



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 in that it provides timely, accurate information about the opinions of specific customers, it does not necessarily provide an accurate picture of the City's golf customer base *as a whole*. That is, most informal customer feedback mechanisms rely on the customer to initiate the feedback—which creates a self-selection bias—and thus the City receives feedback from customers motivated enough to initiate the process. Because these customers tend to be *very* pleased or *very* displeased with a particular aspect of service or their golfing experience, their collective opinions are not necessarily representative of the City's golf customers as a whole.

PURPOSE OF STUDY The motivation for the current study was to design and employ a methodology that would avoid the self-selection bias noted above and thereby provide the City with a statistically reliable understanding of its customers' experiences, perceptions, and concerns as they relate to golf services and facilities provided by the City. Ultimately, the survey results and analyses presented 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 (True North) to design the research plan and conduct the study. Broadly defined, the study was designed to:

- Profile customers' frequency of golf play in general and at the three San Diego courses;
- Evaluate customer experiences with, and perceptions of, the three city golf courses;
- Track the findings of the current 2022 customer opinion study against similar surveys conducted in 2011, 2013, 2015, 2017, 2019, and 2020; *and*
- Collect background and demographic data relevant to understanding customers' perceptions and needs.

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

STATISTICAL SIGNIFICANCE Many figures and tables in this report present the results of questions asked in 2022 alongside the results found in prior surveys 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 between the most recent prior survey (2020) and the current (2022)—as opposed to being due to chance associated with selecting two samples independently and at random. Differences between the two studies are identified as

statistically significant if we can be 95% confident that the differences reflect an actual change in public opinion. 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 2022.

OVERVIEW OF METHODOLOGY A full description of the methodology employed is provided later in this report (see *Methodology* on page 50). In brief, a total of 1,247 randomly selected customers who played at least one round of golf at Torrey Pines, Balboa Park, or Mission Bay between June 2021 and June 2022 participated in the study between August 31 and September 7, 2022. Respondents were recruited to participate in the survey using a combination of email invitations and phone calls, and completed the survey either online at a secure, password protected website or with an interviewer by phone. The maximum margin of error for this study is $\pm 2.8\%$ at the 95% level of confidence for questions answered by all 1,247 respondents.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for collecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report, and a complete set of crosstabulations for the survey results is contained in Appendix A, which is bound separately.

ACKNOWLEDGEMENTS True North thanks the staff at the City of San Diego who contributed valuable input during the design stage of this study. Their collective experience, local knowledge, and insight improved the overall quality of the research presented here.

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

ABOUT TRUE NORTH Founded in 2002, True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, organizational development, establishing fiscal priorities, and developing effective public information campaigns. During their careers, Dr. McLarney (President) and Mr. Sarles (Principal Researcher) have designed and conducted over 1,200 survey research studies for public agencies, including more than 400 studies for California municipalities and 10 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

- Sixty-four percent (64%) of customers' primary residences among those surveyed were located in the City of San Diego, 10% were located in San Diego County but outside the City of San Diego, 6% were in California but outside San Diego County, 19% were located elsewhere in the United States, and about 2% were outside the United States.

FREQUENCY & COURSES PLAYED

- More than a quarter (26%) of golf customers surveyed said they had averaged more than one round of golf per week in the past 12 months, playing more than 52 rounds. Another 23% played between 37 and 52 rounds, 16% had played between 25 and 36 rounds, 15% had played 13 to 24 rounds, 12% had played between 6 and 12 rounds, and 6% had played fewer than 6 rounds in the past year.
- Overall, San Diego golf customers played an average of 41.6 rounds of golf in the 12 months preceding the interview.
- When asked to indicate the course they played most often, 16% of customers surveyed played Torrey Pines most often, followed by Balboa Park (12%) and Mission Bay (10%). The Admiral Baker Golf Course (4%) and Coronado Municipal (3%) were the next most commonly played courses.
- Location (26%) and affordability (25%) were the most common reasons mentioned for playing a particular course most often, followed by course quality (18%), tee-time availability (13%), and being a member of the course (9%).
- Torrey Pines was played most often because of the course quality, whereas affordability and location were the main factors for those who played at Mission Bay and Balboa Park.
- Among the three City of San Diego golf courses, Torrey Pines was the most frequently played course, with 59% of customers playing at least one round on the South Course and 49% playing at least one round on the North Course. Overall, 72% had played at least one Torrey Pines Course. Fifty-nine percent (59%) of golf customers reported playing Balboa Park at least once during the 12 months preceding the interview, whereas the corresponding figure for Mission Bay was 40%.
- 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 (6.0), followed by Mission Bay (3.9), Torrey Pines North Course (3.3), and Torrey Pines South Course (2.4).

RATING OVERALL SAN DIEGO GOLF EXPERIENCES

Torrey Pines - South Course

- Nine-in-ten (91% 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 (55%) or good (36%).
- Thirty-nine percent (39%) of Torrey Pines South Course customers desired no changes or could not think of anything specific to improve their golf experience.
- Top specific mentions for improving Torrey Pines South Course were enforcing the speed of play (15%), reducing fees (9%), increasing availability of tee times (9%), and improving access to tee-time information (7%).

Torrey Pines - North Course

- Nine-in-ten (92% 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 (51%) or good (41%).
- Thirty-six percent (36%) of Torrey Pines North Course customers desired no changes or could not think of anything specific to improve their golf experience.
- Top-mentioned improvements for Torrey Pines North Course were enforcing the speed of play (20%), improving access to tee-time information (8%), increasing availability of tee times (8%), and reducing fees (5%).

Balboa Park Golf Course

- Approximately three-quarters (74%) of customers rated their most recent experience at Balboa Park Golf Course as excellent (22%) or good (52%).
- Close to four-in-ten (39% 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 (10%), improving fairways (8%), and maintaining tee boxes (5%).

Mission Bay Golf Course

- Among those who had played at Mission Bay in the past year, just over six-in-ten customers (63%) rated their most recent experience at Mission Bay as excellent (17%) or good (46%).
- Forty-seven percent (47%) of Mission Bay customers desired no changes or could not think of anything specific to improve their golf experience.
- Mission Bay Golf Course customers most desired completing construction (9%), improving the overall course quality (7%), maintaining tee boxes (5%), and enforcing speed of play (5%).

RATING ASPECTS OF GOLF EXPERIENCE

Torrey Pines - South Course

- Customers who played the South Course gave the most positive ratings for the layout of the course (96% excellent or good), quality of the pro shop (93%), condition of cart paths (91%), overall condition of the course (91%), condition of the greens (90%), and condition of fairways (90%).
- Considering the intensity of the positive rating, the courtesy of golf course starters, marshals, and maintenance staff also received high marks (50% excellent) from South Course customers.
- At the other end of the spectrum, Torrey Pines South Course customers were less pleased with the availability of tee times for reservations by phone (29%) or for walk-up reservations (34%), the availability and condition of driving range facilities (46%), and the pace of play (59%).

Torrey Pines - North Course

- Customers who had played the North Course gave the most positive ratings for the layout of the course (93% excellent or good), quality of the pro shop (92%), condition of fairways (89%), condition of cart paths (89%), and courtesy of golf course starters, marshals, and maintenance staff (89%).
- Considering the intensity of the positive rating, the value of the course for the fee was also viewed quite positively (41% excellent) by many North Course customers.
- At the other end of the spectrum, customers who had played the North Course most often assigned lower ratings to the availability of tee times for reservations by phone (13%) or for walk-up reservations (19%), the pace of play (44%), and the availability and condition of driving range facilities (46%).

Balboa Park Golf Course

- Balboa Park Golf Course customers gave the most positive ratings for the layout of the course (86% excellent or good), condition of the greens (84%), courtesy of golf course starters, marshals, and maintenance staff (81%), value of the course for the fee (78%), and condition of golf carts (77%).
- At the other end of the spectrum, customers were less positive regarding the availability and condition of driving range facilities (32%), availability of tee times when doing a walk-up reservation (37%), quality of the pro shop (41%), and condition of bunkers (44%).

Mission Bay Golf Course

- Customers who played the Mission Bay course most often during the past year gave the highest ratings for the courtesy of course starters, marshals, and maintenance staff (87% excellent or good), the layout of the course (77%), the availability of tee times when making a reservation by phone (77%), the value of the course for the fee (76%), and condition of golf carts (75%).
- Mission Bay customers provided much lower ratings for the quality of the pro shop (27%), quality of the food and beverage services (35%), condition of cart paths (40%), and condition of the bunkers (42%).

FUTURE EXPECTATIONS & RECOMMENDATIONS

- Approximately three-in-ten customers (31%) anticipated that they would increase the frequency of their golf play over the next 12 months. Only 3% felt their frequency of play would decrease, while most (64%) said it would remain about the same.
- Twenty-nine percent (29%) of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 21% for Balboa Park and 12% 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 (11%).
- The most commonly mentioned reasons for playing Torrey Pines less often in the next year were not living near the course (39%), concerns about cost of play (33%), and difficulties getting a tee time (24%).
- The most common specific reasons for playing Balboa Park less often included not living near the course (30%), concerns about the condition of the course (22%), and the pace of play (14%).
- The top specific reasons for choosing to play Mission Bay less often were concerns about the condition of the course (21%), that they don't live near the course (16%), and dislike of the course in general (14%).
- Ninety-three percent (93%) of customers who played Torrey Pines were very (74%) or somewhat (18%) likely to recommend the course to a friend or colleague, compared with 88% of customers who played Balboa Park (51% very and 37% somewhat) and 79% who played Mission Bay (39% very and 40% somewhat).



CONCLUSIONS

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

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

The current survey results indicate that the City of San Diego has continued to perform very well in providing golf services to San Diego residents and visitors alike. In 2022, just over nine-in-ten customers rated their most recent golf experience at Torrey Pines Golf Course as excellent or good (92% North Course, 91% South Course), which was statistically higher than the 2020 survey's combined 88% for the two courses. Balboa Park Golf Course also received high marks, with 74% of customers rating their most recent experience as excellent or good.

Experiences at the Mission Bay Golf Course continue to be less positive (63%) than at the other city courses, dropping significantly from the 2020 study's 72%. The above notwithstanding, it is also the case that Mission Bay Golf Course is currently undergoing a large-scale improvement project, and it is not unexpected for scores to experience a decline during the period leading up to and during construction.

Customers generally echoed the assessments they expressed about their overall golf experiences when asked about a variety of *specific* performance areas at each course. Of the 22 specific service aspects tested, a majority of customers provided ratings of excellent or good for at least 14 aspects at *each* of the City of San Diego courses. This is an area where the Torrey Pines South 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). It is also an area where Torrey Pines South Course stood out with the highest ratio of positive to negative changes that were statistically significant between 2020 and 2022 (see *Rating Aspects of Torrey Pines* on page 28 for more details). In the past two studies, Torrey Pines North held the top spot in both these regards while Torrey Pine South was undergoing course improvements to prepare for the 2021 U.S. Open.

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 three-in-ten customers (29%) expected to increase their frequency of play at Torrey Pines in the coming year, with 21% and 12% offering a similar response for Balboa

Park and Mission Bay courses, respectively. The percentage that indicated they expected to decrease their frequency of play at the courses, on the other hand, was 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 93% of Torrey Pines customers, 88% of Balboa Park customers, and 79% of Mission Bay customers saying they are likely to recommend the course.

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

By comparing the 2022 survey data with the results of identical questions asked in 2020, 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 24 statistically significant changes in specific aspects of performance found between the 2020 and 2022 studies, 13 (54%) were in the negative direction, with 9 of those 13 declines recorded for Mission Bay. The next survey effort will allow an assessment of whether the declines were indeed an artifact of Mission Bay’s current renovation project or a larger trend that needs further examination.

Of the 11 areas that saw improvements over the past two years, 7 belonged to Torrey Pines South, which underwent renovations in 2019. Each of the two most recent surveys had at least a portion of their data collection occur during the renovation period.

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 city golf courses differ with regard to customers’ perceptions of the course, facilities, and services, the vast majority of customers were generally pleased. The top priority for the City should be to maintain the quality of services and facilities it currently provides. Nevertheless, in the spirit of constant improvement, the results of the study suggest several opportunities to increase customer satisfaction further. The opportunities, grouped by golf course, are presented below.

Torrey Pines Golf Course

Among customers who play Torrey Pines, several areas stood out as the top candidates for service improvement on both the south and north courses: improving availability of tee time reservations by phone and for walk-up customers, improving the availability and condition of driving

range facilities, and improving the pace of play. Clearly, these service aspects are directly related to the significant volume of customers who play at Torrey Pines. It is worth noting that these are the same four priority areas for improvement identified in 2013, 2015, 2017, 2019, and 2020 by customers who play the north and/or south courses.

Examining the key differentiators in opinion between those who rated their most recent overall experience at Torrey Pines as excellent or good versus those who said it was fair, poor, or very poor, availability and quality of golf instructors and the value of the course for the fee stood out at both courses, as well as the condition of golf carts at the South Course and overall course condition at the North Course. Indeed, customers who reported a fair, poor, or very poor overall experience with each course were two to three times more likely to offer negative ratings of these four aspects than those with a generally positive overall experience.

The course's *value for the fee* received lower ratings in 2022 than 2020 for both courses, with a statistically significant decline evidenced for the North Course. Non-residents continue to be especially critical of this area, being almost twice as likely as residents to cite the course's value as fair, poor, or very poor. High cost of play was also among the top factors mentioned by customers who intend to play Torrey Pines less frequently in the future.

Balboa Park Golf Course

Improving the availability and condition of driving range facilities, availability of tee times when doing a walk-up reservation, quality of the pro shop, and condition of bunkers were the top improvements desired by Balboa Park Golf Course customers in 2022. Isolating service areas that best separate customers who had an overall excellent or good experience versus those with less positive experiences, the City may also consider focusing on the general course condition, the condition of fairways, tee boxes, and greens, and the pace of play. Additionally, concerns about the condition of the course and the pace of play were among the top factors mentioned by customers who intend to play Balboa Park less frequently in the future.

Mission Bay Golf Course

Of the four city courses, Mission Bay was rated the highest with regard to the availability of tee-times when making a phone or walk-up reservation, availability and condition of driving range facilities, and pace of play. Nevertheless, Mission Bay continues to receive lower overall performance ratings when compared to the other city courses. Based on customers' ratings of 22 specific performance aspects, the best opportunities for

improvement are the quality of the pro shop, quality of the food and beverage services, condition of cart paths, and condition of the bunkers. These improvement areas for the Mission Bay Golf Course in 2022 were also identified in each of the past two studies.

Isolating the conditions that best separate customers who had an overall excellent or good experience from those with less positive experiences, the City may also consider improvements to the overall course condition, layout of the course, the value of the course for the fee, condition of fairways, and condition of the rough.

As might be expected, completing construction was the top specific mention from customers when asked in an open-ended manner to name the change that would improve their overall golf experience at Mission Bay. With renovations expected to be complete later this year, the next survey effort will shed light on how the improvements influence customers' experiences at Mission Bay.

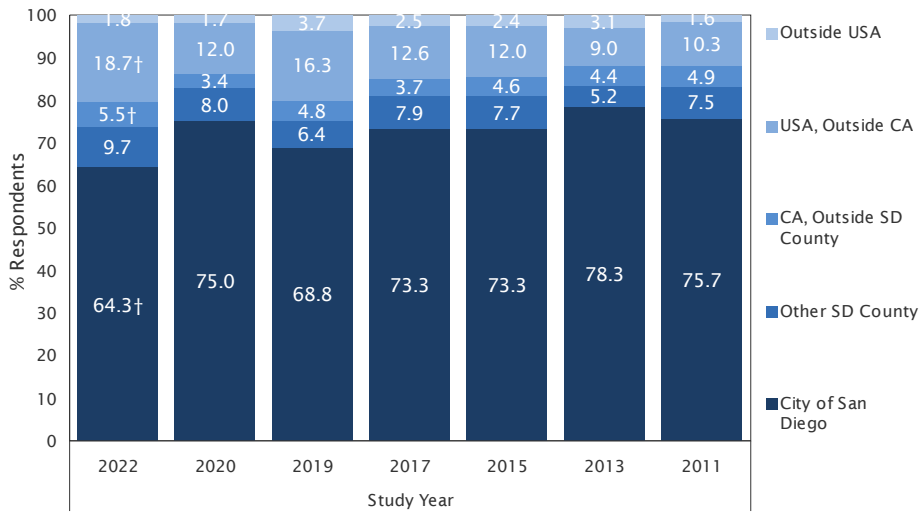
RESIDENCY OF CUSTOMERS

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 resided outside the City of San Diego were also asked to indicate the name of the City they live in or nearest to.

