

CUSTOMER SATISFACTION SURVEY
SUMMARY REPORT

PREPARED FOR THE
CITY OF SAN DIEGO
GOLF OPERATIONS DIVISION



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INTRODUCTION

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

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

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

- Profile customers' frequency of golf play in general and at the three San Diego courses.
- Evaluate customer experiences with, and perceptions of, the three city golf courses.
- Track the findings of the 2019 customer opinion study against similar surveys conducted in 2011, 2013, 2015, and 2017.
- 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—similar studies were conducted in 2011, 2013, 2015, and 2017. Because of the 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 the results of identical questions from the prior studies.

OVERVIEW OF METHODOLOGY A full description of the methodology employed in this study is included later in this report (see *Methodology* on page 51). In brief, a total of 1,228 randomly selected customers who played at least one round of golf at Torrey Pines, Balboa Park, or Mission Bay during the 2018 calendar year participated in the study between February 14 and

March 11, 2019. Respondents were recruited to participate in the survey using a combination of email invitations and telephone calls, and completed the survey either online at a secure, password protected website or by telephone. The maximum margin of error for this study is $\pm 2.77\%$ for questions answered by all 1,228 respondents.

STATISTICAL SIGNIFICANCE Many of the figures and tables in this report present the results of questions asked in 2019, alongside results found in the 2017 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. Statistically significant differences within response categories over time are denoted by the † symbol, which appears in the figure next to the appropriate response value for 2019.

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 Research—and not necessarily those of the City of San Diego. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the opinions, 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, more than 300 of which were for California municipalities, including several for the City of San Diego.



JUST THE FACTS

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

RESIDENCY OF CUSTOMERS

- Approximately seven-in-ten (69% of) customers' primary residences among those surveyed were located in the City of San Diego, 6% were located in San Diego County but outside the City of San Diego, 5% were in California but outside San Diego County, 16% were located elsewhere in the United States, and about 4% were outside the United States.

FREQUENCY & COURSES PLAYED

- Close to three-in-ten (29% of) golf customers surveyed indicated that they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds. Another 23% played between 37 and 52 rounds, 17% had played between 25 and 36 rounds, 15% had played 13 to 24 rounds, 10% had played between 6 and 12 rounds, and 5% had played fewer than 6 rounds in the past year.
- Overall, San Diego golf customers played an average 46.8 rounds of golf in the 12 months preceding the interview.
- When asked to indicate the course they played most often, 19% 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.
- Affordability (31%) and location (26%) were the most common reasons mentioned for playing a particular course most often, followed by course quality (19%), being a member of the course (8%), and *other* (6%).
- Torrey Pines was played most often because of the course quality (45%), followed by affordability (33%).
- Balboa Park was played most often because of affordability (47%) and then location (26%).
- For those who play Mission Bay most often, location was the main factor in that decision (45%), followed by affordability (30%).
- Among the three City of San Diego golf courses, Torrey Pines was the most frequently played course, with 64% of customers playing at least one round in the past 12 months on the south course and 60% playing at least one round on the north course. The majority (55%) 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 39%.
- 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 (5.2), followed by Mission Bay (4.1), Torrey Pines north course (3.8), and Torrey Pines south course (2.9).

RATING OVERALL SAN DIEGO GOLF EXPERIENCES

Torrey Pines - South Course

- Eight-six percent (86%) 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 (50%) or good (36%).
- Thirty-eight percent (38%) 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 speed of play (13%), better maintenance of roughs (10%), reducing fees and costs in general (8%), and maintaining sand traps and bunkers (6%).

Torrey Pines - North Course

- Eight-seven percent (87%) 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 (47%) or good (40%).
- Forty-two percent (42%) of Torrey Pines north course customers desired no changes or could not think of anything specific to improve their golf experience.
- Top-mentioned improvements requested by more than 5% of Torrey Pines north customers were enforcing speed of play (17%), better maintenance of roughs (8%), and improving green conditions (7%).

Balboa Park Golf Course

- Eighty percent (80%) of customers rated their most recent experience at Balboa Park Golf Course as excellent (24%) or good (56%).
- Forty-three percent (43%) 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 (11%), improving overall course quality (8%), improving facility maintenance (8%), improving fairways (7%), improving the green conditions (6%), and improving the clubhouse (6%).

Mission Bay Golf Course

- Among those who had played at Mission Bay in the past year, 72% felt their most recent experience was excellent (20%) or good (52%).
- Approximately four-in-ten Mission Bay customers (41%) desired no changes or could not think of anything specific to improve their golf experience.
- Mission Bay Golf Course customers most desired improving facility maintenance (11%), reopening/renovating the restaurant (9%), improving overall course quality (6%), and adding/expanding facilities (5%).

RATING ASPECTS OF GOLF EXPERIENCE

Torrey Pines - South Course

- Customers who had played the south course most often gave the most positive ratings for the layout of the course (93% excellent or good), availability and quality of golf instructors (87%), condition of fairways (87%), condition of the cart paths (86%), overall condition of the course (86%), and quality of the pro shop (85%).
- At the other end of the spectrum, Torrey Pines south course customers were less pleased with the availability and condition of driving range facilities (34%), the availability of tee times for reservations by telephone (43%) or for walk-up reservations (47%), and pace of play (50%).

Torrey Pines - North Course

- Customers who had played the north course most often gave the most positive ratings for the condition of cart paths (93% excellent or good), quality of the pro shop (92%), overall condition of the course (91%), layout of the course (90%), condition of the tee boxes (89%), and condition of fairways (89%).
- 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 telephone (39%), the pace of play (44%), availability of tee times for walk-up reservations (45%), and availability and condition of driving range facilities (47%).

Balboa Park Golf Course

- Balboa Park Golf Course customers gave the most positive ratings for the courtesy of golf course starters, Marshals, and maintenance staff (90% excellent or good), layout of the course (88%), condition of the greens (87%), and value of the course for the fee (87%).
- At the other end of the spectrum, customers were less positive regarding the availability and condition of driving range facilities (34%), the availability and condition of restrooms (44%), and the condition of the bunkers (48%) 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 most positive ratings for the availability of tee times when making a reservation by phone (93% excellent or good), the courtesy of course starters, Marshals, and maintenance staff (92%), availability and condition of practice putting greens (87%), and availability of tee times when making a walk-up reservation (85%).
- At the other end of the spectrum, customers provided substantially lower ratings for the quality of the food and beverage services (36%), quality of the pro shop (38%), and the availability and condition of restrooms (38%).

FUTURE EXPECTATIONS & RECOMMENDATIONS

- Just over one-third (35%) of all customers anticipated that they would increase the frequency of their golf play in the next 12 months. Only 4% felt their frequency of play would decrease, while most (61%) said it would remain about the same.
- Thirty-two percent (32%) of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 24% for Balboa Park, and 13% for Mission Bay.

- The percentage of customers who plan to play *less often* was reasonably similar between Torrey Pines (12%), Balboa Park (9%), and Mission Bay (10%).
- The most commonly mentioned reasons for playing Torrey Pines less often in the next year were concerns about cost of play (31%), not living near the course (30%), and course renovations and construction (17%).
- The most common specific reasons for playing Balboa Park less often include not living near the course (21%), concerns about the condition of the course (14%), and a preference for other courses (9%).
- The top specific reasons for choosing to play Mission Bay less often were concerns about the condition of the course (17%), that they don't live near the course (15%), and concerns about cost of play (9%).
- Nine-in-ten customers who played Torrey Pines were very (75%) or somewhat (16%) likely to recommend the course to a friend or colleague, compared with 89% of customers who played Balboa Park (57% very and 32% somewhat) and 81% who played Mission Bay (48% very and 33% somewhat).



CONCLUSIONS

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

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

The current survey results indicate that the City of San Diego continues to perform very well in providing golf services to San Diego residents and visitors alike. In 2019, close to nine-in-ten customers rated their most recent golf experience at Torrey Pines Golf Course as excellent or good (87% north course; 86% south course). Balboa Park Golf Course also received high marks, with 80% of customers rating their most recent experience at that course as excellent or good. Customers' experiences at the Mission Bay Golf Course continue to be somewhat less positive (72%) than at the other city courses, although the 2019 rating for the Mission Bay course increased substantially compared with 2017 (+11%), similar to the all-time high of 74% recorded in 2015.

Customers generally echoed the positive assessments they expressed for their overall golf experiences when asked about a variety of *specific* performance areas. Of the 22 specific service aspects tested, a majority of customers provided ratings of excellent or good for at least 18 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 37). This is also an area where Mission Bay Golf Course stood out in the 2019 study, with *both* the second highest number of positive ratings (behind Torrey Pines north) and positive improvements during the past two years in 15 of 22 performance aspects, two of which were statistically significant (see *Rating Aspects of Mission Bay* on page 35 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. Approximately one-third (32%) of customers expected to increase their frequency of play at Torrey Pines in the coming year, with 24% and 13% 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 12% or less for each course.

Perhaps most telling of the City's performance is customers' likelihood of recommending the San Diego courses to a friend or colleague, with eight-in-ten Mission Bay customers, close to nine-in-ten Balboa Park customers, and nine-in-ten Torrey Pines customers saying they are at least somewhat likely to recommend the course.

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

By comparing the 2019 survey data with the results of identical questions asked in 2017, 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 21 statistically significant changes in specific aspects of performance found between the 2017 and 2019 studies, 17 (81%) were in the negative direction, with 11 of those 17 declines recorded for Torrey Pines south. Given that the Torrey Pines south course is currently undergoing a large-scale improvement project, it is not unexpected for scores to experience a decline during the period leading up to and during the construction period (especially given that data collection for this survey occurred around the same time hole closures began). The next survey effort will allow an assessment of whether the declines were indeed an artifact of the project or a larger trend that needs further examination.

Where should the City focus its efforts in the future?

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

Torrey Pines Golf Course

Among customers who play Torrey Pines, four service areas stood out as being the best candidates for service improvement on both the south and north courses: improving the availability and condition of driving range facilities, improving availability of tee time reservations by phone and for walk-up customers, and improving the pace of play. Obviously, each of these service aspects is directly related to the significant volume of customers who play at Torrey Pines. Nevertheless, any efforts to increase the ease with which customers are able to reserve tee times and utilize the driving range, as well as improve the pace of play, would most

certainly enhance their golfing experience and increase their overall satisfaction. It is worth noting that these are the same four priority areas for improvement identified in 2013, 2015, and 2017 by customers who play the north and/or south courses.

Examining the key differentiators in opinion of those who rated their most recent experience at Torrey Pines as excellent or good compared with those who said it was fair, poor, or very poor was their rating of the overall condition of the course and condition of fairways at both courses, as well as the availability and quality of golf instructors at the south course and condition of the greens and the north course. It is worth noting that the course's *value for the fee*—the top differentiator for Torrey Pines south in 2013, 2015, and 2017—was not in the top three in 2019. With that said, non-residents continue to be especially critical about the *value for the fee*, being almost twice as likely as residents to cite the course's value for the fee as fair, poor, or very poor. Cost of play was also the top factor mentioned among customers who intend to play Torrey Pines less frequently in the future.

Balboa Park Golf Course

Improving the availability and condition of driving range facilities, availability and condition of restrooms, and condition of the bunkers topped the improvements most desired by Balboa Park Golf Course customers in 2019—and two of the three were also the top three improvements most desired in 2013, 2015, and 2017. The quality of the pro shop, which had been in the top three in each of the other studies, experienced a 19% increase over the past two years—the largest single improvement from the entire study. Availability and condition of driving range facilities also experienced a statistically significant improvement from 2017 to 2019, although it was still the lowest-rated item among the 22 tested.

Isolating the service areas that best separate customers who had an overall excellent or good experience from those with less positive experiences, the City should also consider focusing on the general course condition and the condition of fairways and tee boxes. The condition of fairways is particularly noteworthy, as it was one of only two performance aspects for the Balboa Park course that exhibited a statistically significant *decline* in the percentage of customers who rated it as excellent or good when compared to the 2017 study findings.

Mission Bay Golf Course

Although customers recognized many improvements at the Mission Bay Golf Course over the past several years, Mission Bay continues to receive lower performance ratings in general when compared to the other city courses. Based on customers' ratings of 22 specific performance

aspects, the best opportunities for improvement are improving the quality of the food and beverage services, quality of the pro shop, and improving the availability and condition of restrooms. The top three improvement areas for the Mission Bay Golf Course in 2019 are the same as those identified in 2013, 2015, and 2017.

Isolating the conditions that best separate customers who had an overall excellent or good experience from those with less positive experiences, the City should also consider improving the overall course condition, condition of fairways, and condition of the greens at Mission Bay.

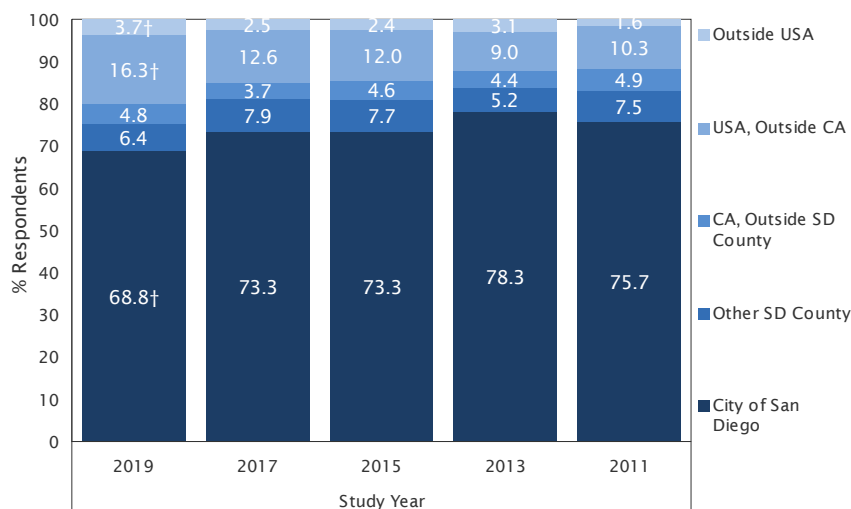
RESIDENCY OF CUSTOMERS

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

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

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

FIGURE 1 AREA OF CURRENT RESIDENCE BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2017 and 2019 studies.

As shown in Figure 1, in 2019 approximately seven-in-ten (69% of) customers' primary residences among those surveyed were located in the City of San Diego, 6% were located in San Diego County but outside the City of San Diego, 5% were in California but outside San Diego County, 16% were located elsewhere in the United States, and about 4% were outside the United States. When compared to the 2017 study, there was a statistically significant decrease in the percentage of customers located in the City of San Diego (-5%) and increases in those from outside California (+4%) and the United States (+1%).

FREQUENCY & COURSES PLAYED

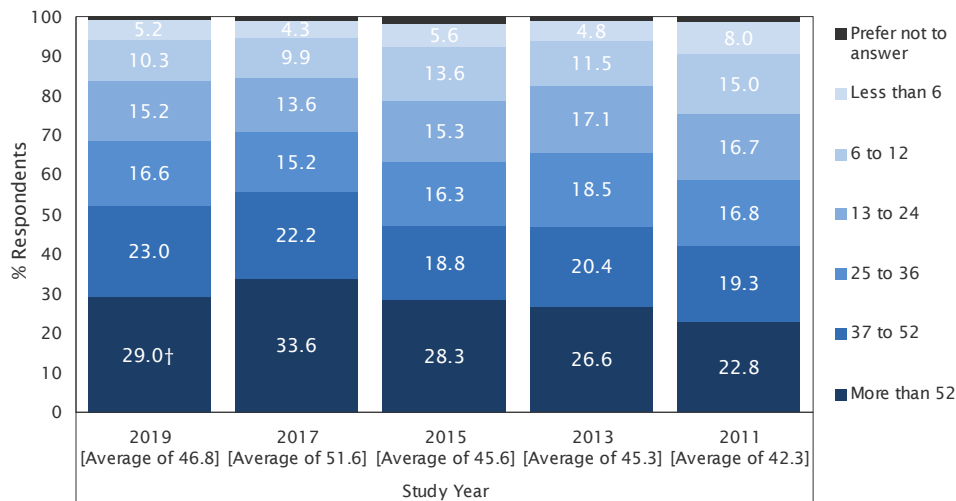
After the introduction and general inquiry regarding the customer’s area of primary residence, the survey turned to the topic of golf with several questions about frequency of play, courses played in San Diego and elsewhere, and frequency of play on each of the City’s three courses.

FREQUENCY OF OVERALL PLAY The first question in this series asked respondents to estimate the total number of golf rounds they had played in the past 12 months. As shown below in Figure 2, close to three-in-ten (29% of) golf customers surveyed in 2019 indicated that they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds. Another 23% played between 37 and 52 rounds, 17% had played between 25 and 36 rounds, 15% had played 13 to 24 rounds, 10% had played between 6 and 12 rounds, and 5% had played fewer than 6 rounds in the past year.

Overall, San Diego golf customers played an average 46.8 rounds of golf in the 12 months preceding the interview. When compared to 2017, there was a statistically significant decrease in the frequency of playing golf among customers of San Diego’s courses. Although the average number of rounds played declined from 2017 to 2019, it is worth noting that the current results are back in line with the slow, but steady increases evidenced from 2011 to 2015.

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 2017 and 2019 studies.

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

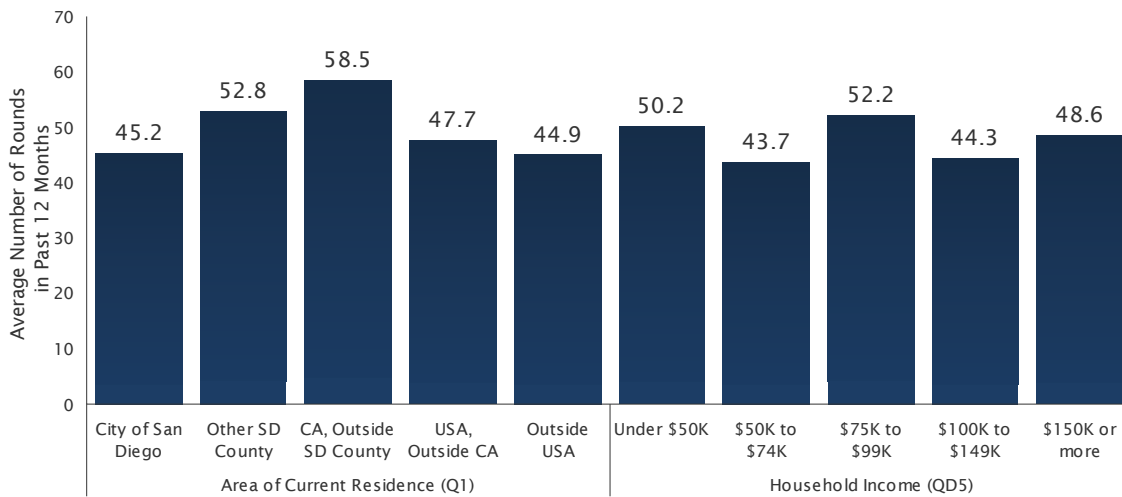
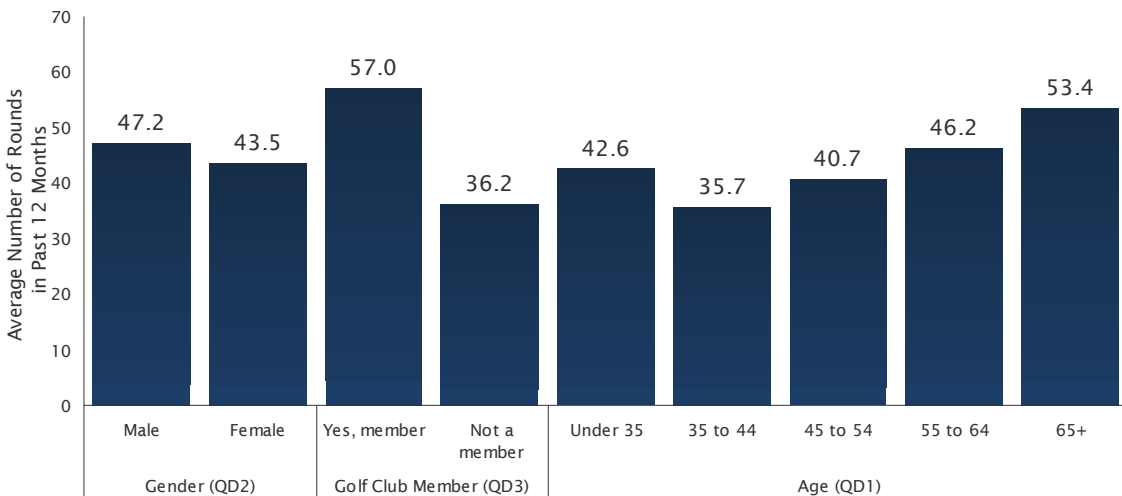


FIGURE 4 AVERAGE NUMBER OF ROUNDS PLAYED IN PAST 12 MONTHS BY GENDER, GOLF CLUB MEMBER & AGE



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 presents the courses mentioned by at least 0.8% of respondents. Approximately one-third of customers identified a course other than those shown in the figure (29%) or indicated that they were not sure or play multiple courses (5%). Among the specific courses cited, 19% 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 on the next page shows the *most commonly played* courses

among residents of the City of San Diego as well as those who live elsewhere in San Diego County.

