

CUSTOMER SATISFACTION STUDY

CONDUCTED FOR THE
CITY OF SAN DIEGO GOLF
OPERATIONS DIVISION

PRESENTED BY
TIMOTHY McLARNEY PH.D.

11/18/2015



PURPOSE OF STUDY

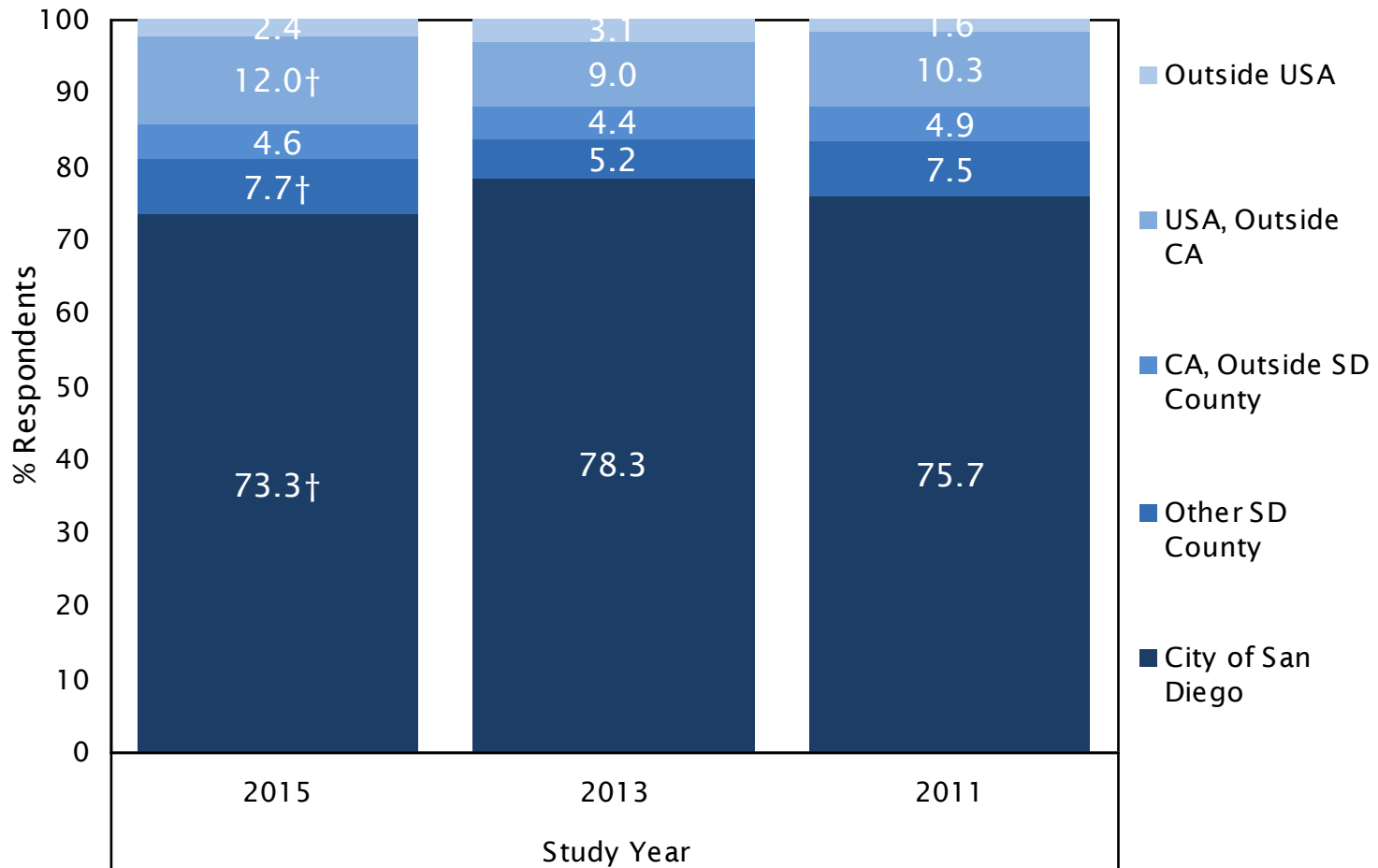
- Profile customers' frequency of golf play in general and at the three San Diego courses.
- Evaluate customer experiences with and perceptions of the three City golf courses.
- Track the findings of the 2015 customer opinion study against similar surveys conducted in 2011 and 2013.
- Collect background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