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

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

FIGURE 1 AREA OF CURRENT RESIDENCE BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

As shown in Figure 1, among those surveyed in 2022, 64% of customers’ primary residences were located in the City of San Diego, 10% were located in San Diego County but outside the City of San Diego, 6% were in California but outside San Diego County, 19% were located elsewhere in the United States, and about 2% were outside the United States. When compared with the 2020 study which occurred during the initial months of the pandemic, there was a statistically significant decline in the percentage of customers who reside in the City of San Diego (-11%) and increases in those from outside the United States (+7%) and within California, but outside San Diego County (+2%). These changes from 2020 results actually reflect a return to pre-pandemic patterns, as the 2022 findings align closely to those of the 2019 study.

FREQUENCY & COURSES PLAYED

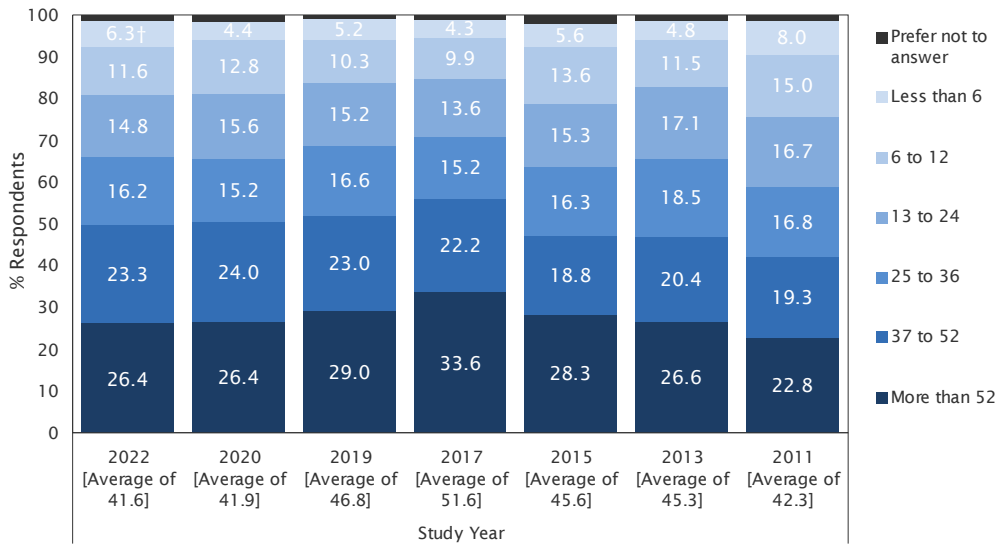
After the introduction and general inquiry regarding the customer’s area of primary residence, the survey turned to the topic of golf with several questions about frequency of play, courses played in San Diego and elsewhere, and frequency of play on each of the City’s three courses.

FREQUENCY OF OVERALL PLAY The first question in this series asked respondents to estimate the number of golf rounds they had played in the past 12 months. As shown below in Figure 2, 26% of golf customers surveyed in 2022 said 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, 16% had played between 25 and 36 rounds, 15% had played 13 to 24 rounds, 12% had played between 6 and 12 rounds, and 6% had played fewer than 6 rounds in the past year. With the exception of a small, but statistically significant increase in the percentage who played six rounds or fewer, the 2022 results are comparable to the 2020 study findings.

Overall, San Diego golf customers played an average of 41.6 rounds of golf in the 12 months preceding the interview, which is statistically consistent with the average from 2020.

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 2020 and 2022 studies.

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

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

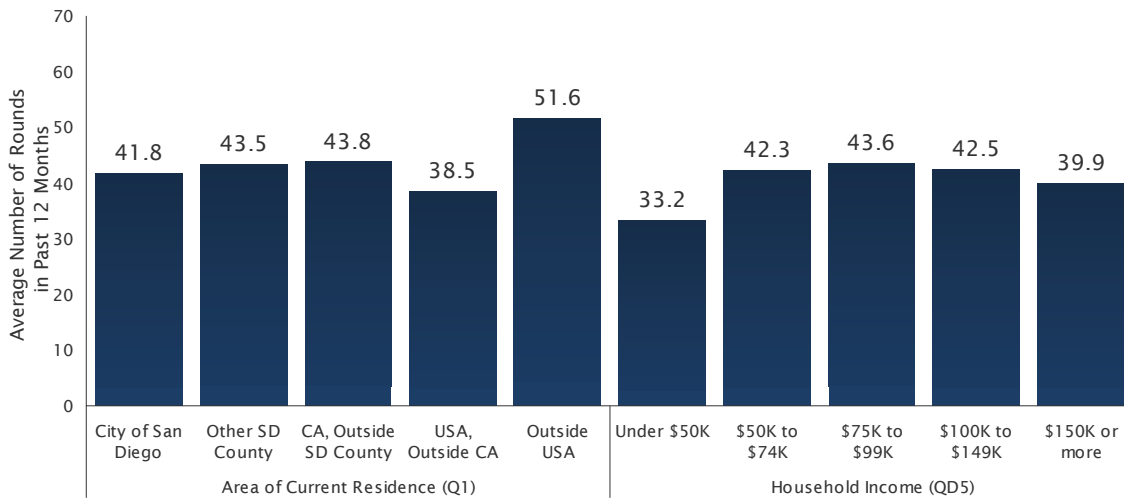
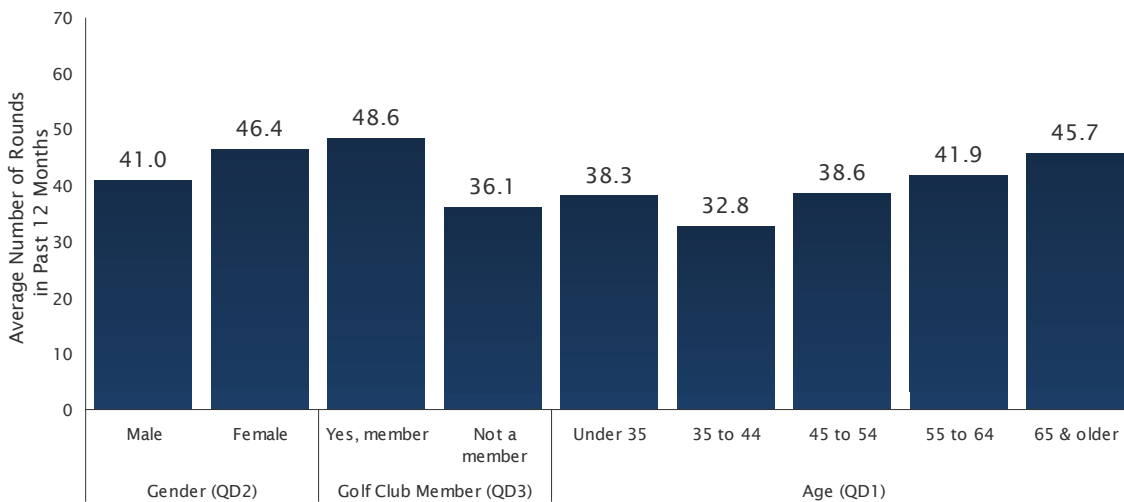


FIGURE 4 AVERAGE NUMBER OF ROUNDS PLAYED IN PAST 12 MONTHS BY GENDER, GOLF CLUB MEMBER & AGE



COURSES PLAYED MOST FREQUENTLY All respondents were next asked to indicate the name of the golf course they play most often. Customers provided names of hundreds of courses from all over the world, although the most commonly mentioned were located in San Diego County and, not surprisingly, within the City of San Diego. Figure 5 on the next page presents the courses mentioned by at least 0.8% of respondents. More than three-in-ten customers identified a course other than those shown in the figure (26%) or indicated that they were not sure or play multiple courses (5%). Among specific courses cited, 16% of customers surveyed played Torrey Pines most often, followed by Balboa Park (12%) and Mission Bay (10%). The Admiral Baker Golf Course (4%) and Coronado Municipal (3%) were the next most commonly played courses. For the interested reader, Figure 6 shows the *most commonly played* courses among residents of the City of San Diego as well as those who live elsewhere in San Diego County.

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

FIGURE 5 COURSE PLAYED MOST OFTEN

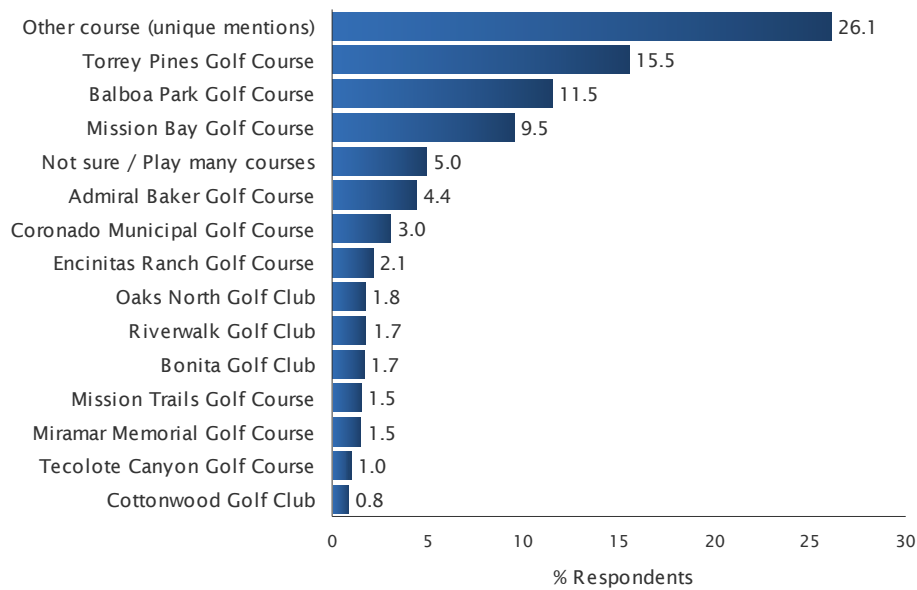
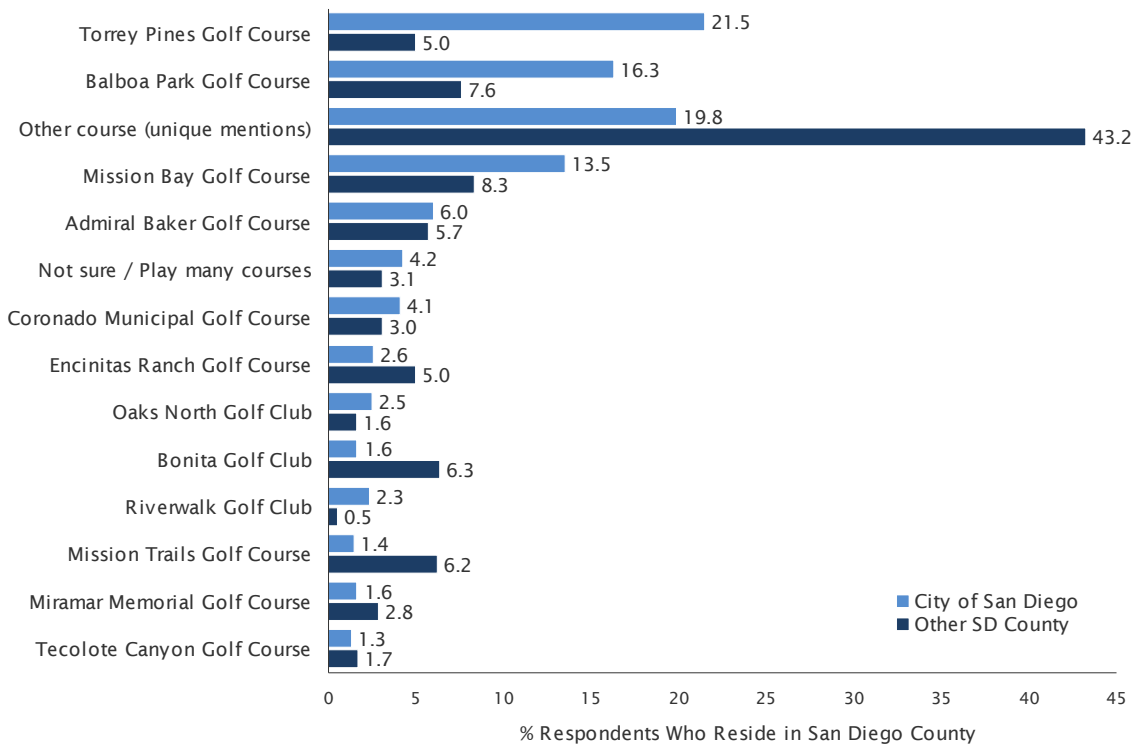


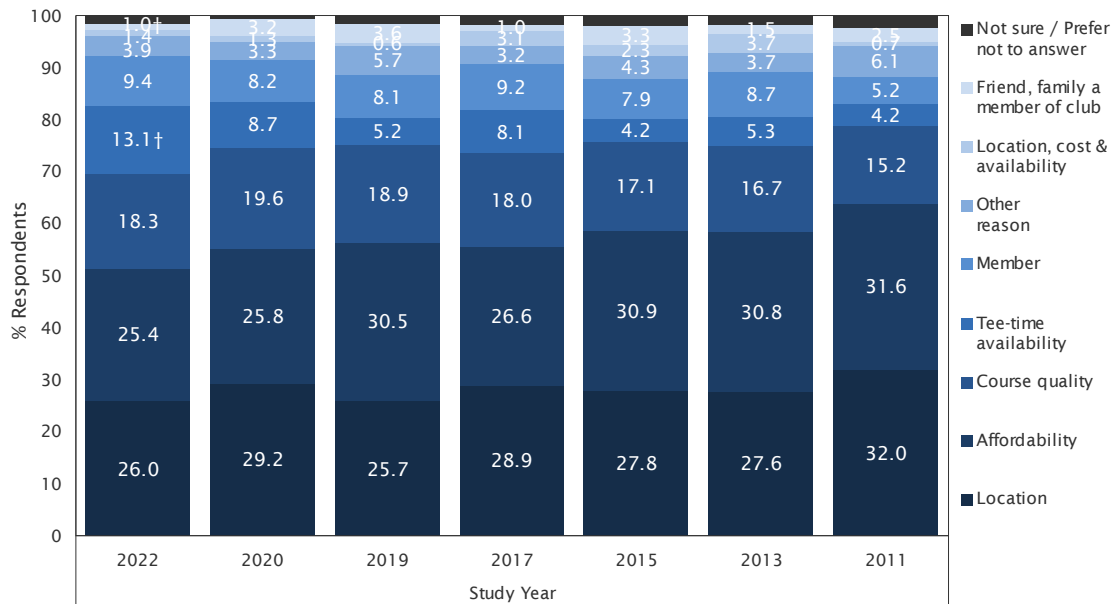
FIGURE 6 COURSE PLAYED MOST OFTEN BY CITY OF RESIDENCE IN SAN DIEGO COUNTY



REASON FOR PLAYING COURSE MOST OFTEN There are a number of motivators for playing a particular golf course most often, including location of the course relative to home and work, cost of play, and overall quality of the course. After customers provided the name of the course they play most often in Question 4, the survey next inquired about the primary reason for their choice. Respondents were not provided with a list of answers from which to choose, although most responses fell into one of several categories presented in Figure 7.