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

FIGURE 5 COURSE PLAYED MOST OFTEN

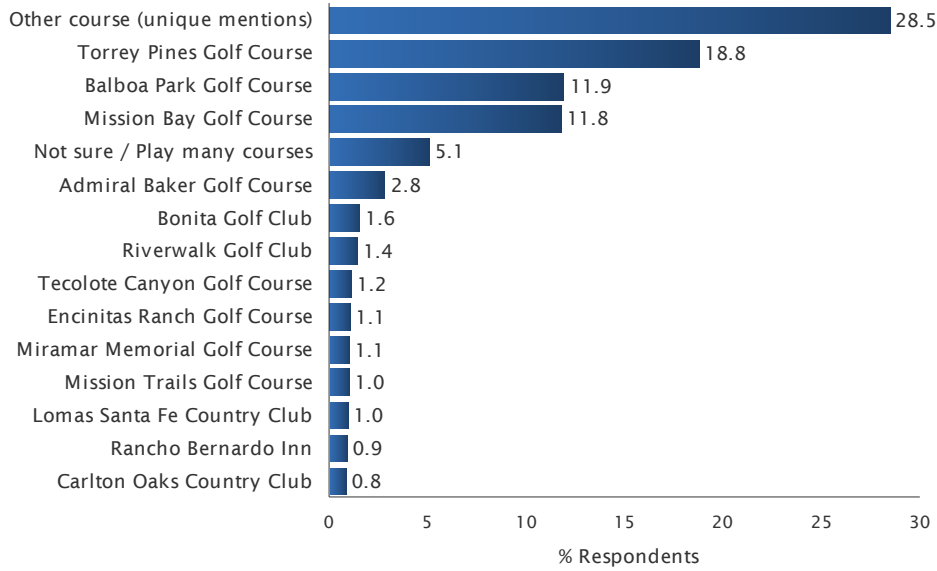
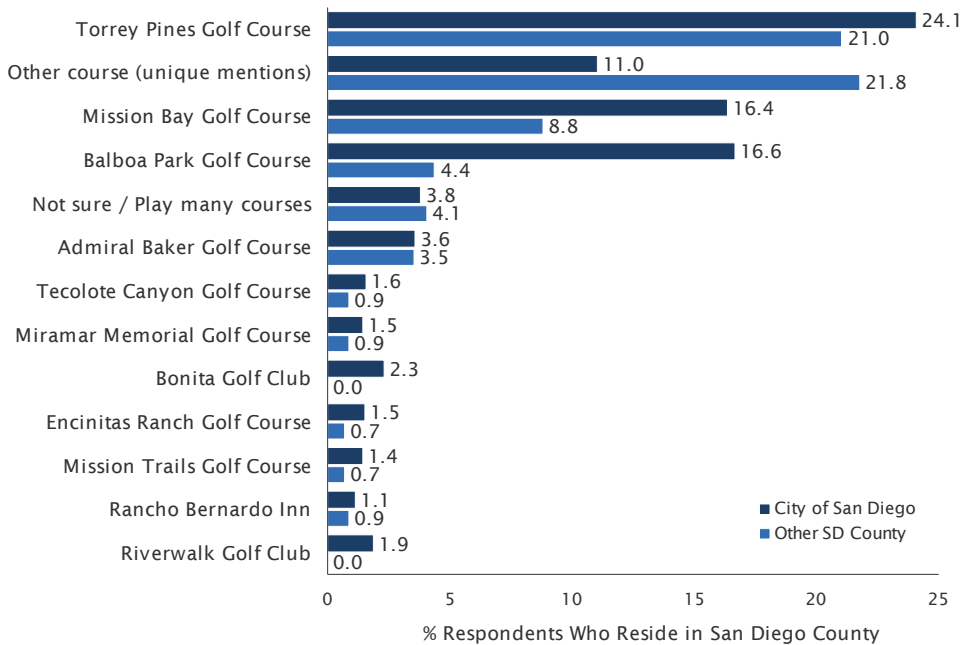


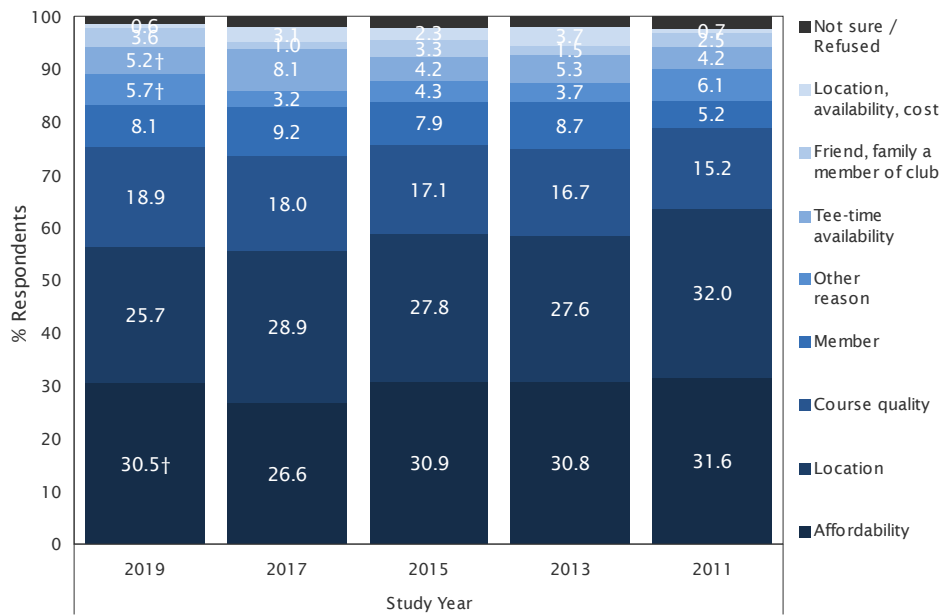
FIGURE 6 COURSE PLAYED MOST OFTEN BY CITY OF RESIDENCE IN SAN DIEGO COUNTY



REASON FOR PLAYING COURSE MOST OFTEN There are a number of primary motivators for playing a particular golf course most often, including location of the course relative to home and work, cost of play, and overall quality of the course. After customers provided the name of the course they play most often in Question 4, the survey next inquired about the primary reason for their choice. Respondents were not provided with a list of answers from which to choose, although most responses fell into one of several categories presented in Figure 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

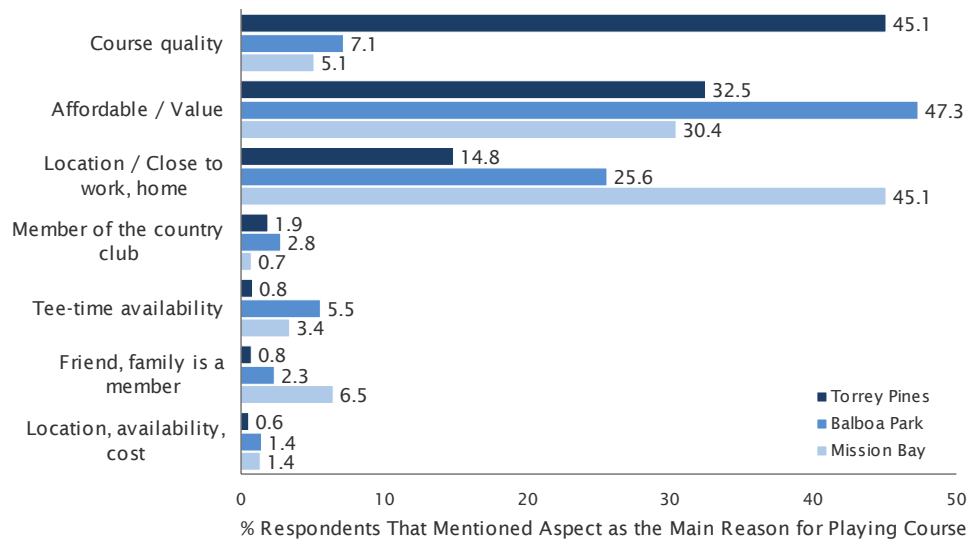


† Statistically significant change ($p < 0.05$) between the 2017 and 2019 studies.

Affordability (31%) and location (26%) were the most common reasons mentioned in 2019 for playing a particular course most often, followed by course quality (19%), being a member of the course (8%), and reasons other than those shown in the figure (6%). When compared to 2017, the percentage of golfers who mentioned affordability or *other* increased significantly, whereas the percentage who mentioned tee-time availability decreased significantly.

Figure 8 on the next page displays the responses to Question 5 among customers who mentioned one of the three city golf courses as the course they play most often, thus highlighting the primary factors in choosing to play each. As shown in the figure, the 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 (45%), followed by affordability (33%). Balboa Park was played most often because of affordability (47%) and then location (26%). For those who play Mission Bay most often, location was the main factor in that decision, mentioned by 45% 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 respondents’ experiences with, and opinions of, the three City of San Diego courses. The first question of this nature asked customers to indicate approximately how many rounds of golf they had played at each of the three city courses in the past 12 months, 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 64% of customers playing at least one round in the past 12 months on the south course and 60% playing at least one round on the north course. The majority (55%) 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 39%.

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 (5.2), followed by Mission Bay (4.1), Torrey Pines north course (3.8), and Torrey Pines south course (2.9). Compared with 2017, there was a statistically significant increase in the average number of rounds played at Mission Bay, a statistically significant decrease in the number played at Balboa Park, and the combined number of rounds played at Torrey Pines remained virtually unchanged (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

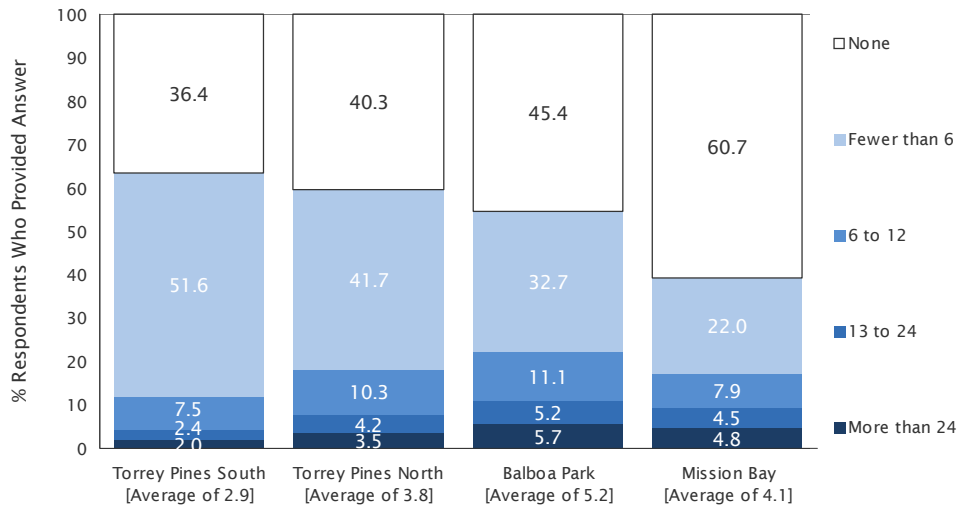
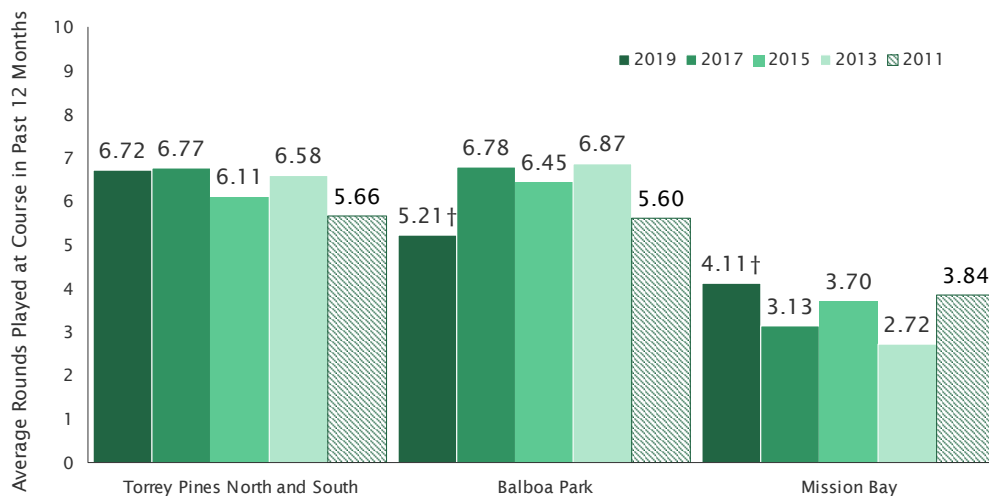


FIGURE 10 FREQUENCY OF PLAYING CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2017 and 2019 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. What stands out from the figures is that the Torrey Pines south course draws customers from outside the County, outside of California, and internationally at a rate far higher than the other city courses.

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

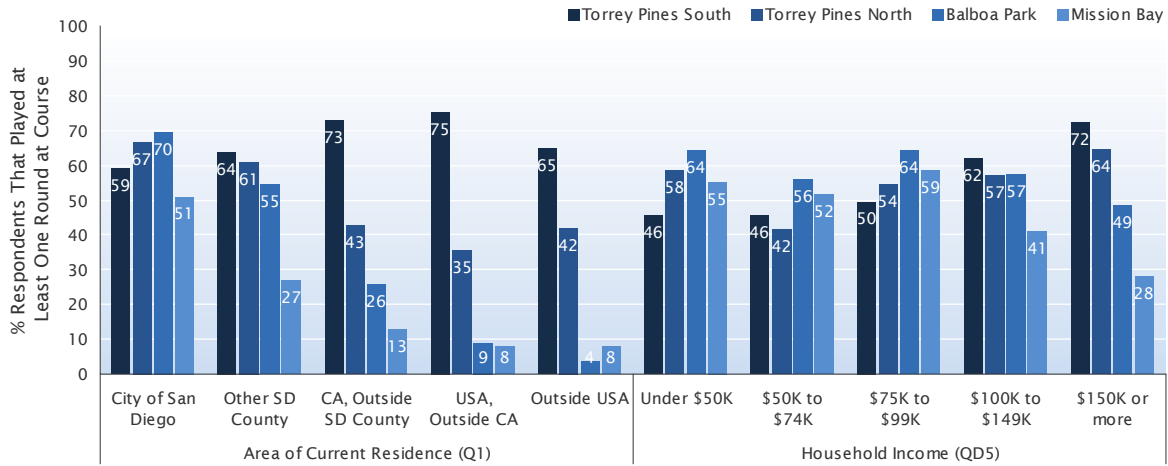


FIGURE 12 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY GENDER & NUMBER OF ROUNDS IN PAST 12 MONTHS

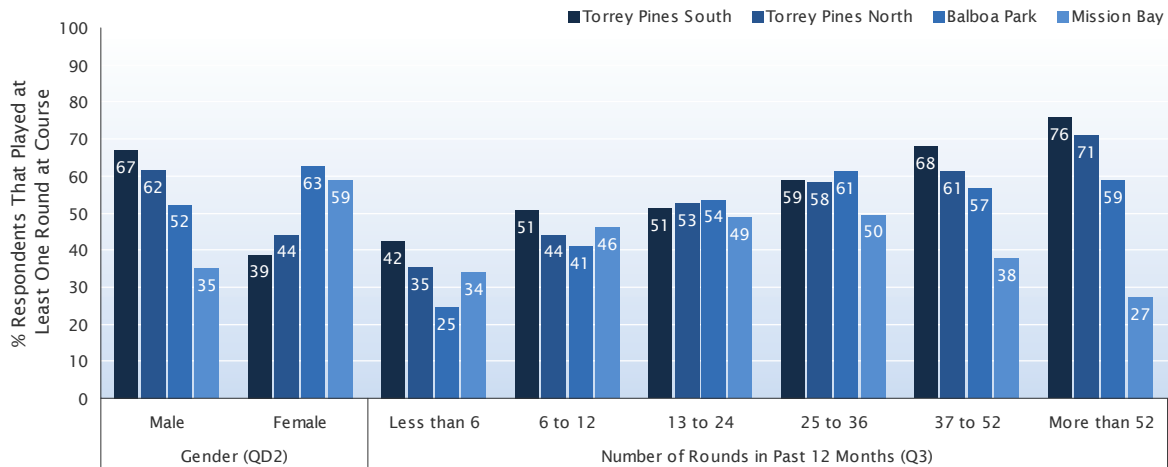
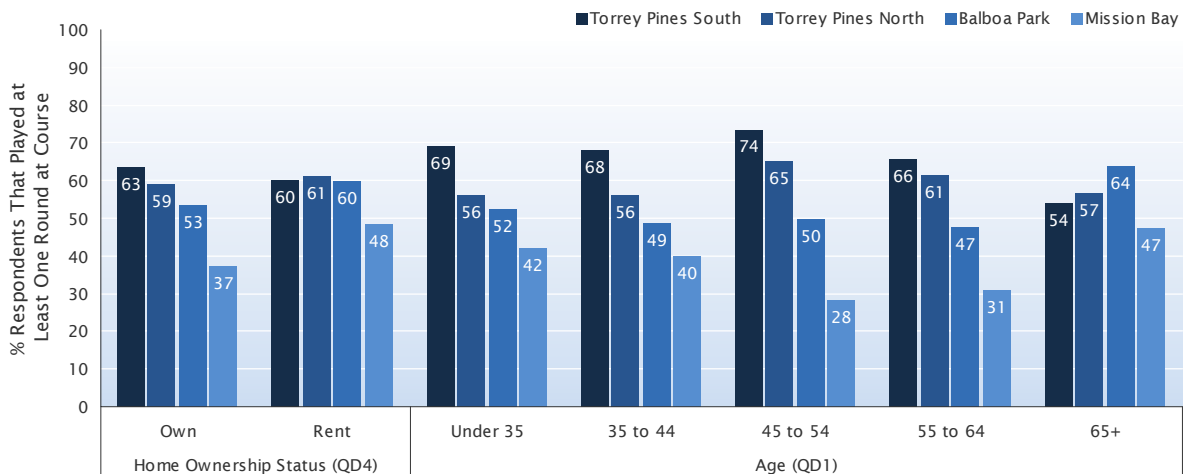


FIGURE 13 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY HOME OWNERSHIP STATUS & AGE



Figures 14 through 16 display the percentage of customers within various demographic subgroups who played each of the courses *most often* in the past 12 months. When compared to the other courses, the tendency to play Torrey Pines south *most often* increased the further away from the City of San Diego a customer resided, generally increased with household income, and was higher among male customers, those who played fewer than six rounds of golf per year, and customers under 35 years old or 45 to 64 years of age. Torrey Pines north course was the dominant course of choice for those who live in the City of San Diego or elsewhere in the County of San Diego, customers who played golf at least once per week, and renters. Although close to a third of customers with a household income under \$50,000 per year identified Balboa Park as their go-to course, no more than 26% of customers in any other identified subgroup played Balboa Park most often. Selecting Mission Bay as one's go-to course appears to be positively related to having a household income between \$50,000 and \$74,999 per year, being female, and playing 13 to 24 rounds of golf annually.