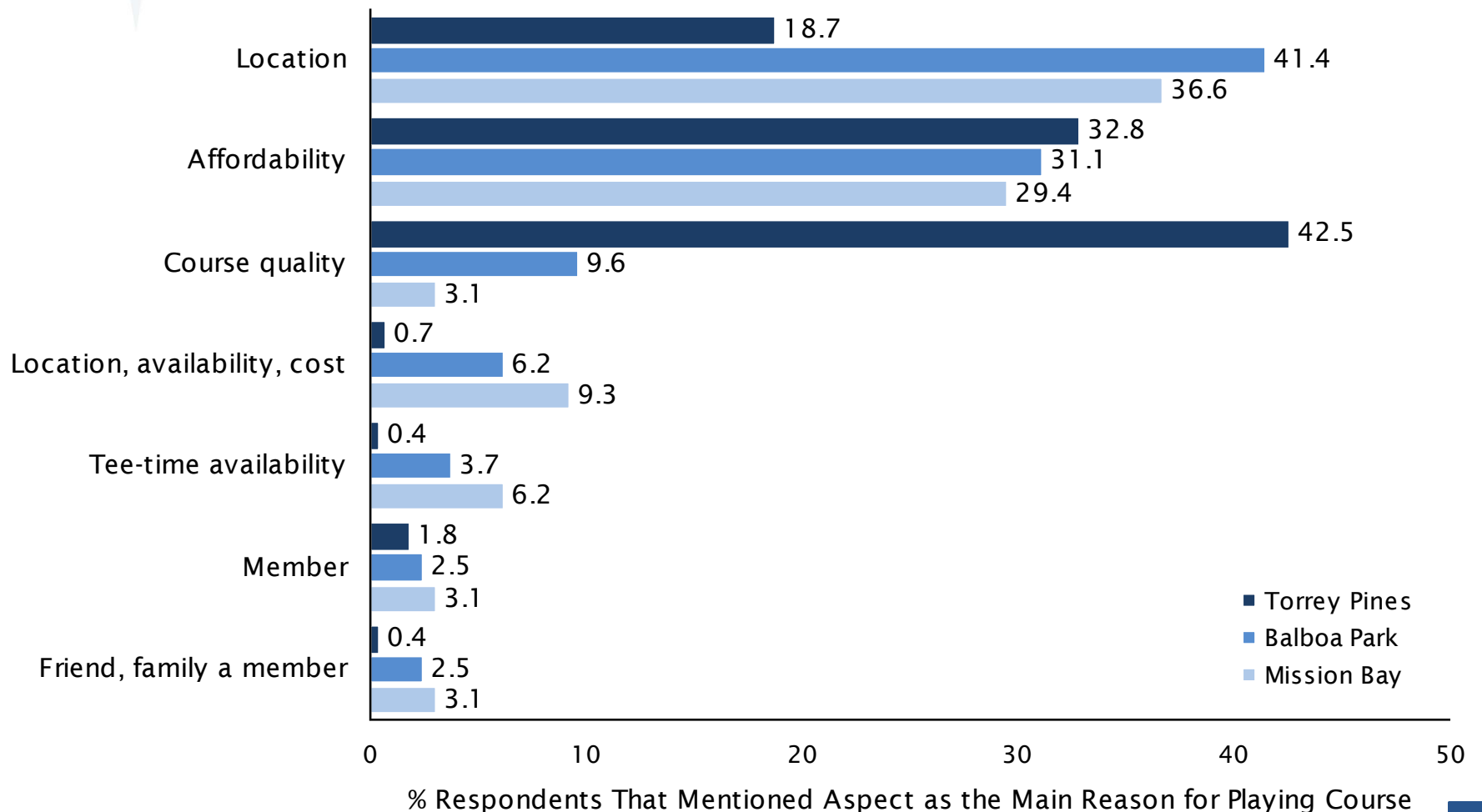
METHODOLOGY OF STUDY

- Telephone and Web survey
- 1,464 customers who played at least one round at Torrey Pines, Balboa Park, Mission Bay during Fiscal Year 2015
- Recruited via telephone and email
- Surveys collected Aug 10 to Aug 24, 2015
- $\pm 2.53\%$ overall margin of error

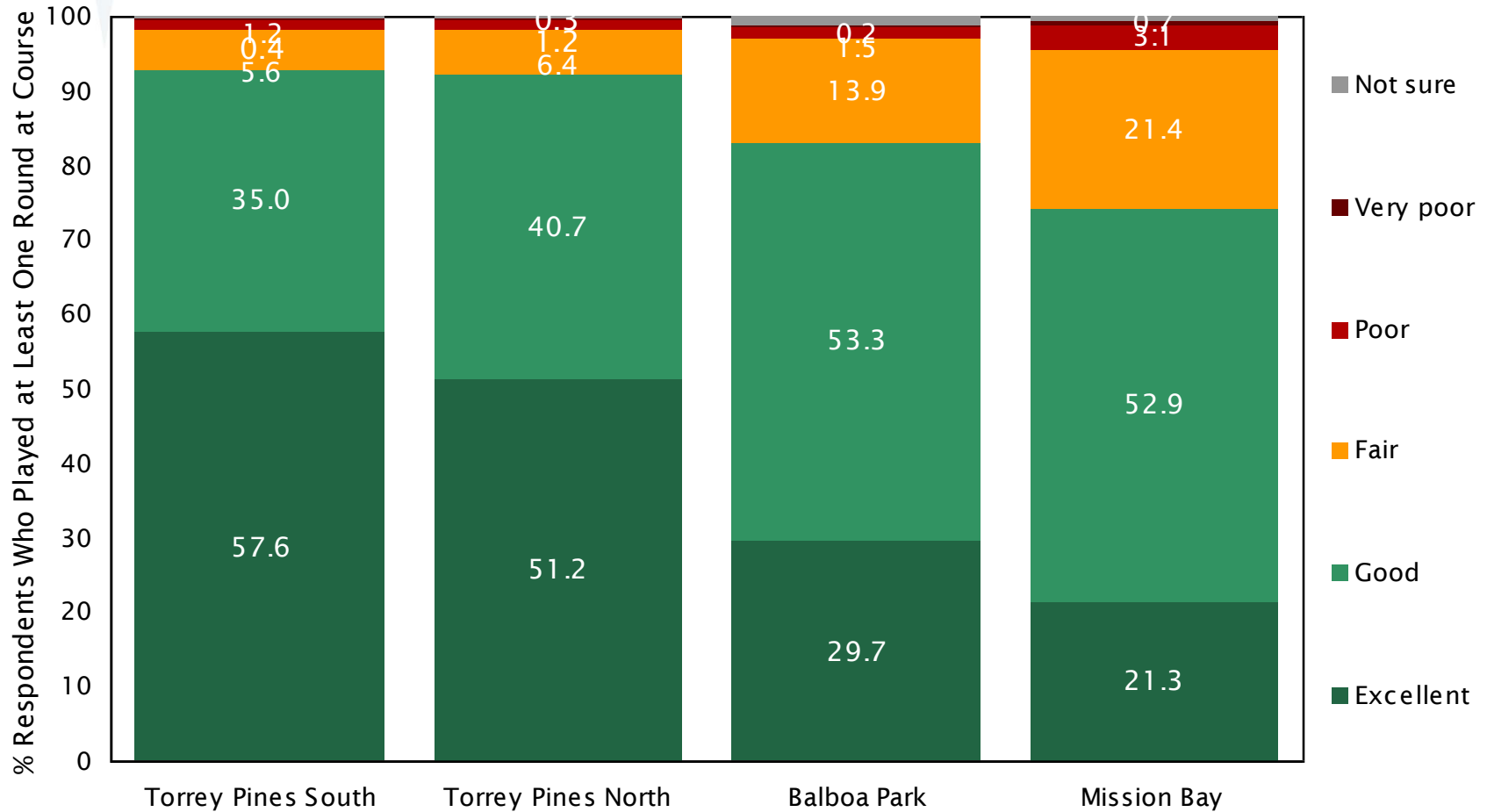
CURRENT RESIDENCE OF CUSTOMERS BY STUDY YEAR