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

FIGURE 7 REASON FOR PLAYING COURSE MOST OFTEN BY STUDY YEAR

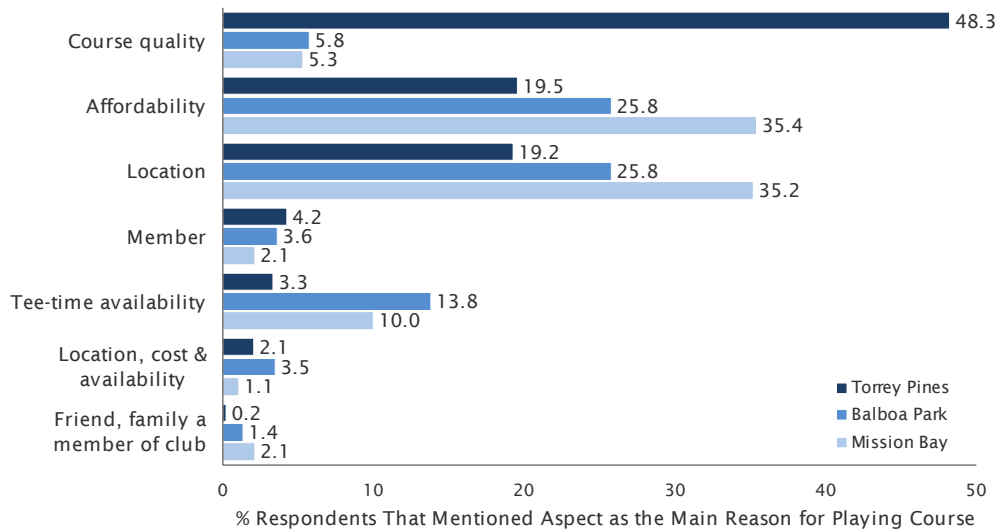


† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

Location (26%) and affordability (25%) were the most common reasons mentioned in 2022 for playing a particular course most often, followed by course quality (18%), tee-time availability (13%), and being a member of the course (9%). Compared with 2020, the percentage of golfers who mentioned tee-time availability increased significantly (+4%), whereas the percentage who mentioned friends or family have a membership as their reason experienced a small, but statistically significant decline (-2%).

Figure 8 on the next page displays responses to Question 5 among customers who mentioned that they play one of the three city golf courses most often, thus highlighting the primary factors in choosing to play each. As shown in the figure, the top reason for playing Torrey Pines was different than Balboa Park and Mission Bay. Torrey Pines was played most often because of the course quality, whereas affordability and location were the main factors for those who played at Mission Bay and Balboa Park.

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



FREQUENCY OF PLAY AT SAN DIEGO COURSES At this point in the survey, the questions became more specific about customers’ experiences with, and opinions of, the three City of San Diego courses. The first question of this nature asked respondents to indicate approximately how many rounds of golf they had played at each of the three city courses in the past 12 months, differentiating between the north and south courses at Torrey Pines. Figure 9 on the next page presents the results of this question and shows that Torrey Pines was the most frequently played course, with 59% of customers playing at least one round on the South Course and 49% playing at least one round on the North Course. Overall, 72% had played at least one Torrey Pines Course. Fifty-nine percent (59%) of golf customers reported playing Balboa Park at least once during the 12 months preceding the interview, whereas the corresponding figure for Mission Bay was 40%.

Also shown in Figure 9 are the average number of rounds per customer who had played each course in the past 12 months. Balboa Park had the highest average number of rounds played during this period (6.0), followed by Mission Bay (3.9), Torrey Pines North Course (3.3), and Torrey Pines South Course (2.4).

In 2022, there was a statistically significant decline in the average number of rounds played at the combined north and south courses of Torrey Pines, down from 9.4 in the prior study to 5.7. The reported average number of rounds at Mission Bay also decreased from 4.6 in 2020 to 3.9 in 2022 (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

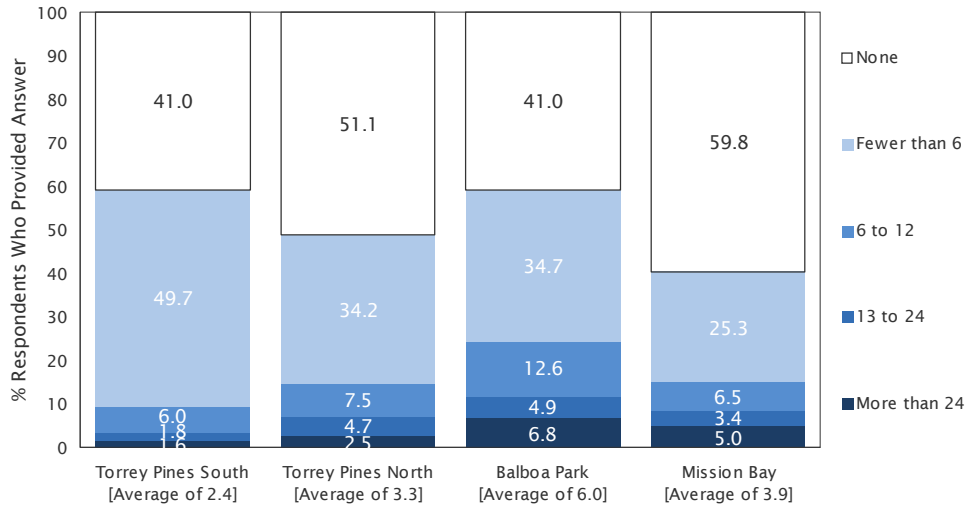
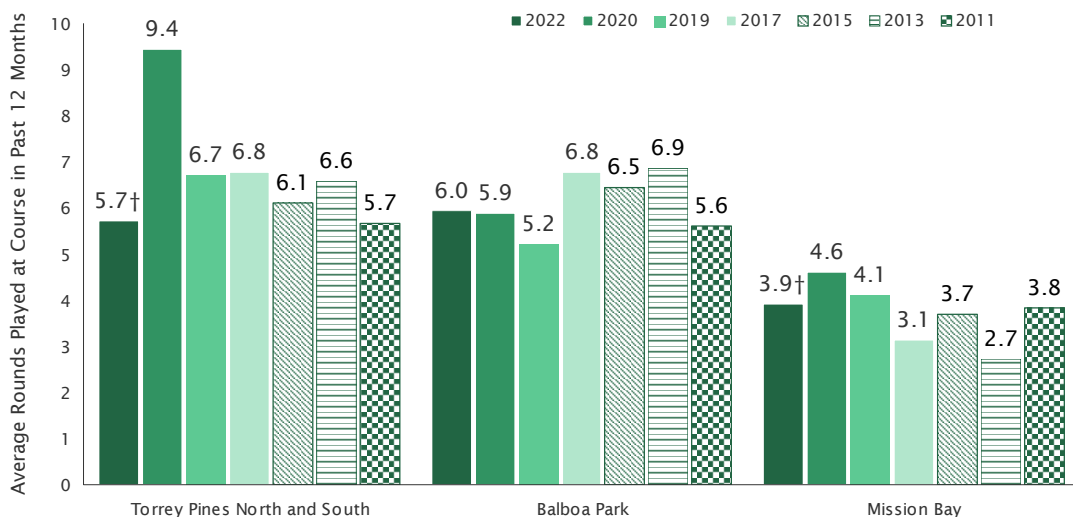


FIGURE 10 FREQUENCY OF PLAYING CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY STUDY YEAR



† Statistically significant change (p < 0.05) between the 2020 and 2022 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. One pattern that jumps out from the figures is that the Torrey Pines South Course draws higher income customers and those from outside the County, outside of California, and internationally at much higher rates than the other city courses.

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

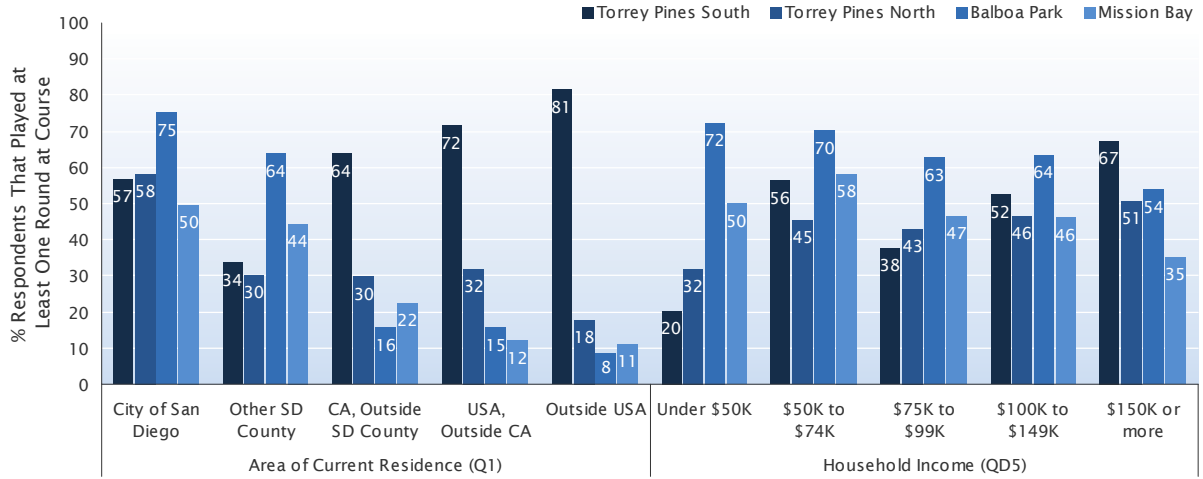


FIGURE 12 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY GENDER & NUMBER OF ROUNDS IN PAST 12 MONTHS

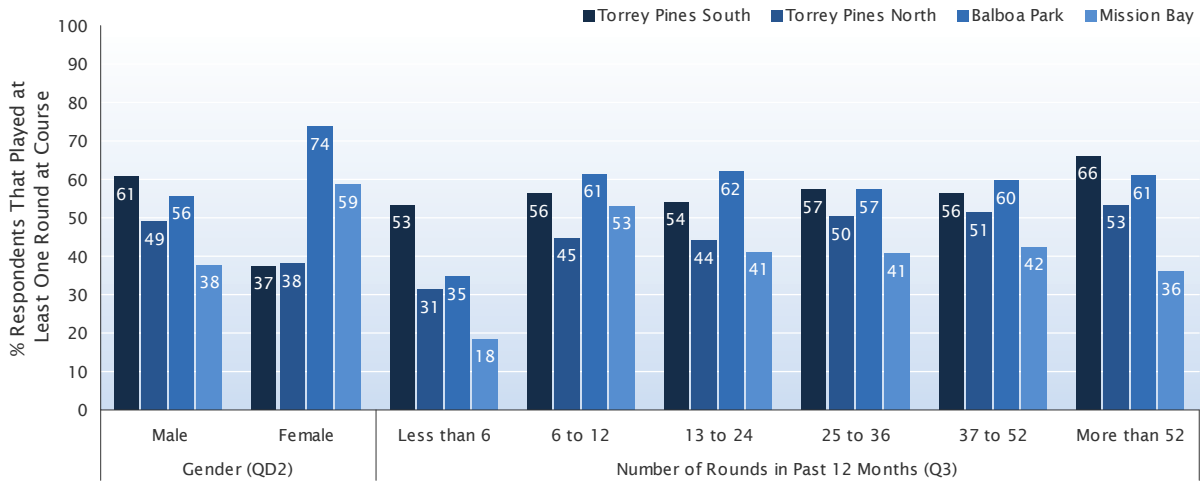
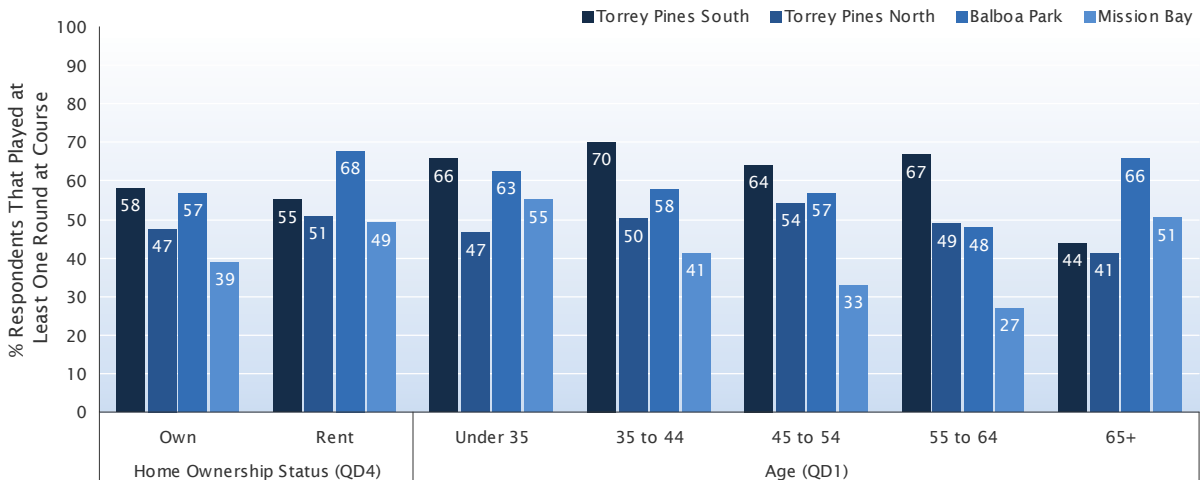


FIGURE 13 PLAYED CITY OF SAN DIEGO COURSES IN PAST 12 MONTHS BY HOME OWNERSHIP STATUS & AGE



Figures 14 through 16 display the percentage of customers within various demographic subgroups that played each of the courses *most often* in the past 12 months. When compared with the other courses, the tendency to play Torrey Pines South *most often* increased the farther away from the County of San Diego a customer resided, generally increased with household income, and was higher among male customers, homeowners, and customers who played fewer than six rounds a year. Torrey Pines North Course was the dominant course of choice for customers who played golf on average at least once per week in the past year. More than half of customers with a household income under \$50,000 per year identified Balboa Park as their go-to course as did more than one-third of those living outside the City of San Diego, but within the County. Women were most likely to identify Mission Bay as the city course they play most often.