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

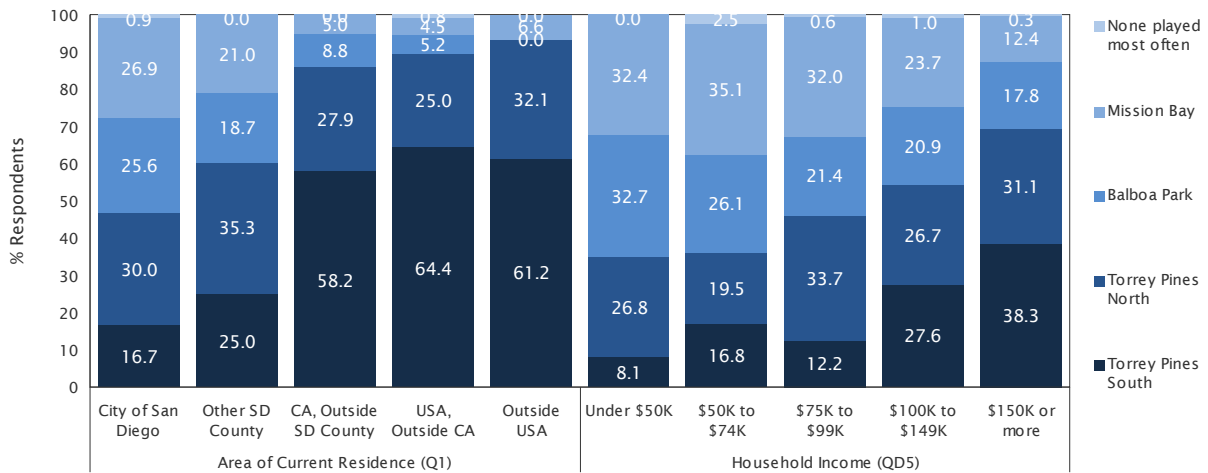


FIGURE 15 SAN DIEGO COURSE PLAYED MOST OFTEN BY GENDER & NUMBER OF ROUNDS IN PAST 12 MONTHS

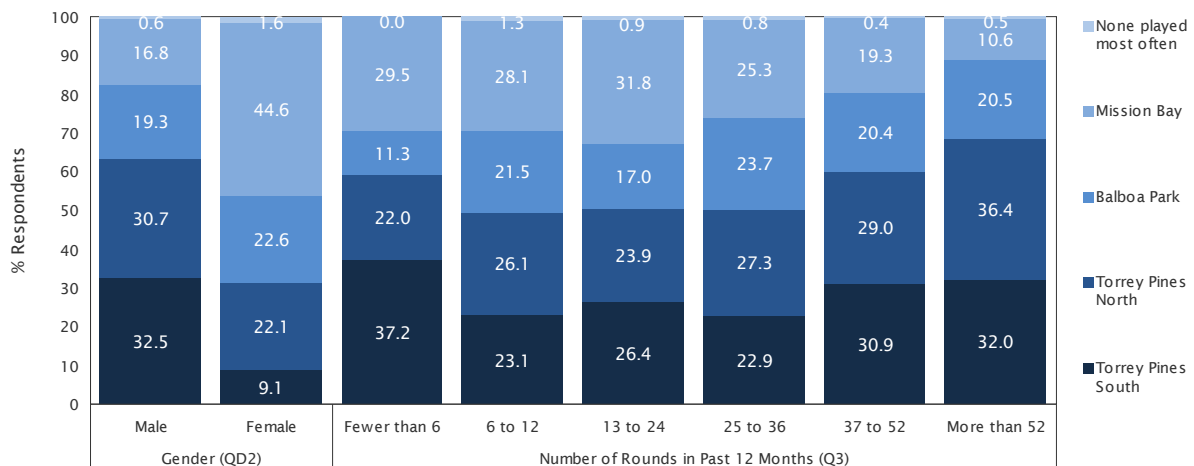
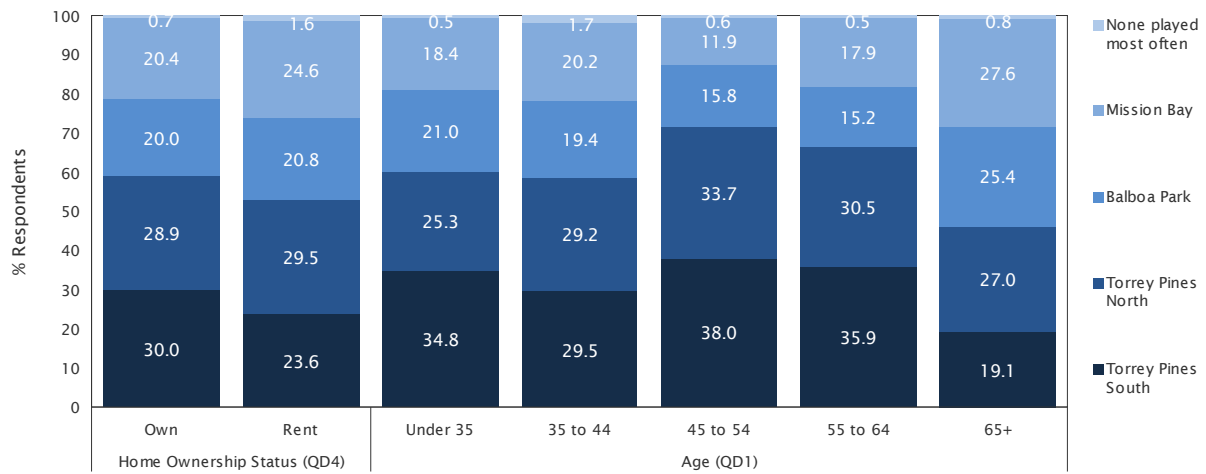


FIGURE 16 SAN DIEGO COURSE PLAYED MOST OFTEN BY HOME OWNERSHIP STATUS & AGE



For the interested reader, Table 1 below provides the demographic distribution of survey respondents who played at least one round of golf at a 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
Q1 Area of Current Residence				
City of San Diego	64.7	77.6	88.4	90.0
Other SD County	6.4	6.6	6.4	4.4
CA, Outside SD County	5.5	3.4	2.3	1.6
USA, Outside CA	19.5	9.7	2.7	3.2
Outside USA	3.9	2.6	0.2	0.8
QD1 Age				
Under 35	10.0	8.6	8.7	9.7
35 to 44	11.5	10.1	9.5	10.9
45 to 54	16.7	15.8	13.1	10.3
55 to 64	28.6	28.4	23.9	21.6
65+	31.1	34.9	42.5	44.2
Prefer not to answer	2.1	2.3	2.3	3.2
QD2 Gender				
Male	89.8	88.1	81.2	76.0
Female	8.6	10.5	16.2	21.2
Prefer not to answer	1.6	1.5	2.6	2.7
QD3 Golf Club Member				
Yes	58.9	53.4	46.6	35.3
No	38.5	44.2	50.6	62.5
Refused	2.6	2.4	2.9	2.2
QD4 Home Ownership Status				
Own	82.4	81.7	80.2	78.2
Rent	10.7	11.5	12.3	13.8
Prefer not to answer	6.9	6.8	7.6	8.0
QD5 Household Income				
Under \$35K	0.4	0.6	1.0	1.1
\$35K to \$49K	2.1	2.8	3.1	3.8
\$50K to \$74K	5.1	5.0	7.3	9.4
\$75K to \$99K	6.0	7.1	9.1	11.5
\$100K to \$149K	16.6	16.3	17.8	17.8
\$150K or more	44.4	42.1	34.5	27.8
Not sure / Prefer not to answer	25.3	26.1	27.3	28.5
City of San Diego Resident				
Resident	64.7	77.6	88.4	90.0
Non-resident	35.3	22.4	11.6	10.0

RATING OVERALL SAN DIEGO GOLF EXPERIENCES

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

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

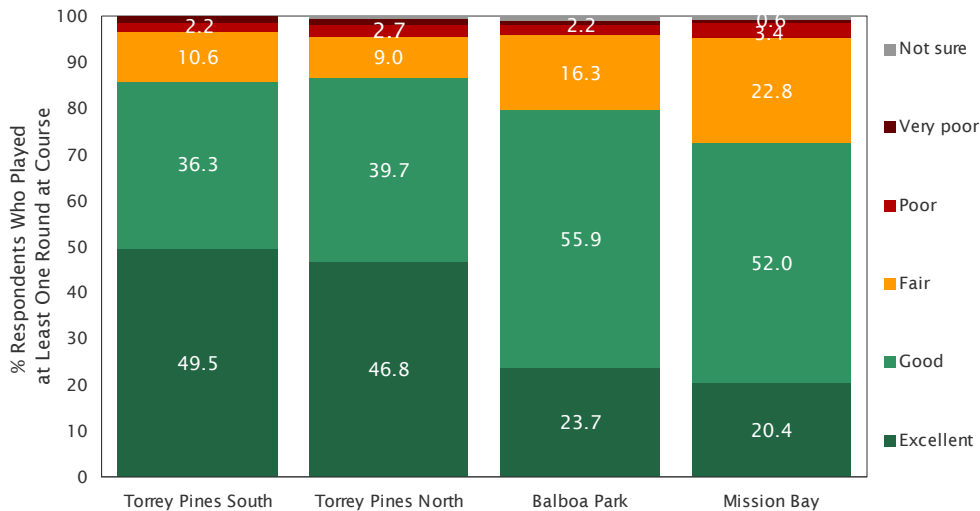
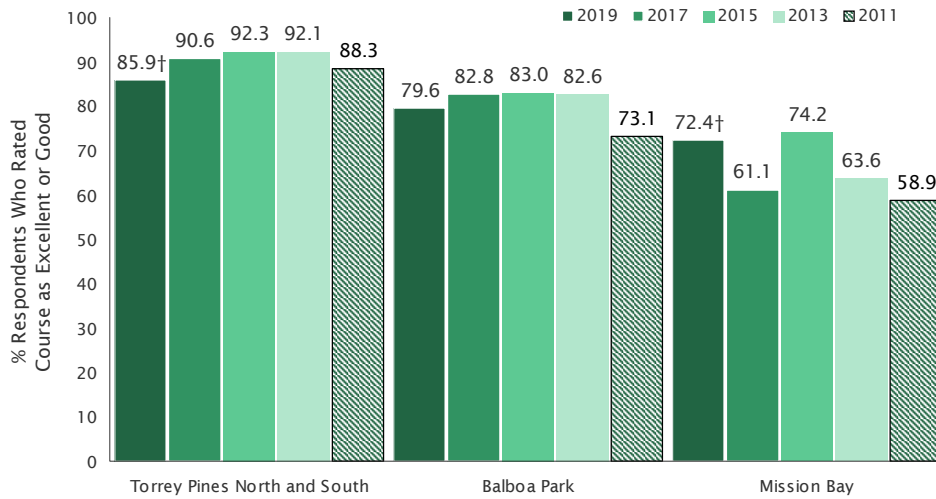


Figure 17 presents the overall performance ratings for Torrey Pines south, Torrey Pines north, Balboa Park, and Mission Bay. Torrey Pines north received the most positive ratings overall, with 87% of customers who had played at least one round there in the past 12 months citing their most recent experience as excellent (47%) or good (40%). Torrey Pines south received similarly positive ratings, with 86% of customers rating their most recent experience as excellent (50%) or good (36%). Eight-in-ten customers (80%) rated their experience at Balboa Park Golf Course as excellent (24%) or good (56%) and just over seven-in-ten customers (72%) rated their experience at Mission Bay as excellent (20%) or good (52%).

Figure 18 shows that the performance ratings for Balboa Park in 2019 were similar to those recorded in 2017, whereas Torrey Pines experienced a 5% decline and Mission Bay posted a statistically significant increase of 11% in the percentage of customers who rated their recent experience at the course as excellent or good.

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



† Statistically significant change ($p < 0.05$) between the 2017 and 2019 studies.

Figures 19-22 display performance ratings for Torrey Pines south and north courses, as well as 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

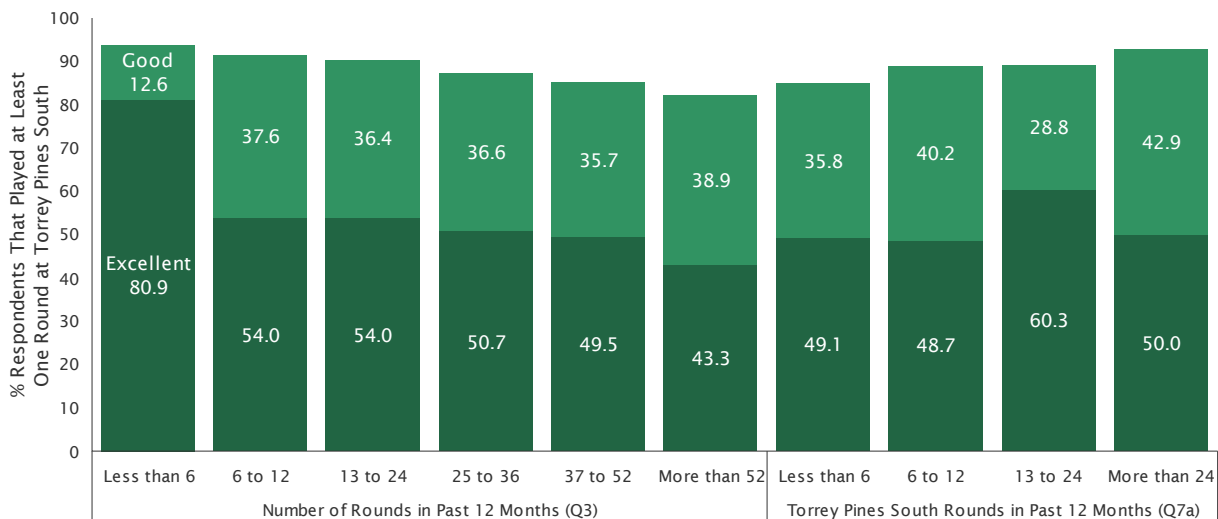


FIGURE 20 RATING TORREY PINES NORTH BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS

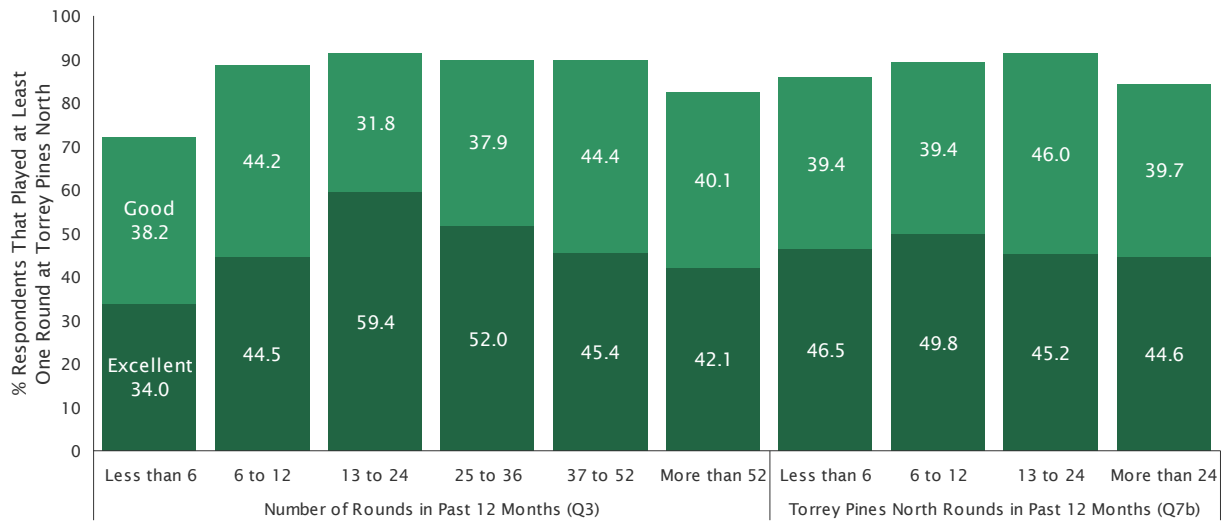


FIGURE 21 RATING BALBOA PARK BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & BALBOA PARK ROUNDS IN PAST 12 MONTHS

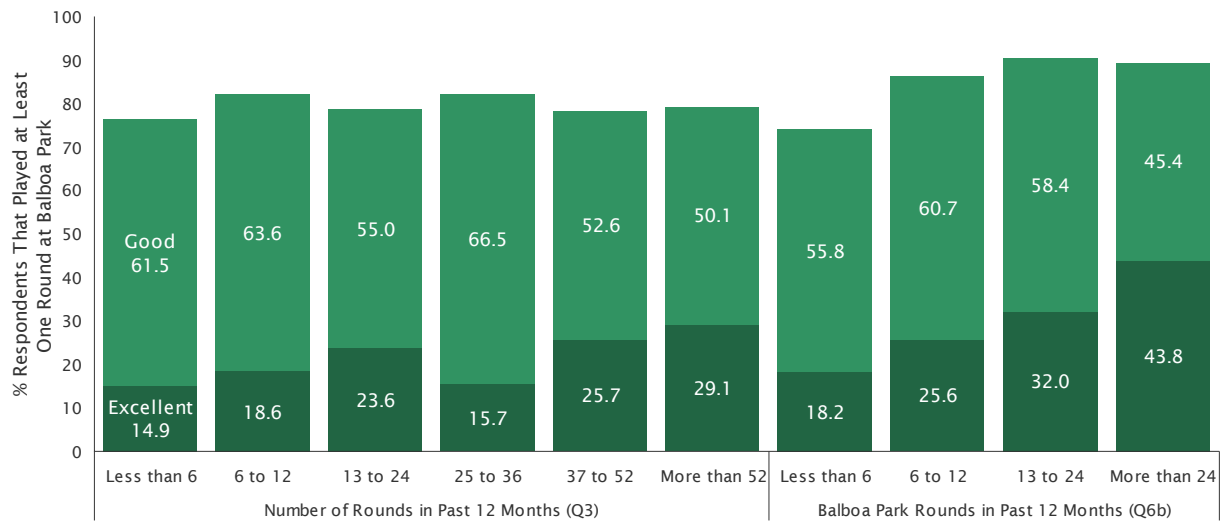
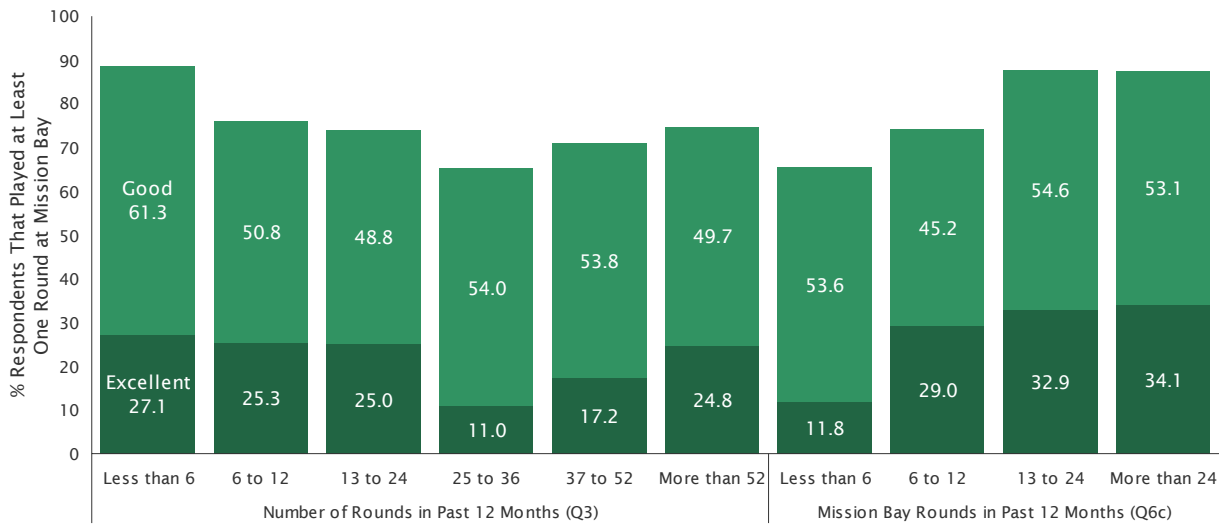


FIGURE 22 RATING MISSION BAY BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & MISSION BAY ROUNDS IN PAST 12 MONTHS



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 their overall golf experience at that particular course. These question were asked in an open-ended manner, allowing customers to mention any improvement that came to mind without being prompted by or restricted to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figures 23-26.

Approximately four-in-ten customers of Torrey Pines south (38%) and north (42%), Balboa Park (43%), and Mission Bay (41%) desired no changes or could not think of anything specific to improve their golf experience. Top specific mentions for improving Torrey Pines south course were enforcing speed of play (13%), better maintenance of roughs (10%), reducing fees and costs in general (8%), and maintaining sand traps and bunkers (6%), whereas for the north course the specific improvements requested by more than 5% of customers were enforcing speed of play (17%), better maintenance of roughs (8%), and improving green conditions (7%).

