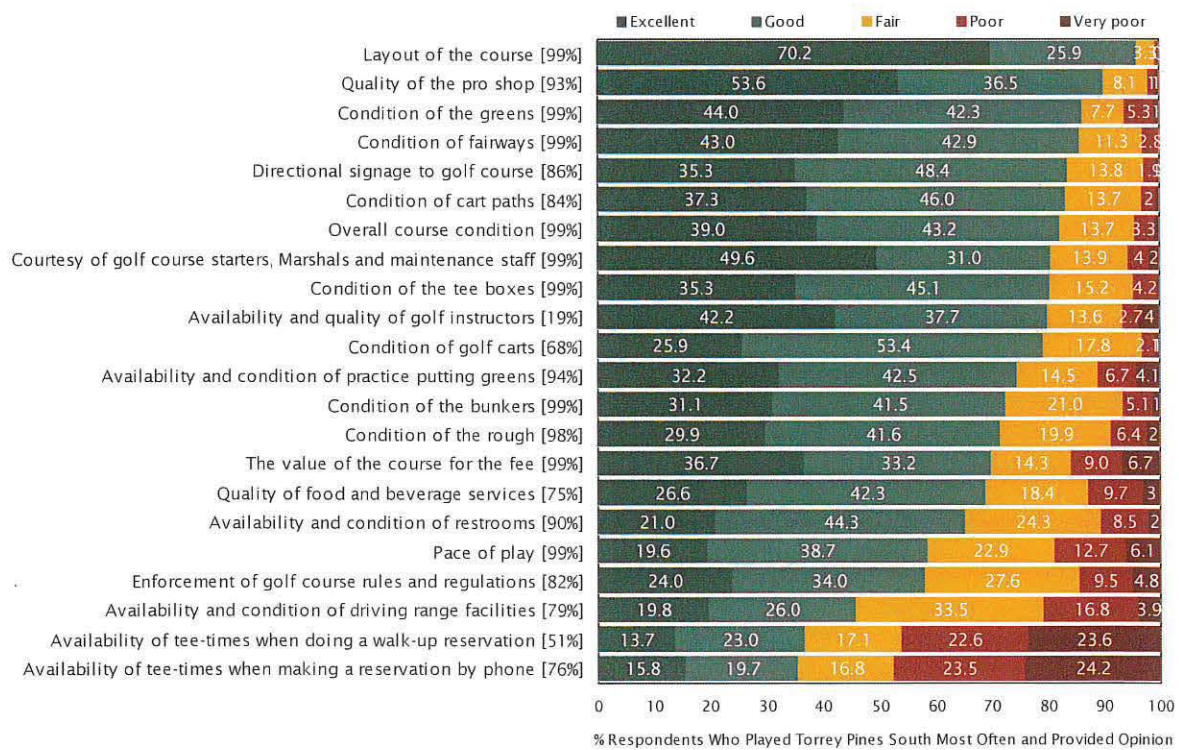
## RATING ASPECTS OF EXPERIENCE

Whereas the previous section of the survey addressed customers' overall experiences with Torrey Pines, Balboa Park, and Mission Bay golf courses, the next several questions asked customers to rate *specific aspects* of their golf experience for the San Diego course they had played most often in the past 12 months. Using a five-point scale of excellent, good, fair, poor, or very poor, respondents rated each of the 22 aspects listed on the left side of figures 29 through 32.

**RATING ASPECTS OF TORREY PINES** Torrey Pines Golf Course customers were divided by the course (south or north) they had played most often. Customers who played the south course most often gave the most positive ratings for the layout of the course (96% excellent or good), quality of the pro shop (90%), condition of greens (86%), condition of fairways (86%), and directional signage (84%). Considering the intensity of the positive rating, the courtesy of golf course starters, Marshals and maintenance staff also received high marks (50% excellent) from south course customers. At the other end of the spectrum, Torrey Pines south course customers were less pleased with the availability of tee times for reservations by phone (36%) or for walk-up reservations (37%), the availability and condition of driving range facilities (46%), enforcement of golf course rules and regulations (58%), and pace of play (58%).

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

**FIGURE 29 RATING ASPECTS OF TORREY PINES SOUTH<sup>1</sup>**



1. For comparison purposes, only customers who held an opinion are included in figures 29-32. The percentage of those who held an opinion is shown in brackets to the right of the aspect label. Numbers shown within bars are percentages of customers who provided an opinion.

Customers who had played the north course most often gave the most positive ratings for the layout of the course (95% excellent or good), condition of cart paths (94%), condition of fairways (93%), overall condition of the course (92%), and quality of the pro shop (90%). Considering the intensity of the positive rating, the value of the course for the fee was also viewed quite positively (54% excellent) by many north course customers. At the other end of the spectrum, customers who had played the north course most often assigned lower ratings to the availability of tee times for reservations by phone (19%) or for walk-up reservations (31%), the pace of play (46%), availability and condition of driving range facilities (48%), and enforcement of golf course rules and regulations (57%).

**FIGURE 30 RATING ASPECTS OF TORREY PINES NORTH**

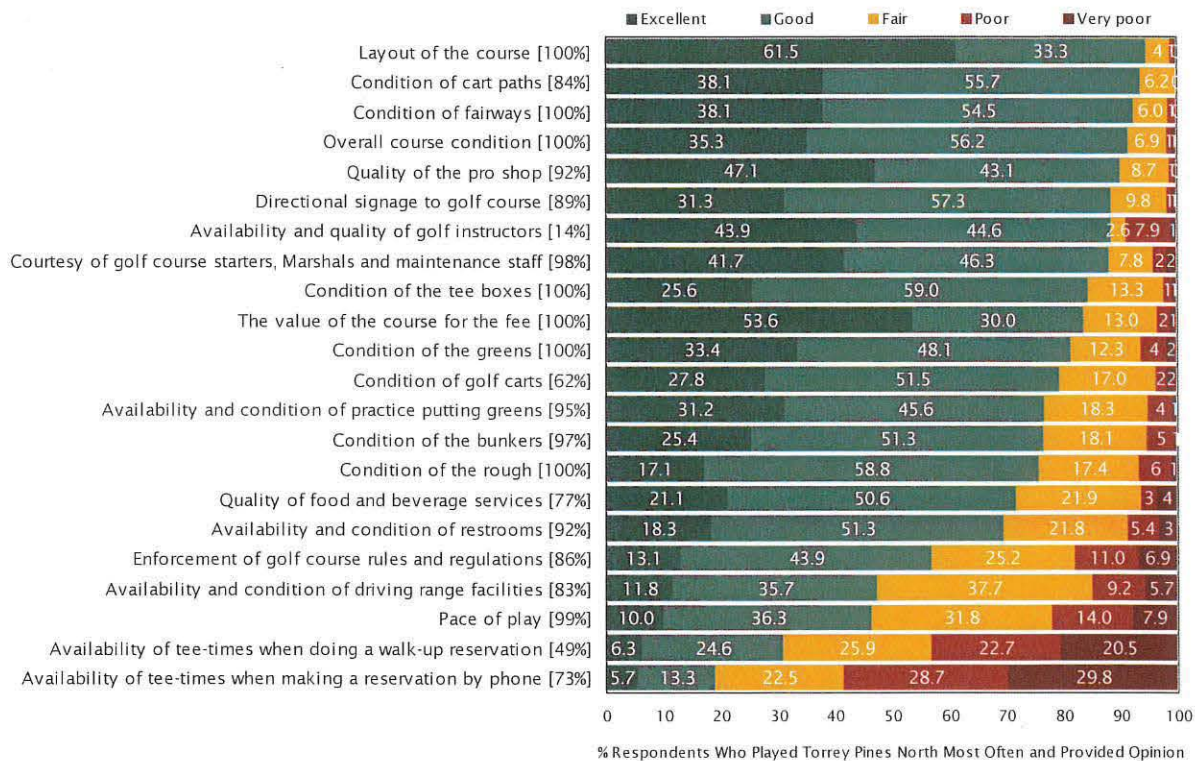


Table 2 on the next page shows the percentage who rated each aspect of Torrey Pines south course as excellent or good in the 2013, 2015, 2017, 2019, and 2020 surveys, as well as the difference between the two most recent studies. Table 3 provides the same analysis for the Torrey Pines north course. When compared with the 2019 survey results, in 2020 there were four statistically significant performance improvements and one significant decline for the south course, whereas the north course saw four statistically significant increases and three decreases in performance ratings from customers during this period.

**TABLE 2 RATING ASPECTS OF TORREY PINES SOUTH BY STUDY YEAR**

	Study Year					Difference in Excellent + Good '19 to '20
	2020	2019	2017	2015	2013	
The value of the course for the fee	69.9	54.2	64.7	61.6	68.0	+15.7†
Availability and condition of driving range facilities	45.8	34.1	45.4	40.8	44.8	+11.7†
Condition of the bunkers	72.6	62.8	72.1	76.1	77.9	+9.8†
Pace of play	58.4	49.8	59.0	55.3	55.5	+8.6†
Quality of food and beverage services	68.9	60.8	64.9	65.7	66.1	+8.0
Quality of the pro shop	90.1	85.3	90.3	90.7	89.5	+4.9
Layout of the course	96.2	92.9	98.1	97.7	97.1	+3.3
Condition of the rough	71.5	69.1	80.8	80.3	83.4	+2.5
Condition of the greens	86.2	84.6	90.0	90.5	89.2	+1.7
Directional signage to golf course	83.7	82.2	83.2	84.3	83.5	+1.5
Availability and condition of restrooms	65.3	64.6	66.7	62.5	64.6	+0.7
Condition of fairways	85.9	87.3	91.2	91.6	93.5	-1.4
Condition of golf carts	79.3	81.2	85.7	79.2	81.6	-2.0
Condition of the tee boxes	80.3	82.6	90.0	89.4	91.2	-2.3
Condition of cart paths	83.3	85.6	89.6	81.5	87.0	-2.3
Overall course condition	82.2	85.5	91.4	91.1	94.1	-3.3
Courtesy of golf course starters, Marshals and maintenance staff	80.6	84.5	85.8	84.9	84.9	-3.9
Availability and condition of practice putting greens	74.7	80.1	86.4	89.3	92.2	-5.4
Availability and quality of golf instructors	79.9	87.4	87.1	70.2	83.8	-7.4
Availability of tee-times when making a reservation by phone	35.5	43.1	37.5	53.8	50.9	-7.6
Availability of tee-times when doing a walk-up reservation	36.7	47.2	42.7	50.2	57.6	-10.5
Enforcement of golf course rules and regulations	58.0	69.4	71.7	72.4	73.1	-11.4†

† Statistically significant change (p < 0.05) between the 2019 and 2020 studies.

**TABLE 3 RATING ASPECTS OF TORREY PINES NORTH BY STUDY YEAR**

	Study Year					Difference in Excellent + Good '19 to '20
	2020	2019	2017	2015	2013	
Quality of food and beverage services	71.8	59.3	63.7	66.1	58.5	+12.5†
Availability and quality of golf instructors	88.5	80.8	82.4	77.9	78.0	+7.7†
Courtesy of golf course starters, Marshals and maintenance staff	88.1	81.2	86.6	87.3	86.6	+6.8†
The value of the course for the fee	83.6	77.5	78.0	81.2	79.4	+6.1†
Condition of the rough	75.9	70.5	85.3	81.2	77.2	+5.4
Directional signage to golf course	88.6	84.1	85.1	86.6	85.1	+4.5
Layout of the course	94.8	90.3	92.6	95.2	96.1	+4.4
Condition of fairways	92.5	88.9	90.7	86.4	90.2	+3.6
Availability and condition of restrooms	69.6	66.9	63.0	64.2	64.7	+2.7
Pace of play	46.3	43.9	53.4	52.5	50.1	+2.4
Condition of the bunkers	76.6	74.8	80.4	74.6	69.1	+1.9
Condition of cart paths	93.8	92.8	91.3	82.6	82.9	+0.9
Overall course condition	91.6	91.2	92.4	91.5	91.6	+0.3
Availability and condition of driving range facilities	47.4	47.5	51.5	53.0	49.1	-0.0
Quality of the pro shop	90.2	91.5	88.9	93.2	88.5	-1.3
Condition of golf carts	79.4	82.9	83.3	85.3	78.2	-3.5
Condition of the tee boxes	84.6	89.0	92.4	87.7	83.8	-4.4
Condition of the greens	81.5	86.7	86.1	91.8	89.6	-5.1
Enforcement of golf course rules and regulations	56.9	62.2	68.3	64.5	67.1	-5.3
Availability and condition of practice putting greens	76.8	83.9	84.4	91.2	87.2	-7.1†
Availability of tee-times when doing a walk-up reservation	30.9	44.8	40.2	53.5	50.3	-13.9†
Availability of tee-times when making a reservation by phone	19.0	38.9	32.5	47.5	47.0	-19.9†

† Statistically significant change (p < 0.05) between the 2019 and 2020 studies.