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

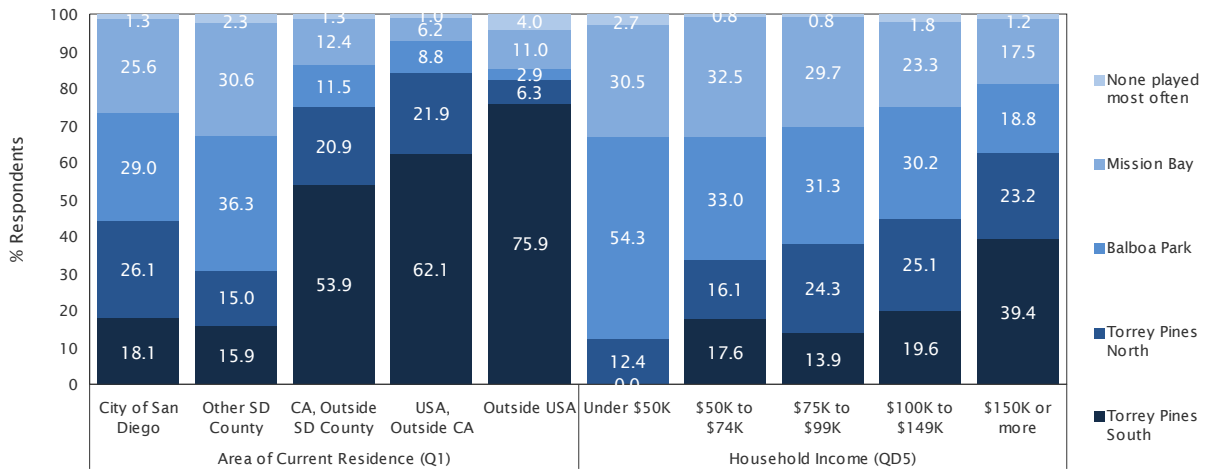


FIGURE 15 SAN DIEGO COURSE PLAYED MOST OFTEN BY GENDER & NUMBER OF ROUNDS IN PAST 12 MONTHS

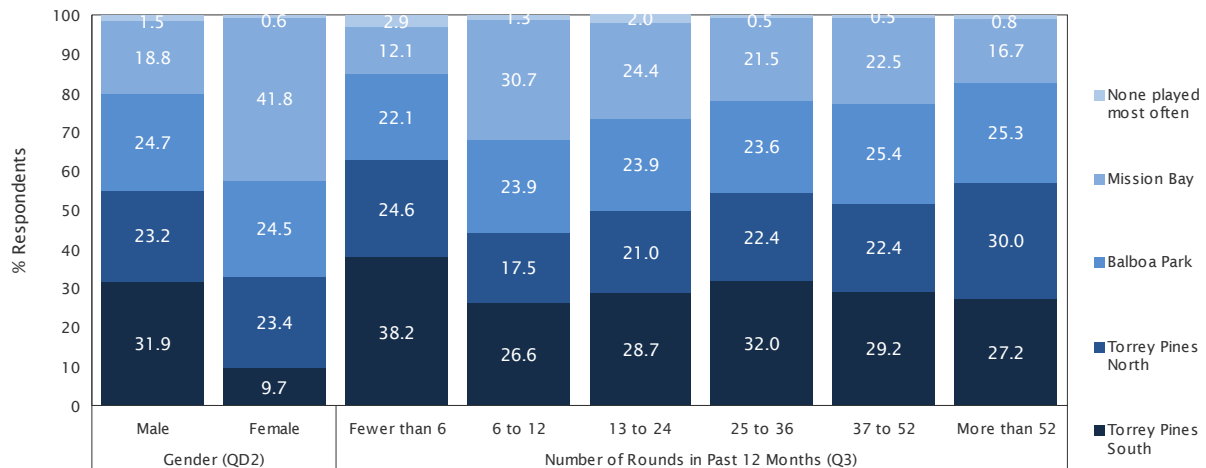
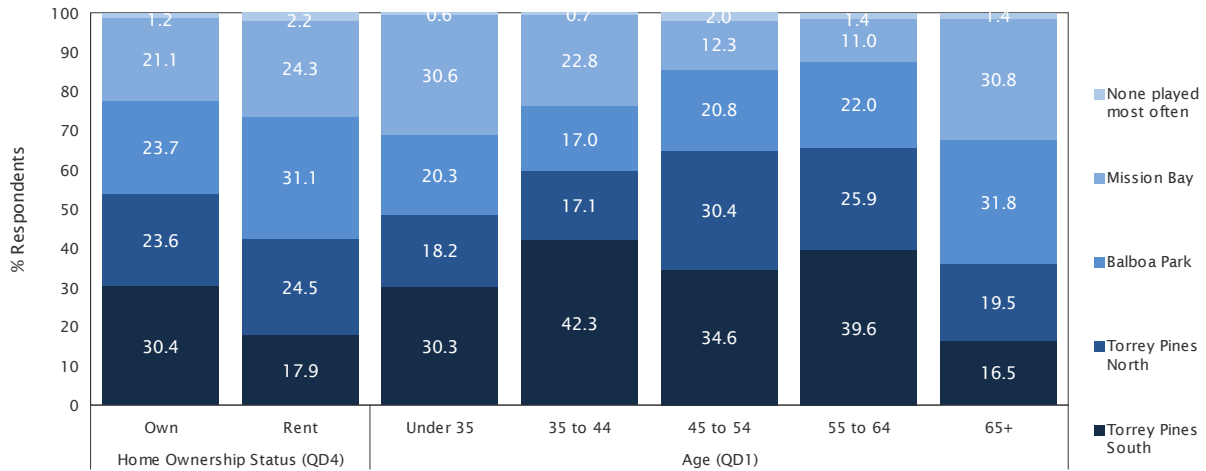


FIGURE 16 SAN DIEGO COURSE PLAYED MOST OFTEN BY HOME OWNERSHIP STATUS & AGE



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

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

	Course Played in Past 12 Months			
	Torrey Pines South	Torrey Pines North	Balboa Park	Mission Bay
Q1 Area of Current Residence				
City of San Diego	62.7	77.6	82.7	80.1
Other SD County	5.6	6.0	10.6	10.8
CA, Outside SD County	6.0	3.4	1.5	3.1
USA, Outside CA	23.0	12.3	4.9	5.6
Outside USA	2.6	0.7	0.3	0.5
QD1 Age				
Under 35	6.7	5.8	6.4	8.2
35 to 44	12.9	11.1	10.6	11.0
45 to 54	18.4	18.8	16.2	13.7
55 to 64	26.6	23.5	18.9	15.6
65+	25.1	28.4	37.3	42.0
Prefer not to answer	10.4	12.5	10.5	9.4
QD2 Gender				
Male	88.6	86.4	81.2	80.3
Female	7.5	9.2	14.7	17.2
Prefer not to answer	3.9	4.4	4.1	2.5
QD3 Golf Club Member				
Yes	51.6	50.7	41.6	40.0
No	44.4	45.9	55.2	58.3
Refused	4.0	3.3	3.2	1.7
QD4 Home Ownership Status				
Own	80.9	79.4	78.6	78.4
Rent	11.3	12.6	13.9	14.8
Prefer not to answer	7.8	8.0	7.5	6.8
QD5 Household Income				
Under \$35K	0.1	0.3	0.8	0.8
\$35K to \$49K	0.4	0.6	0.9	0.9
\$50K to \$74K	4.6	4.5	5.7	7.0
\$75K to \$99K	6.3	8.6	10.4	11.3
\$100K to \$149K	14.8	15.9	17.9	19.0
\$150K or more	49.6	45.0	39.6	37.8
Not sure / Prefer not to answer	24.2	25.2	24.7	23.2
City of San Diego Resident				
Resident	62.7	77.6	82.7	80.1
Non-resident	37.3	22.4	17.3	19.9

RATING OVERALL SAN DIEGO GOLF EXPERIENCES

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

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

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

FIGURE 17 RATING CITY OF SAN DIEGO GOLF COURSES

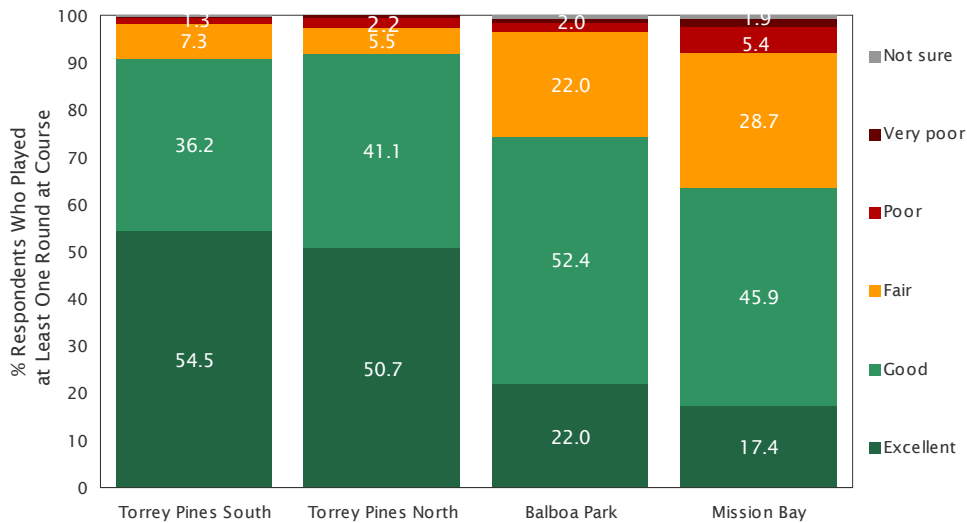
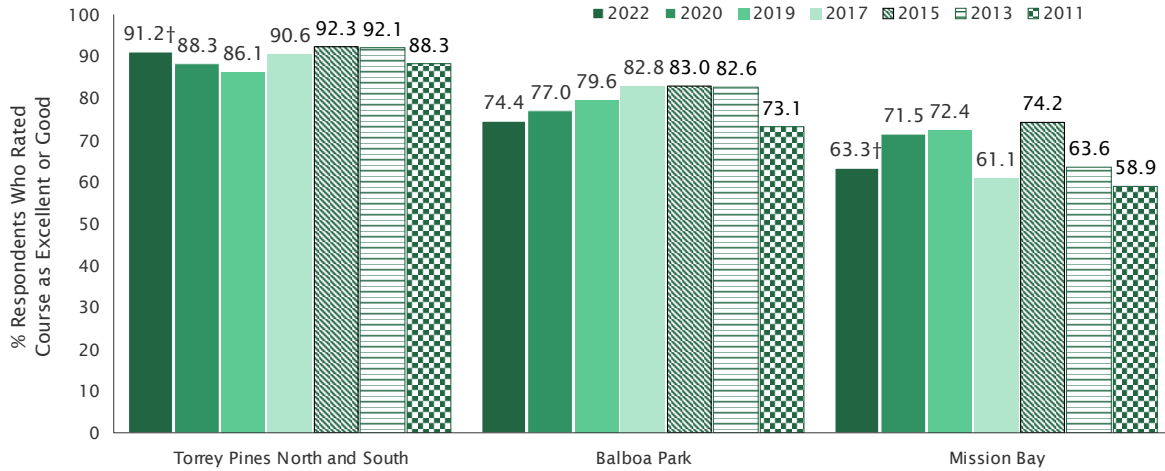


Figure 17 presents the overall performance ratings for Torrey Pines South, Torrey Pines North, Balboa Park, and Mission Bay. Torrey Pines North received the most positive ratings overall, with 92% of customers who had played at least one round there in the past 12 months citing their most recent experience as excellent (51%) or good (41%). Torrey Pines South received similarly positive ratings, with 91% of customers rating their most recent experience as excellent (55%) or good (36%). Approximately three-quarters (74%) of customers rated their experience at Balboa Park Golf Course as excellent (22%) or good (52%), while just over six-in-ten customers (63%) rated their experience at Mission Bay as excellent (17%) or good (46%).

Figure 18 shows the percentage of customers who rated their recent experience at each course as excellent or good in 2022 and the prior six studies. Over the past two years, there was a statistically significant increase in the percentage of customers who rated their most recent Torrey Pines experience as excellent or good and a decline among those providing a positive rating for Mission Bay.

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



† Statistically significant change ($p < 0.05$) between the 2020 and 2022 studies.

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

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

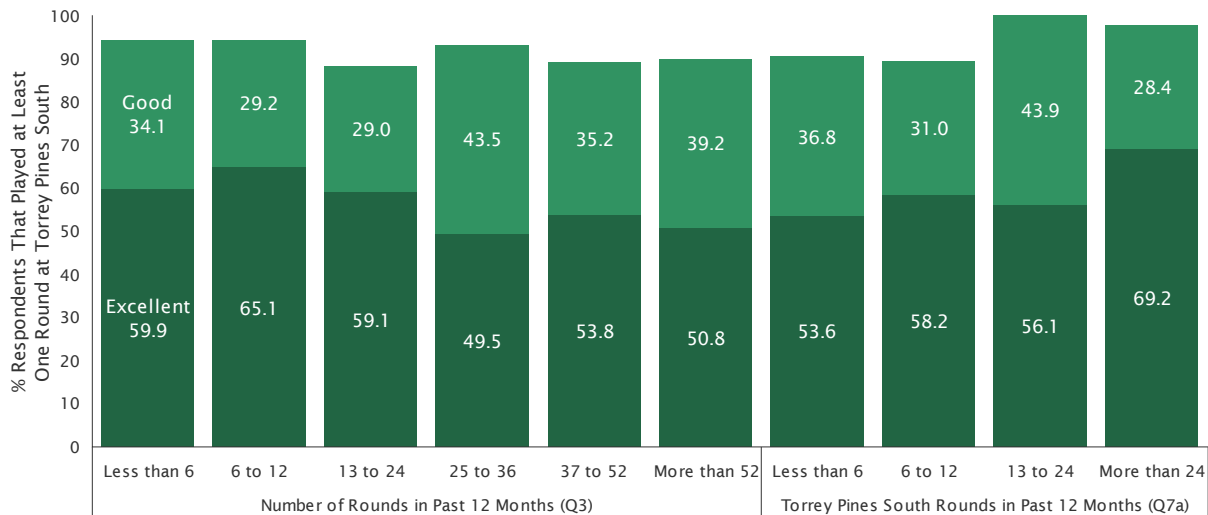


FIGURE 20 RATING TORREY PINES NORTH BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS

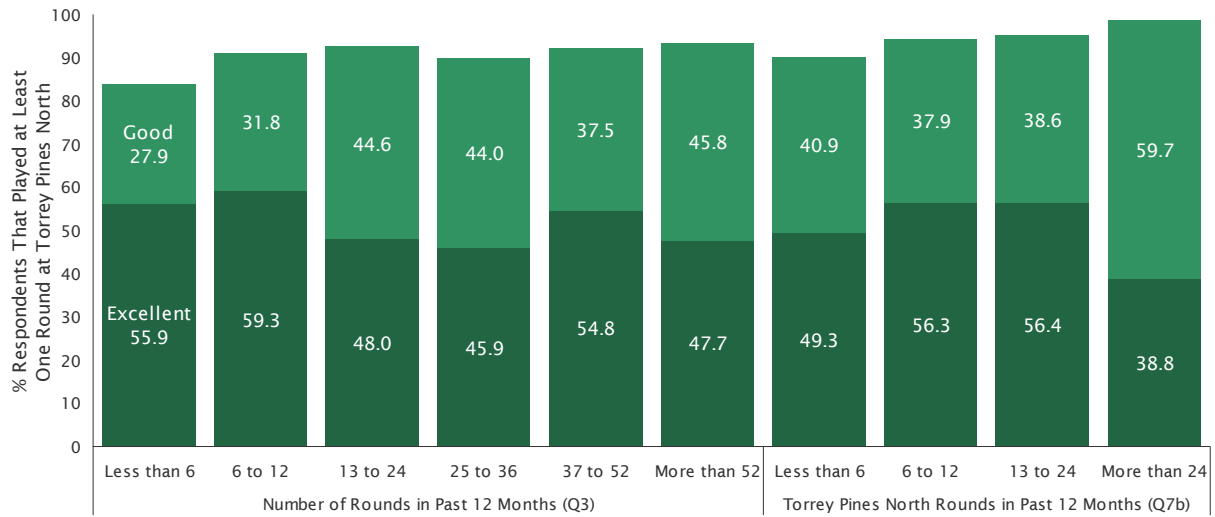


FIGURE 21 RATING BALBOA PARK BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & BALBOA PARK ROUNDS IN PAST 12 MONTHS