Specific mentions for improvement of Balboa Park Golf Course included enforcing speed of play (11%), improving overall course quality (8%), improving facility maintenance (8%), improving fairways (7%), improving the green conditions (6%), and improving the clubhouse (6%). Mission Bay Golf Course customers most desired improving facility maintenance (11%), reopening/renovating the restaurant (9%), improving overall course quality (6%), and adding/expanding facilities (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

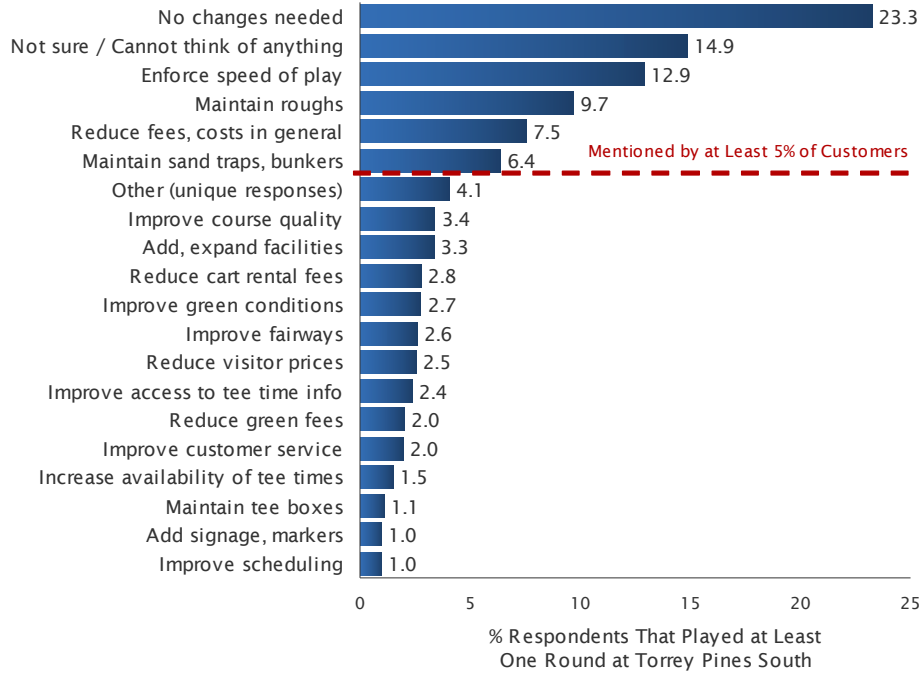


FIGURE 24 DESIRED CHANGES TO TORREY PINES NORTH

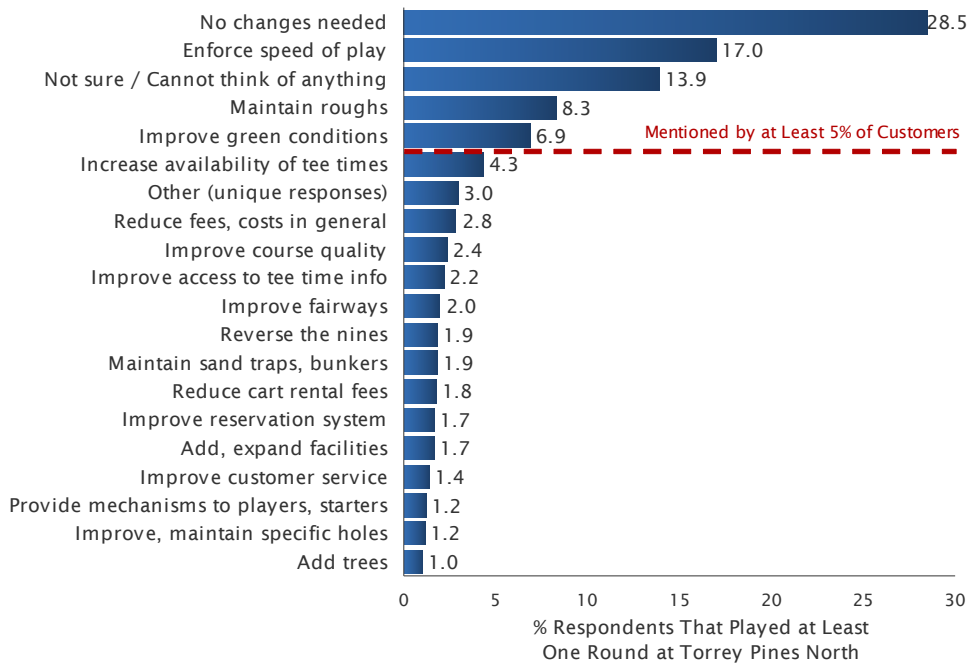


FIGURE 25 DESIRED CHANGES TO BALBOA PARK

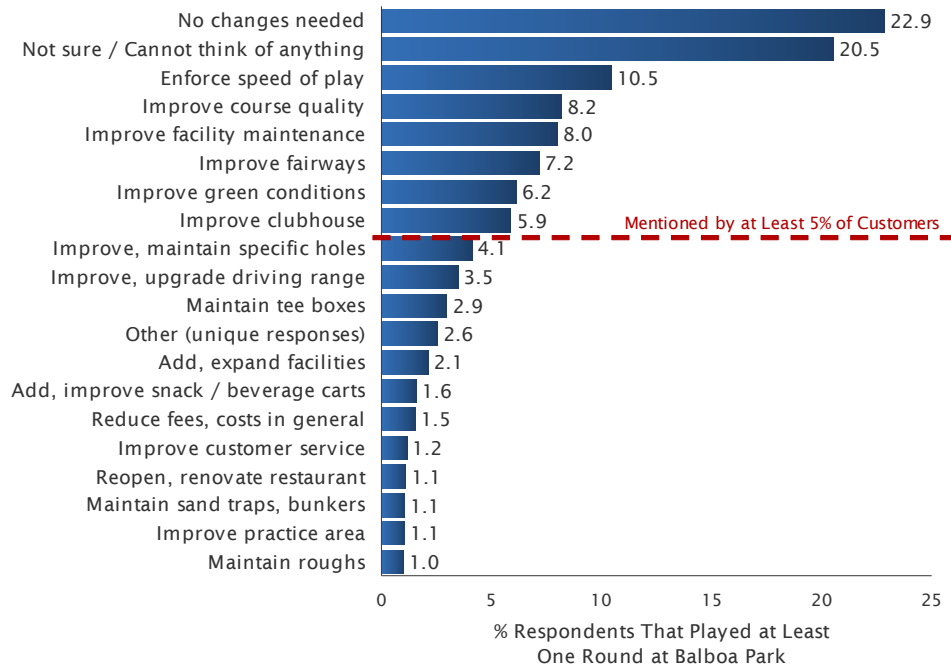
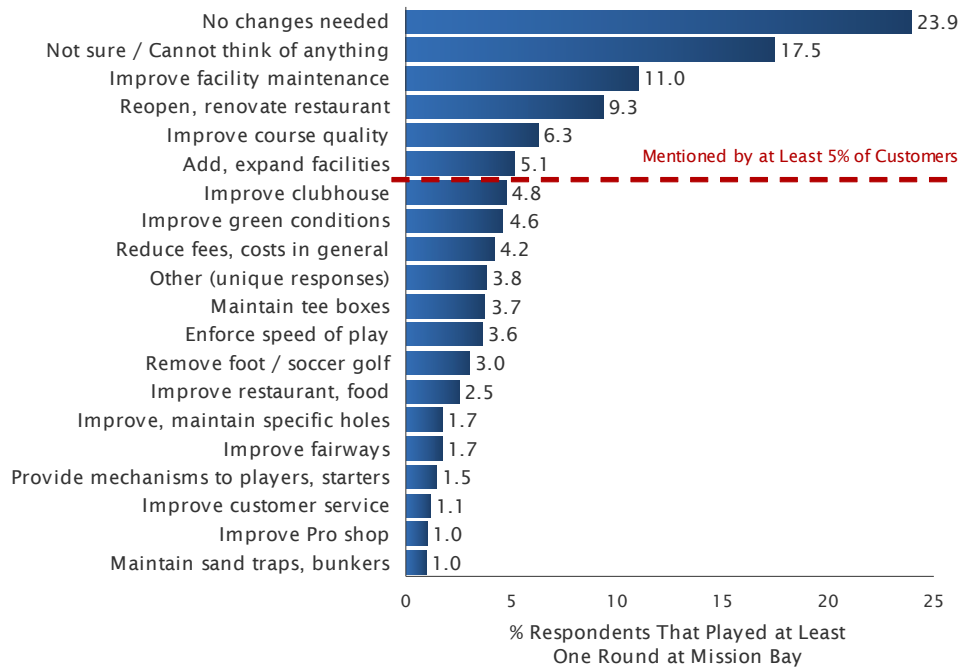


FIGURE 26 DESIRED CHANGES TO MISSION BAY



For the interested reader, Figures 27 and 28 show how suggested improvements for Torrey Pines south and north customers varied according to 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 IN RESERVATION DATABASE

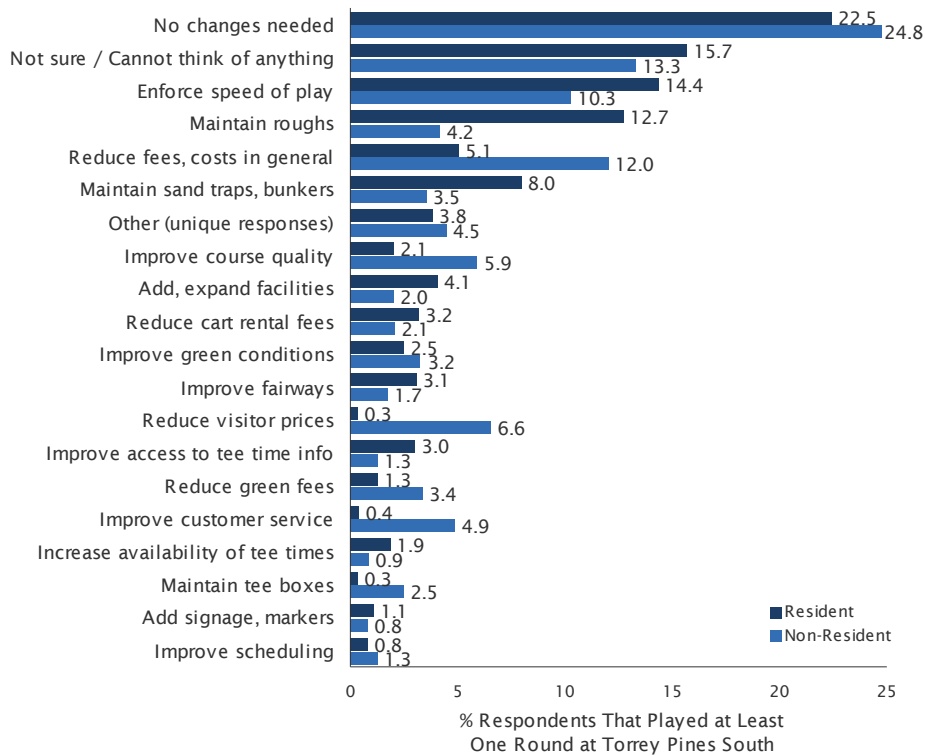
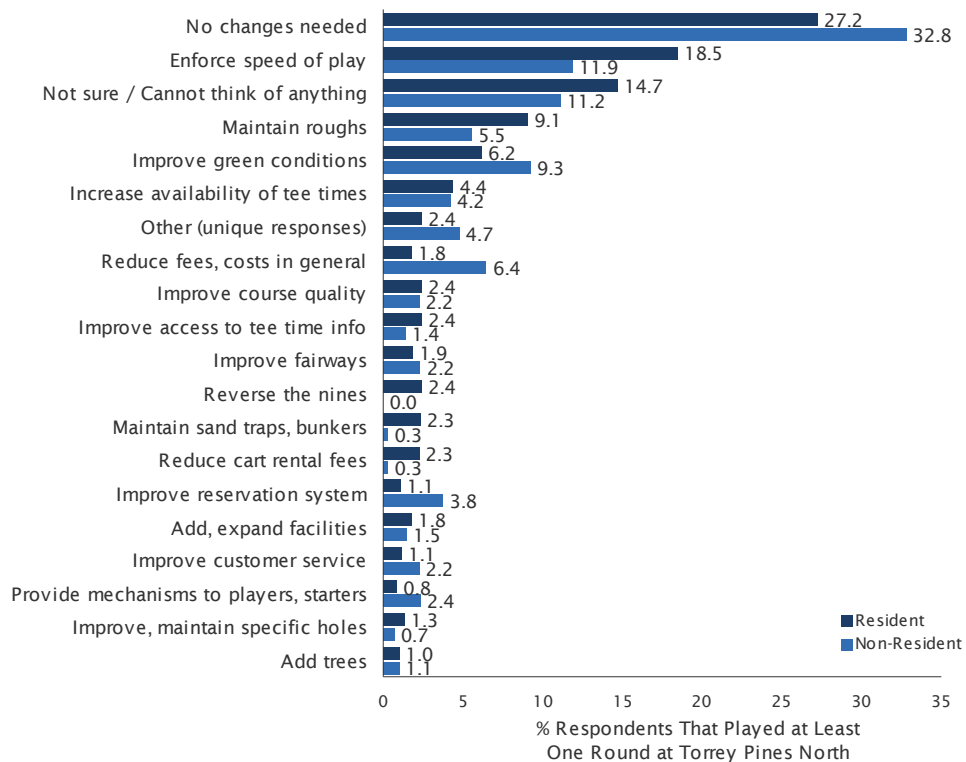


FIGURE 28 DESIRED CHANGES TO TORREY PINES NORTH BY RESIDENT VS. NON-RESIDENT IN RESERVATION DATABASE



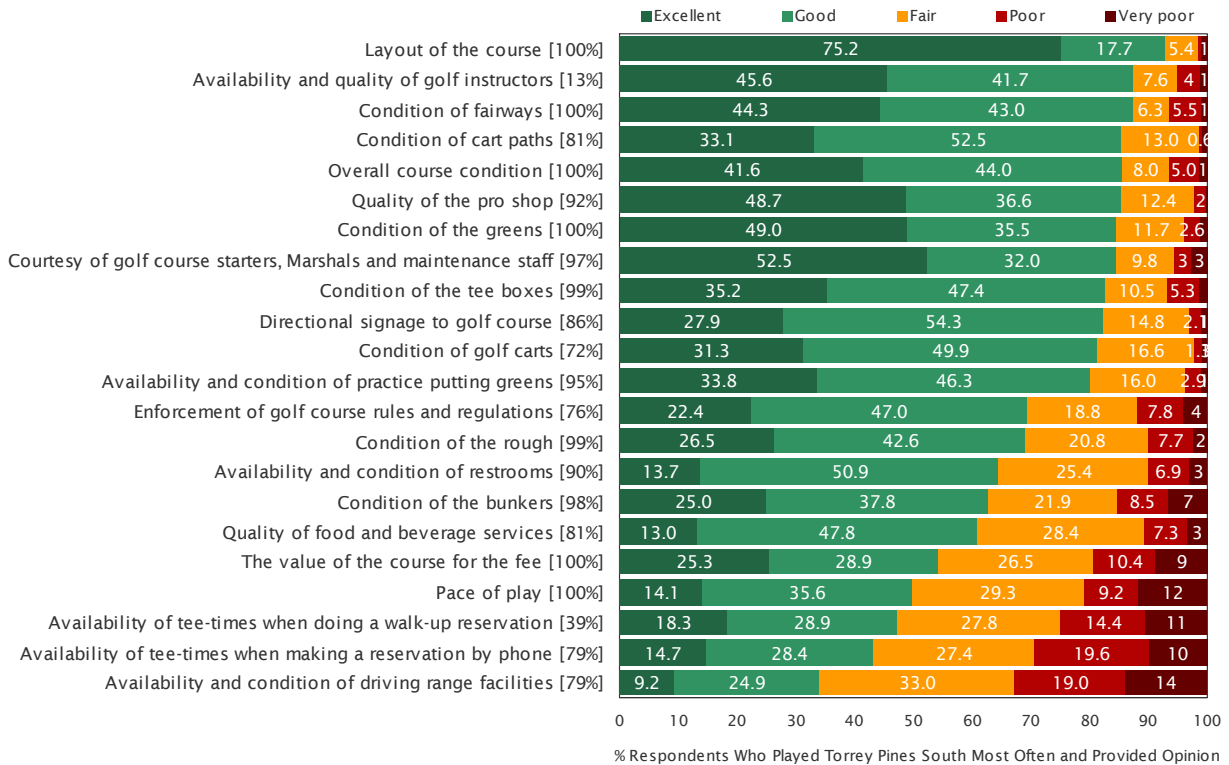
RATING ASPECTS OF GOLF EXPERIENCE

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

RATING ASPECTS OF TORREY PINES Torrey Pines Golf Course customers were divided according to which course (south or north) they had played most often. Customers who had played the south course most often gave the most positive ratings for the layout of the course (93% excellent or good), availability and quality of golf instructors (87%), condition of fairways (87%), condition of the cart paths (86%), overall condition of the course (86%), and quality of the pro shop (85%). At the other end of the spectrum, Torrey Pines south course customers were less pleased with the availability and condition of driving range facilities (34%), the availability of tee times for reservations by telephone (43%) or for walk-up reservations (47%), and pace of play (50%).

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 SOUTH¹



Customers who had played the north course most often gave the most positive ratings for the condition of cart paths (93% excellent or good), quality of the pro shop (92%), overall condition of the course (91%), layout of the course (90%), condition of the tee boxes (89%), and condition of fairways (89%). 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 telephone (39%), the pace of play (44%), availability of tee times for walk-up reservations (45%), and availability and condition of driving range facilities (47%).

FIGURE 30 RATING ASPECTS OF TORREY PINES NORTH

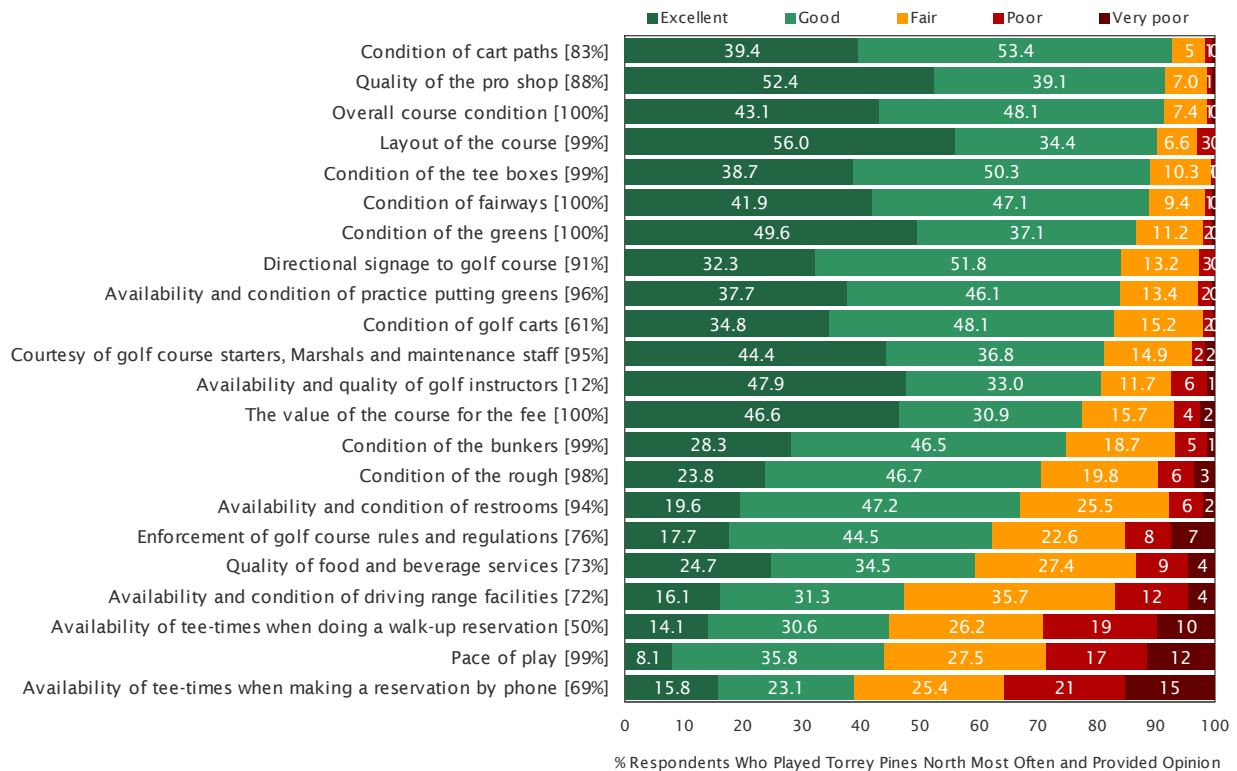


Table 2 on the next page shows the percentage who rated each aspect of Torrey Pines south course as excellent or good in 2013, 2015, 2017, and 2019 surveys, as well as the difference between the two most recent studies. Table 3 provides the same analysis for the Torrey Pines north course. When compared to the 2017 survey results there was a downward trend, with 11 statistically significant performance declines for the south course and two statistically significant decreases in performance ratings from north course customers during this period.

1. For comparison purposes between aspects and courses, 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. The numbers shown within the bars are percentages of customers who provided an opinion.

TABLE 2 RATING ASPECTS OF TORREY PINES SOUTH BY STUDY YEAR

	Study Year				Difference in Excellent + Good 2017 to 2019
	2019	2017	2015	2013	
Availability of tee-times when making a reservation by phone	43.1	37.5	53.8	50.9	+5.6
Availability of tee-times when doing a walk-up reservation	47.2	42.7	50.2	57.6	+4.5
Availability and quality of golf instructors	87.4	87.1	70.2	83.8	+0.3
Directional signage to golf course	82.2	83.2	84.3	83.5	-1.0
Courtesy of golf course starters, Marshals and maintenance staff	84.5	85.8	84.9	84.9	-1.3
Availability and condition of restrooms	64.6	66.7	62.5	64.6	-2.0
Enforcement of golf course rules and regulations	69.4	71.7	72.4	73.1	-2.3
Condition of fairways	87.3	91.2	91.6	93.5	-3.9
Quality of food and beverage services	60.8	64.9	65.7	66.1	-4.0
Condition of cart paths	85.6	89.6	81.5	87.0	-4.1
Condition of golf carts	81.2	85.7	79.2	81.6	-4.5
Quality of the pro shop	85.3	90.3	90.7	89.5	-5.0†
Layout of the course	92.9	98.1	97.7	97.1	-5.2†
Condition of the greens	84.6	90.0	90.5	89.2	-5.5†
Overall course condition	85.5	91.4	91.1	94.1	-5.8†
Availability and condition of practice putting greens	80.1	86.4	89.3	92.2	-6.3†
Condition of the tee boxes	82.6	90.0	89.4	91.2	-7.4†
Pace of play	49.8	59.0	55.3	55.5	-9.2†
Condition of the bunkers	62.8	72.1	76.1	77.9	-9.3†
The value of the course for the fee	54.2	64.7	61.6	68.0	-10.5†
Availability and condition of driving range facilities	34.1	45.4	40.8	44.8	-11.2†
Condition of the rough	69.1	80.8	80.3	83.4	-11.7†

† Statistically significant change (p < 0.05) between the 2017 and 2019 studies.