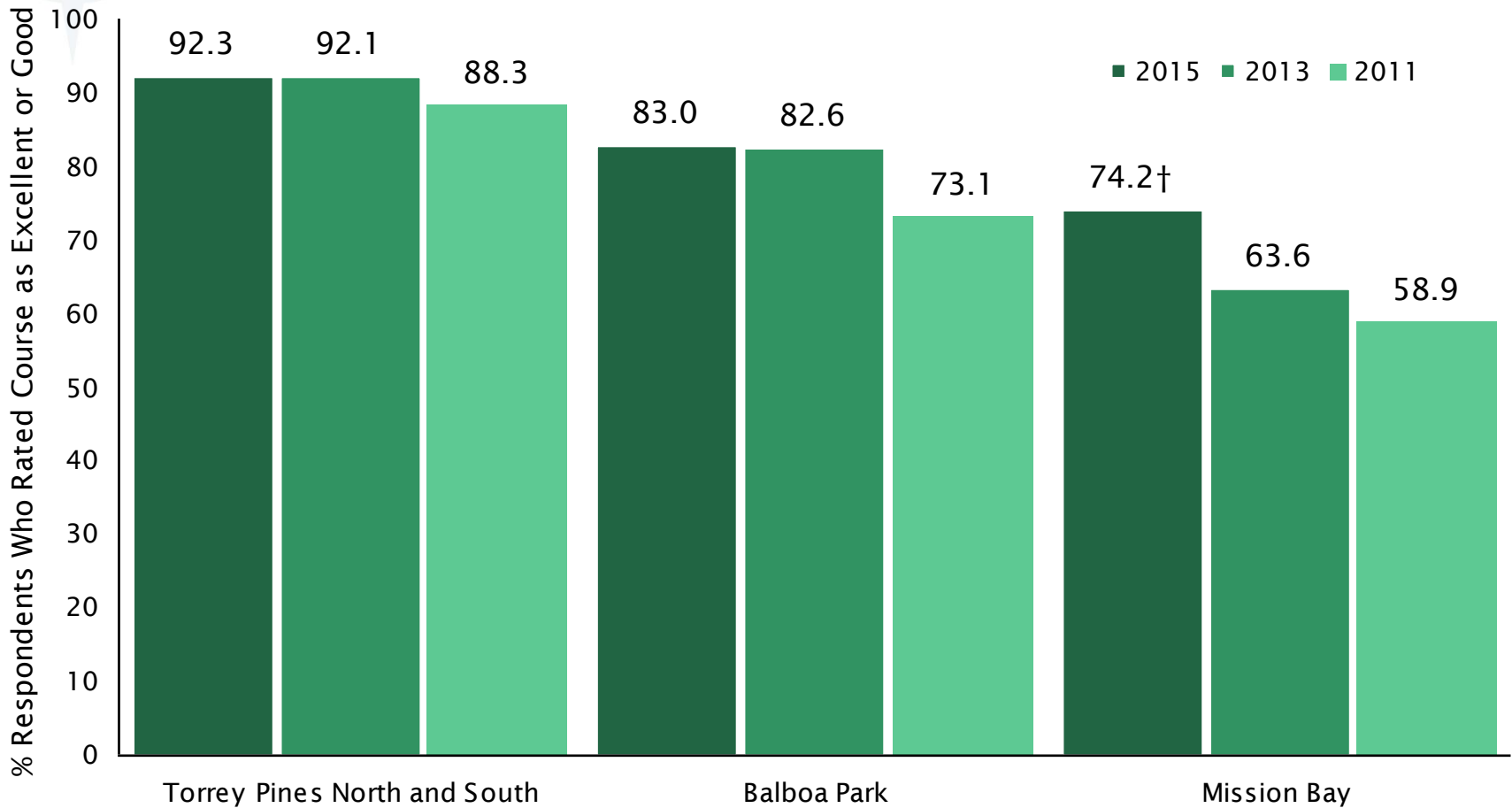
REASON FOR PLAYING SAN DIEGO COURSE MOST OFTEN