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

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

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

	Rating of Torrey Pines South (Q8a)		Difference Between Groups For Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Overall course condition	93	28	-65
The value of the course for the fee	78	29	-49
Condition of the rough	79	34	-45
Condition of the greens	92	53	-39
Courtesy of golf course starters, Marshals and maintenance staff	86	54	-32
Condition of fairways	91	62	-28
Availability and condition of driving range facilities	50	23	-27
Condition of the tee boxes	84	58	-26
Condition of the bunkers	76	51	-25
Enforcement of golf course rules and regulations	61	37	-24
Availability and condition of practice putting greens	78	55	-23
Directional signage to golf course	87	64	-22
Quality of the pro shop	94	72	-22
Condition of cart paths	86	65	-21
Availability and condition of restrooms	68	51	-17
Condition of golf carts	81	67	-14
Layout of the course	98	85	-13
Quality of food and beverage services	70	59	-11
Availability of tee-times when making a reservation by phone	38	29	-9
Pace of play	59	52	-7
Availability of tee-times when doing a walk-up reservation	36	43	+6
Availability and quality of golf instructors	78	100	+22

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

	Rating of Torrey Pines North (Q8b)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Overall course condition	97	40	-57
Condition of the greens	86	35	-51
Enforcement of golf course rules and regulations	61	19	-41
Pace of play	49	15	-34
Condition of the rough	79	45	-34
Condition of fairways	95	69	-26
Availability and condition of practice putting greens	79	54	-25
Condition of the tee boxes	87	62	-25
Availability and quality of golf instructors	90	67	-24
Availability and condition of driving range facilities	49	27	-22
Condition of the bunkers	79	56	-22
Courtesy of golf course starters, Marshals and maintenance staff	90	68	-22
The value of the course for the fee	86	64	-22
Directional signage to golf course	90	72	-18
Condition of golf carts	81	63	-18
Quality of the pro shop	91	77	-15
Layout of the course	96	86	-9
Availability of tee-times when making a reservation by phone	19	19	-0
Availability of tee-times when doing a walk-up reservation	31	31	-0
Availability and condition of restrooms	70	70	+0
Condition of cart paths	94	95	+2
Quality of food and beverage services	72	74	+3

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

	City of San Diego Resident		Difference Between Groups for Each Aspect
	Resident	Non-resident	
The value of the course for the fee	84	53	-31
Overall course condition	88	75	-13
Condition of the tee boxes	84	76	-8
Quality of the pro shop	93	87	-6
Courtesy of golf course starters, Marshals and maintenance staff	83	77	-6
Condition of fairways	89	83	-6
Condition of cart paths	86	80	-6
Condition of the greens	88	84	-4
Directional signage to golf course	85	82	-3
Quality of food and beverage services	70	68	-2
Layout of the course	97	95	-2
Condition of golf carts	79	79	-0
Condition of the rough	71	72	+0
Availability and condition of practice putting greens	74	75	+1
Availability and condition of driving range facilities	45	47	+2
Condition of the bunkers	70	76	+6
Availability of tee-times when doing a walk-up reservation	32	44	+13
Availability and condition of restrooms	59	73	+15
Pace of play	50	68	+18
Enforcement of golf course rules and regulations	51	69	+18
Availability of tee-times when making a reservation by phone	24	47	+23
Availability and quality of golf instructors	69	94	+25

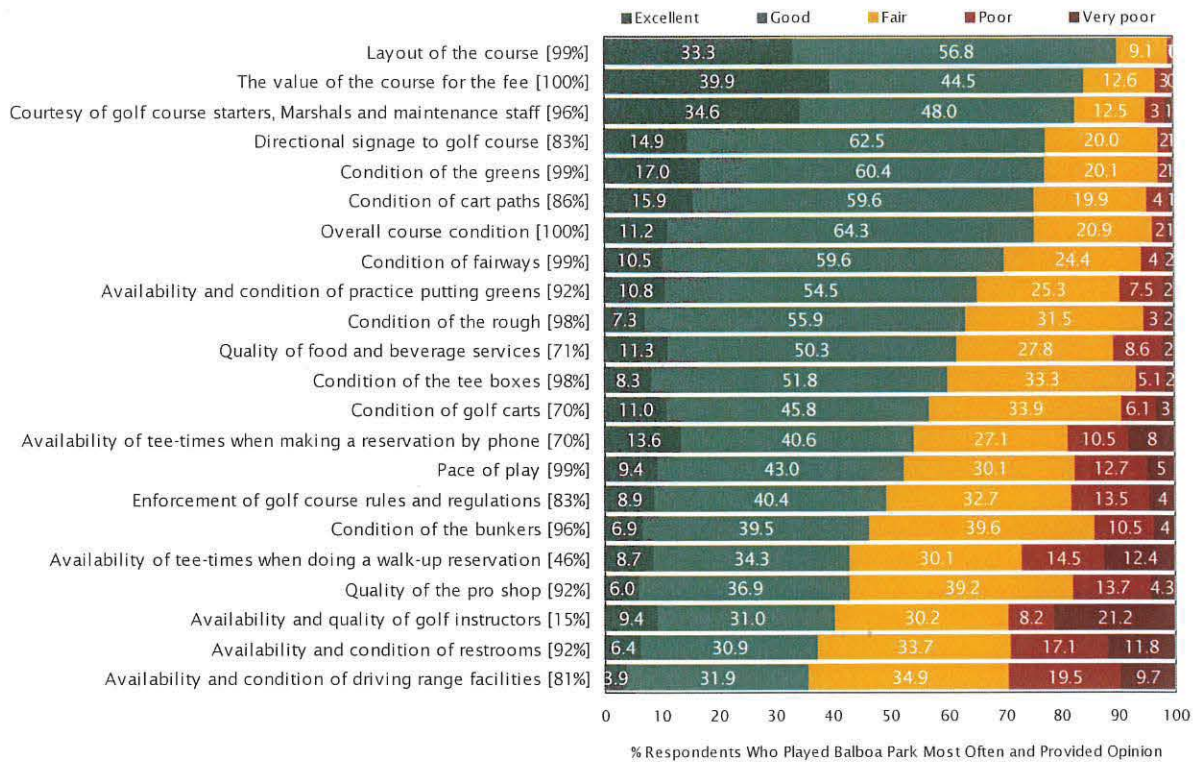
**TABLE 7 RATING ASPECTS OF TORREY PINES NORTH BY RESIDENT VS NON-RESIDENT (SHOWING % EXCELLENT + GOOD)**

	City of San Diego Resident		Difference Between Groups for Each Aspect
	Resident	Non-resident	
The value of the course for the fee	89	60	-29
Courtesy of golf course starters, Marshals and maintenance staff	89	84	-5
Availability and condition of driving range facilities	48	44	-4
Quality of food and beverage services	72	70	-3
Overall course condition	92	90	-2
Condition of fairways	93	91	-2
Layout of the course	95	94	-1
Condition of the tee boxes	85	84	-0
Condition of the bunkers	76	78	+1
Availability and condition of practice putting greens	76	79	+2
Condition of golf carts	79	81	+2
Directional signage to golf course	88	91	+3
Condition of cart paths	93	96	+3
Quality of the pro shop	89	94	+4
Condition of the rough	75	80	+5
Condition of the greens	80	86	+6
Availability and condition of restrooms	67	79	+12
Availability of tee-times when doing a walk-up reservation	29	41	+12
Pace of play	44	57	+14
Availability and quality of golf instructors	86	100	+14
Enforcement of golf course rules and regulations	54	71	+18
Availability of tee-times when making a reservation by phone	13	40	+26

**RATING ASPECTS OF BALBOA PARK** As displayed in Figure 31 on the next page, Balboa Park Golf Course customers gave the most positive ratings for the layout of the course (90% excellent or good), value of the course for the fee (84%), courtesy of golf course starters, Marshals, and maintenance staff (83%), directional signage to the golf course (77%), and condition of the greens (77%). At the other end of the spectrum, customers were less positive regarding the availability and condition of driving range facilities (36%), availability and condition of restrooms (37%), and the availability and quality of golf instructors (40%) at the Balboa Park Golf Course.

Table 8 on the next page shows the percentage of customers who rated each aspect of Balboa Park as excellent or good in the 2011, 2013, 2015, 2017, 2019, and 2020 surveys, as well as the difference between the two most recent studies. Compared with the 2019 survey results, there was a downward trend for most aspects in 2020, with eight statistically significant performance declines among Balboa Park customers during this period.

**FIGURE 31 RATING ASPECTS OF BALBOA PARK**



**TABLE 8 RATING ASPECTS OF BALBOA PARK BY STUDY YEAR**

	Study Year						Difference in Excellent + Good '19 to '20
	2020	2019	2017	2015	2013	2011	
Condition of fairways	70.1	66.3	74.9	75.0	79.7	64.7	+3.8
Directional signage to golf course	77.4	74.1	78.4	74.5	75.1	69.3	+3.3
Availability and condition of driving range facilities	35.8	33.8	21.6	33.3	36.3	33.2	+2.0
Layout of the course	90.1	88.2	88.2	88.7	88.4	88.5	+2.0
Condition of cart paths	75.5	75.0	85.6	82.1	60.9	54.9	+0.4
Pace of play	52.4	52.0	53.4	55.5	55.5	65.6	+0.4
Condition of the rough	63.2	64.0	64.6	63.7	71.0	57.6	-0.8
Condition of the bunkers	46.4	48.1	49.8	55.7	53.2	53.9	-1.7
The value of the course for the fee	84.4	86.7	82.3	83.2	81.1	76.0	-2.3
Condition of the tee boxes	60.1	63.9	64.8	65.6	61.6	61.8	-3.8
Quality of food and beverage services	61.6	65.6	57.5	59.4	57.7	55.7	-4.1
Enforcement of golf course rules and regulations	49.3	54.2	55.0	61.4	61.7	67.8	-4.9
Overall course condition	75.4	81.0	83.9	85.7	85.8	67.4	-5.6
Availability and condition of restrooms	37.4	44.1	42.2	47.9	49.8	53.1	-6.7
Courtesy of golf course starters, Marshals and maintenance staff	82.7	89.6	89.7	85.4	78.6	79.9	-7.0†
Condition of the greens	77.4	87.1	90.6	83.6	85.9	65.4	-9.7†
Quality of the pro shop	42.9	53.1	33.7	34.5	38.8	41.9	-10.2†
Availability and condition of practice putting greens	65.3	75.5	71.5	76.6	75.5	66.7	-10.2†
Availability and quality of golf instructors	40.4	57.4	64.5	64.4	70.9	71.2	-17.0†
Condition of golf carts	56.8	75.1	79.4	53.5	61.8	67.9	-18.4†
Availability of tee-times when making a reservation by phone	54.2	82.2	81.2	79.2	78.3	77.2	-27.9†
Availability of tee-times when doing a walk-up reservation	43.0	75.2	77.8	73.2	72.8	74.2	-32.2†

† Statistically significant change (p < 0.05) between the 2019 and 2020 studies.

**BALBOA PARK ASPECT RATINGS BY SUBGROUP** Table 9 on the next page displays how ratings of each aspect of the Balboa Park Golf Course (Question 13) varied by the customer's overall performance rating for the course (Question 8c). As with Table 4, the table divides those who rated Balboa Park Golf Course as excellent or good into one group, and the minority of customers who rated it as fair, poor, or very poor into another. Also displayed is the difference

between the two groups in the far right column. As one might expect, those with more positive overall ratings of Balboa Park were more likely to rate specific aspects of the course as excellent or good. Aspects of the course for which there existed the greatest disparity between the two groups were: the overall course condition, condition of the rough, and condition of the fairways.

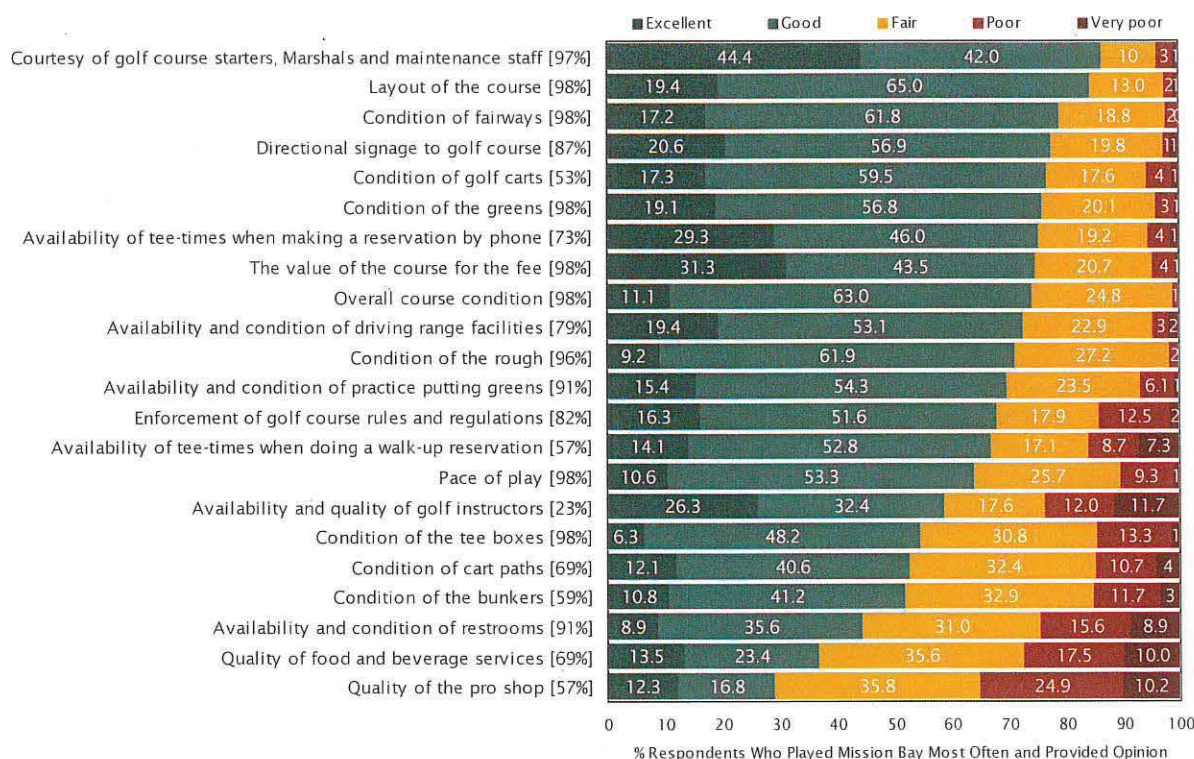
**TABLE 9 RATING ASPECTS OF BALBOA PARK BY OVERALL RATING OF BALBOA PARK (SHOWING % EXCELLENT + GOOD)**

	Rating of Balboa Park (Q8c)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Overall course condition	84	28	-55
Condition of the rough	69	29	-40
Condition of fairways	76	37	-39
Condition of the tee boxes	65	28	-37
The value of the course for the fee	90	54	-36
Condition of cart paths	81	46	-35
Courtesy of golf course starters, Marshals and maintenance staff	88	53	-35
Condition of golf carts	63	30	-32
Availability and condition of practice putting greens	70	40	-30
Condition of the bunkers	50	22	-28
Availability and condition of restrooms	42	14	-27
Enforcement of golf course rules and regulations	53	27	-26
Directional signage to golf course	81	57	-24
Quality of food and beverage services	65	41	-24
Availability and quality of golf instructors	45	21	-23
Availability and condition of driving range facilities	39	16	-23
Quality of the pro shop	46	25	-21
Condition of the greens	81	60	-20
Layout of the course	93	73	-20
Pace of play	55	36	-19
Availability of tee-times when doing a walk-up reservation	46	30	-16
Availability of tee-times when making a reservation by phone	54	54	-0

**RATING ASPECTS OF MISSION BAY** Customers who played the Mission Bay course most often during the past year gave the highest ratings for the courtesy of course starters, Marshals, and maintenance staff (86% excellent or good), the layout of the course (84%), condition of fairways (79%), directional signage to the golf course (78%), and condition of golf carts (77%). Customers provided substantially lower ratings for the quality of the pro shop (29%), quality of the food and beverage services (37%), availability and condition of restrooms (45%), condition of the bunkers (52%), and condition of cart paths (53%).