TABLE 3 RATING ASPECTS OF TORREY PINES NORTH BY STUDY YEAR

	Study Year				Difference in Excellent + Good 2017 to 2019
	2019	2017	2015	2013	
Availability of tee-times when making a reservation by phone	38.9	32.5	47.5	47.0	+6.4
Availability of tee-times when doing a walk-up reservation	44.8	40.2	53.5	50.3	+4.6
Availability and condition of restrooms	66.9	63.0	64.2	64.7	+3.9
Quality of the pro shop	91.5	88.9	93.2	88.5	+2.6
Condition of cart paths	92.8	91.3	82.6	82.9	+1.5
Condition of the greens	86.7	86.1	91.8	89.6	+0.5
Condition of golf carts	82.9	83.3	85.3	78.2	-0.4
The value of the course for the fee	77.5	78.0	81.2	79.4	-0.5
Availability and condition of practice putting greens	83.9	84.4	91.2	87.2	-0.5
Directional signage to golf course	84.1	85.1	86.6	85.1	-1.0
Overall course condition	91.2	92.4	91.5	91.6	-1.2
Availability and quality of golf instructors	80.8	82.4	77.9	78.0	-1.5
Condition of fairways	88.9	90.7	86.4	90.2	-1.8
Layout of the course	90.3	92.6	95.2	96.1	-2.3
Condition of the tee boxes	89.0	92.4	87.7	83.8	-3.4
Availability and condition of driving range facilities	47.5	51.5	53.0	49.1	-4.0
Quality of food and beverage services	59.3	63.7	66.1	58.5	-4.4
Courtesy of golf course starters, Marshals and maintenance staff	81.2	86.6	87.3	86.6	-5.4
Condition of the bunkers	74.8	80.4	74.6	69.1	-5.7
Enforcement of golf course rules and regulations	62.2	68.3	64.5	67.1	-6.1
Pace of play	43.9	53.4	52.5	50.1	-9.5†
Condition of the rough	70.5	85.3	81.2	77.2	-14.8†

† Statistically significant change (p < 0.05) between the 2017 and 2019 studies.

TORREY PINES ASPECT RATINGS BY SUBGROUP For the interested reader, Tables 4 and 5 display how the rating of each aspect of Torrey Pines Golf Course tested (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 an *aspect* as excellent or good (far right column).

When compared to 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, availability and quality of golf instructors, and condition of fairways (see Table 4). For the north course, the three aspects with the largest disparity between the two groups were the condition of the greens, overall course condition, and condition of fairways. 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	94	43	-51
Availability and quality of golf instructors	92	43	-48
Condition of fairways	95	48	-48
Condition of the rough	76	31	-46
Availability of tee-times when doing a walk-up reservation	55	10	-44
The value of the course for the fee	61	21	-39
Pace of play	56	18	-38
Condition of the greens	91	53	-38
Condition of the tee boxes	89	52	-37
Condition of cart paths	91	58	-33
Condition of the bunkers	68	36	-32
Condition of golf carts	87	57	-30
Enforcement of golf course rules and regulations	74	45	-29
Quality of food and beverage services	66	37	-29
Quality of the pro shop	90	64	-26
Availability and condition of restrooms	69	43	-25
Courtesy of golf course starters, Marshals and maintenance staff	89	65	-23
Layout of the course	96	76	-21
Availability of tee-times when making a reservation by phone	46	28	-18
Directional signage to golf course	85	67	-18
Availability and condition of practice putting greens	83	66	-17
Availability and condition of driving range facilities	36	25	-11

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	
Condition of the greens	92	48	-44
Overall course condition	97	54	-43
Condition of fairways	94	54	-40
Enforcement of golf course rules and regulations	67	29	-38
The value of the course for the fee	82	46	-36
Availability and condition of driving range facilities	51	20	-30
Courtesy of golf course starters, Marshals and maintenance staff	85	57	-28
Condition of the rough	74	47	-27
Quality of food and beverage services	63	38	-25
Layout of the course	93	70	-24
Condition of the tee boxes	92	70	-22
Pace of play	47	25	-21
Condition of the bunkers	77	60	-17
Availability and condition of practice putting greens	86	69	-17
Condition of cart paths	95	79	-15
Quality of the pro shop	93	79	-14
Availability of tee-times when making a reservation by phone	40	28	-12
Availability of tee-times when doing a walk-up reservation	46	38	-8
Directional signage to golf course	85	80	-4
Availability and quality of golf instructors	81	77	-4
Availability and condition of restrooms	67	65	-2
Condition of golf carts	83	85	+3

TABLE 6 RATING ASPECTS OF TORREY PINES SOUTH BY RESIDENT VS NON-RESIDENT IN CITY OF SAN DIEGO 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	75	41	-34
Availability and condition of practice putting greens	86	76	-11
Condition of golf carts	87	78	-8
Condition of the greens	88	82	-7
Condition of the tee boxes	85	81	-4
Overall course condition	88	84	-4
Availability of tee-times when doing a walk-up reservation	49	45	-4
Condition of cart paths	88	84	-4
Availability and quality of golf instructors	89	86	-4
Condition of fairways	88	87	-2
Layout of the course	94	92	-2
Directional signage to golf course	82	82	-0
Quality of the pro shop	86	85	-0
Availability and condition of driving range facilities	34	34	+0
Condition of the rough	68	70	+2
Courtesy of golf course starters, Marshals and maintenance staff	82	86	+4
Availability of tee-times when making a reservation by phone	37	47	+10
Availability and condition of restrooms	58	69	+10
Pace of play	42	55	+13
Quality of food and beverage services	48	70	+22
Enforcement of golf course rules and regulations	55	81	+26
Condition of the bunkers	46	74	+29

TABLE 7 RATING ASPECTS OF TORREY PINES NORTH BY RESIDENT VS NON-RESIDENT IN CITY OF SAN DIEGO 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	86	58	-28
Condition of the greens	88	83	-5
Availability and quality of golf instructors	82	77	-5
Condition of fairways	90	87	-3
Overall course condition	92	90	-2
Availability and condition of driving range facilities	47	47	-0
Availability and condition of practice putting greens	83	85	+2
Courtesy of golf course starters, Marshals and maintenance staff	81	83	+2
Condition of cart paths	92	94	+2
Condition of the tee boxes	88	91	+3
Directional signage to golf course	83	87	+4
Quality of the pro shop	90	94	+4
Layout of the course	89	94	+5
Condition of the bunkers	73	79	+6
Availability of tee-times when doing a walk-up reservation	41	54	+12
Enforcement of golf course rules and regulations	59	71	+13
Condition of the rough	66	80	+14
Condition of golf carts	77	95	+18
Availability of tee-times when making a reservation by phone	33	51	+19
Availability and condition of restrooms	61	81	+20
Quality of food and beverage services	53	73	+20
Pace of play	37	60	+24

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 courtesy of golf course starters, Marshals, and maintenance staff (90% excellent or good), layout of the course (88%), condition of the greens (87%), and value of the course for the fee (87%). At the other end of the spectrum, customers were less positive regarding the availability and condition of driving range facilities (34%), the availability and condition of restrooms (44%), and the condition of the bunkers (48%) at the Balboa Park Golf Course.

Table 8 on the next page shows the percentage who rated each aspect of Balboa Park as excellent or good in 2011, 2013, 2015, 2017, and 2019, as well as the difference between the two most recent studies. When compared to the 2017 survey results, two performance aspects displayed statistically significant improvements in customers' ratings, whereas the same number (2) exhibited statistically significant declines.

FIGURE 31 RATING ASPECTS OF BALBOA PARK

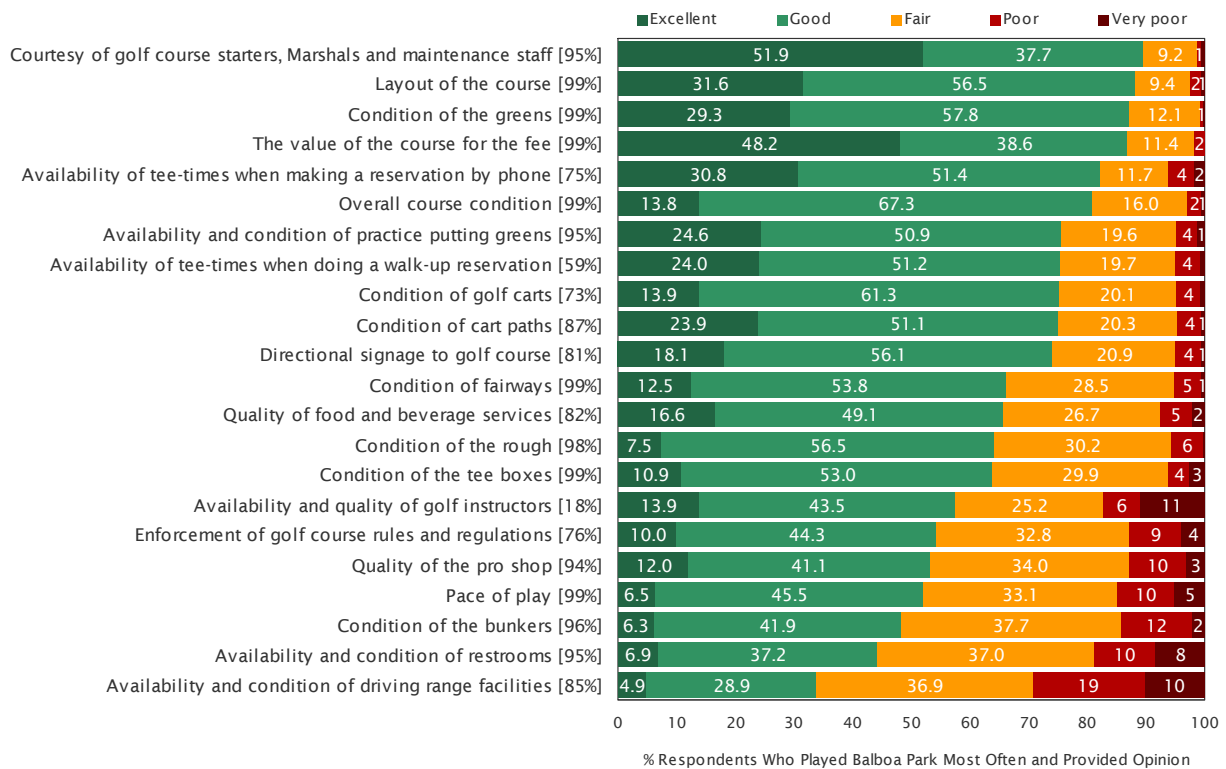


TABLE 8 RATING ASPECTS OF BALBOA PARK BY STUDY YEAR

	Study Year					Difference in Excellent + Good 2017 to 2019
	2019	2017	2015	2013	2011	
Quality of the pro shop	53.1	33.7	34.5	38.8	41.9	+19.4†
Availability and condition of driving range facilities	33.8	21.6	33.3	36.3	33.2	+12.2†
Quality of food and beverage services	65.6	57.5	59.4	57.7	55.7	+8.1
The value of the course for the fee	86.7	82.3	83.2	81.1	76.0	+4.4
Availability and condition of practice putting greens	75.5	71.5	76.6	75.5	66.7	+4.0
Availability and condition of restrooms	44.1	42.2	47.9	49.8	53.1	+1.9
Availability of tee-times when making a reservation by phone	82.2	81.2	79.2	78.3	77.2	+0.9
Layout of the course	88.2	88.2	88.7	88.4	88.5	-0.1
Courtesy of golf course starters, Marshals and maintenance staff	89.6	89.7	85.4	78.6	79.9	-0.1
Condition of the rough	64.0	64.6	63.7	71.0	57.6	-0.6
Enforcement of golf course rules and regulations	54.2	55.0	61.4	61.7	67.8	-0.7
Condition of the tee boxes	63.9	64.8	65.6	61.6	61.8	-0.9
Pace of play	52.0	53.4	55.5	55.5	65.6	-1.4
Condition of the bunkers	48.1	49.8	55.7	53.2	53.9	-1.6
Availability of tee-times when doing a walk-up reservation	75.2	77.8	73.2	72.8	74.2	-2.6
Overall course condition	81.0	83.9	85.7	85.8	67.4	-2.9
Condition of the greens	87.1	90.6	83.6	85.9	65.4	-3.5
Condition of golf carts	75.1	79.4	53.5	61.8	67.9	-4.2
Directional signage to golf course	74.1	78.4	74.5	75.1	69.3	-4.3
Availability and quality of golf instructors	57.4	64.5	64.4	70.9	71.2	-7.1
Condition of fairways	66.3	74.9	75.0	79.7	64.7	-8.6†
Condition of cart paths	75.0	85.6	82.1	60.9	54.9	-10.6†

† Statistically significant change (p < 0.05) between the 2017 and 2019 studies.

BALBOA PARK ASPECT RATINGS BY SUBGROUP

Table 9 on the next page displays how the rating of each aspect of Balboa Park Golf Course tested (Question 13) varied by the customer's overall performance rating for the course (Question 8c). As with Table 4, this table divides those who rated Balboa Park Golf Course as excellent or good into one group, and the minority of customers who rated it as fair, poor, or very poor into another group. Also displayed is the difference between the two groups in the far right column. As one might expect, those with more positive overall ratings of Balboa Park were more likely to rate specific aspects of the

course from their most recent visit as excellent or good. Aspects of the course for which there existed the greatest disparity between the two groups were: the overall course condition, condition of fairways, and condition of the tee boxes.

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	89	26	-63
Condition of fairways	73	21	-52
Condition of the tee boxes	70	26	-44
The value of the course for the fee	92	49	-43
Condition of the rough	70	30	-39
Availability and condition of restrooms	48	14	-35
Pace of play	56	23	-33
Condition of the bunkers	53	20	-32
Enforcement of golf course rules and regulations	58	28	-31
Condition of golf carts	79	49	-30
Availability and quality of golf instructors	63	33	-29
Condition of cart paths	79	50	-29
Layout of the course	92	64	-28
Quality of the pro shop	56	31	-25
Availability and condition of driving range facilities	37	12	-25
Quality of food and beverage services	69	44	-25
Availability and condition of practice putting greens	79	55	-24
Availability of tee-times when making a reservation by phone	85	63	-22
Condition of the greens	90	71	-20
Courtesy of golf course starters, Marshals and maintenance staff	92	73	-19
Availability of tee-times when doing a walk-up reservation	78	59	-19
Directional signage to golf course	76	60	-16

RATING ASPECTS OF MISSION BAY Customers who played the Mission Bay course most often during the past year gave the most positive ratings for the availability of tee times when making a reservation by phone (93% excellent or good), the courtesy of course starters, Marshals, and maintenance staff (92%), availability and condition of practice putting greens (87%), and availability of tee times when making a walk-up reservation (85%). At the other end of the spectrum, customers provided substantially lower ratings for the quality of the food and beverage services (36%), quality of the pro shop (38%), and the availability and condition of restrooms (38%).

Table 10 on the next page shows the percentage who rated each aspect of Mission Bay as excellent or good in 2011, 2013, 2015, 2017, and 2019, as well as the difference between the two studies. When compared to the 2017 survey results, two performance aspects displayed statistically significant improvements in customers' ratings, and an equal number (2) exhibited statistically significant declines during this period.

FIGURE 32 RATING ASPECTS OF MISSION BAY

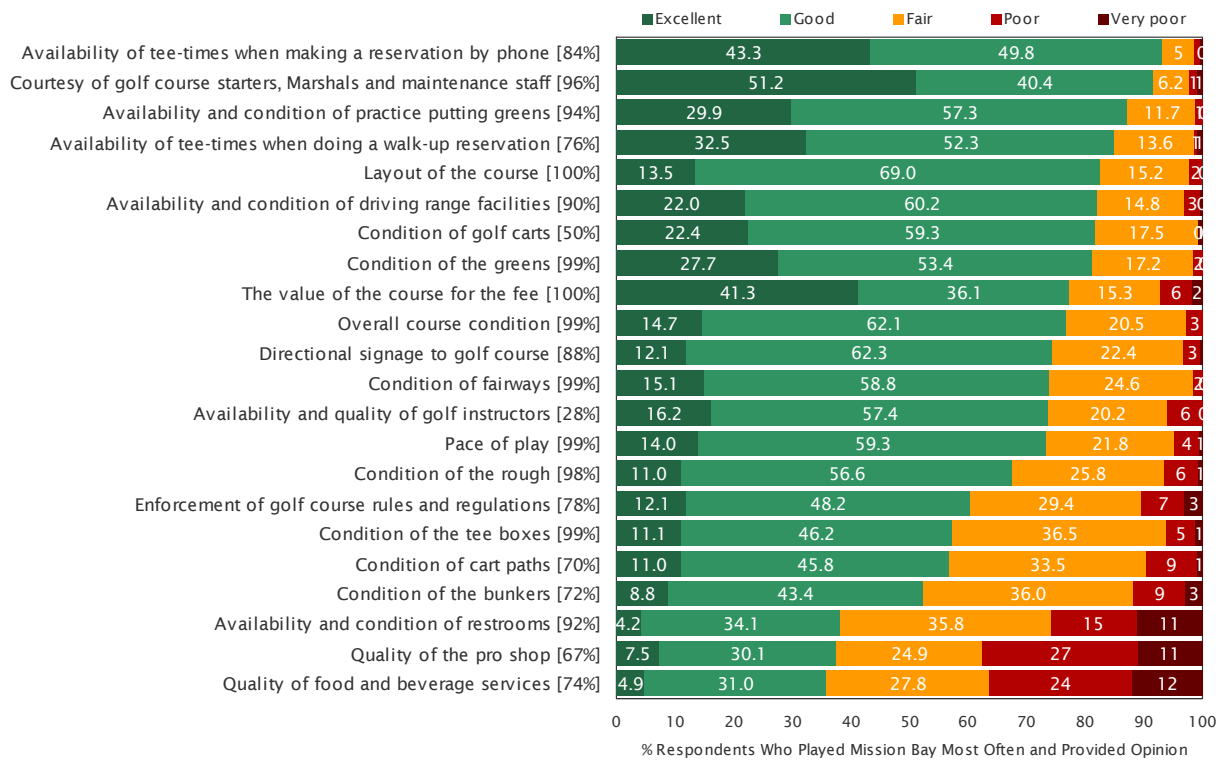


TABLE 10 RATING ASPECTS OF MISSION BAY BY STUDY YEAR

	Study Year					Difference in Excellent + Good 2017 to 2019
	2019	2017	2015	2013	2011	
Condition of the bunkers	52.2	41.7	55.1	49.2	51.4	+10.5†
The value of the course for the fee	77.4	67.8	76.2	60.4	61.7	+9.6†
Condition of the tee boxes	57.3	49.0	59.9	54.2	56.1	+8.3
Pace of play	73.3	66.6	72.8	63.0	73.3	+6.7
Directional signage to golf course	74.4	68.6	65.9	65.0	65.7	+5.8
Quality of the pro shop	37.6	32.5	22.6	14.7	27.3	+5.1
Quality of food and beverage services	35.9	32.1	44.9	27.5	34.8	+3.8
Layout of the course	82.5	79.5	75.2	70.5	67.5	+2.9
Courtesy of golf course starters, Marshals and maintenance staff	91.6	88.9	86.7	76.7	75.4	+2.7
Condition of cart paths	56.8	54.3	50.1	54.0	54.0	+2.5
Availability and condition of restrooms	38.3	36.9	49.9	46.2	25.2	+1.3
Overall course condition	76.8	75.6	78.9	69.1	60.7	+1.2
Availability and condition of driving range facilities	82.2	81.1	69.5	60.5	68.2	+1.1
Availability and quality of golf instructors	73.7	73.3	71.0	48.0	70.8	+0.4
Availability and condition of practice putting greens	87.1	86.9	73.3	60.6	64.0	+0.2
Availability of tee-times when making a reservation by phone	93.1	93.4	83.6	78.6	88.1	-0.3
Condition of fairways	73.9	74.4	77.9	77.7	68.1	-0.5
Availability of tee-times when doing a walk-up reservation	84.9	86.8	89.4	78.8	75.5	-1.9
Condition of golf carts	81.7	85.9	75.8	79.2	78.5	-4.1
Condition of the rough	67.6	71.8	80.6	68.2	57.1	-4.3
Condition of the greens	81.2	88.3	76.2	76.7	62.4	-7.2†
Enforcement of golf course rules and regulations	60.3	71.7	73.6	48.9	72.6	-11.4†

† Statistically significant change (p < 0.05) between the 2017 and 2019 studies.