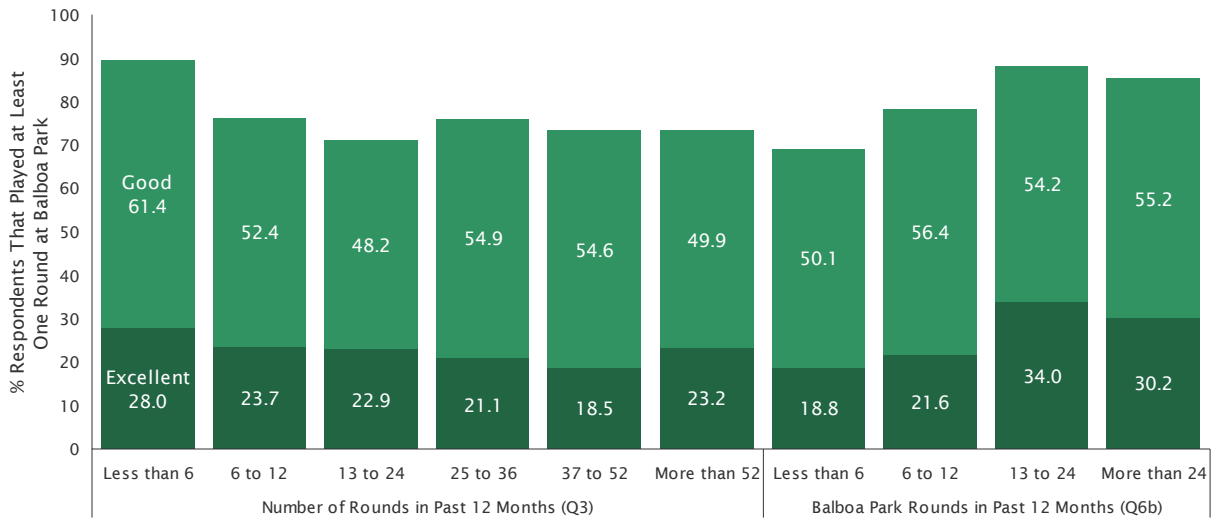
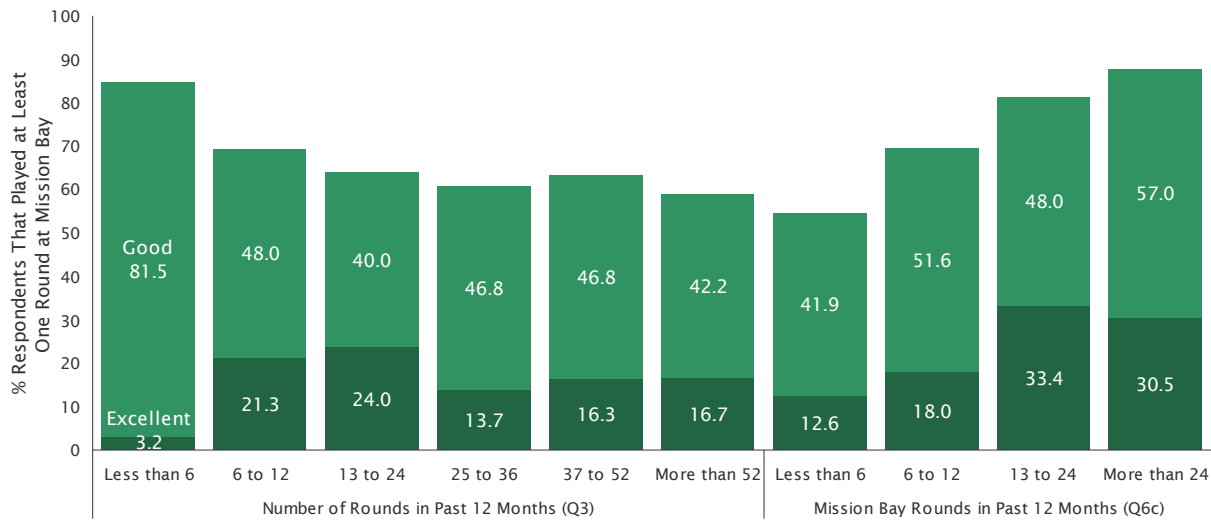


FIGURE 22 RATING MISSION BAY BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & MISSION BAY ROUNDS IN PAST 12 MONTHS



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

Approximately four-in-ten customers of Torrey Pines South (39%) and North (36%), Balboa Park (39%), and Mission Bay (47%) desired no changes or could not think of anything specific to improve their golf experience.

Top specific mentions for improving Torrey Pines South Course were enforcing the speed of play (15%), reducing fees (9%), increasing availability of tee times (9%), and improving access to tee-time information (7%), whereas for the North Course the specific improvements requested by at least 5% of customers were enforcing the speed of play (20%), improving access to tee-time information (8%), increasing availability of tee times (8%), and reducing fees (5%).

Specific mentions for improving the Balboa Park Golf Course included enforcing speed of play (11%), improving overall course quality (10%), improving fairways (8%), and maintaining tee boxes (5%). Mission Bay Golf Course customers most desired completing construction (9%), improving the overall course quality (7%), maintaining tee boxes (5%), and enforcing speed of play (5%).

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

FIGURE 23 DESIRED CHANGES TO TORREY PINES SOUTH

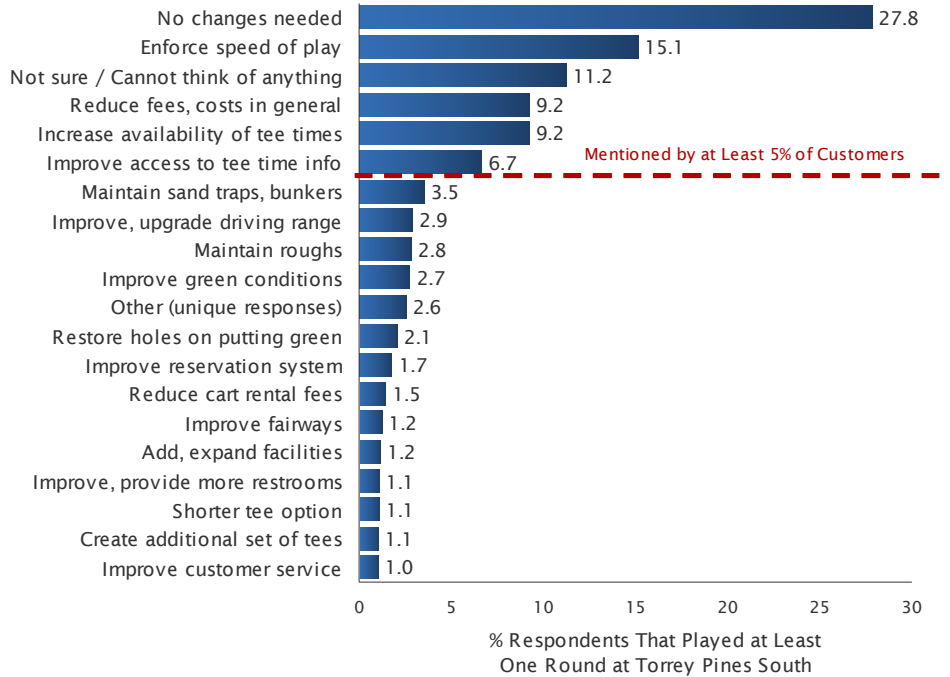


FIGURE 24 DESIRED CHANGES TO TORREY PINES NORTH

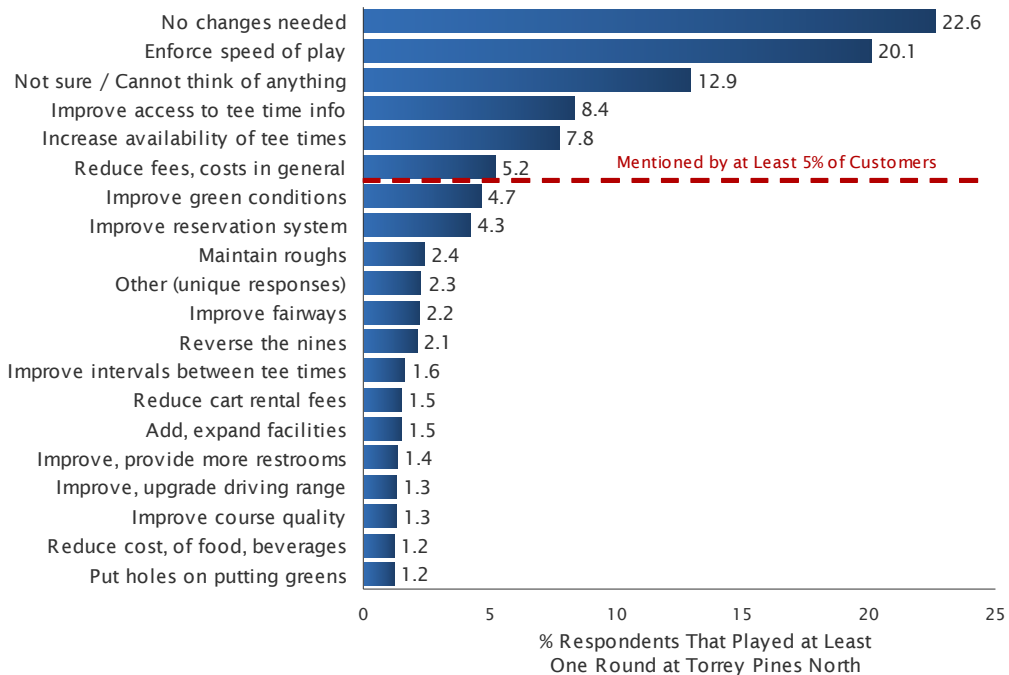


FIGURE 25 DESIRED CHANGES TO BALBOA PARK

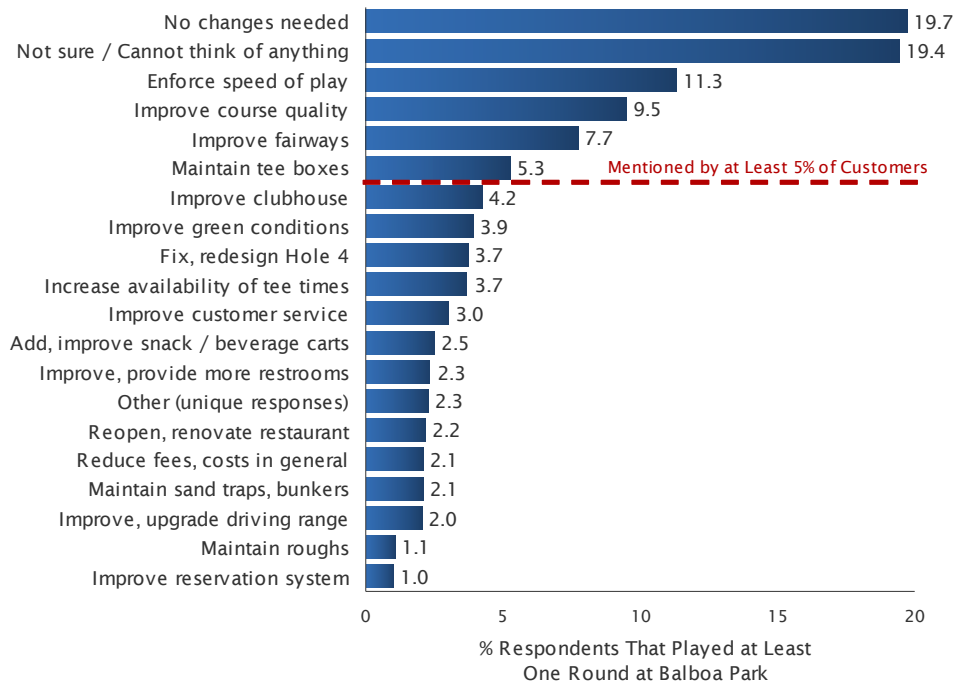
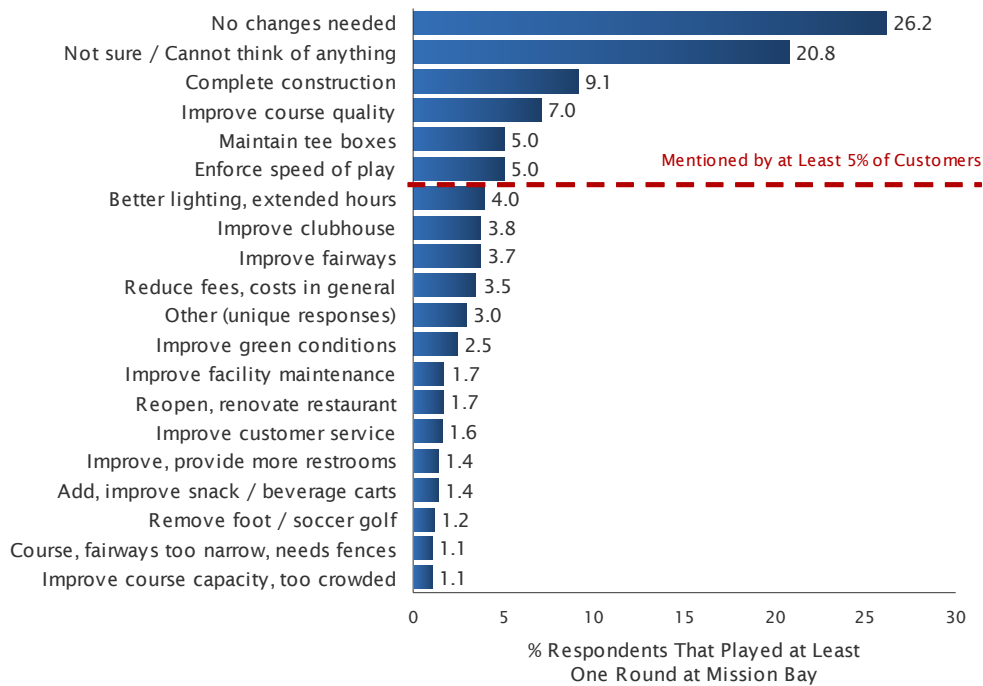


FIGURE 26 DESIRED CHANGES TO MISSION BAY



Figures 27 and 28 on the next page show how suggested improvements for Torrey Pines South and North customers varied by whether customers were residents or non-residents. Because of the limited sample size of Balboa Park and Mission Bay customers who are not residents of the City of San Diego, this additional analysis is only provided for Torrey Pines customers.

FIGURE 27 DESIRED CHANGES TO TORREY PINES SOUTH BY CITY OF SAN DIEGO RESIDENT VS. NON-RESIDENT

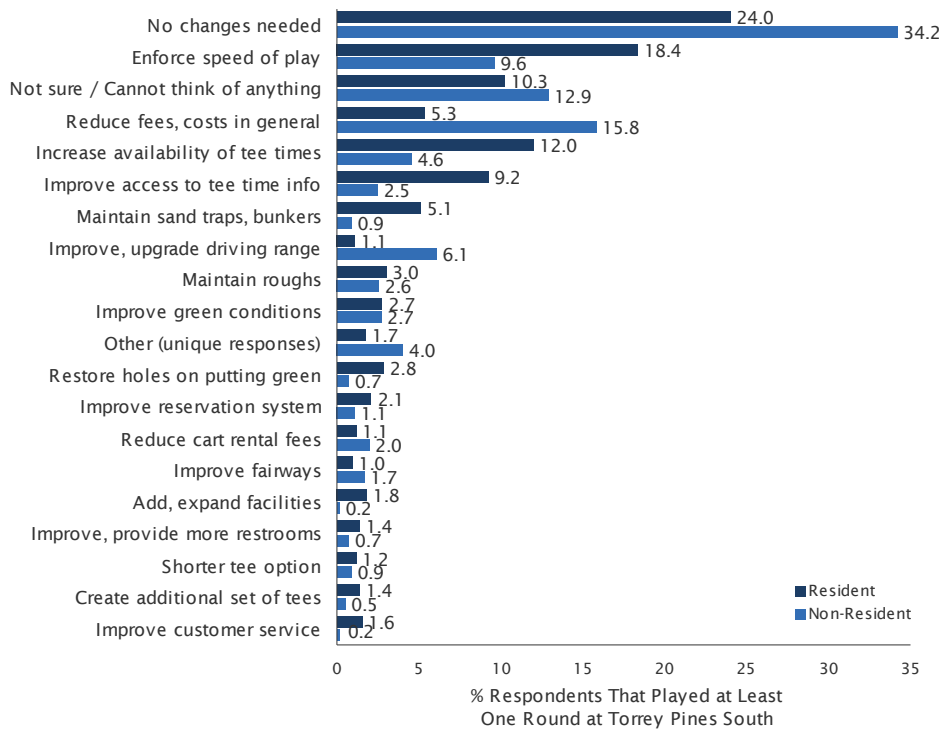
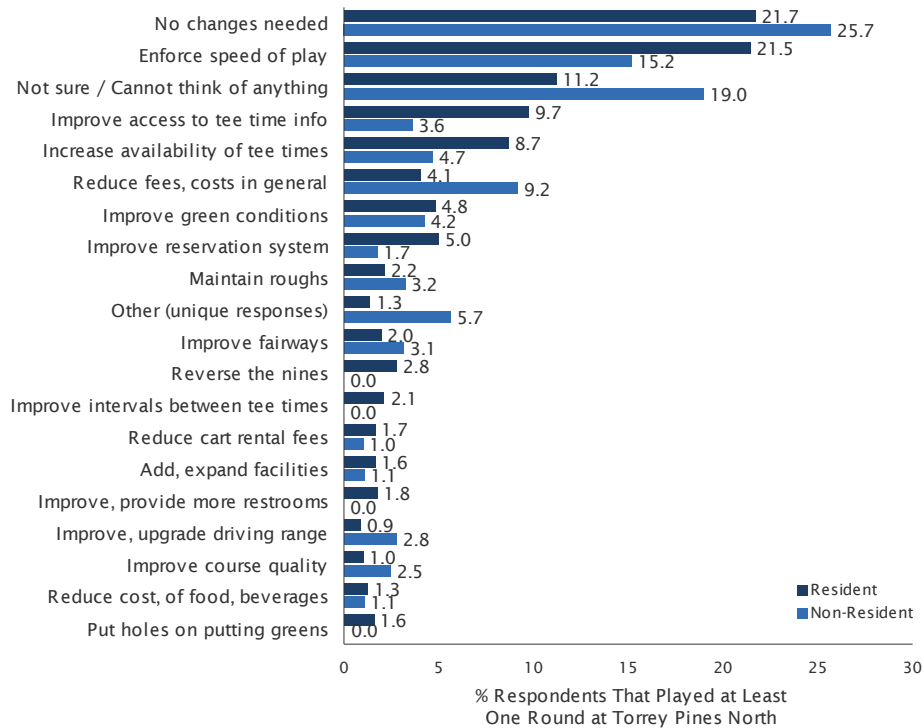