Table 10 on the next page shows the percentage of customers who rated each aspect of Mission Bay as excellent or good in the 2011, 2013, 2015, 2017, 2019, and 2020 surveys, as well as the difference between the two most recent studies. Compared with the 2019 study, there was a downward trend for various aspects of the course in 2020, with six statistically significant performance declines among Mission Bay customers during this period.

**FIGURE 32 RATING ASPECTS OF MISSION BAY**



**TABLE 10 RATING ASPECTS OF MISSION BAY BY STUDY YEAR**

Rating Aspect	Study Year						Difference in Excellent + Good '19 to '20
	2020	2019	2017	2015	2013	2011	
Enforcement of golf course rules and regulations	67.9	60.3	71.7	73.6	48.9	72.6	+7.7
Availability and condition of restrooms	44.5	38.3	36.9	49.9	46.2	25.2	+6.2
Condition of fairways	79.0	73.9	74.4	77.9	77.7	68.1	+5.1
Condition of the rough	71.1	67.6	71.8	80.6	68.2	57.1	+3.6
Directional signage to golf course	77.5	74.4	68.6	65.9	65.0	65.7	+3.2
Layout of the course	84.5	82.5	79.5	75.2	70.5	67.5	+2.0
Quality of food and beverage services	36.9	35.9	32.1	44.9	27.5	34.8	+1.0
Condition of the bunkers	51.9	52.2	41.7	55.1	49.2	51.4	-0.3
The value of the course for the fee	74.8	77.4	67.8	76.2	60.4	61.7	-2.6
Overall course condition	74.1	76.8	75.6	78.9	69.1	60.7	-2.7
Condition of the tee boxes	54.5	57.3	49.0	59.9	54.2	56.1	-2.8
Condition of cart paths	52.7	56.8	54.3	50.1	54.0	54.0	-4.1
Condition of golf carts	76.8	81.7	85.9	75.8	79.2	78.5	-4.9
Courtesy of golf course starters, Marshals and maintenance staff	86.4	91.6	88.9	86.7	76.7	75.4	-5.1
Condition of the greens	75.9	81.2	88.3	76.2	76.7	62.4	-5.3
Quality of the pro shop	29.1	37.6	32.5	22.6	14.7	27.3	-8.4
Pace of play	63.9	73.3	66.6	72.8	63.0	73.3	-9.4†
Availability and condition of driving range facilities	72.5	82.2	81.1	69.5	60.5	68.2	-9.7†
Availability and quality of golf instructors	58.8	73.7	73.3	71.0	48.0	70.8	-14.9†
Availability and condition of practice putting greens	69.6	87.1	86.9	73.3	60.6	64.0	-17.5†
Availability of tee-times when making a reservation by phone	75.4	93.1	93.4	83.6	78.6	88.1	-17.8†
Availability of tee-times when doing a walk-up reservation	67.0	84.9	86.8	89.4	78.8	75.5	-17.9†

† Statistically significant change (p < 0.05) between the 2019 and 2020 studies.

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

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

	Rating of Mission Bay (Q8d)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Overall course condition	84	23	-62
Directional signage to golf course	84	37	-47
Condition of the greens	83	37	-47
Condition of golf carts	83	38	-45
Condition of the rough	78	35	-43
Condition of cart paths	60	17	-42
Availability and condition of driving range facilities	79	40	-39
Condition of the bunkers	57	19	-38
Availability and condition of restrooms	50	12	-38
The value of the course for the fee	81	45	-35
Condition of fairways	85	49	-35
Layout of the course	90	57	-32
Enforcement of golf course rules and regulations	72	42	-30
Condition of the tee boxes	59	31	-28
Quality of food and beverage services	41	14	-27
Courtesy of golf course starters, Marshals and maintenance staff	91	64	-27
Pace of play	67	47	-20
Availability and condition of practice putting greens	72	57	-15
Availability of tee-times when doing a walk-up reservation	70	55	-15
Availability of tee-times when making a reservation by phone	77	65	-12
Availability and quality of golf instructors	61	50	-11
Quality of the pro shop	31	20	-11

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

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

	Torrey Pines South	Torrey Pines North	Balboa Park	Mission Bay
Layout of the course	96	95	90	84
Condition of cart paths	83	94	75	53
Condition of fairways	86	93	70	79
Overall course condition	82	92	75	74
Quality of the pro shop	90	90	43	29
Directional signage to golf course	84	89	77	78
Availability and quality of golf instructors	80	89	40	59
Courtesy of golf course starters, Marshals and maintenance staff	81	88	83	86
Condition of the greens	86	82	77	76
Condition of the tee boxes	80	85	60	54
The value of the course for the fee	70	84	84	75
Condition of golf carts	79	79	57	77
Availability and condition of practice putting greens	75	77	65	70
Condition of the bunkers	73	77	46	52
Condition of the rough	72	76	63	71
Availability of tee-times when making a reservation by phone	36	19	54	75
Availability and condition of driving range facilities	46	47	36	73
Quality of food and beverage services	69	72	62	37
Availability and condition of restrooms	65	70	37	45
Enforcement of golf course rules and regulations	58	57	49	68
Availability of tee-times when doing a walk-up reservation	37	31	43	67
Pace of play	58	46	52	64



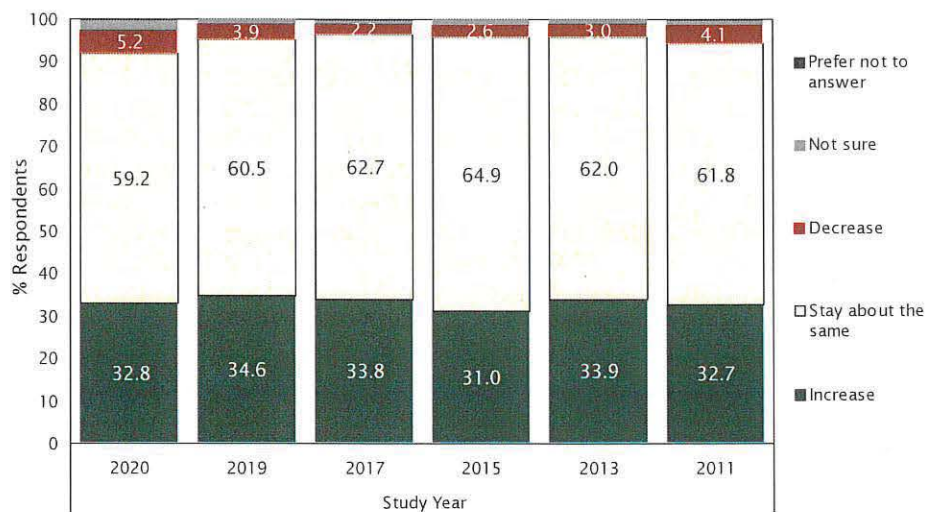
## FUTURE EXPECTATIONS & RECOMMENDATIONS

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.

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

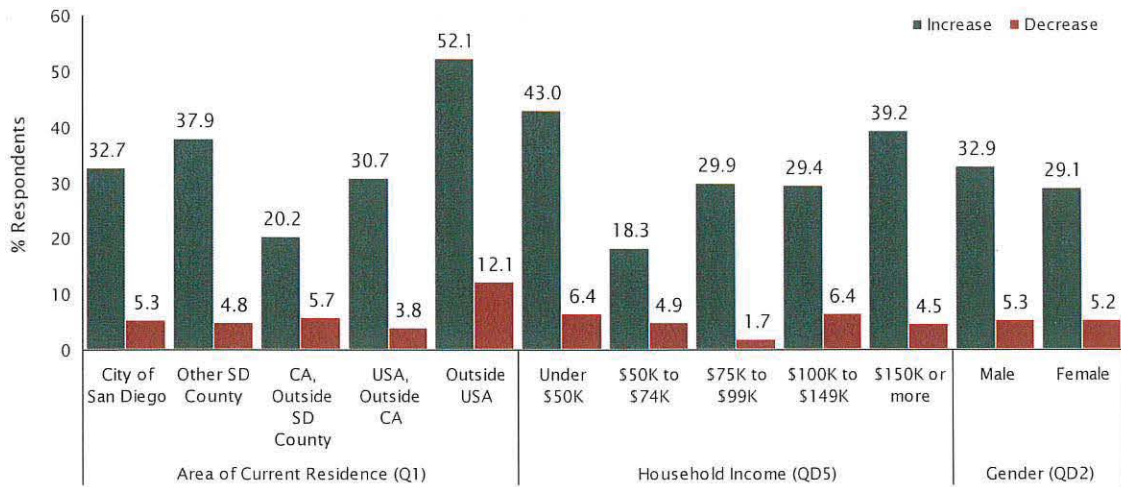
**FIGURE 33** FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY STUDY YEAR



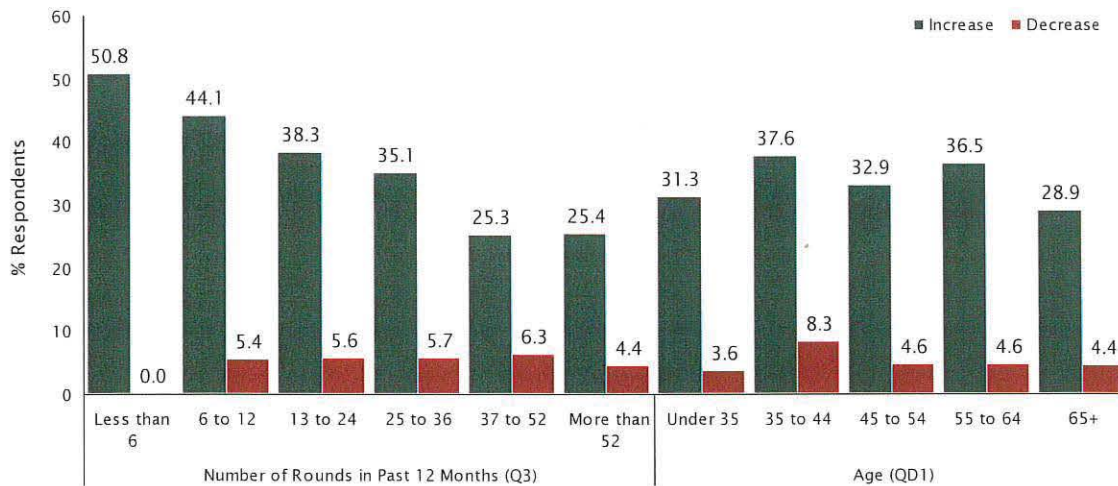
As shown in Figure 33, approximately one-third (33%) of all customers anticipated that they would increase the frequency of their golf play in the next 12 months. Only 5% felt their frequency of play would decrease, while most (59%) said it would remain about the same. There were no statistically significant changes from the 2019 study.

The next two figures display the percentage of customers who anticipate increasing or decreasing their frequency of play over the next year by various subgroups. Those who live outside of the United States or in the City of San Diego, those with a household income of less than \$50,000 or at least \$150,000 per year, and customers who golfed an average of once per month or less in the past year were the most likely to anticipate increasing the frequency of their play in the coming year.