MISSION BAY ASPECT RATINGS BY SUBGROUP Table 11 displays how the rating 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, the condition of fairways, 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	87	31	-56
Condition of fairways	83	35	-47
Condition of the greens	89	47	-42
Condition of cart paths	64	31	-33
Condition of the rough	73	43	-30
The value of the course for the fee	83	53	-30
Condition of the bunkers	58	30	-28
Condition of the tee boxes	62	35	-27
Pace of play	78	53	-25
Layout of the course	87	62	-25
Enforcement of golf course rules and regulations	64	41	-24
Courtesy of golf course starters, Marshals and maintenance staff	95	75	-20
Availability and condition of driving range facilities	86	66	-20
Quality of the pro shop	41	23	-18
Availability and condition of restrooms	41	24	-17
Availability and condition of practice putting greens	90	74	-16
Availability of tee-times when making a reservation by phone	96	80	-16
Condition of golf carts	84	70	-14
Availability of tee-times when doing a walk-up reservation	86	79	-8
Quality of food and beverage services	37	31	-7
Directional signage to golf course	75	72	-3
Availability and quality of golf instructors	71	85	+14

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 courses, along with the combined percentage of customers who provided an opinion that rated the aspect as excellent or good. The course (or courses) with the highest combined percentage per aspect are highlighted green. 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	Torrey Pines	Balboa Park	Mission Bay
	South	North		
Layout of the course	93	90	88	82
Courtesy of golf course starters, Marshals and maintenance staff	84	81	90	92
Condition of the greens	85	87	87	81
Overall course condition	86	91	81	77
Availability and condition of practice putting greens	80	84	76	87
Condition of golf carts	81	83	75	82
Condition of fairways	87	89	66	74
Directional signage to golf course	82	84	74	74
Condition of cart paths	86	93	75	57
Availability and quality of golf instructors	87	81	57	74
The value of the course for the fee	54	77	87	77
Condition of the tee boxes	83	89	64	57
Condition of the rough	69	71	64	68
Quality of the pro shop	85	91	53	38
Availability of tee-times when making a reservation by phone	43	39	82	93
Availability of tee-times when doing a walk-up reservation	47	45	75	85
Enforcement of golf course rules and regulations	69	62	54	60
Condition of the bunkers	63	75	48	52
Quality of food and beverage services	61	59	66	36
Pace of play	50	44	52	73
Availability and condition of restrooms	65	67	44	38
Availability and condition of driving range facilities	34	47	34	82

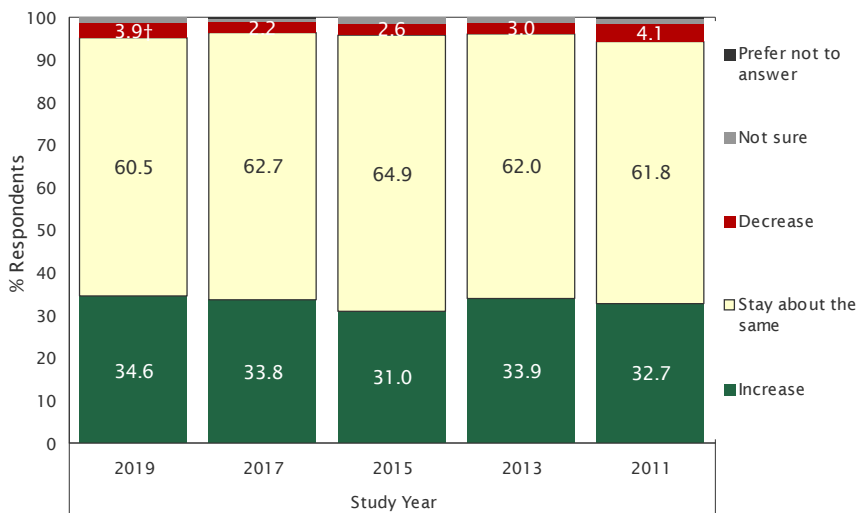
FUTURE EXPECTATIONS & RECOMMENDATIONS

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



† Statistically significant change ($p < 0.05$) between the 2017 and 2019 studies.

As shown in Figure 33, just over one-third (35%) of all customers anticipated that they would increase the frequency of their golf play in the next 12 months. Only 4% felt their frequency of play would decrease, while most (61%) said it would remain about the same. Compared with 2017, a statistically higher percentage of customers expected their frequency to decrease (+2%).

The next two figures display the percentage of customers who anticipate increasing or decreasing their frequency of play over the next year by subgroups. Those who live outside of California in the United States or in the City of San Diego, those with a household income of at least \$150,000 per year, females, and customers who golfed 6 to 12 rounds 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

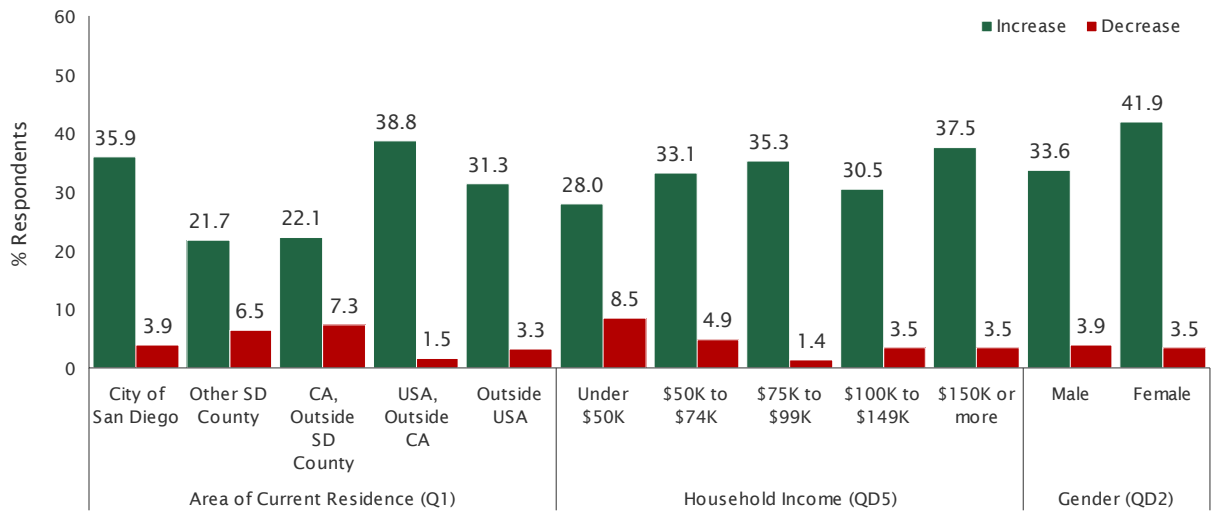
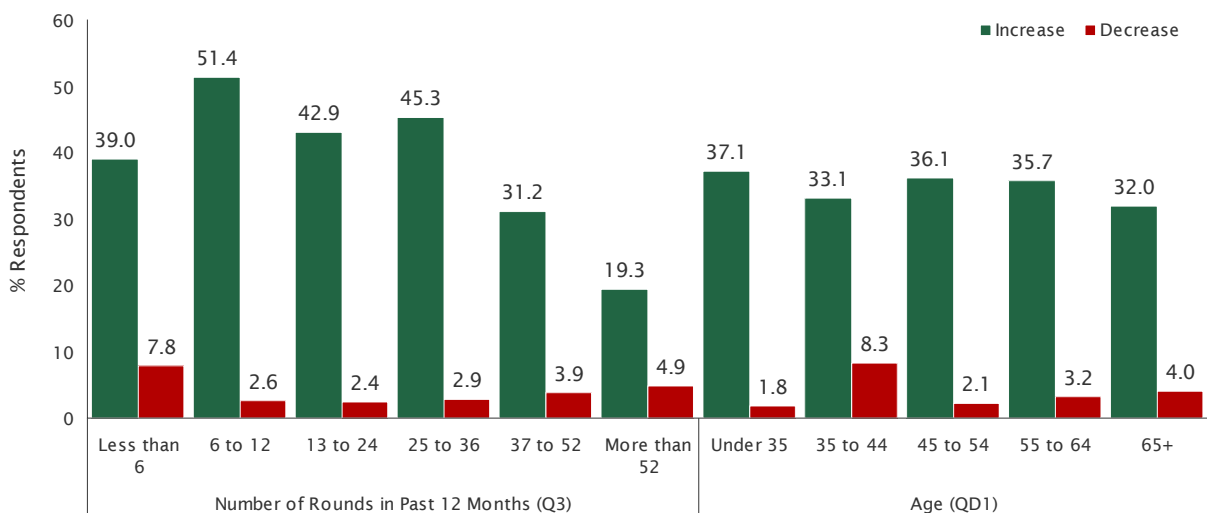


FIGURE 35 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & AGE



FREQUENCY OF FUTURE PLAY AT SAN DIEGO COURSES All 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 32% of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 24% for Balboa Park, and 13% for Mission Bay. The percentage of customers who plan to play *less often* was reasonably similar between Torrey Pines (12%), Balboa Park (9%), and Mission Bay (10%). When compared to 2017, there was a statistically significant increase in the percentage of customers who expected to play Mission Bay more frequently in the coming year, as well as a decline in the percentage expecting to play Torrey Pines more often and an increase in the percentage that anticipated playing Torrey Pines less often (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

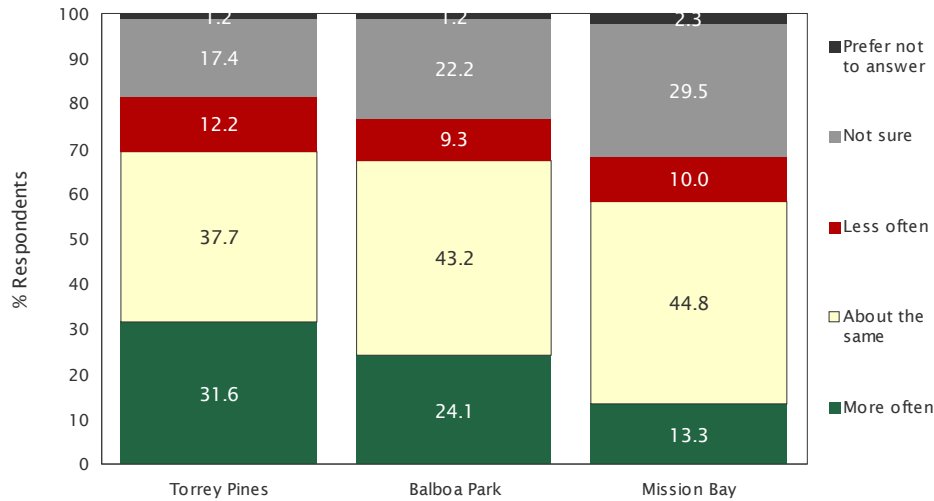
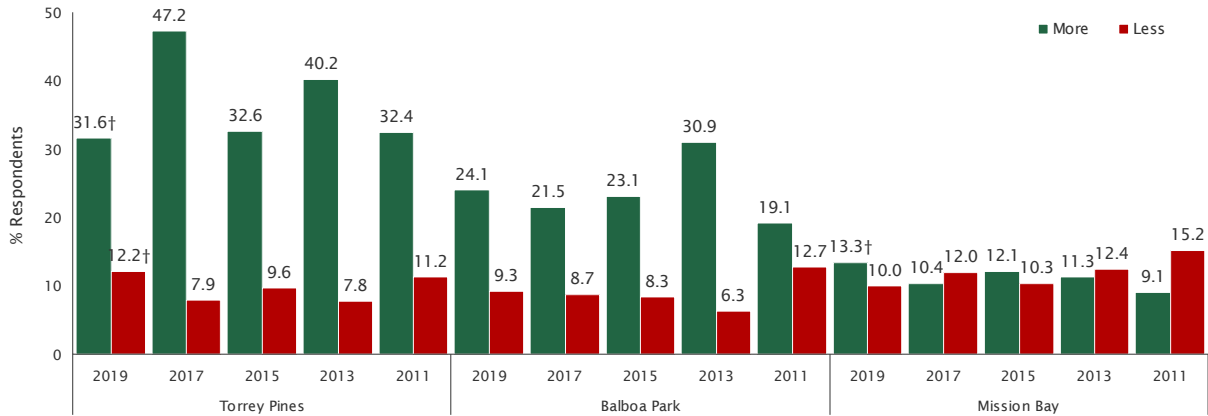


FIGURE 37 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2017 and 2019 studies.

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

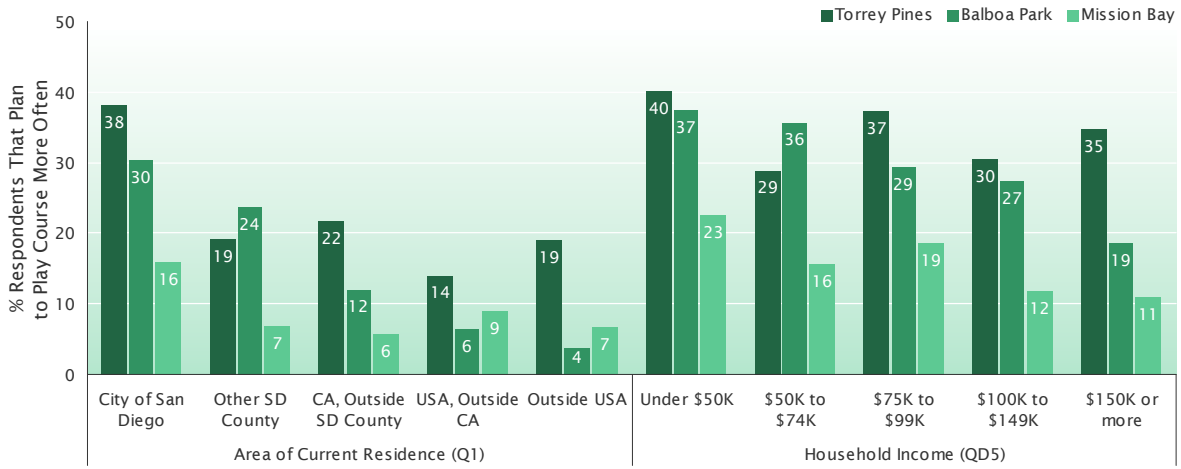


FIGURE 39 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS

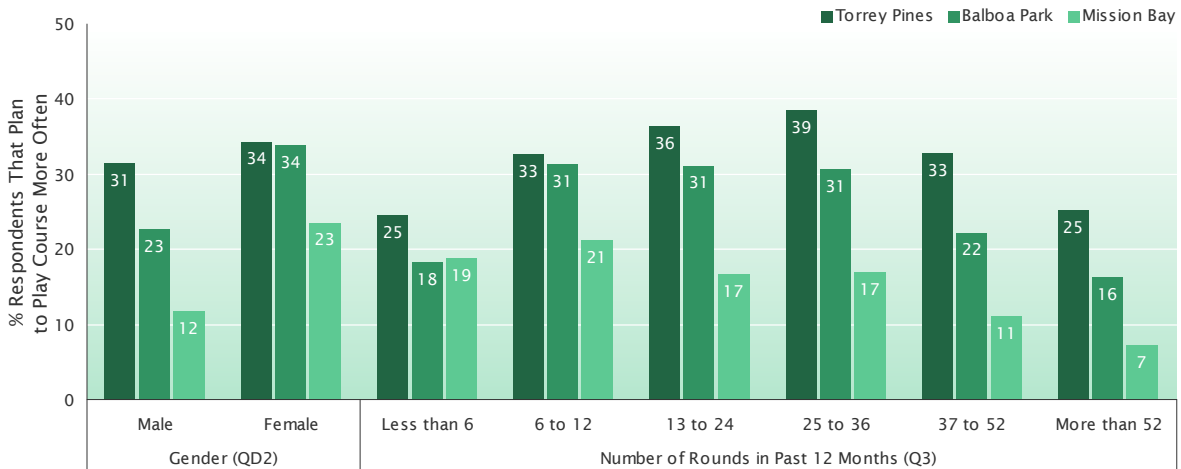
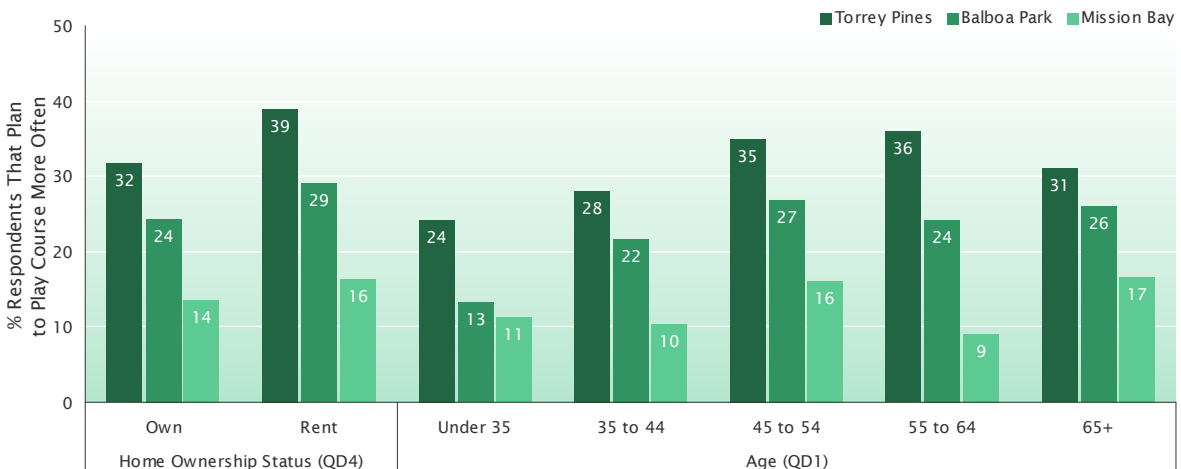


FIGURE 40 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY HOME OWNERSHIP STATUS & AGE



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

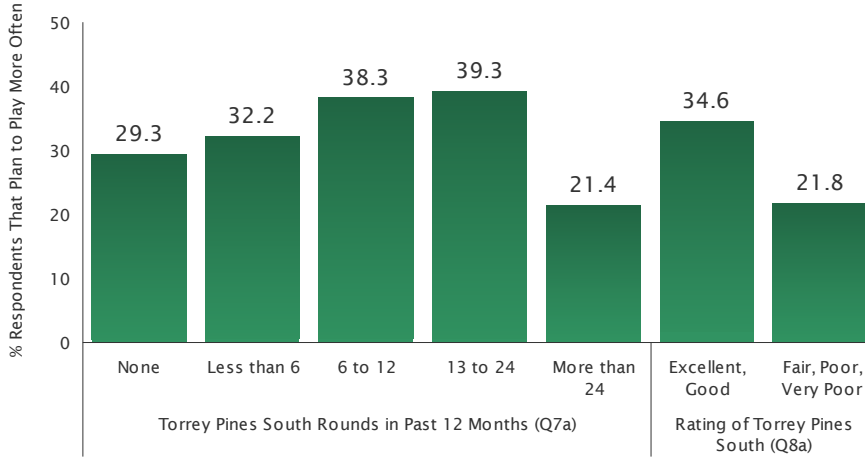


FIGURE 42 PLAN TO PLAY TORREY PINES MORE OFTEN BY TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS & RATING OF TORREY PINES NORTH

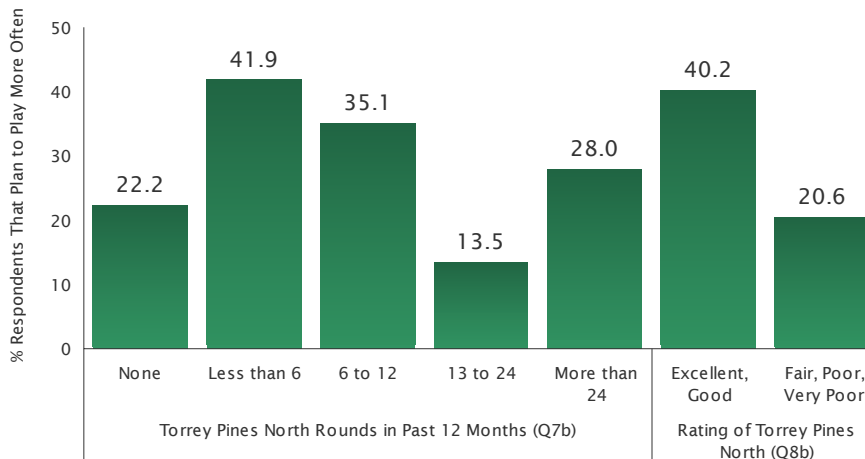


FIGURE 43 PLAN TO PLAY BALBOA PARK MORE OFTEN BY BALBOA PARK ROUNDS IN PAST 12 MONTHS & RATING OF BALBOA PARK

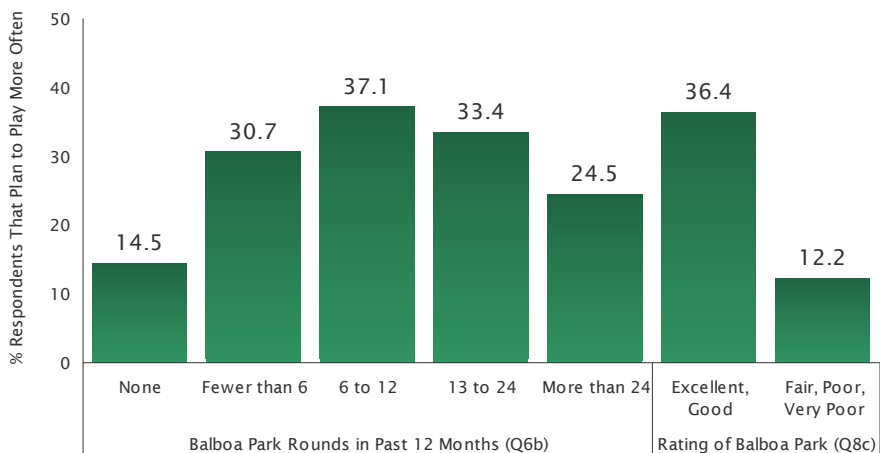
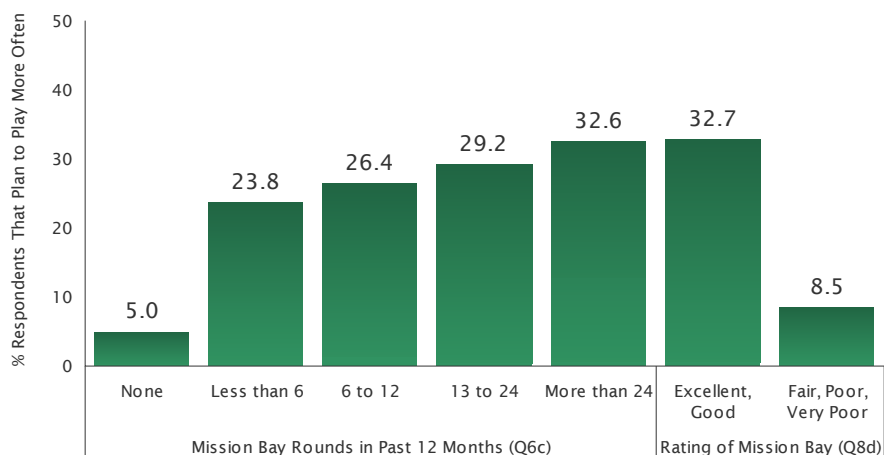
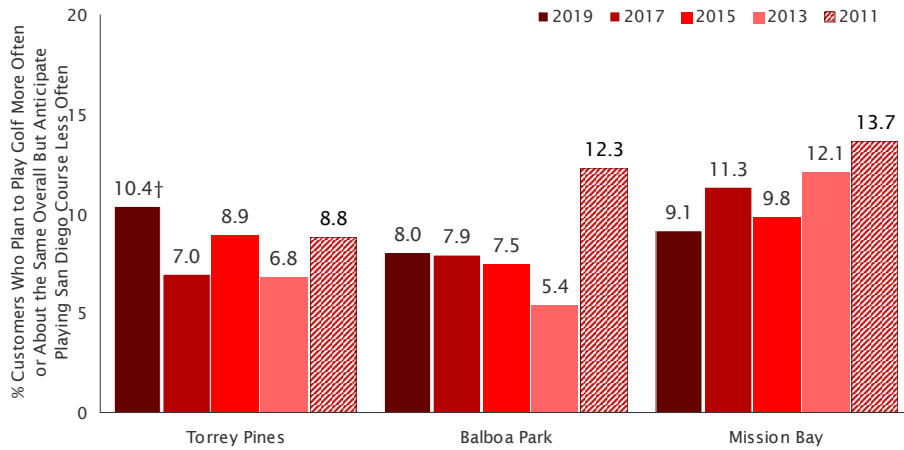


FIGURE 44 PLAN TO PLAY MISSION BAY MORE OFTEN BY MISSION BAY ROUNDS IN PAST 12 MONTHS & RATING OF MISSION BAY



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) and yet anticipated playing one or more San Diego courses *less often* in the coming year (Question 15) were subsequently 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 a 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 2017 and 2019 studies.