RATING CITY OF SAN DIEGO GOLF COURSES

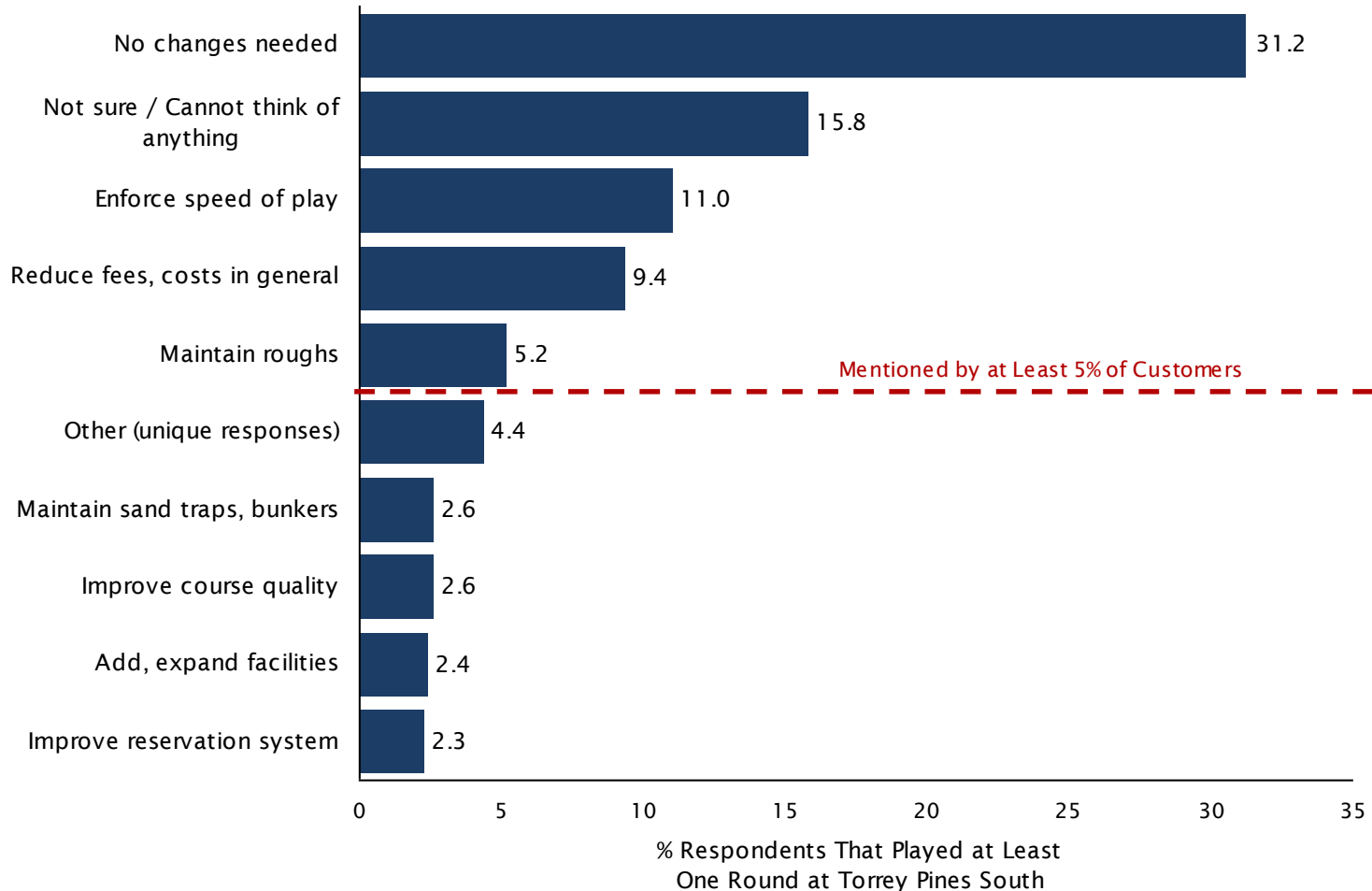


GOLF COURSE RATING BY STUDY YEAR



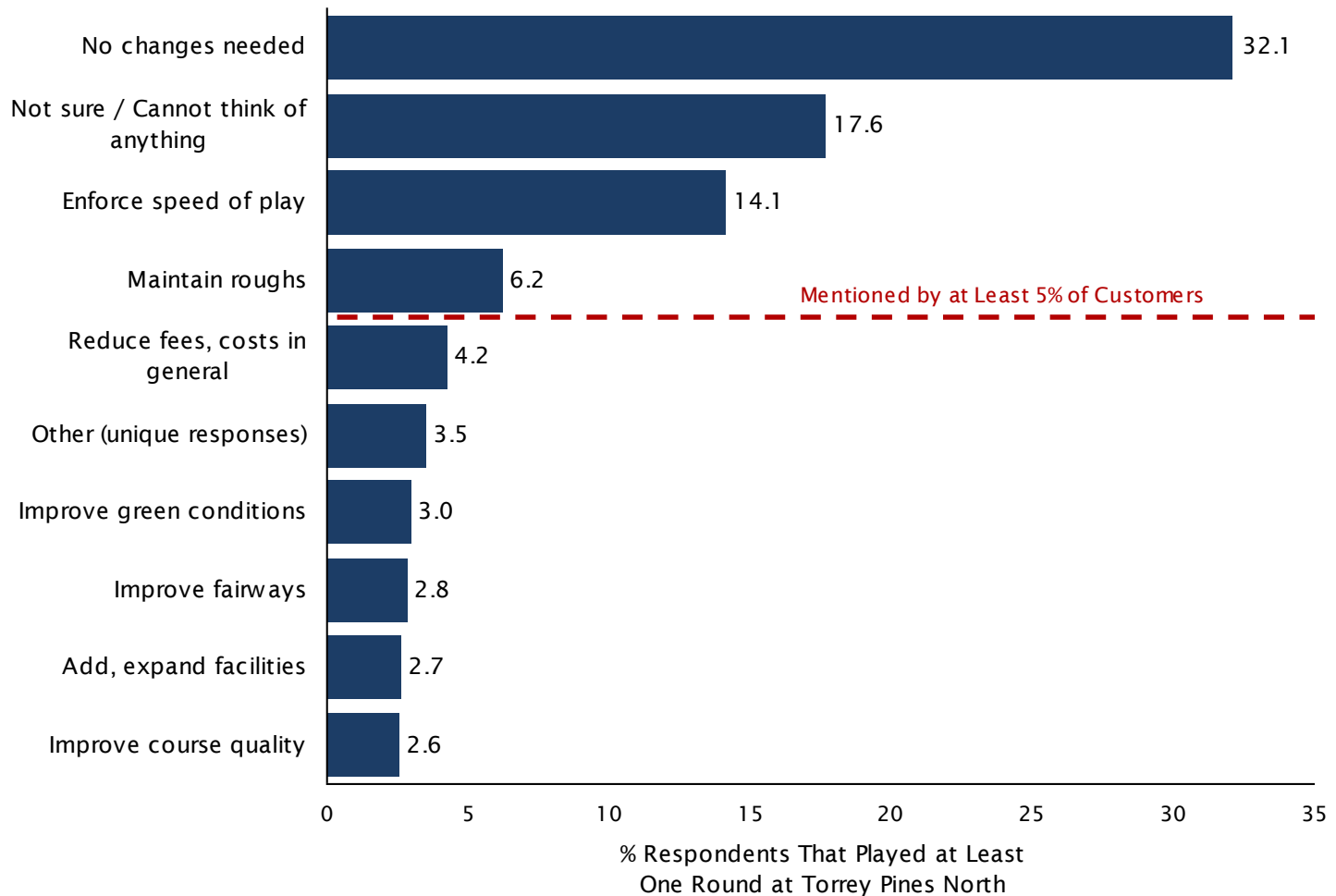
SUGGESTIONS FOR IMPROVEMENT

TORREY PINES SOUTH



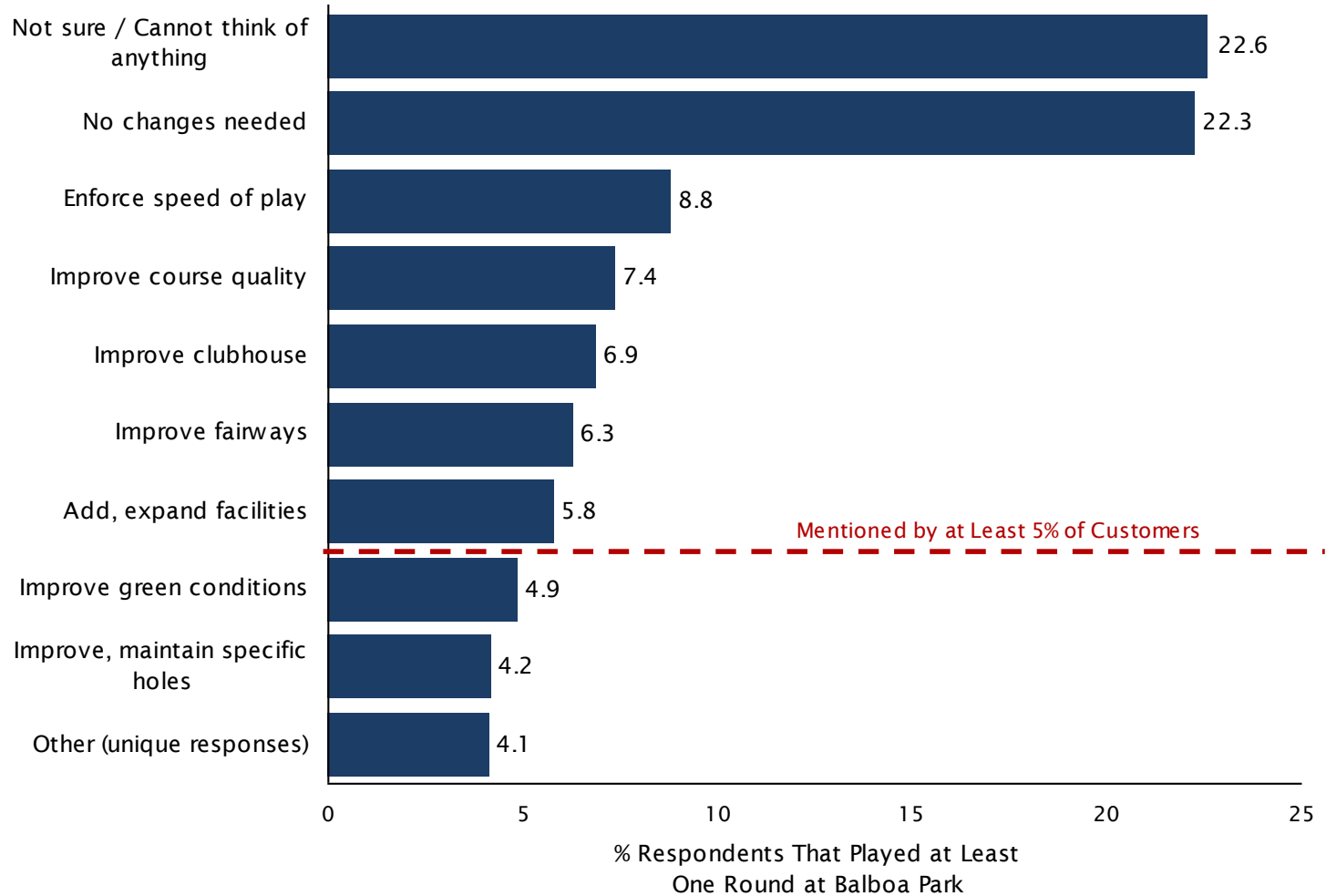
SUGGESTIONS FOR IMPROVEMENT

TORREY PINES NORTH