**FIGURE 34 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY AREA OF CURRENT RESIDENCE, HOUSEHOLD INCOME & GENDER**



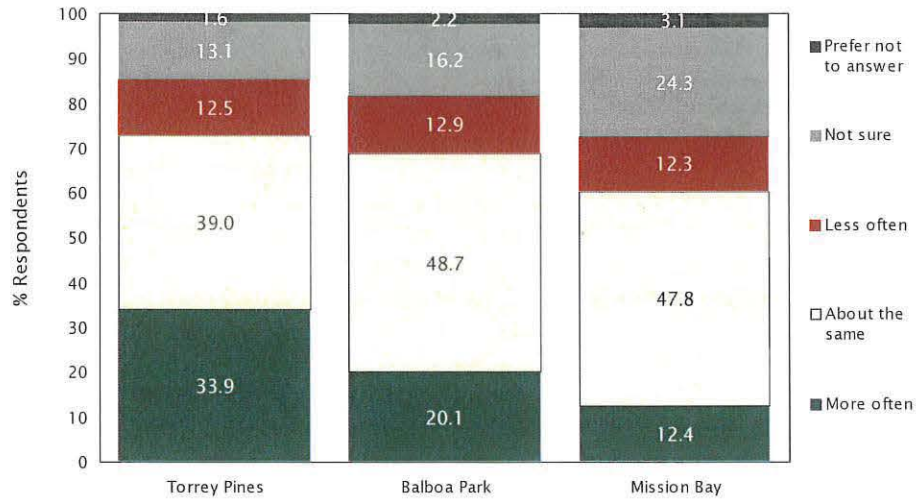
**FIGURE 35 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & AGE**



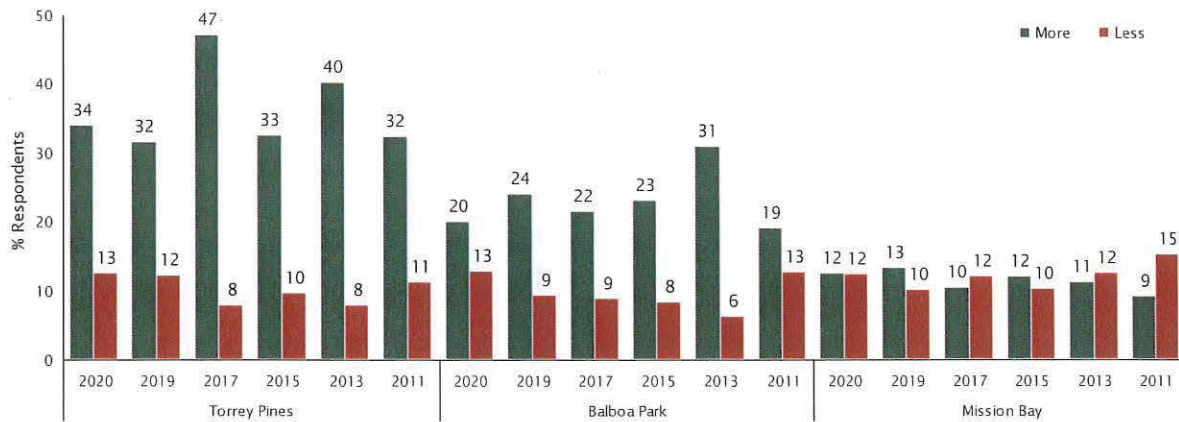
**FREQUENCY OF FUTURE PLAY AT SAN DIEGO COURSES** All survey respondents were next asked if, over the next 12 months, they plan to play more, less, or about the same that they currently do at each of the three San Diego courses. Figure 36 on the next page shows that 34% of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 20% for Balboa Park and 12% for Mission Bay. The percentage of customers who plan to play *less often* was similar between Torrey Pines (13%), Balboa Park (13%), and Mission Bay (12%). When compared with 2019, there were no statistically significant changes in the expected frequency of playing each of the three courses in the coming year (see Figure 37 on next page).

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

**FIGURE 36** FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS

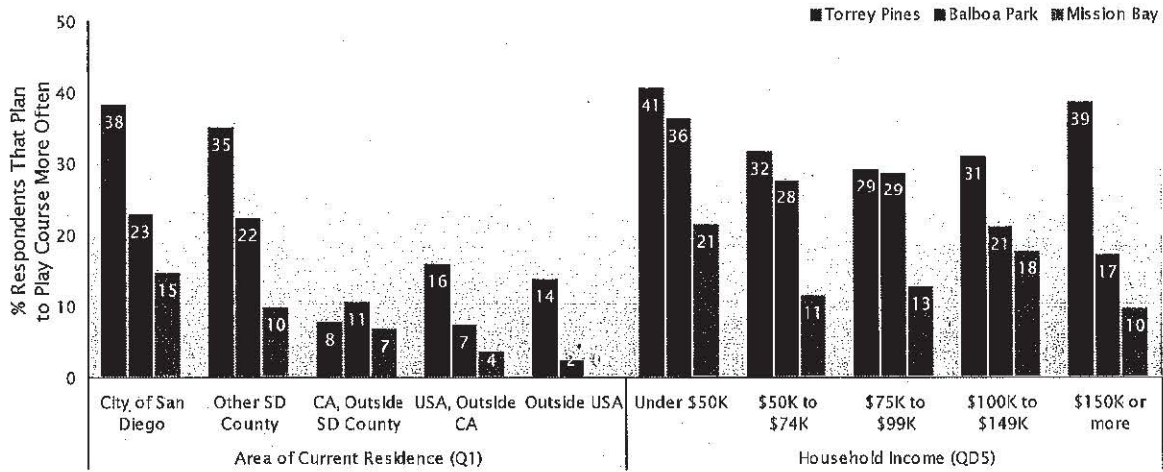


**FIGURE 37** FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY STUDY YEAR

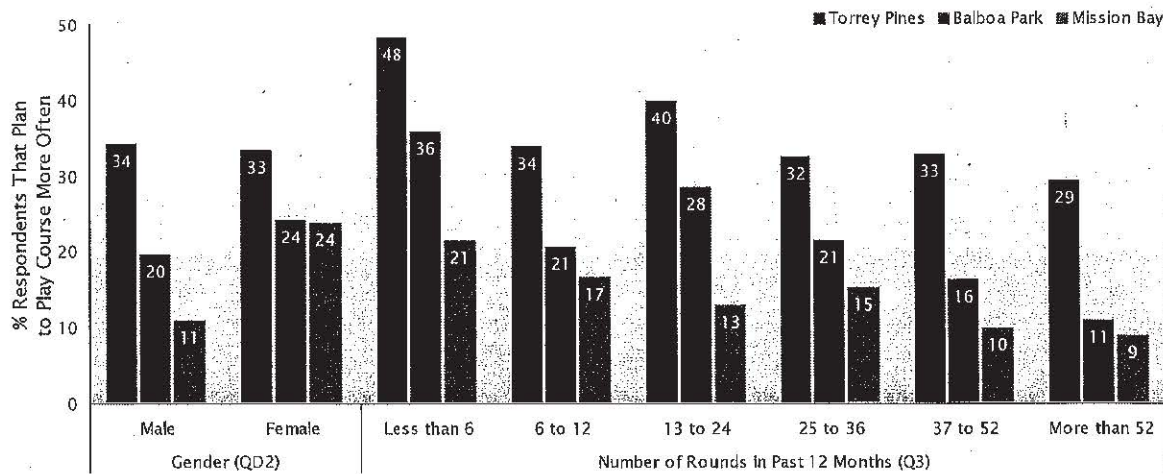


Figures 38 through 40 on the next page display the percentage of customers at each of the three San Diego courses that expect to increase their play over the next 12 months by a variety of demographic subgroups. Nearly all subgroups were *most* likely to anticipate increasing their play at Torrey Pines, followed by Balboa Park.

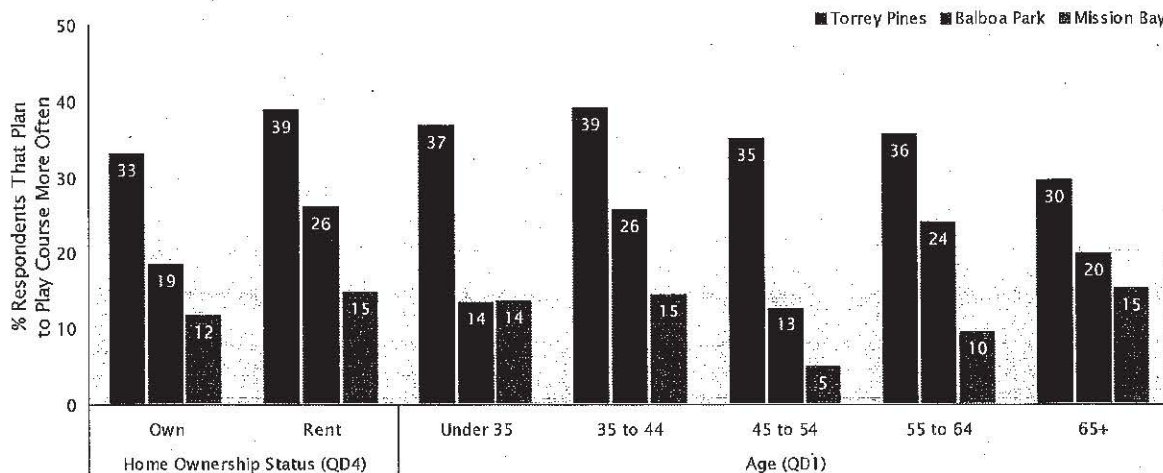
**FIGURE 38 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY AREA OF RESIDENCE & HOUSEHOLD INCOME**



**FIGURE 39 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS**

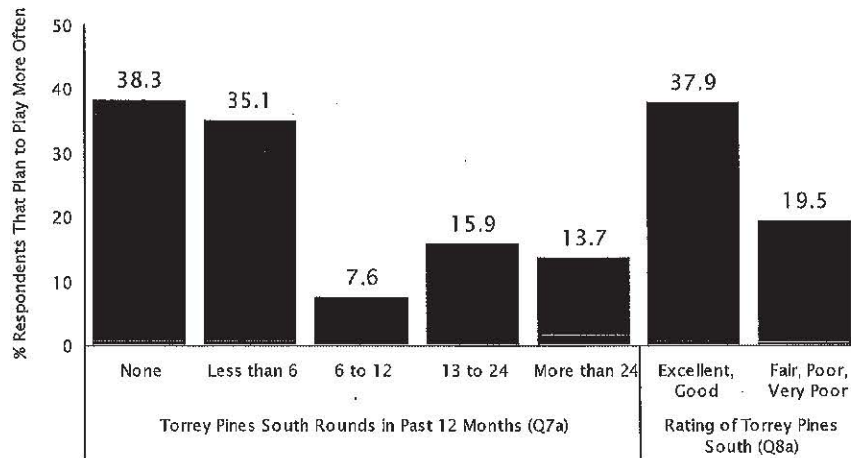


**FIGURE 40 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY HOME OWNERSHIP STATUS & AGE**

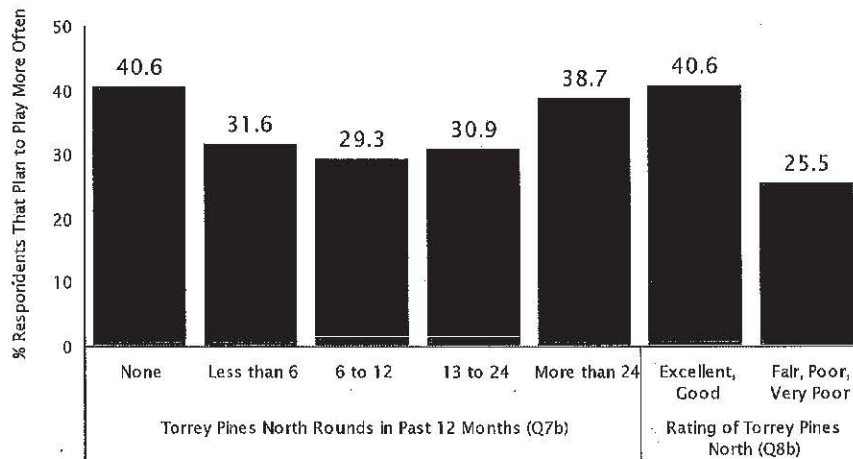


Figures 41 through 44 display the percentage of customers at each course that expected to increase their play over the next 12 months by their frequency of play at that particular course in the *past* 12 months as well as the overall performance rating they assigned to the same course. As one would expect, customers who rated a course as excellent or good were generally more likely to plan on playing that course more often in the future.