The most commonly mentioned reasons for playing Torrey Pines less often in the next year were concerns about cost of play (31%), not living near the course (30%), and course renovations and construction (17%). The most common specific reasons for playing Balboa Park less often include not living near the course (21%), concerns about the condition of the course (14%), and a preference for other courses (9%). The top specific reasons for choosing to play Mission Bay less often were concerns about the condition of the course (17%), that they don't live near the course (15%), and concerns about cost of play (9%).

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

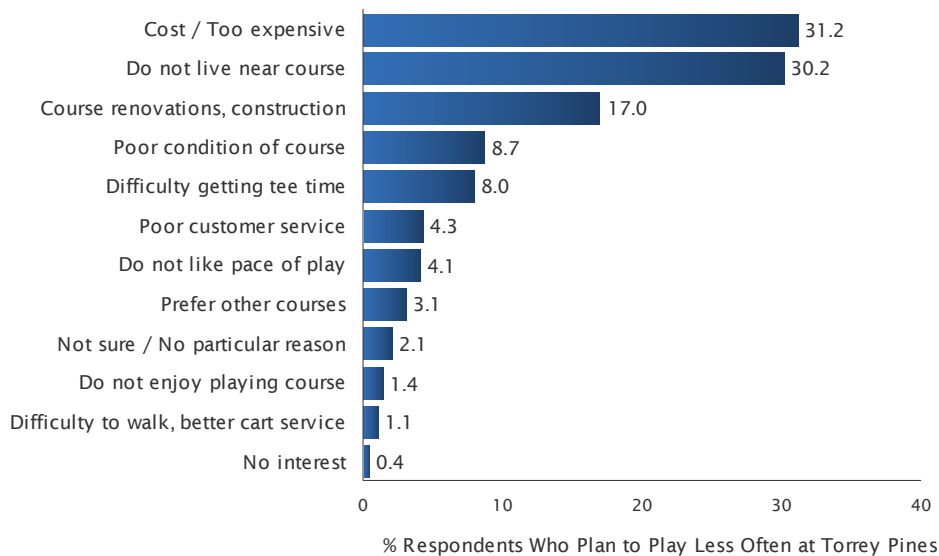


FIGURE 47 REASONS FOR PLANNING TO PLAY BALBOA PARK LESS OFTEN

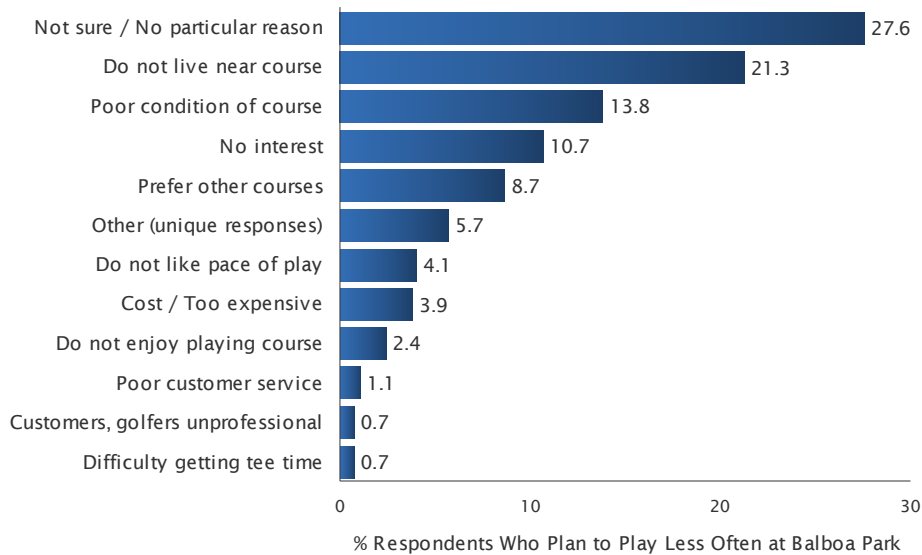
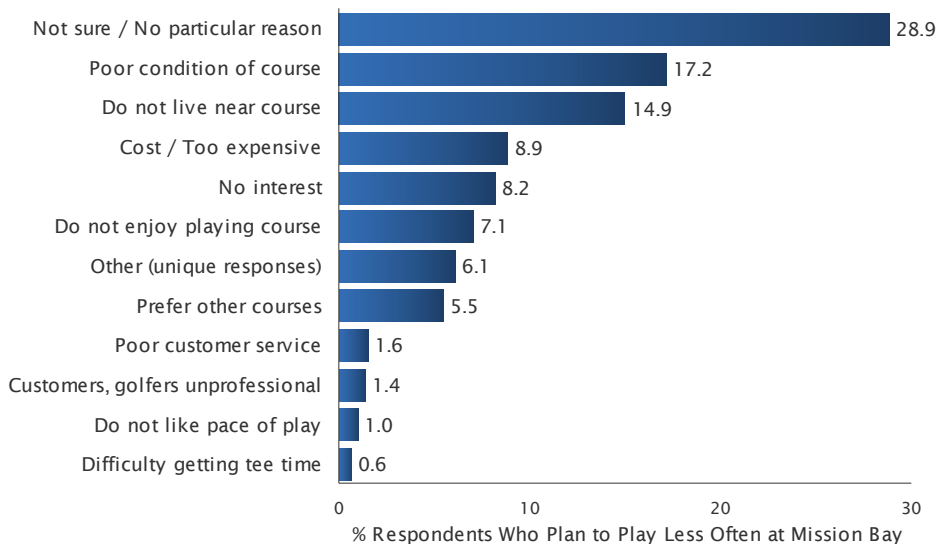


FIGURE 48 REASONS FOR PLANNING TO PLAY MISSION BAY LESS OFTEN



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.

Nine-in-ten customers who played Torrey Pines were very (75%) or somewhat (16%) likely to recommend the course to a friend or colleague, compared with 89% of customers who played Balboa Park (57% very and 32% somewhat) and 81% who played Mission Bay (48% very and 33% somewhat). When compared to 2017, Torrey Pines posted a statistically significant *decrease* in

the percentage of customers who were likely to recommend the course to a friend or colleague, and Mission Bay experienced a statistically significant *increase* (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

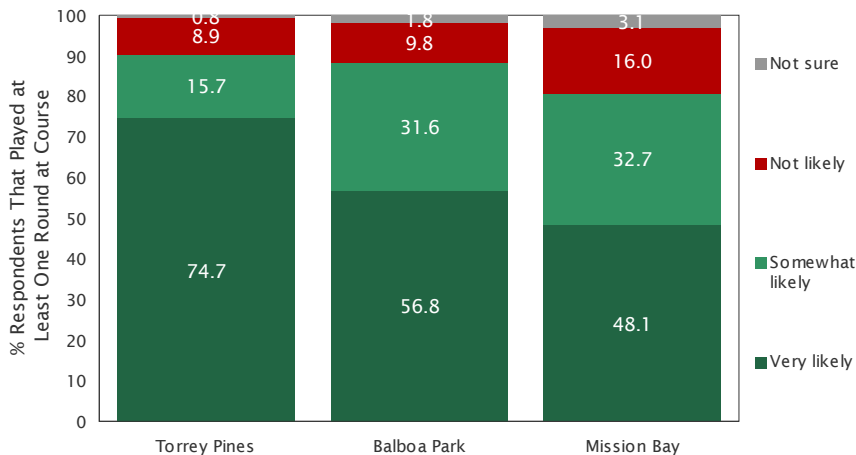
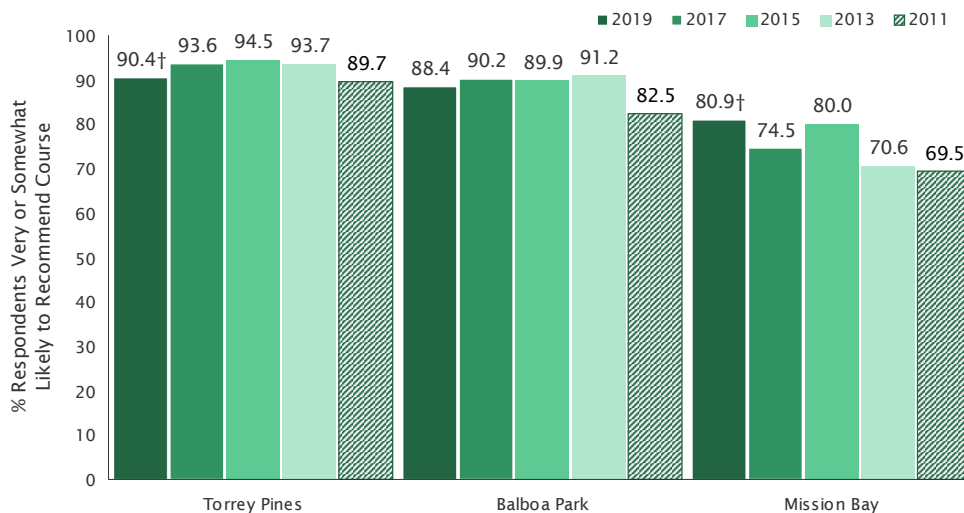


FIGURE 50 LIKELIHOOD OF RECOMMENDING COURSES BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2017 and 2019 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. The percentage of customers who would be very likely to recommend Balboa Park Golf Course varied from a low of 33% among those who live outside the United States to a high of 78% among those with a household income under \$50,000 per year. Mission Bay Golf Course had greater variation among cus-

tomers, ranging from a low of 0% among customers who reside outside of the United States being very likely to recommend the course to a high of 64% among those with a household income less than \$50,000 annually.

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

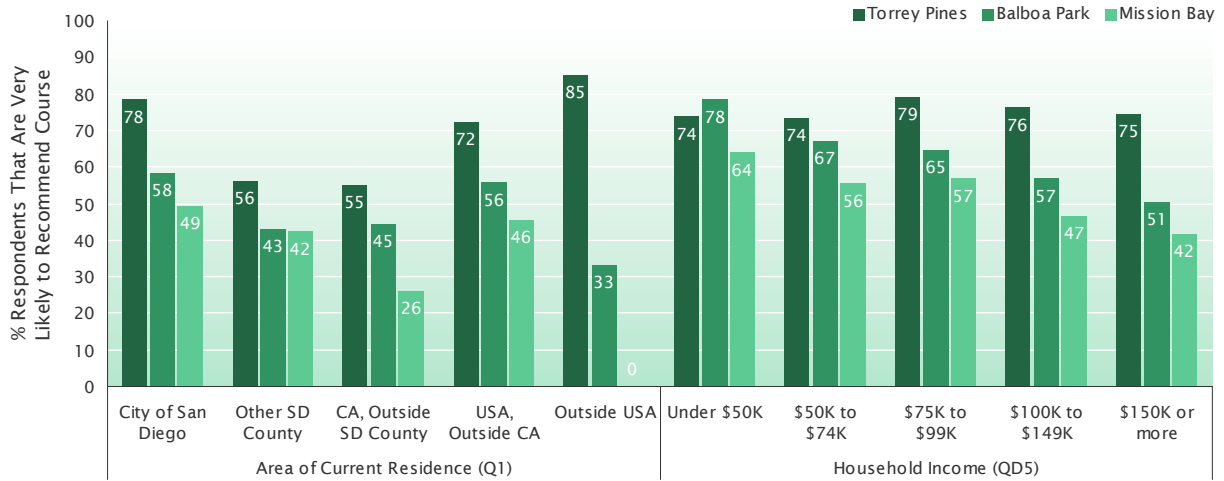


FIGURE 52 LIKELIHOOD OF RECOMMENDING COURSES BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS

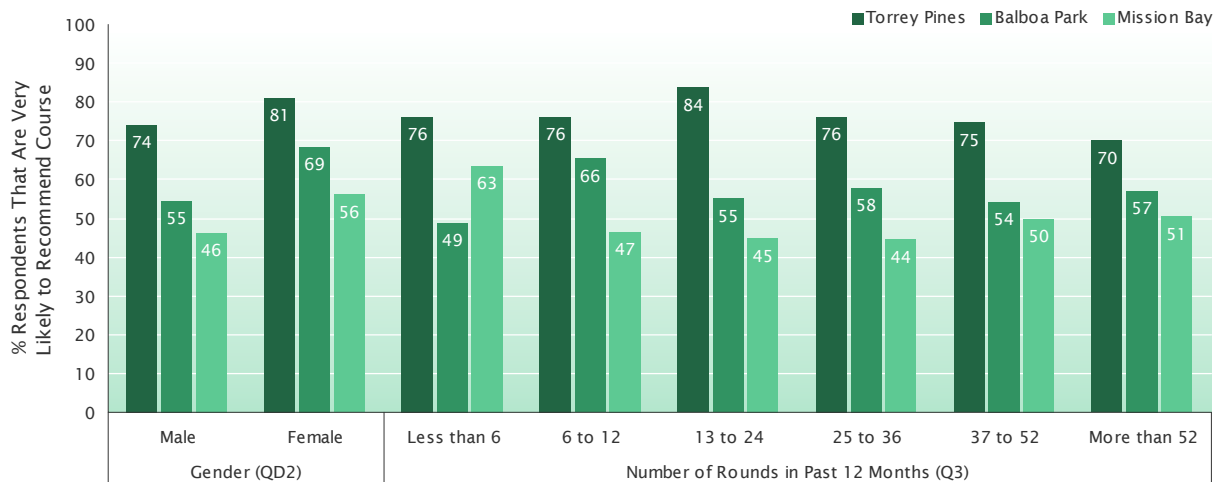
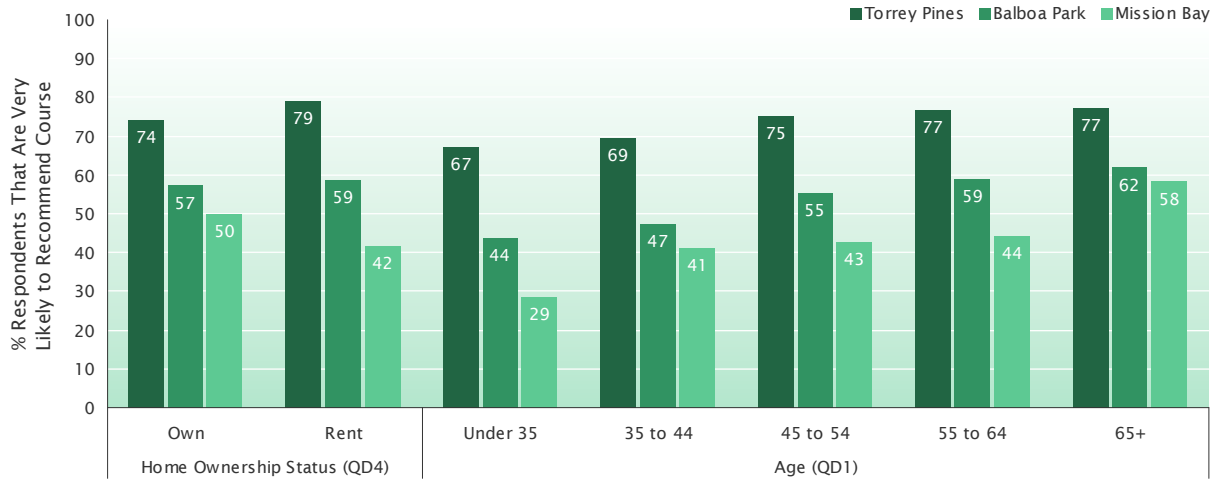


FIGURE 53 LIKELIHOOD OF RECOMMENDING COURSES BY HOME OWNERSHIP STATUS & AGE



BACKGROUND & DEMOGRAPHICS

Table 13 presents the key demographic and background information that was collected during the survey of San Diego golf customers. Most of the information was gathered during the interview, although number of visits and customer type were gathered from the customer database. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of customers who played at least one round of golf at Torrey Pines, Balboa Park, and/or Mission Bay golf courses in the 2018 calendar year (and surveyed in 2019). 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				
	2019	2017	2015	2013	2011
<i>Total Respondents</i>	<i>1,228</i>	<i>1,874</i>	<i>1,464</i>	<i>1,444</i>	<i>1,306</i>
Q1 Area of Current Residence					
City of San Diego	68.8	73.3	73.3	78.3	75.7
Other SD County	6.4	7.9	7.7	5.2	7.5
CA, Outside SD County	4.8	3.7	4.6	4.4	4.9
USA, Outside CA	16.3	12.6	12.0	9.0	10.3
Outside USA	3.7	2.5	2.4	3.1	1.6
QD1 Age					
Under 35	9.1	8.1	7.9	14.3	18.1
35 to 44	10.6	14.2	14.5	18.1	15.2
45 to 54	14.3	16.6	20.2	19.6	20.5
55 to 64	27.3	24.2	25.6	26.1	20.2
65+	36.3	30.5	31.3	20.9	19.9
Prefer not to answer	2.4	6.4	0.5	1.0	6.1
QD2 Gender					
Male	84.3	89.2	88.3	90.0	84.5
Female	14.0	9.0	10.8	8.5	14.1
Prefer not to answer	1.7	1.8	1.0	1.6	1.5
QD3 Golf Club Member					
Yes	49.5	47.9	41.2	39.5	36.1
No	48.4	50.0	57.1	59.2	62.5
Prefer not to answer	2.1	2.1	1.8	1.3	1.4
QD4 Home Ownership Status					
Own	81.7	77.3	77.0	74.6	72.9
Rent	11.1	15.9	16.0	18.5	20.6
Prefer not to answer	7.2	6.8	7.1	6.9	6.4
QD5 Household Income					
Under \$35K	0.9	1.6	1.6	1.4	3.0
\$35K to \$49K	2.6	2.5	2.1	2.8	4.1
\$50K to \$74K	7.1	5.6	6.1	7.9	9.7
\$75K to \$99K	7.7	9.5	9.8	10.7	12.1
\$100K to \$149K	16.9	16.9	18.0	22.0	18.6
\$150K or more	38.6	40.1	38.8	35.9	31.6
Not sure / Prefer not to answer	26.3	23.8	23.5	19.3	20.9
City of San Diego Resident					
Resident	68.8	73.3	81.7	85.9	83.7
Non-resident	31.2	26.7	18.3	14.1	16.3



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

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the City of San Diego to develop a questionnaire that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias, the items were asked in a random order for each respondent. The 2019 questionnaire was identical to the 2017 questionnaire, which differed very little from the original survey developed for the 2011 study to allow for apples-to-apples comparisons in customer responses over time.

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

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

SAMPLE The sample for this study was drawn from the City's golf reservation database, which contains records representing each round of golf played at Torrey Pines 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 in 2018 comprised the universe for the study. The database was organized by customer and included the number of individual rounds of golf 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 contained a hyperlink to the survey website, and each link contained a unique personal identification number (PIN). Using PINs in the invitation links ensured that only customers formally invited to participate in the survey could access the survey site. It also ensured that once a customer completed a survey, he or she could not do so again.