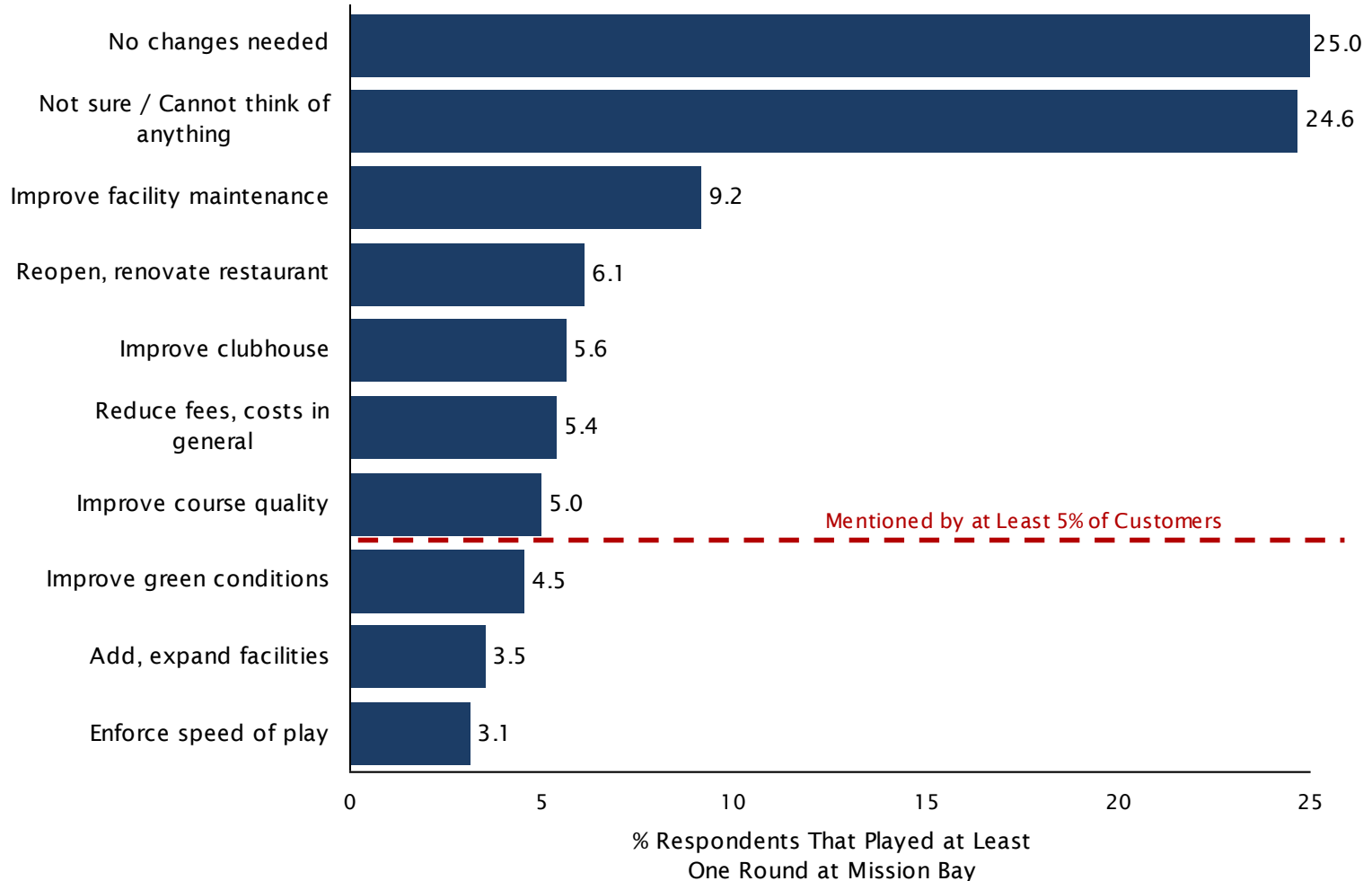


SUGGESTIONS FOR IMPROVEMENT

BALBOA PARK



SUGGESTIONS FOR IMPROVEMENT MISSION BAY



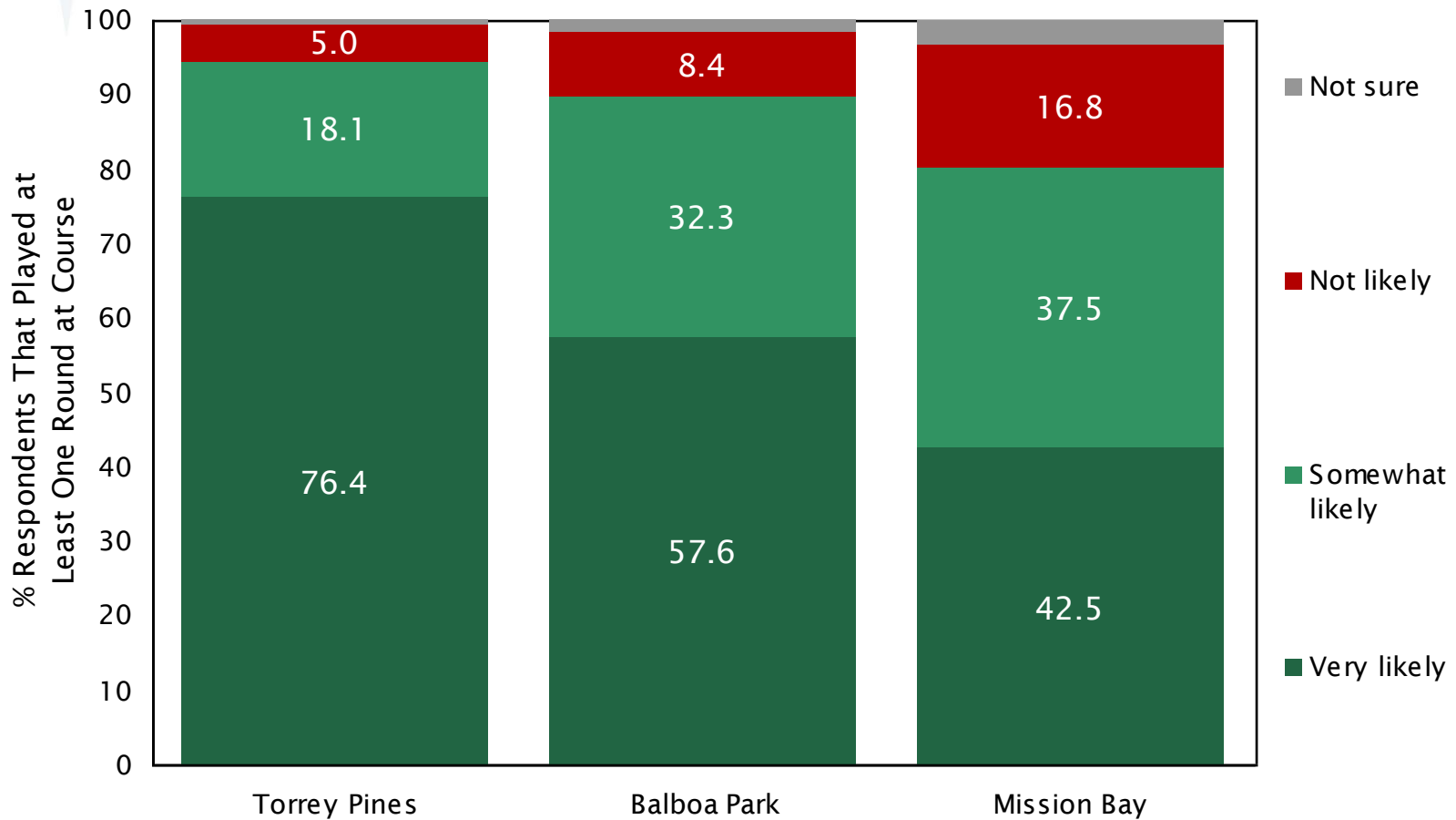
COURSE ASPECTS WITH HIGHEST RATINGS OF EXCELLENT OR GOOD

Torrey Pines South	Torrey Pines North	Balboa Park	Mission Bay
Layout of the course (98%)	Layout of the course (95%)	Layout of the course (89%)	Availability of tee-times for walk-up reservation (89%)
Condition of fairways (92%)	Quality of the pro shop (93%)	Condition of the greens (86%)	Courtesy of staff, Marshals (87%)
Overall course condition (91%)	Overall course condition (92%)	Courtesy of staff, Marshals (85%)	Availability of tee-times for phone reservation (84%)
Condition of the greens (91%)	Condition of the greens (92%)	Condition of the greens (84%)	Condition of the rough (81%)
Quality of the pro shop (91%)	Availability & condition of practice putting greens (91%)	Condition of fairways (83%)	Condition of fairways (81%)