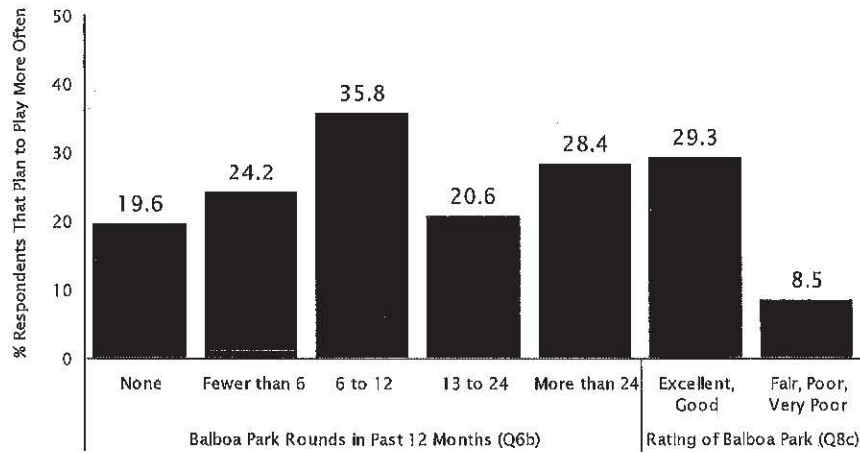
**FIGURE 41 PLAN TO PLAY TORREY PINES MORE OFTEN BY TORREY PINES SOUTH ROUNDS IN PAST 12 MONTHS & RATING OF TORREY PINES SOUTH**



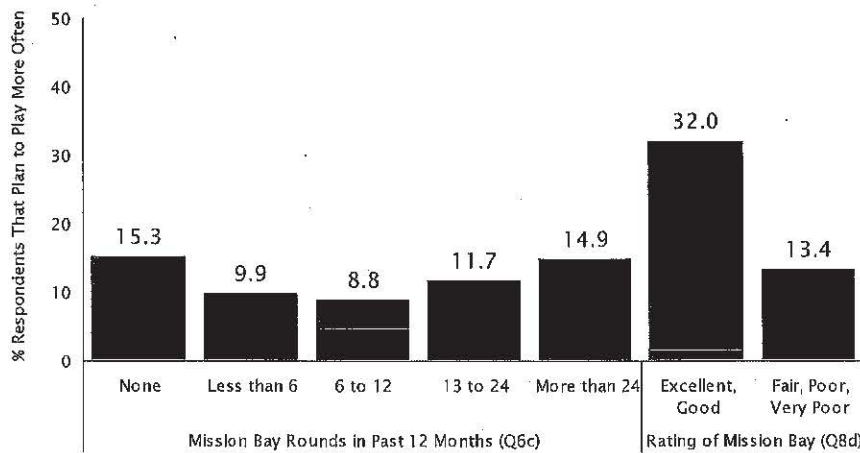
**FIGURE 42 PLAN TO PLAY TORREY PINES MORE OFTEN BY TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS & RATING OF TORREY PINES NORTH**



**FIGURE 43 PLAN TO PLAY BALBOA PARK MORE OFTEN BY BALBOA PARK ROUNDS IN PAST 12 MONTHS & RATING OF BALBOA PARK**

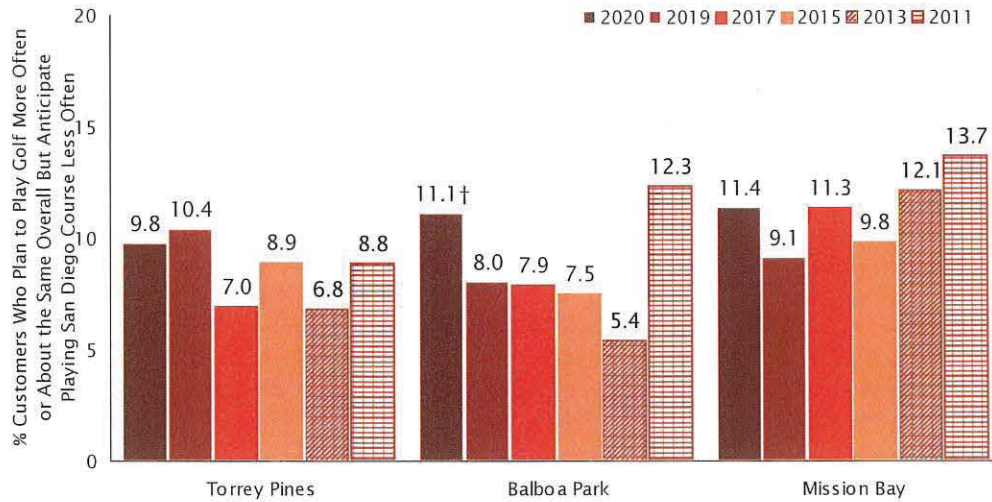


**FIGURE 44 PLAN TO PLAY MISSION BAY MORE OFTEN BY MISSION BAY ROUNDS IN PAST 12 MONTHS & RATING OF MISSION BAY**



**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 14) yet anticipated playing one or more San Diego courses *less often* in the coming year (Question 15) were asked the reason for their expected reduction in play. These 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 46 through 48. 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 45 displays the percentage of customers from each course that anticipate playing less often and thus received the follow-up question as to why.

**FIGURE 45 PLAN TO PLAY GOLF MORE OFTEN OR ABOUT THE SAME BUT ANTICIPATE PLAYING SAN DIEGO COURSES LESS OFTEN IN NEXT 12 MONTHS BY STUDY YEAR**

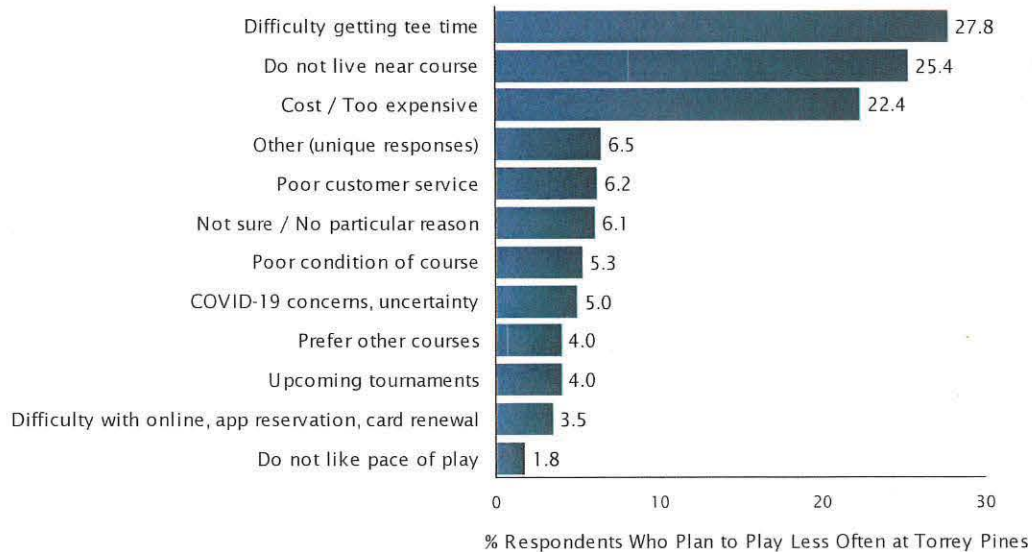


† Statistically significant change (p < 0.05) between the 2019 and 2020 studies.

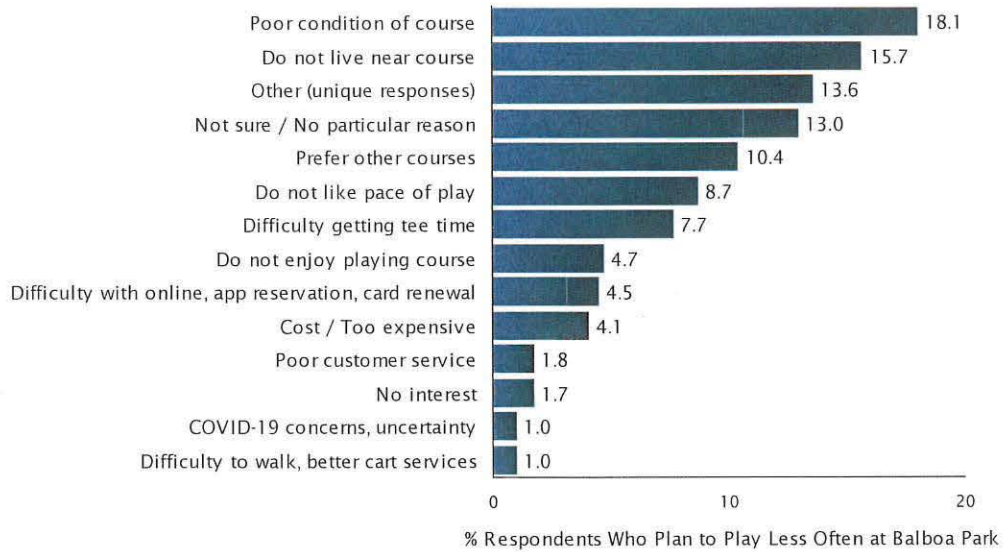
The most commonly mentioned reasons for playing Torrey Pines less often in the next year were difficulties getting a tee time (28%), not living near the course (25%), and concerns about cost of play (22%). The most common specific reasons for playing Balboa Park less often included concerns about the condition of the course (18%), not living near the course (16%), and a preference for other courses (10%). The top specific reasons for choosing to play Mission Bay less often were that they don't live near the course (14%), concerns about the condition of the course (13%), and dislike of the course in general (11%).

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

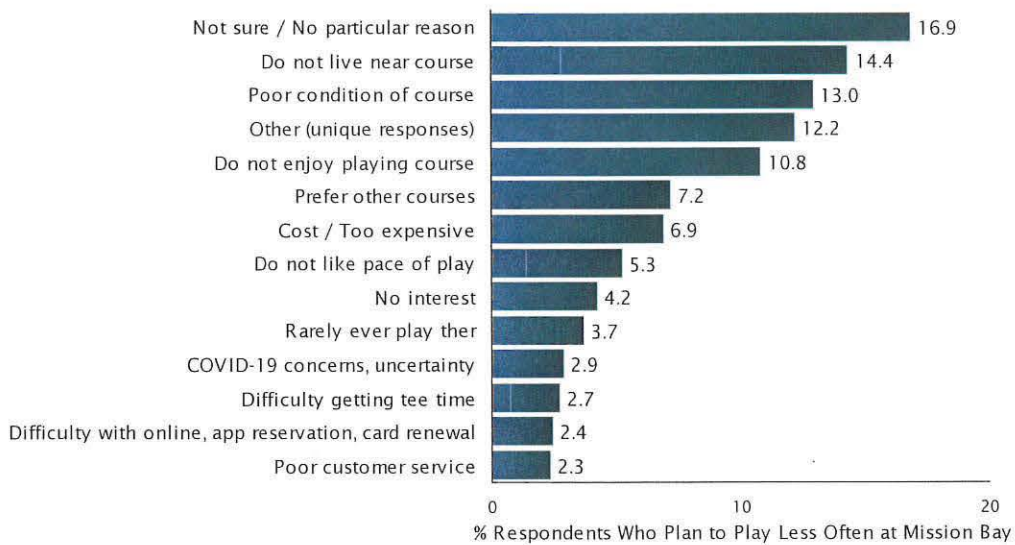
**FIGURE 46 REASONS FOR PLANNING TO PLAY TORREY PINES LESS OFTEN**



**FIGURE 47 REASONS FOR PLANNING TO PLAY BALBOA PARK LESS OFTEN**



**FIGURE 48 REASONS FOR PLANNING TO PLAY MISSION BAY LESS OFTEN**



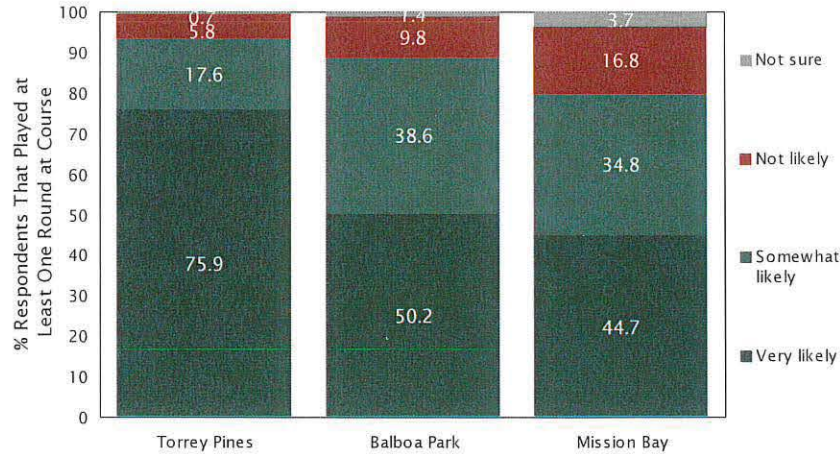
**LIKELIHOOD OF RECOMMENDING SAN DIEGO GOLF COURSES** The final substantive question of the survey examined customers' likelihood of recommending San Diego golf courses to their friends and colleagues. The question was asked for each of the three city golf courses a customer had played in the past 12 months, offering the respondent options of very likely, somewhat likely, or not likely. The results are presented in Figure 49 on the next page.

Ninety-four percent (94%) of customers who played Torrey Pines were very (76%) or somewhat (18%) likely to recommend the course to a friend or colleague, compared with 89% of customers who played Balboa Park (50% very and 39% somewhat) and 80% who played Mission Bay (45% very and 35% somewhat). When compared with 2019, Torrey Pines posted a statistically significant *increase* in the percentage of customers who were likely to recommend the course to a friend or colleague (see Figure 50).

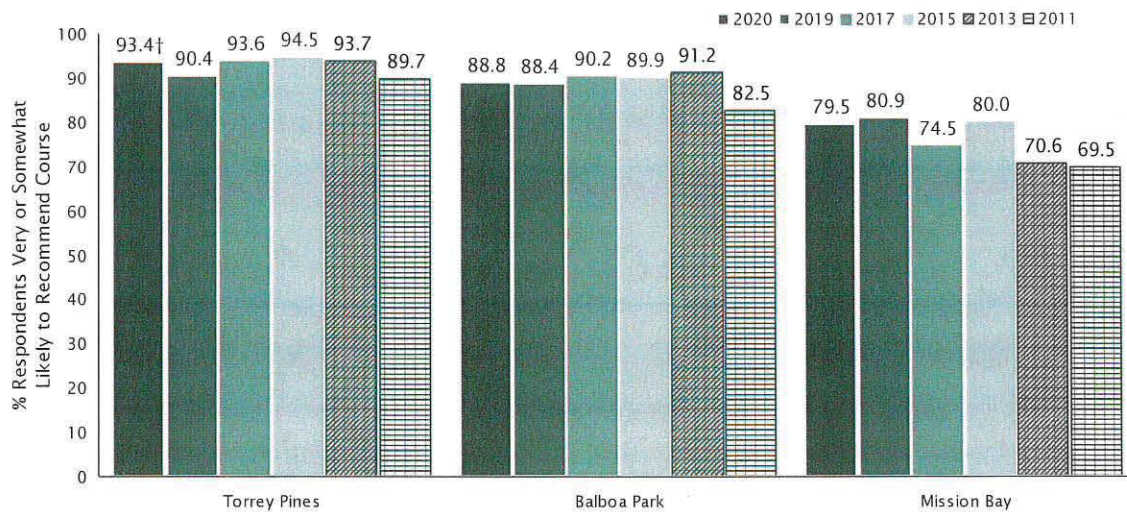


**Question 19** Overall, how likely are you to recommend the \_\_\_\_\_ to a friend or colleague who is interested in playing golf in San Diego County?