In coordination with this effort, telephone interviews were conducted on weekday evenings and weekends, with the average interview lasting 13 minutes. The online and telephone data collection period lasted from February 14 to March 11, 2019, and resulted in a total of 1,228 completed surveys.

STATISTICAL MARGIN OF ERROR By using a probability-based sampling design and monitoring the sample characteristics as data collection proceeded, True North ensured that the resulting sample was representative of the universe of San Diego golf customers who played at least one round of golf in the City in 2018. The results of the survey can thus be used to estimate the opinions of *all* City of San Diego golf course customers who played in 2018. Because not all customers participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 1,228 respondents for a particular question and what would have been found if all of the estimated 65,320 customers had been interviewed.

FIGURE 54 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING

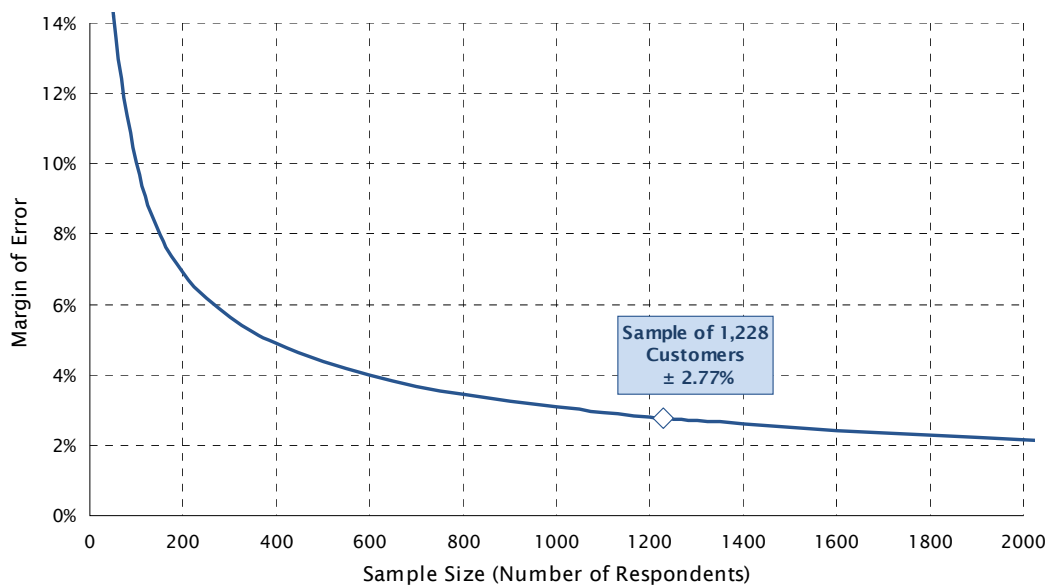


Figure 54 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response (i.e., $\hat{p} = 0.5$). For this survey, the maximum margin of error is $\pm 2.77\%$ for questions answered by all 1,228 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 thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing open-ended responses, and preparing frequency analyses and cross-tabulations. Where appropriate, tests of statistical significance were conducted to evaluate changes in responses between the 2017 and 2019 studies. The final data were weighted to match the distribution of resident and non-resident customers across the courses, according to the City’s reservation database.

ROUNDING In this report and Appendix A, numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and charts. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and figures for a given question.

QUESTIONNAIRE & TOPLINES



City of San Diego
Golf Customer Survey
Final Toplines (n=1,228)
March 2019

Section 1: Introduction to Study

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

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

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

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

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

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

Section 2: ZIP Code & Residency

Q1 To begin, what is the ZIP code at your primary residence? ZIP code recorded and later grouped into categories shown below.

1	City of San Diego	69%
2	Other San Diego County city	6%
3	California, outside San Diego County	5%
4	USA, outside California	16%
5	Outside USA	4%

Ask Q2 if Q1 = (2,3,4).

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 Including courses in San Diego and elsewhere, in the past 12 months approximately how many rounds of golf did you play? *If unsure, ask to estimate.* Number of rounds recorded and later grouped into categories shown below.

Less than 6	5%
6 to 12	10%
13 to 24	15%
25 to 36	17%
37 to 52	23%
More than 52	29%
Prefer not to answer	1%

Q4	What is the name of the golf course that you play most often? Verbatim names recorded and later grouped into the categories shown below. Categories mentioned by at least 1% of respondents shown.	
	Torrey Pines Golf Course	19%
	Balboa Park Golf Club	12%
	Mission Bay Golf Course	12%
	Not sure / Play many courses	5%
	Admiral Baker Golf Course	3%
	Bonita Golf Club	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%
	Mt. Woodson Country Club	1%
	Oaks North Golf Club	1%
	Rancho Bernardo Inn	1%
	Riverwalk Golf Club	1%
	Steele Canyon Golf Club	1%
	Tecolote Canyon Golf Course	1%
	The Crossings at Carlsbad Golf Course	1%
	Miramar Memorial Golf Course	1%
	Sea 'N Air Golf Course	1%
	Other course (unique mentions)	28%
Q5	Is there a particular reason why you play this course most often? Verbatim names recorded and later grouped into the categories shown below.	
	Affordable / Value	31%
	Location / Close to work, home	26%
	Course quality	19%
	Member of the country club	8%
	Other reason (unique responses)	6%
	Tee-time availability	5%
	Friend, family is a member	4%
	Location, availability, cost	1%
	Not sure	1%

Q6	Thinking now of courses in the City of San Diego -- In the past 12 months, approximately how many rounds of golf did you play at: _____?	
<i>Randomize Courses</i>		
A	Torrey (Torr-ee) Pines Golf Course	
	None	21%
	Fewer than 6	50%
	6 to 12	15%
	13 to 24	6%
	More than 24	8%
	Prefer not to answer	1%
B	Balboa (Bal-BOW-uh) Park Golf Course	
	None	45%
	Fewer than 6	32%
	6 to 12	11%
	13 to 24	5%
	More than 24	6%
	Prefer not to answer	1%
C	Mission Bay Golf Course	
	None	60%
	Fewer than 6	22%
	6 to 12	8%
	13 to 24	5%
	More than 24	5%
	Prefer not to answer	1%
<i>Only ask Q7 if Q6a > 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	Torrey (Torr-ee) Pines South Course	
	None	36%
	Fewer than 6	51%
	6 to 12	7%
	13 to 24	2%
	More than 24	2%
	Prefer not to answer	1%

B	Torrey Pines North Course (Automatically coded)	
	None	40%
	Fewer than 6	41%
	6 to 12	10%
	13 to 24	4%
	More than 24	3%
	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 South Golf Course	50%	36%	11%	2%	1%	0%	0%
B	Torrey Pines North Golf Course	47%	40%	9%	3%	1%	0%	0%
C	Balboa Park Golf Course	24%	56%	16%	2%	1%	1%	0%
D	Mission Bay Golf Course	20%	52%	23%	3%	1%	1%	0%

Only ask Q9 if Q7a > 0.

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	23%
Not sure / Cannot think of anything	15%
Enforce speed of play	13%
Maintain roughs	10%
Reduce fees, costs in general	8%
Maintain sand traps, bunkers	6%
Reduce cart rental fees	3%
Reduce visitor prices	3%
Improve course quality	3%
Improve green conditions	3%
Improve fairways	3%
Add, expand facilities	3%
Reduce green fees	2%

Improve access to tee time info	2%
Increase availability of tee times	2%
Improve customer service	2%
Maintain tee boxes	1%
Improve facility maintenance	1%
Improve clubhouse	1%
Improve, upgrade driving range	1%
Add GPS on golf carts	1%
Add trees	1%
Improve reservation system	1%
Add, improve snack / beverage carts	1%
Enforce handicap rule	1%
Improve restaurant, food	1%
Add signage, markers	1%
Improve course capacity, too crowded	1%
Improve scheduling	1%
Make it easier to play / more playable for average golfer	1%
Lower / Lesser cost, prices for food, beverages	1%
<i>Only ask Q10 if Q7b > 0.</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	17%
Not sure / Cannot think of anything	14%
Maintain roughs	8%
Improve green conditions	7%
Increase availability of tee times	4%
Reduce fees, costs in general	3%
Reduce cart rental fees	2%
Improve access to tee time info	2%
Improve course quality	2%
Improve fairways	2%
Improve reservation system	2%
Add, expand facilities	2%
Maintain sand traps, bunkers	2%

	Reverse the nines	2%
	Reduce visitor prices	1%
	Improve customer service	1%
	Improve cart paths	1%
	Add trees	1%
	Extend twilight tee times	1%
	Improve, maintain specific holes	1%
	Improve restaurant, food	1%
	Add signage, markers	1%
	Provide mechanisms to players, starters	1%
	Improve scheduling	1%
	Make it easier to play / more playable for average golfer	1%
	Lower / Lesser cost, prices for food, beverages	1%
<i>Only ask Q11 if Q6b > 0.</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	23%
	Not sure / Cannot think of anything	21%
	Enforce speed of play	10%
	Improve course quality	8%
	Improve facility maintenance	8%
	Improve fairways	7%
	Improve green conditions	6%
	Improve clubhouse	6%
	Improve, maintain specific holes	4%
	Maintain tee boxes	3%
	Improve, upgrade driving range	3%
	Reduce fees, costs in general	2%
	Add, improve snack / beverage carts	2%
	Add, expand facilities	2%
	Increase availability of tee times	1%
	Maintain roughs	1%
	Reopen, renovate restaurant	1%
	Improve customer service	1%
	Improve cart paths	1%

	Maintain sand traps, bunkers	1%
	Provide mechanisms to players, starters	1%
	Improve practice area	1%
	Improve Pro shop	1%
<i>Only ask Q12 if Q6c > 0.</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	24%
	Not sure / Cannot think of anything	17%
	Improve facility maintenance	11%
	Reopen, renovate restaurant	9%
	Improve course quality	6%
	Improve green conditions	5%
	Improve clubhouse	5%
	Add, expand facilities	5%
	Reduce fees, costs in general	4%
	Maintain tee boxes	4%
	Enforce speed of play	4%
	Improve restaurant, food	3%
	Remove foot / soccer golf	3%
	Improve fairways	2%
	Improve, maintain specific holes	2%
	Increase availability of tee times	1%
	Improve, upgrade driving range	1%
	Improve customer service	1%
	Add, improve snack / beverage carts	1%
	Enforce handicap rule	1%
	Maintain sand traps, bunkers	1%
	Add signage, markers	1%
	Provide mechanisms to players, starters	1%
	Improve scheduling	1%
	Improve Pro shop	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?							
	<i>Randomize</i>	Excellent	Good	Fair	Poor	Very poor	Not sure	Prefer not to answer
Torrey Pines South Golf Course (240 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	51%	31%	10%	3%	3%	3%	0%
B	Directional signage to golf course	24%	47%	13%	2%	1%	13%	0%
C	Availability of tee-times when doing a walk-up reservation	7%	11%	11%	6%	4%	59%	3%
D	Availability of tee-times when making a reservation by phone	12%	23%	22%	16%	8%	21%	0%
E	The value of the course for the fee	25%	29%	26%	10%	9%	0%	0%
F	Overall course condition	42%	44%	8%	5%	1%	0%	0%
G	Condition of the tee boxes	35%	47%	10%	5%	1%	1%	0%
H	Condition of fairways	44%	43%	6%	5%	1%	0%	0%
I	Condition of the rough	26%	42%	21%	8%	2%	1%	0%
J	Condition of the bunkers	25%	37%	21%	8%	7%	2%	0%
K	Condition of the greens	49%	36%	12%	3%	1%	0%	0%
L	Layout of the course	75%	18%	5%	1%	1%	0%	0%
M	Pace of play	14%	36%	29%	9%	12%	0%	0%
N	Quality of the pro shop	45%	34%	12%	2%	0%	8%	0%
O	Quality of food and beverage services	11%	39%	23%	6%	3%	19%	0%
P	Availability and quality of golf instructors	6%	5%	1%	0%	0%	83%	4%
Q	Condition of cart paths	27%	42%	11%	0%	1%	18%	1%
R	Condition of golf carts	23%	36%	12%	1%	1%	27%	0%
S	Availability and condition of restrooms	12%	46%	23%	6%	3%	9%	1%
T	Enforcement of golf course rules and regulations	17%	36%	14%	6%	3%	22%	1%
U	Availability and condition of driving range facilities	7%	20%	26%	15%	11%	21%	0%
V	Availability and condition of practice putting greens	32%	44%	15%	3%	1%	4%	0%

Torrey Pines North Golf Course (327 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	42%	35%	14%	2%	2%	4%	1%
B	Directional signage to golf course	29%	47%	12%	2%	0%	8%	1%
C	Availability of tee-times when doing a walk-up reservation	7%	15%	13%	10%	5%	48%	2%
D	Availability of tee-times when making a reservation by phone	11%	16%	17%	14%	10%	30%	2%
E	The value of the course for the fee	47%	31%	16%	4%	2%	0%	0%
F	Overall course condition	43%	48%	7%	1%	0%	0%	0%
G	Condition of the tee boxes	38%	50%	10%	1%	0%	1%	0%
H	Condition of fairways	42%	47%	9%	1%	0%	0%	0%
I	Condition of the rough	23%	46%	19%	6%	3%	2%	0%
J	Condition of the bunkers	28%	46%	18%	5%	1%	1%	0%
K	Condition of the greens	50%	37%	11%	2%	0%	0%	0%
L	Layout of the course	56%	34%	7%	3%	0%	0%	0%
M	Pace of play	8%	36%	27%	17%	12%	1%	0%
N	Quality of the pro shop	46%	34%	6%	1%	0%	12%	1%
O	Quality of food and beverage services	18%	25%	20%	6%	3%	27%	0%
P	Availability and quality of golf instructors	6%	4%	1%	1%	0%	84%	4%
Q	Condition of cart paths	33%	44%	5%	1%	0%	17%	1%
R	Condition of golf carts	21%	29%	9%	1%	0%	38%	1%
S	Availability and condition of restrooms	18%	44%	24%	5%	2%	6%	0%
T	Enforcement of golf course rules and regulations	13%	34%	17%	6%	6%	23%	1%
U	Availability and condition of driving range facilities	12%	23%	26%	9%	3%	26%	2%
V	Availability and condition of practice putting greens	36%	44%	13%	2%	0%	4%	0%
Balboa Park Golf Course (367 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	49%	36%	9%	1%	1%	5%	0%
B	Directional signage to golf course	15%	45%	17%	3%	1%	19%	0%
C	Availability of tee-times when doing a walk-up reservation	14%	30%	12%	2%	0%	40%	1%
D	Availability of tee-times when making a reservation by phone	23%	38%	9%	3%	1%	24%	1%
E	The value of the course for the fee	48%	38%	11%	2%	0%	1%	0%
F	Overall course condition	14%	67%	16%	2%	1%	1%	0%
G	Condition of the tee boxes	11%	53%	30%	4%	2%	1%	0%
H	Condition of fairways	12%	53%	28%	5%	1%	1%	0%

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I	Condition of the rough	7%	56%	30%	5%	0%	2%	0%
J	Condition of the bunkers	6%	40%	36%	11%	2%	4%	0%
K	Condition of the greens	29%	57%	12%	0%	0%	1%	0%
L	Layout of the course	31%	56%	9%	2%	1%	1%	0%
M	Pace of play	6%	45%	33%	10%	5%	1%	0%
N	Quality of the pro shop	11%	38%	32%	9%	3%	5%	1%
O	Quality of food and beverage services	14%	40%	22%	4%	2%	17%	1%
P	Availability and quality of golf instructors	2%	8%	4%	1%	2%	77%	5%
Q	Condition of cart paths	21%	45%	18%	4%	1%	12%	1%
R	Condition of golf carts	10%	44%	15%	3%	1%	26%	2%
S	Availability and condition of restrooms	7%	35%	35%	10%	8%	5%	1%
T	Enforcement of golf course rules and regulations	8%	34%	25%	7%	3%	22%	2%
U	Availability and condition of driving range facilities	4%	24%	31%	16%	9%	14%	1%
V	Availability and condition of practice putting greens	23%	48%	19%	3%	1%	5%	0%
Mission Bay Golf Course (277 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	49%	39%	6%	1%	1%	4%	0%
B	Directional signage to golf course	11%	55%	20%	2%	0%	12%	0%
C	Availability of tee-times when doing a walk-up reservation	25%	40%	10%	0%	1%	22%	2%
D	Availability of tee-times when making a reservation by phone	36%	42%	5%	1%	0%	16%	0%
E	The value of the course for the fee	41%	36%	15%	6%	2%	0%	0%
F	Overall course condition	15%	62%	20%	3%	0%	1%	0%
G	Condition of the tee boxes	11%	46%	36%	5%	1%	1%	0%
H	Condition of fairways	15%	58%	24%	2%	0%	1%	0%
I	Condition of the rough	11%	55%	25%	6%	1%	2%	0%
J	Condition of the bunkers	6%	31%	26%	6%	2%	27%	1%
K	Condition of the greens	28%	53%	17%	2%	0%	1%	0%
L	Layout of the course	13%	69%	15%	2%	0%	0%	0%
M	Pace of play	14%	58%	22%	4%	1%	1%	0%
N	Quality of the pro shop	5%	20%	17%	18%	7%	32%	1%
O	Quality of food and beverage services	4%	23%	21%	18%	9%	25%	1%
P	Availability and quality of golf instructors	5%	16%	6%	2%	0%	67%	4%
Q	Condition of cart paths	8%	32%	23%	6%	1%	30%	0%
R	Condition of golf carts	11%	29%	9%	0%	0%	49%	1%
S	Availability and condition of restrooms	4%	31%	33%	13%	10%	8%	0%

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T	Enforcement of golf course rules and regulations	9%	37%	23%	6%	2%	22%	0%
U	Availability and condition of driving range facilities	20%	54%	13%	2%	0%	10%	0%
V	Availability and condition of practice putting greens	28%	54%	11%	1%	0%	6%	0%

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				35%	
	2	Decrease				4%	
	3	Stay about the same				60%	
	98	Not sure				1%	
	99	Prefer not to answer				0%	
Q15	Looking forward to the next 12 months, do you anticipate that you will play golf at the _____ more often, less often, or about the same as you do now?						
		<i>Randomize</i>	More often	Less often	About the same	Not sure	Prefer not to answer
A	Torrey Pines Golf Course		32%	12%	38%	17%	1%
B	Balboa Park Golf Course		24%	9%	43%	22%	1%
C	Mission Bay Golf Course		13%	10%	45%	30%	2%
<i>Ask Q16 if Q14 = (1,3) and Q15a = (2).</i>							
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.						
	Cost / Too expensive					31%	
	Do not live near course					30%	
	Course renovations, construction					17%	
	Poor condition of course					9%	
	Difficulty getting tee time					8%	
	Poor customer service					4%	
	Do not like pace of play					4%	
	Prefer other courses					3%	
	Not sure / No particular reason					2%	
	Do not enjoy playing course					1%	
	Difficulty to walk, better cart service					1%	

<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.	
	Not sure / No particular reason	28%
	Do not live near course	21%
	Poor condition of course	14%
	No interest	11%
	Prefer other courses	9%
	Other (unique responses)	6%
	Cost / Too expensive	4%
	Do not like pace of play	4%
	Do not enjoy playing course	2%
	Poor customer service	1%
	Difficulty getting tee time	1%
	Customers, golfers unprofessional	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	29%
	Poor condition of course	17%
	Do not live near course	15%
	Cost / Too expensive	9%
	No interest	8%
	Do not enjoy playing course	7%
	Prefer other courses	6%
	Other (unique responses)	6%
	Poor customer service	2%
	Difficulty getting tee time	1%
	Do not like pace of play	1%
	Customers, golfers unprofessional	1%

Only ask Q19 for courses where respondent played in past year (Q6 > 0).

Q19		Overall, how likely are you to recommend the _____ to a friend or colleague who is interested in playing golf in San Diego County?				
<i>Randomize</i>		Very likely	Somewhat likely	Not likely	Not sure	Prefer not to answer
A	Torrey Pines Golf Course	75%	16%	9%	1%	0%
B	Balboa Park Golf Course	57%	32%	10%	1%	1%
C	Mission Bay Golf Course & Practice Center	48%	33%	16%	2%	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		9%
	35 to 44		11%
	45 to 54		14%
	55 to 64		27%
	65 or older		36%
	Prefer not to answer		2%
D2		Gender	
1	Male		84%
2	Female		14%
99	Prefer not to answer		2%
D3		Are you a member of a golfing club?	
1	Yes		49%
2	No		48%
99	Prefer not to answer		2%
D4		Do you own or rent your home?	
1	Own		82%
2	Rent		11%
99	Prefer not to answer		7%

D5	This last question is for statistical purposes only. As I read the following income categories, please stop me when I reach the category that best represents your household's total annual income before taxes.		
	1	Under \$35,000	1%
	2	\$35,000 to \$49,999	3%
	3	\$50,000 to \$74,999	7%
	4	\$75,000 to \$99,999	8%
	5	\$100,000 to \$149,999	17%
	6	\$150,000 or more	39%
	99	Not sure / Prefer not to answer	26%

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