FIGURE 28 DESIRED CHANGES TO TORREY PINES NORTH BY CITY OF SAN DIEGO RESIDENT VS. NON-RESIDENT



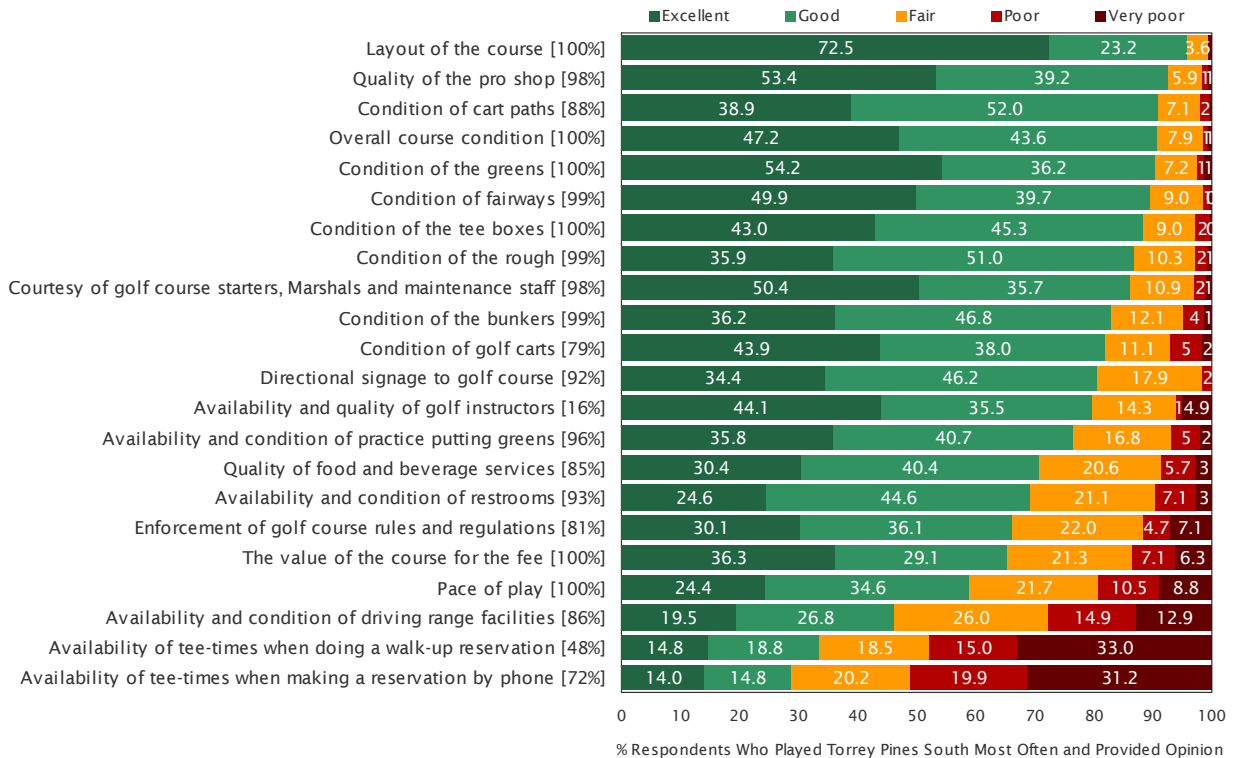
RATING ASPECTS OF EXPERIENCE

Whereas the previous section of the survey addressed customers' overall experiences with Torrey Pines, Balboa Park, and Mission Bay golf courses, the next several questions asked customers to rate *specific aspects* of their golf experience for the San Diego course they had played most often in the past 12 months. Using a five-point scale of excellent, good, fair, poor, or very poor, respondents rated each of the 22 aspects listed on the left side of figures 29 through 32.¹

RATING ASPECTS OF TORREY PINES Torrey Pines Golf Course customers were divided by the course (south or north) they had played most often. Customers who played the South Course gave the most positive ratings for the layout of the course (96% excellent or good), quality of the pro shop (93%), condition of cart paths (91%), overall condition of the course (91%), condition of the greens (90%), and condition of fairways (90%). Considering the intensity of the positive rating, the courtesy of golf course starters, marshals, and maintenance staff also received high marks (50% excellent) from South Course customers. At the other end of the spectrum, Torrey Pines South Course customers were less pleased with the availability of tee times for reservations by phone (29%) or for walk-up reservations (34%), the availability and condition of driving range facilities (46%), and the pace of play (59%).

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

FIGURE 29 RATING ASPECTS OF TORREY PINES SOUTH



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

Customers who had played the North Course gave the most positive ratings for the layout of the course (93% excellent or good), quality of the pro shop (92%), condition of fairways (89%), condition of cart paths (89%), and courtesy of golf course starters, marshals, and maintenance staff (89%). Considering the intensity of the positive rating, the value of the course for the fee was also viewed quite positively (41% excellent) by many North Course customers. At the other end of the spectrum, customers who had played the North Course most often assigned lower ratings to the availability of tee times for reservations by phone (13%) or for walk-up reservations (19%), the pace of play (44%), and the availability and condition of driving range facilities (46%).

FIGURE 30 RATING ASPECTS OF TORREY PINES NORTH

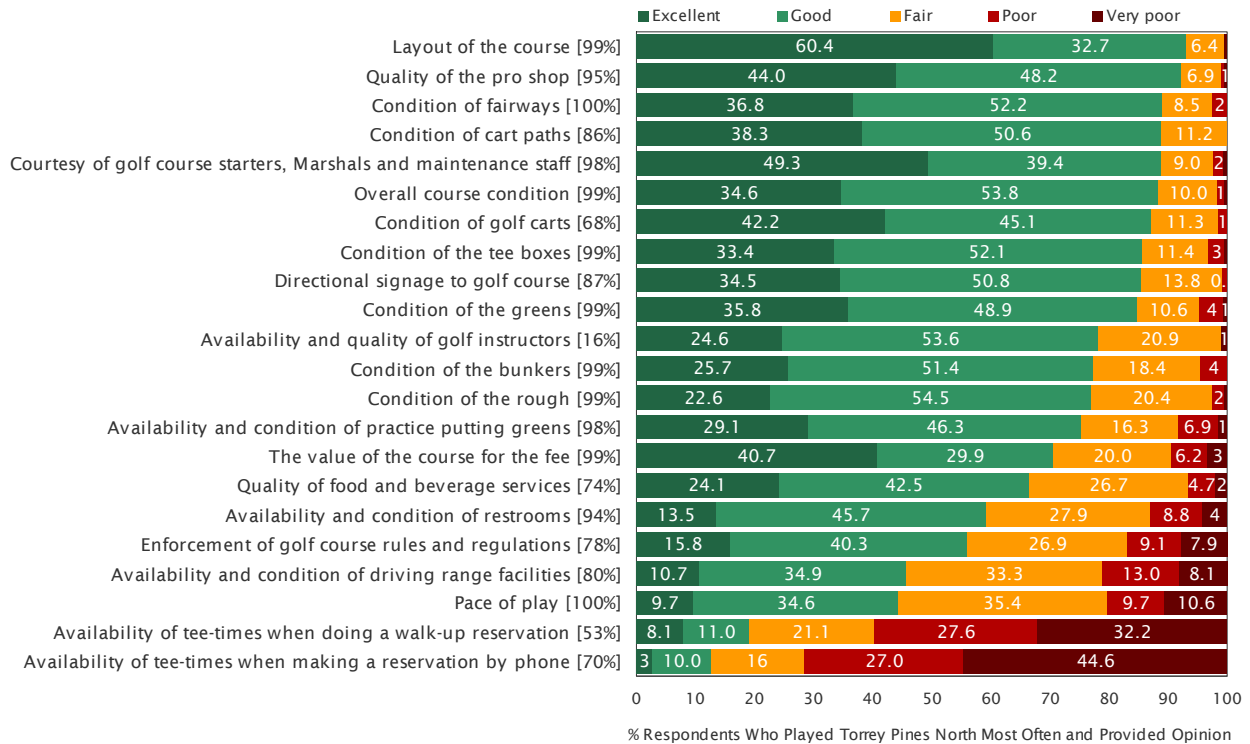


Table 2 on the next page shows the percentage who rated each aspect of Torrey Pines South Course as excellent or good by study year, as well as the difference between the two most recent studies. Table 3 provides the same analysis for the Torrey Pines North Course. When compared with the 2020 survey results, in 2022 there were seven statistically significant performance improvements for the South Course, whereas the North Course saw one statistically significant increase and three declines in performance ratings from customers during this period.

TABLE 2 RATING ASPECTS OF TORREY PINES SOUTH BY STUDY YEAR

	Study Year						Difference in Excellent + Good '20 to '22
	2022	2020	2019	2017	2015	2013	
Condition of the rough	86.9	71.5	69.1	80.8	80.3	83.4	+15.4†
Condition of the bunkers	83.0	72.6	62.8	72.1	76.1	77.9	+10.3†
Overall course condition	90.7	82.2	85.5	91.4	91.1	94.1	+8.5†
Enforcement of golf course rules and regulations	66.3	58.0	69.4	71.7	72.4	73.1	+8.2†
Condition of the tee boxes	88.3	80.3	82.6	90.0	89.4	91.2	+7.9†
Condition of cart paths	90.9	83.3	85.6	89.6	81.5	87.0	+7.6†
Courtesy of golf course starters, Marshals and maintenance staff	86.2	80.6	84.5	85.8	84.9	84.9	+5.6†
Condition of the greens	90.4	86.2	84.6	90.0	90.5	89.2	+4.2
Availability and condition of restrooms	69.2	65.3	64.6	66.7	62.5	64.6	+3.9
Condition of fairways	89.6	85.9	87.3	91.2	91.6	93.5	+3.7
Condition of golf carts	81.9	79.3	81.2	85.7	79.2	81.6	+2.6
Quality of the pro shop	92.6	90.1	85.3	90.3	90.7	89.5	+2.4
Quality of food and beverage services	70.8	68.9	60.8	64.9	65.7	66.1	+1.9
Availability and condition of practice putting greens	76.5	74.7	80.1	86.4	89.3	92.2	+1.8
Pace of play	59.0	58.4	49.8	59.0	55.3	55.5	+0.6
Availability and condition of driving range facilities	46.2	45.8	34.1	45.4	40.8	44.8	+0.4
Availability and quality of golf instructors	79.6	79.9	87.4	87.1	70.2	83.8	-0.3
Layout of the course	95.7	96.2	92.9	98.1	97.7	97.1	-0.4
Directional signage to golf course	80.6	83.7	82.2	83.2	84.3	83.5	-3.1
Availability of tee-times when doing a walk-up reservation	33.5	36.7	47.2	42.7	50.2	57.6	-3.2
The value of the course for the fee	65.3	69.9	54.2	64.7	61.6	68.0	-4.6
Availability of tee-times when making a reservation by phone	28.8	35.5	43.1	37.5	53.8	50.9	-6.7

† Statistically significant change (p < 0.05) between the 2020 and 2022 studies.

TABLE 3 RATING ASPECTS OF TORREY PINES NORTH BY STUDY YEAR²

	Study Year						Difference in Excellent + Good '20 to '22
	2022	2020	2019	2017	2015	2013	
Condition of golf carts	87.2	79.4	82.9	83.3	85.3	78.2	+7.9†
Condition of the greens	84.7	81.5	86.7	86.1	91.8	89.6	+3.2
Quality of the pro shop	92.2	90.2	91.5	88.9	93.2	88.5	+2.0
Condition of the rough	77.0	75.9	70.5	85.3	81.2	77.2	+1.2
Condition of the tee boxes	85.5	84.6	89.0	92.4	87.7	83.8	+0.9
Courtesy of golf course starters, Marshals and maintenance staff	88.8	88.1	81.2	86.6	87.3	86.6	+0.7
Condition of the bunkers	77.1	76.6	74.8	80.4	74.6	69.1	+0.5
Enforcement of golf course rules and regulations	56.1	56.9	62.2	68.3	64.5	67.1	-0.8
Availability and condition of practice putting greens	75.3	76.8	83.9	84.4	91.2	87.2	-1.4
Layout of the course	93.1	94.8	90.3	92.6	95.2	96.1	-1.7
Availability and condition of driving range facilities	45.6	47.4	47.5	51.5	53.0	49.1	-1.8
Pace of play	44.3	46.3	43.9	53.4	52.5	50.1	-2.0
Overall course condition	88.4	91.6	91.2	92.4	91.5	91.6	-3.2
Directional signage to golf course	85.3	88.6	84.1	85.1	86.6	85.1	-3.3
Condition of fairways	89.0	92.5	88.9	90.7	86.4	90.2	-3.5
Condition of cart paths	88.8	93.8	92.8	91.3	82.6	82.9	-4.9
Quality of food and beverage services	66.6	71.8	59.3	63.7	66.1	58.5	-5.2
Availability of tee-times when making a reservation by phone	12.6	19.0	38.9	32.5	47.5	47.0	-6.4
Availability and quality of golf instructors	78.2	88.5	80.8	82.4	77.9	78.0	-10.4
Availability and condition of restrooms	59.2	69.6	66.9	63.0	64.2	64.7	-10.4†
Availability of tee-times when doing a walk-up reservation	19.1	30.9	44.8	40.2	53.5	50.3	-11.8†
The value of the course for the fee	70.6	83.6	77.5	78.0	81.2	79.4	-13.0†

† Statistically significant change (p < 0.05) between the 2020 and 2022 studies.

2. Since statistical testing takes into account the number of respondents who provided an opinion for each item by year, two items can have the same percentage change yet a different result for significance testing.

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

Compared with their counterparts, those who provided positive *overall* ratings of Torrey Pines were more likely to rate nearly all specific 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 condition of golf carts, availability and quality of golf instructors, and the value of the course for the fee (see Table 4). For the North Course, the three aspects with the largest disparity between the two customer groups were the overall course condition, availability and quality of golf instructors, and the value of the course for the fee (see Table 5). Tables 6 and 7 show the ratings for the respective courses by city resident vs. non-resident.