**FIGURE 49 LIKELIHOOD OF RECOMMENDING COURSES**



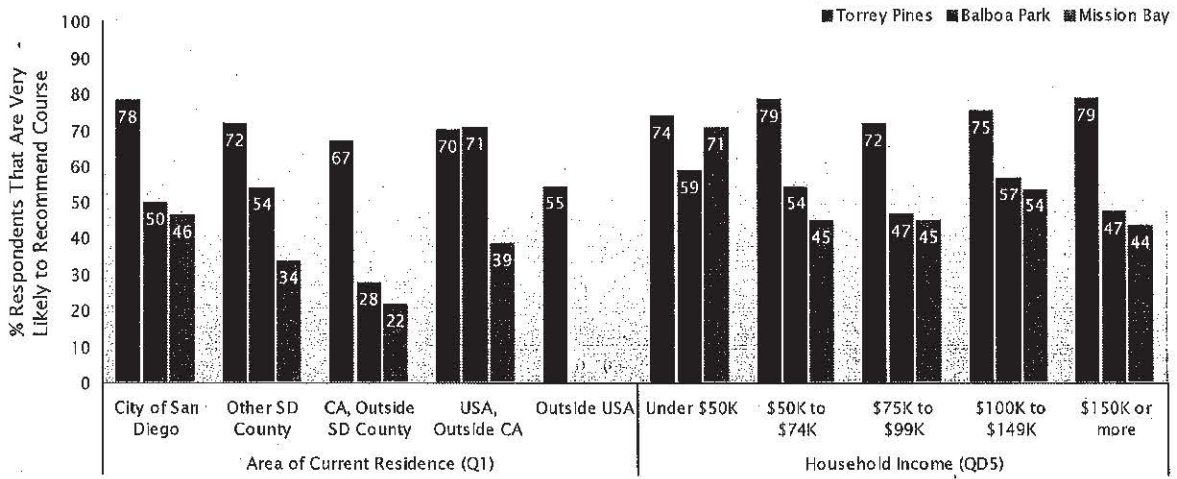
**FIGURE 50 LIKELIHOOD OF RECOMMENDING COURSES BY STUDY YEAR**



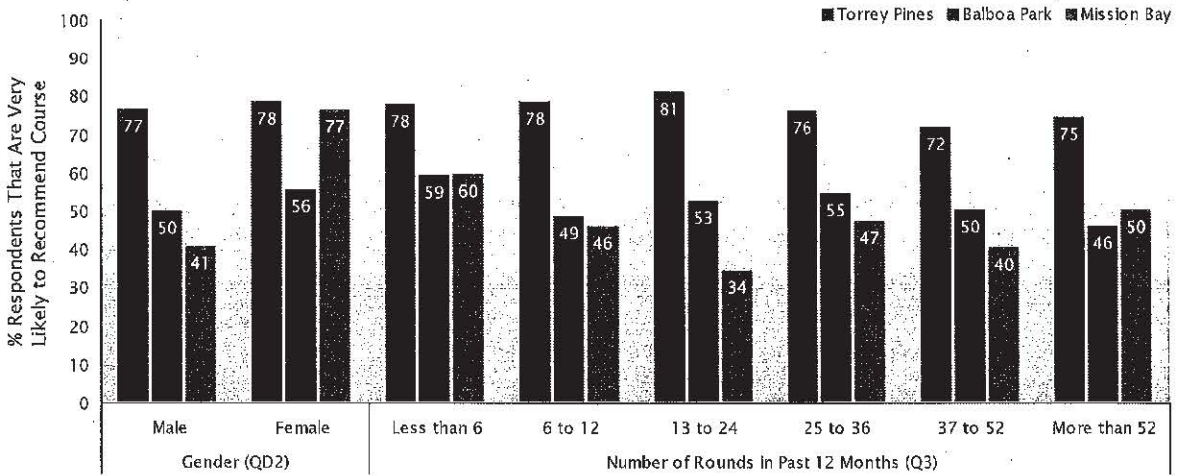
† Statistically significant change ( $p < 0.05$ ) between the 2019 and 2020 studies.

Figures 51 through 53 display the percentage of customers at each of the three San Diego courses that would be *very likely* to recommend the course by a variety of demographic subgroups. The most obvious finding is that the majority of *all* subgroups indicated they would be very likely to recommend Torrey Pines Golf Course to a friend or colleague, ranging from a low of 54% among those who live outside the United States to a high of 82% among those under the age of 35. The percentage of customers who would be very likely to recommend Balboa Park Golf Course varied from a low of 0% among those who live outside the United States to a high of 71% among those with a household income under \$50,000 per year. Mission Bay Golf Course had similar variation among customers likely to recommend the course, ranging from a low of 0% among those who reside outside the country to a high of 76% among women.

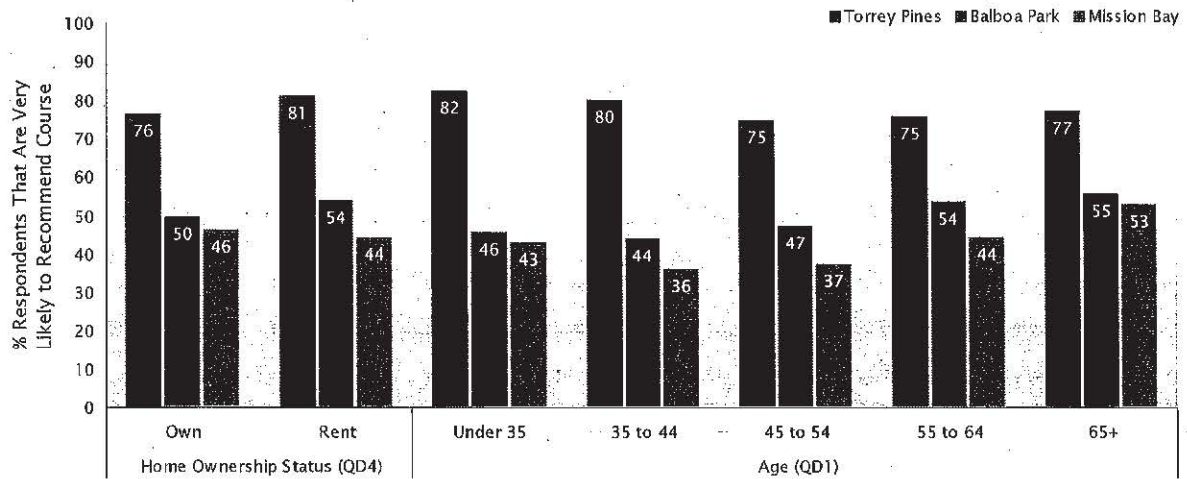
**FIGURE 51 LIKELIHOOD OF RECOMMENDING COURSES BY AREA OF RESIDENCE & HOUSEHOLD INCOME**



**FIGURE 52 LIKELIHOOD OF RECOMMENDING COURSES BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS**



**FIGURE 53 LIKELIHOOD OF RECOMMENDING COURSES BY HOME OWNERSHIP STATUS & AGE**



## BACKGROUND & DEMOGRAPHICS

Table 13 presents the key demographic and background information collected in the survey of San Diego golf customers. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of customers who played at least one round of golf at Torrey Pines, Balboa Park, and/or Mission Bay golf courses between August 2019 and July 2020. The primary motivation for collecting background and demographic information was to provide a better insight into how the results of the substantive questions of the survey vary by demographic characteristics as presented in this report.

**TABLE 13 DEMOGRAPHICS OF SAMPLE**

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

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

**QUESTIONNAIRE DEVELOPMENT** Dr. McLarney worked closely with the City of San Diego to develop a questionnaire that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias, the items were asked in a random order for each respondent. The 2020 questionnaire was identical to the 2019 questionnaire, which differed very little from the original survey developed for the 2011 study to allow for direct comparisons in customer responses over time.

Many questions asked in this study were presented only to a subset of respondents. For example, only those who had played at one or more San Diego courses (Question 6) were asked about their perceptions of and experiences with each course they had played (Question 8). The questionnaire included with this report (see *Questionnaire & Toplines* on page 54) identifies skip patterns used during the interview to ensure each respondent received the appropriate questions.

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

**SAMPLE** The sample for this study was drawn from the City's golf reservation database, which contains records representing each round of golf played at Torrey Pines North, Torrey Pines South, Balboa Park, and/or Mission Bay Golf Course. All customers who played at least one round of golf at one of the city courses between August 2019 and July 2020 comprised the universe for the study. The database was organized by customer and included the number of rounds played at each course for each customer. Finally, the universe of customers was stratified by the number of rounds a customer had played and their most frequently-played course.

**RECRUITMENT AND DATA COLLECTION** True North used multiple methods to recruit and encourage participation in the survey. Customer records in the database that contained email contact information were sent email invitations to participate in the study. The invitations included a hyperlink to the survey website, and each link contained a unique passcode. The passcode ensured that only customers formally invited to participate in the survey could participate, and that they could only do so once. In coordination with this effort, phone interviews were conducted on weekday evenings and weekends, with the average interview lasting 14 minutes. The data collection period lasted from September 1 to September 16, 2020, and resulted in a total of 1,207 completed surveys.

**STATISTICAL MARGIN OF ERROR** By using a probability-based sampling design and monitoring sample characteristics as data collection proceeded, True North ensured that the final sample was representative of the universe of San Diego golf customers who played at least one round between August 2019 and July 2020. The results of the survey can thus be used to estimate the opinions of *all* City of San Diego golf course customers who played during that time period. Because not all customers participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in this survey of 1,207 respondents for a particular question and what would have been found if all the estimated 62,570 customers had participated.

**FIGURE 54 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING**

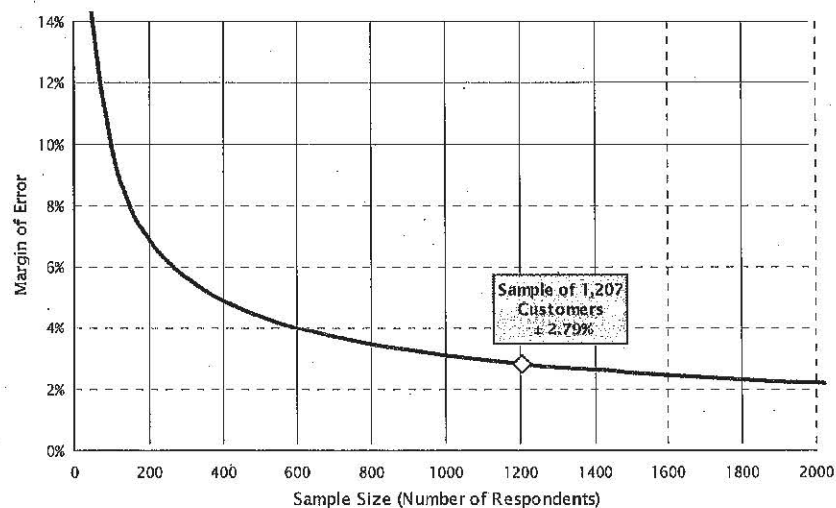


Figure 54 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response (i.e.,  $\hat{p} = 0.5$ ). For this survey, the maximum margin of error is  $\pm 2.79\%$  for questions answered by all 1,207 respondents.

Within this report, figures and tables show how responses to certain questions varied by subgroups such as area of current residence, household income, and age. Figure 54 above is useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

**DATA PROCESSING** Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing open-ended responses, and preparing frequency analyses and cross-tabulations. Where appropriate, tests of statistical significance were conducted to evaluate changes in responses between the 2019 and 2020 studies. The final data were weighted to match the distribution of customers across the courses, according to the City's reservation database.

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

# QUESTIONNAIRE & TOPLINES



City of San Diego  
Golf Customer Survey  
Prelim Toplines (n = 1,207)  
September 2020

## 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 to 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	75%
	2	Other San Diego County city	8%
	3	California, outside San Diego County	3%
	4	USA, outside California	12%
	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 general questions about your golfing experiences.