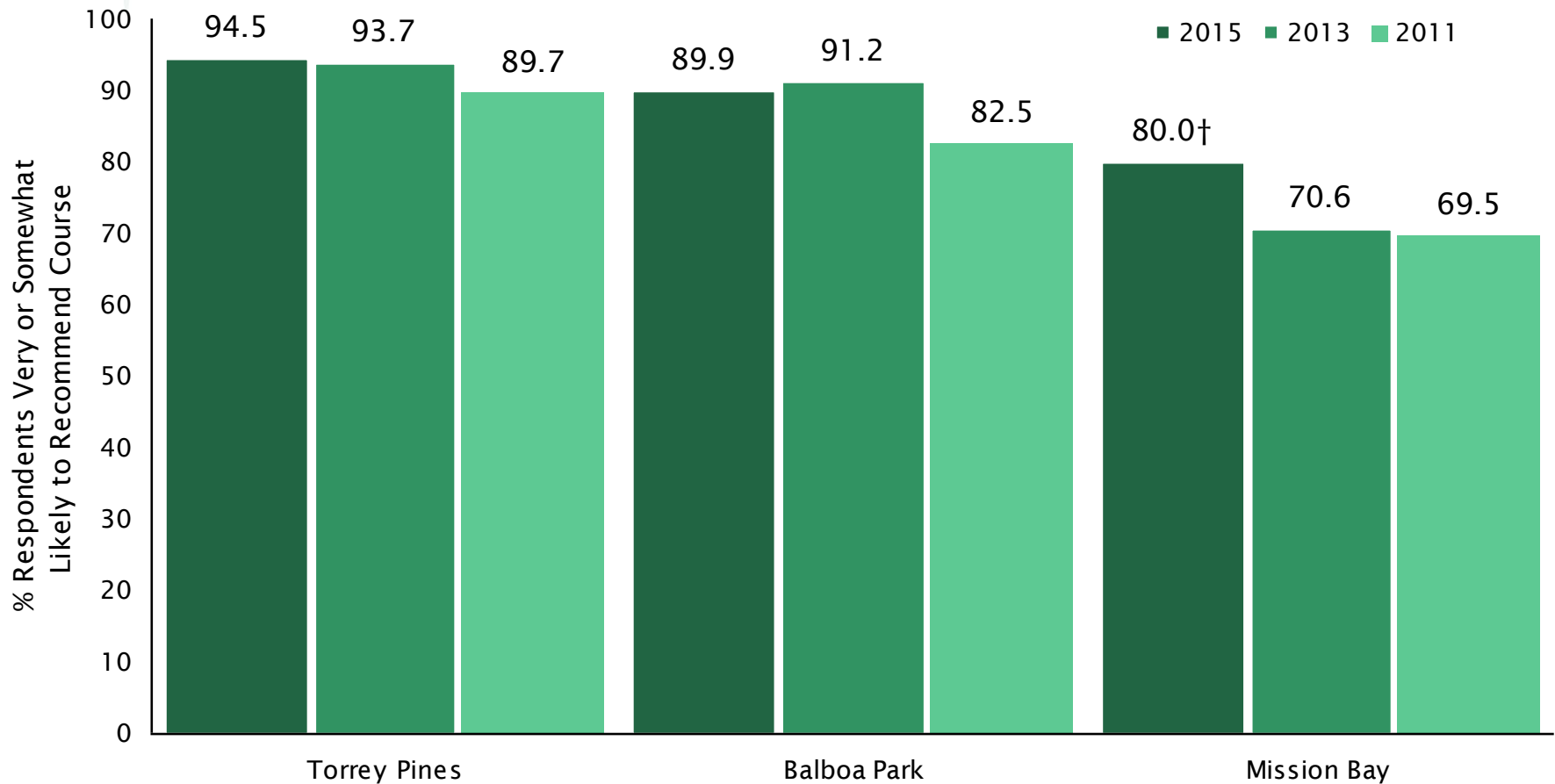
COURSE ASPECTS WITH LOWEST RATINGS OF EXCELLENT OR GOOD

Torrey Pines South	Torrey Pines North	Balboa Park	Mission Bay
Availability & condition of driving range facilities (41%)	Availability of tee-times for phone reservation (48%)	Availability & condition of driving range facilities (33%)	Quality of pro shop (23%)
Availability of tee-times for walk-up reservation (50%)	Pace of play (53%)	Quality of pro shop (35%)	Quality of food & beverages services (45%)
Availability of tee-times for phone reservation (54%)	Availability & condition of driving range facilities (53%)	Availability & condition of restrooms (48%)	Availability & condition of restrooms (50%)
Pace of play (55%)	Availability of tee-times for walk-up reservation (53%)	Condition of golf carts (54%)	Condition of cart paths (50%)
The value of the course for the fee (62%)	Availability & condition of restrooms (64%)	Pace of play (55%)	Condition of the bunkers (55%)

LIKELIHOOD OF RECOMMENDING COURSE



LIKELIHOOD OF RECOMMENDING COURSE BY STUDY YEAR





KEY CONCLUSIONS

- Customers continue to have a high level of satisfaction with the City of San Diego's golf courses
 - More than 9 in 10 customers rated golf experience at Torrey Pines as excellent or good
 - More than 8 in 10 customers rated golf experience at Balboa Park as excellent or good
 - Approximately three-quarters of customers rated golf experience at Mission Bay as excellent or good (11% increase from 2013)
- Customers also provided strong ratings for various aspects/performance dimensions
 - A majority of customers provided ratings of excellent or good for 19 of 22 specific aspects tested at every City golf course
- Path of improvement: 15 of 17 significant changes were positive
- At least 8 in 10 customers indicated they would recommend each City golf course to a friend or colleague



AREAS OF IMPROVEMENT

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

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