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

	Rating of Torrey Pines South (Q8a)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Condition of golf carts	89	35	-54
Availability and quality of golf instructors	86	33	-53
The value of the course for the fee	71	22	-50
Condition of cart paths	95	55	-40
Overall course condition	96	56	-39
Availability and condition of restrooms	74	36	-38
Courtesy of golf course starters, Marshals and maintenance staff	90	54	-37
Quality of food and beverage services	75	40	-34
Condition of the rough	91	57	-34
Condition of the greens	94	61	-33
Condition of fairways	93	63	-30
Availability and condition of driving range facilities	50	22	-27
Enforcement of golf course rules and regulations	69	44	-25
Pace of play	62	38	-24
Condition of the bunkers	86	62	-23
Availability of tee-times when doing a walk-up reservation	36	14	-22
Quality of the pro shop	95	75	-20
Directional signage to golf course	83	64	-19
Availability of tee-times when making a reservation by phone	31	13	-18
Availability and condition of practice putting greens	79	60	-18
Layout of the course	98	81	-17
Condition of the tee boxes	90	74	-16

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

	Rating of Torrey Pines North (Q8b)		Difference Between Groups for Each Aspect
	Excellent, Good	Fair, Poor, Very Poor	
Overall course condition	92	36	-56
Availability and quality of golf instructors	84	31	-53
The value of the course for the fee	75	23	-52
Condition of the greens	88	41	-47
Condition of the bunkers	80	39	-42
Condition of the tee boxes	89	50	-39
Condition of fairways	92	55	-37
Condition of golf carts	91	56	-36
Quality of food and beverage services	69	35	-34
Quality of the pro shop	95	63	-32
Pace of play	46	20	-26
Condition of the rough	79	56	-22
Layout of the course	94	76	-19
Courtesy of golf course starters, Marshals and maintenance staff	90	72	-18
Directional signage to golf course	86	72	-14
Availability and condition of driving range facilities	47	34	-13
Availability and condition of restrooms	60	49	-11
Availability of tee-times when doing a walk-up reservation	20	12	-7
Availability of tee-times when making a reservation by phone	13	8	-5
Availability and condition of practice putting greens	75	72	-3
Enforcement of golf course rules and regulations	56	55	-1
Condition of cart paths	89	90	+1

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

	City of San Diego Resident		Difference Between Groups for Each Aspect
	Resident	Non-resident	
The value of the course for the fee	84	53	-31
Condition of the greens	95	88	-7
Availability and quality of golf instructors	83	77	-6
Condition of the rough	90	85	-5
Condition of fairways	93	88	-5
Overall course condition	92	90	-2
Quality of the pro shop	94	92	-2
Availability and condition of driving range facilities	47	46	-0
Directional signage to golf course	80	81	+1
Layout of the course	94	97	+3
Condition of cart paths	88	93	+5
Courtesy of golf course starters, Marshals and maintenance staff	83	88	+5
Condition of the tee boxes	85	90	+6
Quality of food and beverage services	67	73	+7
Availability and condition of practice putting greens	72	79	+7
Condition of golf carts	77	85	+7
Condition of the bunkers	76	88	+12
Availability and condition of restrooms	57	77	+20
Availability of tee-times when doing a walk-up reservation	24	48	+24
Availability of tee-times when making a reservation by phone	14	40	+26
Pace of play	39	73	+34
Enforcement of golf course rules and regulations	46	81	+35

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

	City of San Diego Resident		Difference Between Groups for Each Aspect
	Resident	Non-resident	
The value of the course for the fee	80	47	-33
Overall course condition	92	80	-12
Condition of the rough	79	72	-7
Directional signage to golf course	87	82	-5
Quality of food and beverage services	68	63	-4
Condition of fairways	90	87	-3
Condition of golf carts	88	86	-2
Condition of the bunkers	78	76	-1
Availability and condition of driving range facilities	46	46	+0
Condition of cart paths	88	90	+1
Courtesy of golf course starters, Marshals and maintenance staff	88	90	+2
Condition of the tee boxes	85	87	+2
Condition of the greens	84	87	+3
Layout of the course	92	96	+4
Availability and condition of practice putting greens	74	79	+5
Quality of the pro shop	91	96	+6
Availability of tee-times when making a reservation by phone	10	18	+8
Enforcement of golf course rules and regulations	54	63	+10
Availability and quality of golf instructors	76	93	+16
Pace of play	39	57	+17
Availability and condition of restrooms	53	77	+24
Availability of tee-times when doing a walk-up reservation	12	41	+29

RATING ASPECTS OF BALBOA PARK As displayed in Figure 31 on the next page, Balboa Park Golf Course customers gave the most positive ratings for the layout of the course (86% excellent or good), condition of the greens (84%), courtesy of golf course starters, marshals, and maintenance staff (81%), value of the course for the fee (78%), and condition of golf carts (77%). At the other end of the spectrum, customers were less positive regarding the availability and condition of driving range facilities (32%), availability of tee times when doing a walk-up reservation (37%), quality of the pro shop (41%), and condition of bunkers (44%).

Table 8 on the next page shows the percentage of customers who rated each aspect of Balboa Park as excellent or good by study year, as well as the difference between the two most recent studies. Compared with the 2020 survey results, there were three statistically significant performance improvements and one decline among Balboa Park customers during this period.

FIGURE 31 RATING ASPECTS OF BALBOA PARK

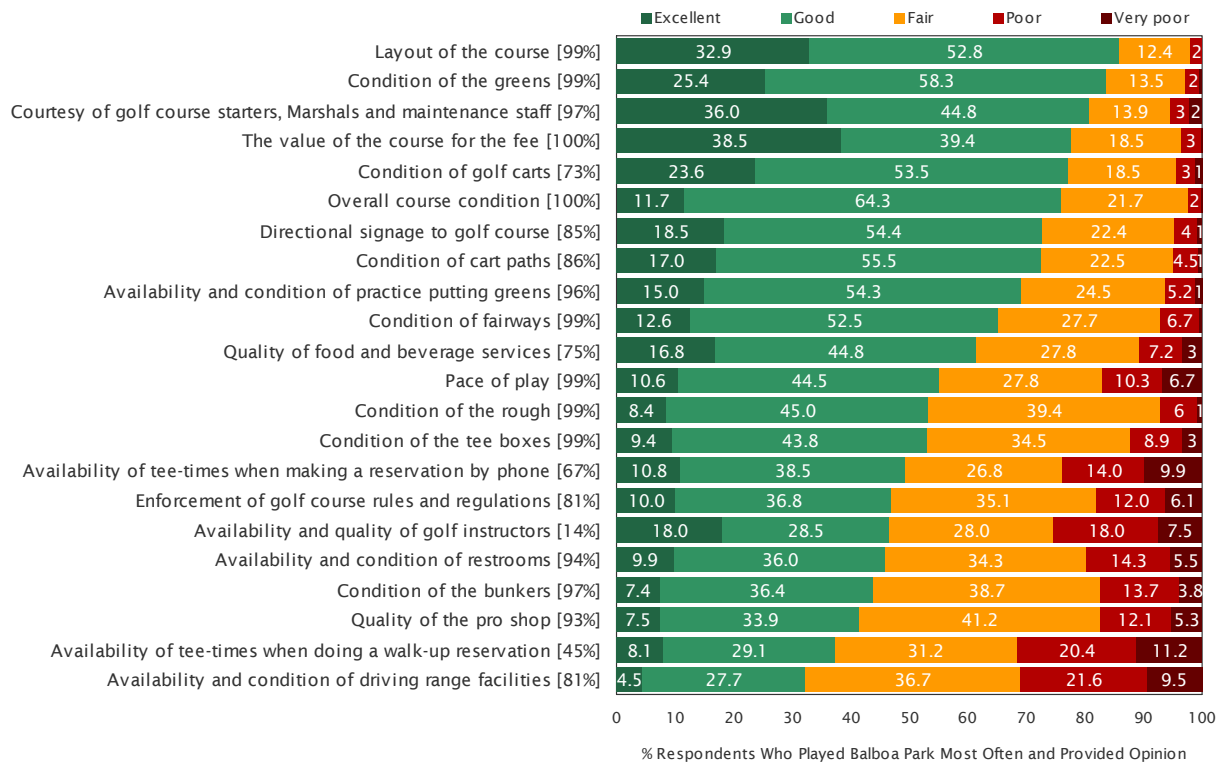


TABLE 8 RATING ASPECTS OF BALBOA PARK BY STUDY YEAR

	Study Year							Difference in Excellent + Good '20 to '22
	2022	2020	2019	2017	2015	2013	2011	
Condition of golf carts	77.1	56.8	75.1	79.4	53.5	61.8	67.9	+20.3†
Availability and condition of restrooms	45.9	37.4	44.1	42.2	47.9	49.8	53.1	+8.5†
Condition of the greens	83.7	77.4	87.1	90.6	83.6	85.9	65.4	+6.2†
Availability and quality of golf instructors	46.5	40.4	57.4	64.5	64.4	70.9	71.2	+6.1
Availability and condition of practice putting greens	69.2	65.3	75.5	71.5	76.6	75.5	66.7	+3.9
Pace of play	55.1	52.4	52.0	53.4	55.5	55.5	65.6	+2.7
Overall course condition	76.0	75.4	81.0	83.9	85.7	85.8	67.4	+0.5
Quality of food and beverage services	61.6	61.6	65.6	57.5	59.4	57.7	55.7	+0.0
Quality of the pro shop	41.4	42.9	53.1	33.7	34.5	38.8	41.9	-1.5
Courtesy of golf course starters, Marshals and maintenance staff	80.7	82.7	89.6	89.7	85.4	78.6	79.9	-1.9
Enforcement of golf course rules and regulations	46.8	49.3	54.2	55.0	61.4	61.7	67.8	-2.5
Condition of the bunkers	43.8	46.4	48.1	49.8	55.7	53.2	53.9	-2.6
Condition of cart paths	72.5	75.5	75.0	85.6	82.1	60.9	54.9	-3.0
Availability and condition of driving range facilities	32.2	35.8	33.8	21.6	33.3	36.3	33.2	-3.6
Layout of the course	85.7	90.1	88.2	88.2	88.7	88.4	88.5	-4.4
Directional signage to golf course	72.8	77.4	74.1	78.4	74.5	75.1	69.3	-4.6
Availability of tee-times when making a reservation by phone	49.3	54.2	82.2	81.2	79.2	78.3	77.2	-4.9
Condition of fairways	65.1	70.1	66.3	74.9	75.0	79.7	64.7	-4.9
Availability of tee-times when doing a walk-up reservation	37.2	43.0	75.2	77.8	73.2	72.8	74.2	-5.8
The value of the course for the fee	77.8	84.4	86.7	82.3	83.2	81.1	76.0	-6.6
Condition of the tee boxes	53.2	60.1	63.9	64.8	65.6	61.6	61.8	-6.9
Condition of the rough	53.4	63.2	64.0	64.6	63.7	71.0	57.6	-9.8†

† Statistically significant change (p < 0.05) between the 2020 and 2022 studies.

BALBOA PARK ASPECT RATINGS BY SUBGROUP Table 9 displays how ratings of each aspect of the Balboa Park Golf Course (Question 13) varied by the customer’s overall performance rating for the course (Question 8c). As with Table 4, the table divides those who rated Balboa Park Golf Course as excellent or good into one group, and customers who rated it as fair, poor, or very poor into another. Also displayed is the difference between the two groups in the far right column. As one might expect, those who provided positive overall ratings for Balboa Park were also more likely to rate specific aspects of the course as excellent or good. Aspects of the course for which there existed the greatest disparity between the two groups were: the overall course condition, condition of fairways, condition of the tee boxes, condition of the greens, and pace of play.

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	86	25	-61
Condition of fairways	73	28	-45
Condition of the tee boxes	60	19	-41
Condition of the greens	91	50	-40
Pace of play	62	21	-40
The value of the course for the fee	84	46	-38
Condition of golf carts	83	51	-32
Quality of the pro shop	46	17	-30
Condition of the bunkers	49	19	-29
Layout of the course	91	62	-28
Enforcement of golf course rules and regulations	52	24	-28
Courtesy of golf course starters, Marshals and maintenance staff	85	58	-28
Availability and condition of practice putting greens	74	47	-27
Condition of cart paths	77	52	-25
Availability and condition of driving range facilities	37	12	-24
Availability of tee-times when making a reservation by phone	53	30	-24
Directional signage to golf course	77	54	-23
Condition of the rough	57	34	-23
Availability of tee-times when doing a walk-up reservation	41	18	-23
Quality of food and beverage services	64	47	-17
Availability and condition of restrooms	49	32	-16
Availability and quality of golf instructors	48	36	-12

RATING ASPECTS OF MISSION BAY Customers who played the Mission Bay Course most often during the past year gave the highest ratings for the courtesy of course starters, marshals, and maintenance staff (87% excellent or good), the layout of the course (77%), the availability of tee times when making a reservation by phone (77%), the value of the course for the fee (76%), and condition of golf carts (75%). Mission Bay customers provided much lower ratings for the quality of the pro shop (27%), quality of the food and beverage services (35%), condition of cart paths (40%), and condition of the bunkers (42%).

Table 10 on the next page shows the percentage of customers who rated each aspect of Mission Bay as excellent or good by study year, as well as the difference between the two most recent studies. Compared with the 2020 study, there was a downward trend for various aspects of the course in 2022, with nine statistically significant performance declines among Mission Bay customers during this period.