Q3	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		4%
	6 to 12		13%
	13 to 24		16%
	25 to 36		15%
	37 to 52		24%
	More than 52		26%
	Prefer not to answer		2%

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	24%
	Balboa Park Golf Club	12%
	Mission Bay Golf Course	12%
	Admiral Baker Golf Course	3%
	Not sure / Play many courses	3%
	Bonita Golf Club	2%
	Rancho Bernardo Inn	2%
	Carlton Oaks Country Club	1%
	Encinitas Ranch Golf Course	1%
	Fairbanks Ranch Country Club	1%
	Lomas Santa Fe Country Club	1%
	Maderas Golf Club	1%
	Mission Trails Golf Course	1%
	Oaks North Golf Club	1%
	Riverwalk Golf Club	1%
	Steele Canyon Golf Club	1%
	Tecolote Canyon Golf Course	1%
	The Crossings at Carlsbad Golf Course	1%
	Twin Oaks Golf Course	1%
	Cottonwood Golf Club	1%
	Miramar Memorial Golf Course	1%
	Other course (unique mentions)	23%
Q5		
Is there a particular reason why you play this course most often? Verbatim names recorded and later grouped into the categories shown below.		
1	Location / Close to home or work	29%
2	Affordable fees/ Good value	26%
3	Course quality	20%
4	Tee-time availability	9%
6	Member	8%
7	Friend, family is a member	3%
8	Location, availability, cost	1%
5	Other reason	3%
98	Not sure	0%
99	Prefer not to answer	0%



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	18%
	Fewer than 6	45%
	6 to 12	15%
	13 to 24	10%
	More than 24	11%
	Prefer not to answer	1%
B	Balboa (Bal-BOW-uh) Park Golf Course	
	None	36%
	Fewer than 6	38%
	6 to 12	13%
	13 to 24	7%
	More than 24	6%
	Prefer not to answer	1%
C	Mission Bay Golf Course	
	None	61%
	Fewer than 6	19%
	6 to 12	9%
	13 to 24	4%
	More than 24	5%
	Prefer not to answer	1%
<i>Only ask Q7 if Q6a &gt; 0.</i>		
Q7	Of the ____ <<pipe Q6a #>> times you played at Torrey (Torr-ee) Pines in past 12 months, how many times did you play the south course? <i>Constrain to max = # in Q6a for south course.</i>	
<i>Randomize Courses</i>		
A	South Course	
	None	35%
	Fewer than 6	46%
	6 to 12	11%
	13 to 24	4%
	More than 24	3%
	Prefer not to answer	1%

B	North Course	
	None	33%
	Fewer than 6	40%
	6 to 12	13%
	13 to 24	7%
	More than 24	6%
	Prefer not to answer	1%

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

*Only ask Q8 for courses where respondent played in past year (Q6 or Q7 > 0).*

Q8 Overall, how would you rate your most recent golf experiences at: \_\_\_\_\_? Would you rate them as excellent, good, fair, poor and very poor?

<i>Randomize</i>		Excellent	Good	Fair	Poor	Very Poor	Not sure	Prefer not to answer
A	Torrey Pines <b>South</b> Golf Course	51%	36%	10%	2%	1%	0%	0%
B	Torrey Pines <b>North</b> Golf Course	49%	41%	8%	1%	1%	0%	0%
C	Balboa Park Golf Course	20%	57%	18%	3%	1%	0%	0%
D	Mission Bay Golf Course	21%	50%	24%	2%	1%	1%	1%

*Only ask Q9 if Q7a > 0.  
(Respondent played at least one round of golf at Torrey Pines South in past year)*

Q9 If the course managers could change something about the Torrey Pines **South** 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	28%
	Enforce speed of play	12%
	Not sure / Cannot think of anything	12%
	Maintain roughs	10%
	Increase availability of tee times	7%
	Reduce fees, costs in general	5%
	Improve course quality	4%
	Improve access to tee time info	3%
	Reduce cart rental fees	2%
	Improve green conditions	2%
	Maintain sand traps, bunkers	2%
	Complete renovations / Some holes closed	2%
	Reduce visitor prices	1%

Maintain tee boxes	1%
Improve fairways	1%
Improve customer service	1%
Improve ball washers	1%
Add trees	1%
Improve reservation system	1%
Add, improve snack / beverage carts	1%
Offer earlier tee times	1%
Add, expand facilities	1%
Improve check-in process	1%
Create additional set of tees	1%
Improve scheduling	1%
Make it easier to play / more playable for average golfer	1%
Encourage players to use appropriate tee	1%
Reduce cost of food, beverages	1%
Improve maintenance schedules	1%
Divots, ball mark repairs	1%
Improve intervals between tee times	1%
Improve, provide more restrooms	1%
Course policing to watch for disrespectful players, rule violations	1%
Ability to get a cart and green fees at the same time	1%
Add benches with shade on tee boxes	1%
Improve card renewal process	1%
<i>Only ask Q10 if Q7b &gt; 0. (Respondent played at least one round of golf at Torrey Pines North in past year)</i>	
Q10	If the course managers could change something about the Torrey Pines North 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 28%
	Enforce speed of play 15%
	Not sure / Cannot think of anything 13%
	Increase availability of tee times 7%
	Improve green conditions 6%
	Maintain roughs 5%
	Reverse the nines 5%
	Reduce fees, costs in general 4%
	Improve access to tee time info 4%

	Improve intervals between tee times	4%
	Reduce cart rental fees	2%
	Improve course quality	2%
	Add trees	2%
	Improve, provide more restrooms	2%
	Maintain tee boxes	1%
	Improve fairways	1%
	Improve customer service	1%
	Improve cart paths	1%
	Maintain sand traps, bunkers	1%
	Add signage, markers	1%
	Create additional set of tees	1%
	Improve course capacity, too crowded	1%
	Divots, ball mark repairs	1%
	Course policing to watch for disrespectful players, rule violations	1%
	Add benches with shade on tee boxes	1%
<i>Only ask Q11 if Q6b &gt; 0. (Respondent played at least one round of golf at Balboa Park in past year)</i>		
Q11	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.	
	No changes needed	22%
	Not sure / Cannot think of anything	20%
	Enforce speed of play	12%
	Improve course quality	10%
	Improve fairways	6%
	Improve green conditions	5%
	Fix, redesign Hole 4	5%
	Improve facility maintenance	3%
	Improve clubhouse	3%
	Reduce fees, costs in general	2%
	Maintain tee boxes	2%
	Improve, upgrade driving range	2%
	Improve customer service	2%
	Improve, provide more restrooms	2%
	Reduce cart rental fees	1%
	Improve access to tee time info	1%

Increase availability of tee times	1%	
Reopen, renovate restaurant	1%	
Improve carts in general	1%	
Improve reservation system	1%	
Add, improve snack / beverage carts	1%	
Maintain sand traps, bunkers	1%	
Improve restaurant, food	1%	
Improve course capacity, too crowded	1%	
Improve practice area	1%	
Improve pro shop	1%	
Divots, ball mark repairs	1%	
Improve intervals between tee times	1%	
Improve chipping and putting area	1%	
Improve card renewal process	1%	
Improve, expand parking, allow carts	1%	
Provide more golf carts	1%	
Improve turf conditions	1%	
<i>Only ask Q12 if Q6c &gt; 0. (Respondent played at least one round of golf at Mission Bay in past year)</i>		
Q12	If the course managers could change something about the Mission Bay Golf Course to improve your overall golf experience, what change would you most like to see? Verbatim responses recorded and later grouped into categories shown below.	
	No changes needed	23%
	Not sure / Cannot think of anything	18%
	Improve course quality	7%
	Maintain tee boxes	6%
	Improve green conditions	6%
	Improve facility maintenance	6%
	Improve clubhouse	5%
	Enforce speed of play	5%
	Better lighting, extended hours	5%
	Reduce fees, costs in general	4%
	Reopen, renovate restaurant	3%
	Remove foot / soccer golf	3%
	Improve, provide more restrooms	3%
	Improve, upgrade driving range	2%
	Improve practice area	2%
	Improve intervals between tee times	2%

Reduce green fees	1%
Improve fairways	1%
Maintain roughs	1%
Improve customer service	1%
Maintain sand traps, bunkers	1%
Improve restaurant, food	1%
Improve course capacity, too crowded	1%
Divots, ball mark repairs	1%
Course policing to watch for disrespectful players, rule violations	1%
Improve, expand parking, allow carts	1%

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

Q13 Next, I'd like you to think back to your most recent golf experiences at <golf course used most often from Q6 or Q7, or choose random if tie between multiple courses>. Would you say the ----- was excellent, good, fair, poor, or very poor?

Randomize	Excellent	Good	Fair	Poor	Very poor	Not sure	Prefer not to answer
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Torrey Pines South Golf Course (342 respondents)							
A	Courtesy of golf course starters, Marshals and maintenance staff	49%	31%	14%	4%	2%	0%
B	Directional signage to golf course	30%	42%	12%	2%	1%	0%
C	Availability of tee-times when doing a walk-up reservation	7%	12%	9%	12%	12%	48%
D	Availability of tee-times when making a reservation by phone	12%	15%	13%	18%	18%	24%
E	The value of the course for the fee	37%	33%	14%	9%	7%	0%
F	Overall course condition	39%	43%	14%	3%	1%	0%
G	Condition of the tee boxes	35%	45%	15%	4%	0%	0%
H	Condition of fairways	42%	42%	11%	3%	0%	0%
I	Condition of the rough	29%	41%	20%	6%	2%	1%
J	Condition of the bunkers	31%	41%	21%	5%	1%	0%
K	Condition of the greens	44%	42%	8%	5%	1%	0%
L	Layout of the course	70%	26%	3%	0%	0%	0%
M	Pace of play	19%	38%	23%	13%	6%	0%
N	Quality of the pro shop	50%	34%	8%	1%	1%	0%
O	Quality of food and beverage services	20%	32%	14%	7%	2%	25%
P	Availability and quality of golf instructors	8%	7%	3%	1%	1%	79%

Q	Condition of cart paths	31%	39%	12%	2%	1%	16%	0%
R	Condition of golf carts	18%	36%	12%	1%	1%	32%	0%
S	Availability and condition of restrooms	19%	40%	22%	8%	2%	10%	0%
T	Enforcement of golf course rules and regulations	20%	28%	23%	8%	4%	17%	1%
U	Availability and condition of driving range facilities	16%	21%	26%	13%	3%	21%	0%
V	Availability and condition of practice putting greens	30%	40%	14%	6%	4%	6%	0%
Torrey Pines North Golf Course (342 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	41%	45%	8%	2%	2%	2%	0%
B	Directional signage to golf course	28%	51%	9%	1%	1%	11%	0%
C	Availability of tee-times when doing a walk-up reservation	3%	12%	13%	11%	10%	48%	3%
D	Availability of tee-times when making a reservation by phone	4%	10%	16%	21%	22%	25%	2%
E	The value of the course for the fee	53%	30%	13%	2%	1%	0%	0%
F	Overall course condition	35%	56%	7%	1%	1%	0%	0%
G	Condition of the tee boxes	26%	59%	13%	1%	1%	0%	0%
H	Condition of fairways	38%	54%	6%	1%	0%	0%	0%
I	Condition of the rough	17%	59%	17%	6%	1%	0%	0%
J	Condition of the bunkers	25%	50%	18%	5%	0%	2%	1%
K	Condition of the greens	33%	48%	12%	4%	2%	0%	0%
L	Layout of the course	61%	33%	4%	1%	0%	0%	0%
M	Pace of play	10%	36%	31%	14%	8%	1%	0%
N	Quality of the pro shop	44%	40%	8%	1%	0%	7%	0%
O	Quality of food and beverage services	16%	39%	17%	2%	3%	22%	1%
P	Availability and quality of golf instructors	6%	6%	0%	1%	0%	81%	6%
Q	Condition of cart paths	32%	47%	5%	0%	0%	15%	1%
R	Condition of golf carts	17%	32%	11%	1%	1%	35%	3%
S	Availability and condition of restrooms	17%	47%	20%	5%	3%	8%	0%
T	Enforcement of golf course rules and regulations	11%	38%	22%	9%	6%	13%	1%
U	Availability and condition of driving range facilities	10%	30%	31%	8%	5%	16%	1%
V	Availability and condition of practice putting greens	30%	43%	17%	4%	1%	5%	0%
Balboa Park Golf Course (252 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	33%	46%	12%	3%	1%	4%	0%
B	Directional signage to golf course	12%	52%	17%	2%	0%	16%	0%

C	Availability of tee-times when doing a walk-up reservation	4%	16%	14%	7%	6%	52%	2%
D	Availability of tee-times when making a reservation by phone	10%	28%	19%	7%	6%	28%	2%
E	The value of the course for the fee	40%	44%	13%	3%	0%	0%	0%
F	Overall course condition	11%	64%	21%	2%	1%	0%	0%
G	Condition of the tee boxes	8%	51%	33%	5%	1%	2%	0%
H	Condition of fairways	10%	59%	24%	4%	1%	1%	0%
I	Condition of the rough	7%	55%	31%	3%	2%	1%	0%
J	Condition of the bunkers	7%	38%	38%	10%	3%	3%	0%
K	Condition of the greens	17%	60%	20%	1%	1%	1%	0%
L	Layout of the course	33%	56%	9%	1%	0%	1%	0%
M	Pace of play	9%	43%	30%	13%	5%	0%	0%
N	Quality of the pro shop	5%	34%	36%	13%	4%	7%	0%
O	Quality of food and beverage services	8%	36%	20%	6%	1%	27%	1%
P	Availability and quality of golf instructors	1%	5%	5%	1%	3%	81%	4%
Q	Condition of cart paths	14%	51%	17%	3%	1%	14%	0%
R	Condition of golf carts	8%	32%	24%	4%	2%	29%	1%
S	Availability and condition of restrooms	6%	28%	31%	16%	11%	7%	1%
T	Enforcement of golf course rules and regulations	7%	34%	27%	11%	4%	16%	1%
U	Availability and condition of driving range facilities	3%	26%	28%	16%	8%	18%	1%
V	Availability and condition of practice putting greens	10%	50%	23%	7%	2%	8%	0%
Mission Bay Golf Course (248 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	43%	41%	9%	3%	1%	3%	1%
B	Directional signage to golf course	18%	49%	17%	1%	1%	12%	1%
C	Availability of tee-times when doing a walk-up reservation	8%	30%	10%	5%	4%	39%	4%
D	Availability of tee-times when making a reservation by phone	22%	34%	14%	3%	1%	24%	3%
E	The value of the course for the fee	31%	43%	20%	4%	1%	1%	1%
F	Overall course condition	11%	62%	24%	1%	0%	1%	1%
G	Condition of the tee boxes	6%	47%	30%	13%	1%	1%	1%
H	Condition of fairways	17%	61%	18%	2%	0%	1%	1%
I	Condition of the rough	9%	59%	26%	2%	0%	4%	1%
J	Condition of the bunkers	6%	24%	19%	7%	2%	36%	4%
K	Condition of the greens	19%	56%	20%	3%	1%	1%	1%
L	Layout of the course	19%	63%	13%	2%	1%	2%	1%



M	Pace of play	10%	52%	25%	9%	1%	1%	1%
N	Quality of the pro shop	7%	10%	21%	14%	6%	39%	4%
O	Quality of food and beverage services	9%	16%	24%	12%	7%	30%	1%
P	Availability and quality of golf instructors	6%	8%	4%	3%	3%	70%	7%
Q	Condition of cart paths	8%	28%	23%	7%	3%	27%	4%
R	Condition of golf carts	9%	31%	9%	2%	1%	45%	2%
S	Availability and condition of restrooms	8%	33%	28%	14%	8%	8%	1%
T	Enforcement of golf course rules and regulations	13%	42%	15%	10%	1%	16%	2%
U	Availability and condition of driving range facilities	15%	42%	18%	2%	1%	20%	1%
V	Availability and condition of practice putting greens	14%	49%	21%	6%	1%	8%	1%

**Section 6: Future Expectations & Recommendations**

Q14	Including <u>all</u> courses that you may play, in the next 12 months do you anticipate that the frequency with which you play golf will increase, decrease or stay about the same as now?				
	1	Increase			33%
	2	Decrease			5%
	3	Stay about the same			59%
	98	Don't know			3%
	99	Prefer not to answer			0%

Q15	Looking forward to the next 12 months, do you anticipate that you will play golf at the ----- more often, less often, or about the same as you do now?						
	<i>Randomize</i>		More often	Less often	About the same	Not sure	Prefer not to answer
A	Torrey Pines Golf Course		34%	13%	39%	13%	2%
B	Balboa Park Golf Course		20%	13%	49%	16%	2%
C	Mission Bay Golf Course		12%	12%	48%	24%	3%

*Ask Q16 if Q14 = (1,3) and Q15a = (2).*

Q16	Is there a particular reason why you expect to play golf <u>less</u> frequently at Torrey Pines Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.				
	Difficulty getting tee time		28%		
	Do not live near course		25%		
	Cost / Too expensive		22%		
	Poor customer service		6%		
	Not sure / No particular reason		6%		

City of San Diego Golf Customer Survey

September 2020

	Poor condition of course	5%
	COVID-19 concerns, uncertainty	5%
	Prefer other courses	4%
	Upcoming tournaments	4%
	Difficulty with online, app reservation, card renewal	3%
	Do not like pace of play	2%
<i>Ask Q17 if Q14 = (1,3) and Q15b = (2).</i>		
Q17	Is there a particular reason why you expect to play golf <u>less</u> frequently at Balboa Park Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.	
	Poor condition of course	18%
	Do not live near course	16%
	Other (unique responses)	14%
	Not sure / No particular reason	13%
	Prefer other courses	10%
	Do not like pace of play	9%
	Difficulty getting tee time	8%
	Do not enjoy playing course	5%
	Difficulty with online, app reservation, card renewal	5%
	Cost / Too expensive	4%
	Poor customer service	2%
	No interest	2%
	Difficulty to walk, better cart services	1%
	COVID-19 concerns, uncertainty	1%
<i>Ask Q18 if Q14 = (1,3) and Q15c = (2).</i>		
Q18	Is there a particular reason why you expect to play golf <u>less</u> frequently at Mission Bay Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / No particular reason	17%
	Do not live near course	14%
	Poor condition of course	13%
	Other (unique responses)	12%
	Do not enjoy playing course	11%
	Cost / Too expensive	7%
	Prefer other courses	7%
	Do not like pace of play	5%
	No interest	4%

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Page 12

	Rarely ever play there					4%
	Difficulty getting tee time					3%
	COVID-19 concerns, uncertainty					3%
	Poor customer service					2%
	Difficulty with online, app reservation, card renewal					2%
<i>Only ask Q19 for courses where respondent played in past year (Q6 &gt; 0).</i>						
Q19	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	76%	18%	6%	1%	0%
B	Balboa Park Golf Course	50%	39%	10%	1%	0%
C	Mission Bay Golf Course & Practice Center	45%	35%	17%	3%	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					5%
	35 to 44					13%
	45 to 54					17%
	55 to 64					22%
	65 or older					32%
	Prefer not to answer					11%
D2	Gender					
	1	Male				87%
	2	Female				10%
	99	Prefer not to answer				3%
D3	Are you a member of a golfing club?					
	1	Yes				48%
	2	No				49%
	99	Prefer not to answer				3%

D4	Do you own or rent your home?		
	1	Own	77%
	2	Rent	14%
	99	Prefer not to answer	9%
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	2%
	2	\$35,000 to \$49,999	2%
	3	\$50,000 to \$74,999	5%
	4	\$75,000 to \$99,999	8%
	5	\$100,000 to \$149,999	17%
	6	\$150,000 or more	43%
	99	Not sure / Prefer not to answer	24%
Thank you so much for your participation. This survey was conducted for the City of San Diego's Golf Program.			

## FEE INCREASES

<b>BALBOA PARK 9 HOLE GOLF COURSE PROPOSED FEE INCREASES</b>			
<b>TYPE OF FEE</b>	<b>Current Fees</b>	<b>New Fees</b>	<b>Change</b>
<b>RESIDENT</b>	<b>CY2021</b>	<b>CY2022</b>	
9 Holes - Weekdays Adult	\$15	\$16	\$1
9 Holes - Weekdays Junior	\$14	\$15	\$1
9 Holes - Weekdays Senior	\$11	\$12	\$1
9 Holes - Weekends / Holidays	\$20	\$21	\$1
<b>NON-RESIDENT</b>			
9 Holes - Weekdays Adult	\$20	\$21	\$1
9 Holes - Weekdays Junior	\$15	\$16	\$1
9 Holes - Weekdays Senior	\$20	\$21	\$1
9 Holes - Weekends / Holidays	\$25	\$26	\$1
<b>TOURNAMENTS</b>			
*Tournament - Weekdays - Tee Times	\$30	\$31	\$1
*Tournament - Weekdays - Shotgun Start	\$40	\$41	\$1
*Tournament - Weekends / Holidays - Tee Times	\$35	\$36	\$1
*Tournament - Weekends / Holidays - Shotgun Start	\$45	\$46	\$1
1 Day Course Buy-Out (Monday / Thursday)	\$17,000	\$17,000	\$0
1 Day Course Buy-Out (Friday/Sunday and Holidays)	\$20,000	\$20,000	\$0
* Since presenting report to the Municipal Golf Committee on 9-16-21, these rates have been updated as a result of a formula error that was discovered.			

<b>BALBOA PARK 18 HOLE GOLF COURSE PROPOSED FEE INCREASES</b>			
<b>TYPE OF FEE</b>	<b>Current Fees</b>	<b>New Fees</b>	<b>Change</b>
<b>RESIDENT</b>	<b>CY2021</b>	<b>CY2022</b>	
18 Holes – Weekdays Adult	\$34	\$35	\$1
18 Holes - Weekdays Junior	\$30	\$31	\$1
18 Holes – Weekdays Senior	\$24	\$25	\$1
18 Holes - Weekends / Holidays	\$42	\$43	\$1
Twilight Weekdays	\$21	\$22	\$1
Twilight Weekends	\$26	\$27	\$1
<b>NON-RESIDENT</b>			
18 Holes – Weekdays Adult	\$44	\$46	\$2
18 Holes – Weekdays Junior	\$30	\$32	\$2
18 Holes - Weekdays Senior	\$44	\$46	\$2
18 Holes - Weekends / Holidays	\$56	\$59	\$3
Twilight Weekdays	\$26	\$27	\$1
Twilight Weekends	\$34	\$36	\$2
<b>TOURNAMENTS</b>			
*Tournament – Weekdays - Tee Times	\$61	\$63	\$2
*Tournament – Weekdays - Shotgun Start	\$71	\$73	\$2
*Tournament - Weekends / Holidays - Tee Times	\$73	\$75	\$3
*Tournament - Weekends / Holidays - Shotgun Start	\$83	\$85	\$3
1 Day Course Buy-Out (Monday / Thursday)	\$19,000	\$19,000	\$0
1 Day Course Buy-Out (Friday/Sunday and Holidays)	\$24,000	\$24,000	\$0
* Since presenting report to the Municipal Golf Committee on 9-16-21, these rates have been updated as a result of a formula error that was discovered.			

<b>TORREY PINES SOUTH COURSE PROPOSED FEE INCREASES</b>			
<b>TYPE OF FEE</b>	<b>Current Fees</b>	<b>New Fees</b>	<b>Change</b>
<b>RESIDENT</b>	<b>CY2021</b>	<b>CY2022</b>	
18 Holes - Weekdays (Mon. - Thurs.) Adult	\$63	\$65	\$2
18 Holes - Weekdays (Mon. - Thurs.) Junior	\$63	\$65	\$2
18 Holes - Weekdays (Mon. - Thurs.) Senior	\$44	\$45	\$1
18 Holes - Weekends (Fri. - Sun.) / Holidays	\$78	\$80	\$2
Twilight Weekdays (Mon. - Thurs.)	\$38	\$39	\$1
Twilight Weekends (Fri. - Sun.)	\$47	\$48	\$1
<b>NON-RESIDENT</b>			
18 Holes - Weekdays (Mon. - Thurs.) Adult	\$202	\$212	\$10
18 Holes - Weekdays (Mon. - Thurs.) Junior	\$141	\$148	\$7
18 Holes - Weekdays (Mon. - Thurs.) Senior	\$202	\$212	\$10
18 Holes - Weekends (Fri. - Sun.) / Holidays	\$252	\$265	\$13
Twilight Weekdays (Mon. - Thurs.)	\$122	\$128	\$6
Twilight Weekends (Fri. - Sun.)	\$151	\$159	\$8
<b>TOURNAMENTS</b>			
Tournament - Weekdays (Mon. - Thurs.)	\$202	\$212	\$10
Tournament - Weekends (Fri. - Sun.) / Holidays	\$252	\$265	\$13
1 Day Course Buy-Out (Weekday/Weekends Non-Holiday)	\$54,000	\$54,000	\$0

<b>TORREY PINES NORTH COURSE PROPOSED FEE INCREASES</b>			
<b>TYPE OF FEE</b>	<b>Current Fees</b>	<b>New Fees</b>	<b>Change</b>
<b>RESIDENT</b>	<b>CY2021</b>	<b>CY2022</b>	
18 Holes - Weekdays (Mon. - Thurs.) Adult	\$44	\$45	\$1
18 Holes - Weekdays (Mon. - Thurs.) Junior	\$44	\$45	\$1
18 Holes - Weekdays (Mon. - Thurs.) Senior	\$32	\$33	\$1
18 Holes - Weekends (Fri. - Sun.) / Holidays	\$58	\$60	\$2
Twilight Weekdays (Mon. - Thurs.)	\$28	\$29	\$1
Twilight Weekends (Fri. - Sun.)	\$34	\$35	\$1
9-Hole Only (back 9) Weekends (Fri. - Sun.)/Holidays	\$34	\$35	\$1
<b>NON-RESIDENT</b>			
18 Holes - Weekdays (Mon. - Thurs.) Adult	\$128	\$134	\$6
18 Holes - Weekdays (Mon. - Thurs.) Junior	\$89	\$93	\$4
18 Holes - Weekdays (Mon. - Thurs.) Senior	\$128	\$134	\$6
18 Holes - Weekends (Fri. - Sun.) / Holidays	\$160	\$168	\$8
Twilight Weekdays (Mon. - Thurs.)	\$76	\$80	\$4
Twilight Weekends (Fri. - Sun.)	\$96	\$101	\$5
9-Hole Only (back 9) Weekends (Fri. - Sun.)/Holidays	\$96	\$101	\$5
<b>TOURNAMENTS</b>			
Tournament - Weekdays (Mon. - Thurs.)	\$128	\$134	\$6
Tournament - Weekends (Fri. - Sun.) / Holidays	\$160	\$168	\$8
1 Day Course Buy-Out (Weekday/Weekends Non-Holiday)	\$54,000	\$54,000	\$0



<b>MISSION BAY GOLF COURSE PROPOSED FEE INCREASES</b>			
<b>TYPE OF FEE</b>	<b>Current Fees</b>	<b>New Fees</b>	<b>Change</b>
<b>RESIDENT</b>	<b>CY2021</b>	<b>CY2022</b>	
18 Holes - Weekdays Adult	\$26	\$27	\$1
18 Holes - Weekdays Junior	\$11	\$11	\$0
18 Holes - Weekdays Senior	\$19	\$20	\$1
18 Holes - Weekends / Holidays	\$32	\$33	\$1
9-Holes Adult Weekday	\$15	\$15	\$0
9-Holes - Weekdays Junior	\$11	\$11	\$0
9-Holes Senior Weekday	\$11	\$11	\$0
9-Holes Weekend/Holidays	\$20	\$21	\$1
<b>NON-RESIDENT</b>			
18 Holes - Weekdays Adult	\$32	\$34	\$2
18 Holes - Weekdays Junior	\$22	\$23	\$1
18 Holes - Weekdays Senior	\$32	\$34	\$2
18 Holes - Weekends / Holidays	\$40	\$42	\$2
9-Holes Adult Weekday	\$19	\$20	\$1
9-Holes -Weekdays Junior	\$13	\$14	\$1
9-Holes Senior Weekday	\$19	\$20	\$1
9-Holes Weekend/Holidays	\$24	\$25	\$1
<b>TOURNAMENTS</b>			
Tournament - Weekdays	\$32	\$34	\$2
Tournament - Weekends / Holidays	\$40	\$42	\$2