FIGURE 32 RATING ASPECTS OF MISSION BAY

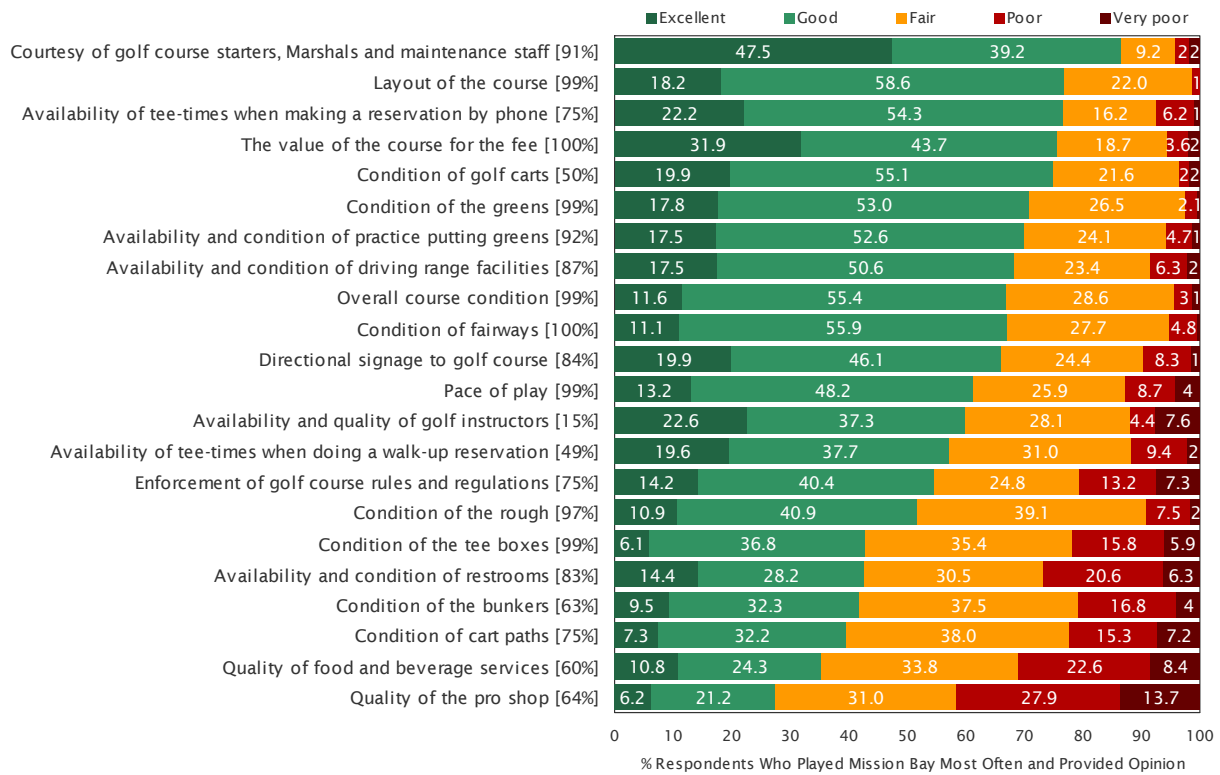


TABLE 10 RATING ASPECTS OF MISSION BAY BY STUDY YEAR

	Study Year							Difference in Excellent + Good '20 to '22
	2022	2020	2019	2017	2015	2013	2011	
Availability of tee-times when making a reservation by phone	76.5	75.4	93.1	93.4	83.6	78.6	88.1	+1.2
Availability and quality of golf instructors	59.8	58.8	73.7	73.3	71.0	48.0	70.8	+1.0
The value of the course for the fee	75.6	74.8	77.4	67.8	76.2	60.4	61.7	+0.8
Availability and condition of practice putting greens	70.0	69.6	87.1	86.9	73.3	60.6	64.0	+0.4
Courtesy of golf course starters, Marshals and maintenance staff	86.7	86.4	91.6	88.9	86.7	76.7	75.4	+0.2
Quality of the pro shop	27.3	29.1	37.6	32.5	22.6	14.7	27.3	-1.8
Quality of food and beverage services	35.1	36.9	35.9	32.1	44.9	27.5	34.8	-1.8
Condition of golf carts	74.9	76.8	81.7	85.9	75.8	79.2	78.5	-1.9
Availability and condition of restrooms	42.6	44.5	38.3	36.9	49.9	46.2	25.2	-1.9
Pace of play	61.3	63.9	73.3	66.6	72.8	63.0	73.3	-2.5
Availability and condition of driving range facilities	68.1	72.5	82.2	81.1	69.5	60.5	68.2	-4.4
Condition of the greens	70.9	75.9	81.2	88.3	76.2	76.7	62.4	-5.0
Overall course condition	67.0	74.1	76.8	75.6	78.9	69.1	60.7	-7.0
Layout of the course	76.8	84.5	82.5	79.5	75.2	70.5	67.5	-7.7†
Availability of tee-times when doing a walk-up reservation	57.2	67.0	84.9	86.8	89.4	78.8	75.5	-9.7†
Condition of the bunkers	41.7	51.9	52.2	41.7	55.1	49.2	51.4	-10.2†
Directional signage to golf course	66.0	77.5	74.4	68.6	65.9	65.0	65.7	-11.6†
Condition of the tee boxes	42.9	54.5	57.3	49.0	59.9	54.2	56.1	-11.6†
Condition of fairways	67.0	79.0	73.9	74.4	77.9	77.7	68.1	-12.0†
Condition of cart paths	39.5	52.7	56.8	54.3	50.1	54.0	54.0	-13.2†
Enforcement of golf course rules and regulations	54.6	67.9	60.3	71.7	73.6	48.9	72.6	-13.4†
Condition of the rough	51.8	71.1	67.6	71.8	80.6	68.2	57.1	-19.4†

† Statistically significant change (p < 0.05) between the 2020 and 2022 studies.

MISSION BAY ASPECT RATINGS BY SUBGROUP Table 11 displays how the ratings of each aspect of Mission Bay Golf Course tested (Question 13) varied by the customer’s overall performance rating for the course (Question 8d). The table divides those who rated Mission Bay Golf Course as excellent or good into one group, and customers who rated it as fair, poor, or very poor into another group. The difference between the two groups appears in the far right column. Those providing positive overall ratings for 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, layout of the course, the value of the course for the fee, condition of fairways, and condition of the rough.

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	80	30	-49
Layout of the course	88	46	-42
The value of the course for the fee	86	46	-40
Condition of fairways	77	38	-39
Condition of the rough	62	25	-37
Condition of cart paths	49	15	-34
Condition of the greens	80	46	-34
Pace of play	70	37	-33
Condition of the tee boxes	51	19	-32
Enforcement of golf course rules and regulations	63	31	-32
Availability and condition of driving range facilities	77	45	-32
Availability and quality of golf instructors	67	37	-31
Availability and condition of practice putting greens	77	47	-30
Availability of tee-times when making a reservation by phone	84	55	-29
Availability and condition of restrooms	50	22	-28
Availability of tee-times when doing a walk-up reservation	66	39	-28
Courtesy of golf course starters, Marshals and maintenance staff	93	69	-24
Condition of the bunkers	49	26	-23
Quality of the pro shop	33	12	-21
Directional signage to golf course	72	51	-21
Condition of golf carts	81	61	-20
Quality of food and beverage services	38	28	-10

COMPARISON OF SAN DIEGO GOLF COURSE RATINGS Table 12 on the next page presents the 22 course, facility, and service aspects tested for each of the three courses, along with the combined percentage of customers who provided an opinion that rated the specific aspect as excellent or good. The course (or courses) with the highest combined percentage per aspect are highlighted green. In cases where two courses had similarly high ratings (within 1%), both are highlighted in green. As shown in the table, Torrey Pines South held the top spot for 14 of the 22 aspects tested.

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	96	93	86	77
Quality of the pro shop	93	92	41	27
Condition of cart paths	91	89	72	40
Overall course condition	91	88	76	67
Condition of the greens	90	85	84	71
Condition of fairways	90	89	65	67
Courtesy of golf course starters, Marshals and maintenance staff	86	89	81	87
Condition of the tee boxes	88	85	53	43
Condition of golf carts	82	87	77	75
Condition of the rough	87	77	53	52
Directional signage to golf course	81	85	73	66
Condition of the bunkers	83	77	44	42
Availability and quality of golf instructors	80	78	46	60
The value of the course for the fee	65	71	78	76
Availability of tee-times when making a reservation by phone	29	13	49	77
Availability and condition of practice putting greens	76	75	69	70
Quality of food and beverage services	71	67	62	35
Availability and condition of restrooms	69	59	46	43
Availability and condition of driving range facilities	46	46	32	68
Enforcement of golf course rules and regulations	66	56	47	55
Pace of play	59	44	55	61
Availability of tee-times when doing a walk-up reservation	34	19	37	57

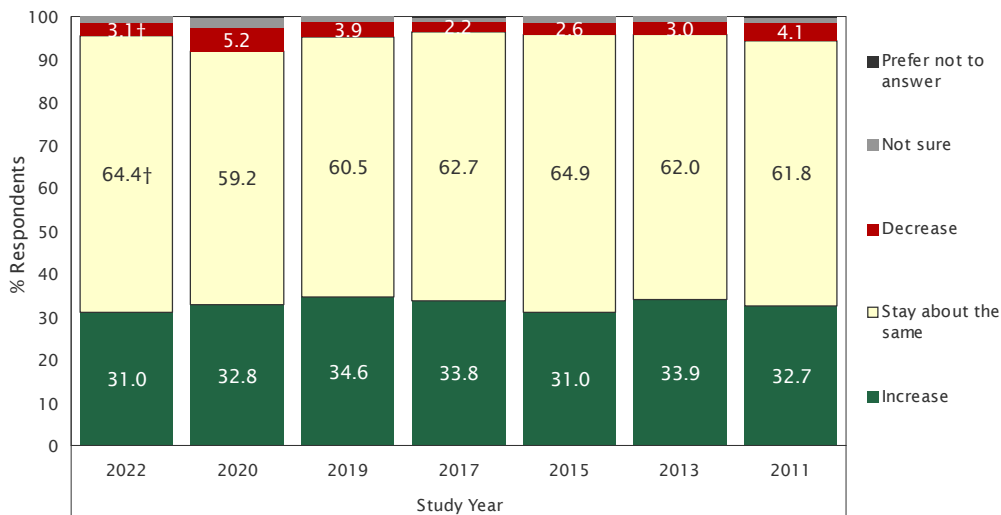
FUTURE EXPECTATIONS & RECOMMENDATIONS

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 to 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 2020 and 2022 studies.

As shown in Figure 33, approximately three-in-ten customers (31%) anticipated that they would increase the frequency of their golf play over the next 12 months. Only 3% felt their frequency of play would decrease, while most (64%) said it would remain about the same. Compared with the last study, there was a statistically significant increase in the percentage of customers who anticipated the same amount of play over the next year (+5%), and a small but statistically significant decrease in the percentage who expected to play less often (-2%).

The next two figures display the percentage of customers who anticipate increasing or decreasing their frequency of play over the next year by various subgroups. A much higher than average percentage of customers with a household income under \$50,000 expected to play less often over the next year. Also of note is the strong relationship between number of rounds played over the last year and the expectation of increased play, with 54% of those who played less than six

rounds in the past 12 months expecting to play more often compared with 18% of those who played at least once a week.

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

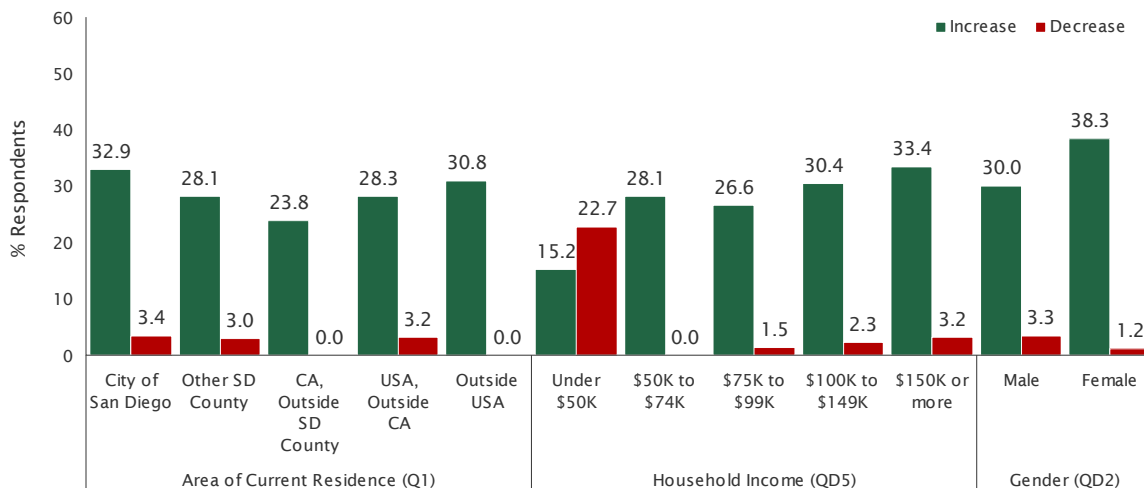
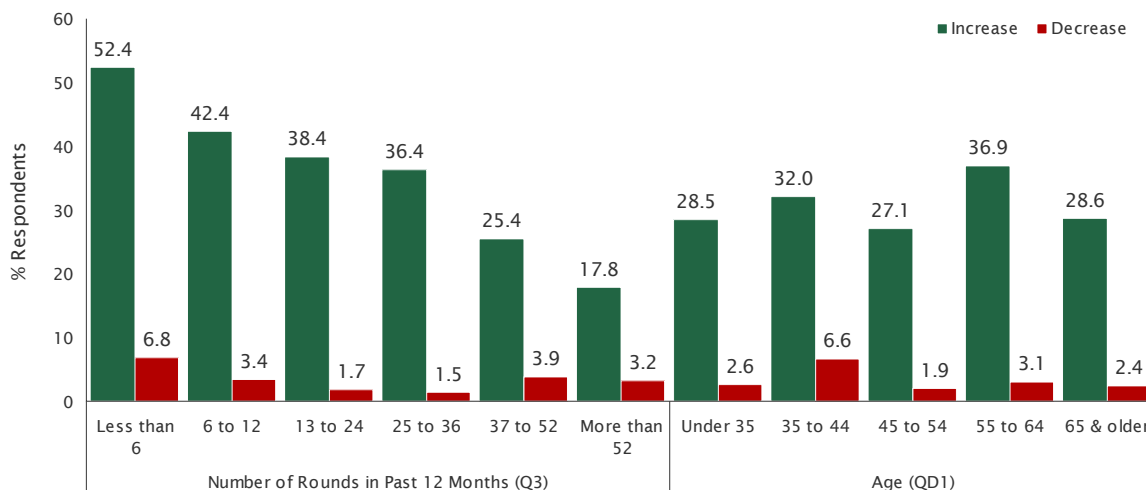


FIGURE 35 FREQUENCY OF GOLF PLAY OVER NEXT 12 MONTHS BY NUMBER OF ALL ROUNDS IN PAST 12 MONTHS & AGE



FREQUENCY OF FUTURE PLAY AT SAN DIEGO COURSES All survey respondents were next asked if, over the next 12 months, they plan to play more, less, or about the same than they currently do at each of the three San Diego courses. Figure 36 on the next page shows that 29% of customers plan to play Torrey Pines Golf Course more often in the coming year, compared with 21% for Balboa Park and 12% 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 (11%). When compared with 2020, there were statistically significant changes in the percentage that expected to play Torrey Pines more often (-5%) and Balboa Park less often (-4%). Changes were driven by the percentage who were unsure how much golf they would play at each course over the next year (see Figure 37 on next page).

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

FIGURE 36 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS

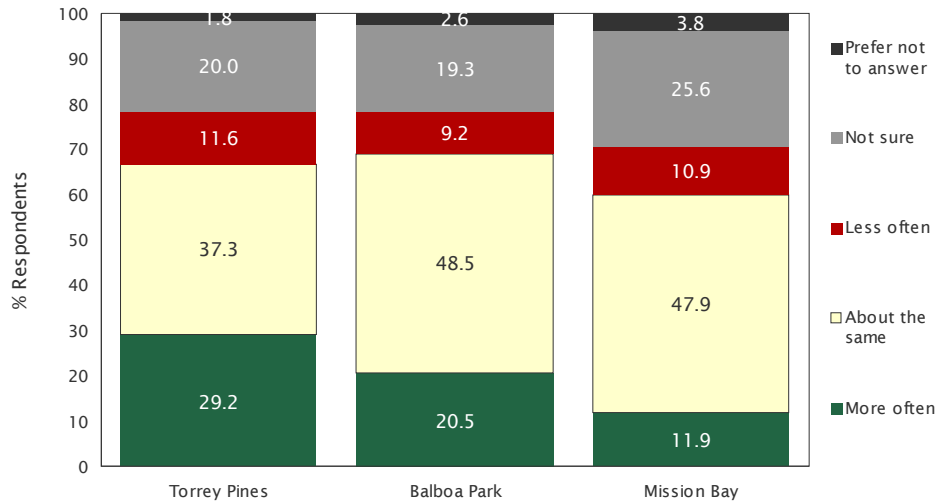
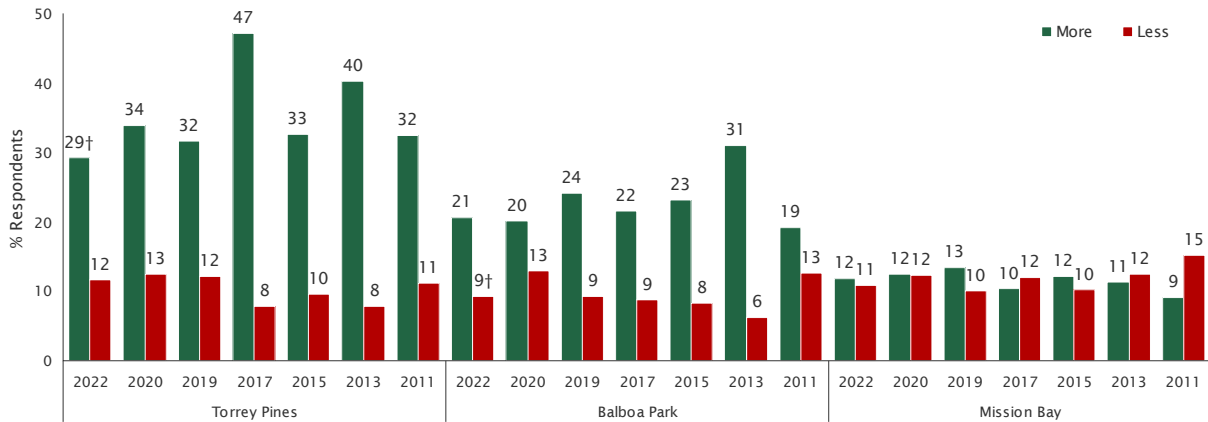


FIGURE 37 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY STUDY YEAR



† Statistically significant change ($p < 0.05$) between the 2020 and 2022 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

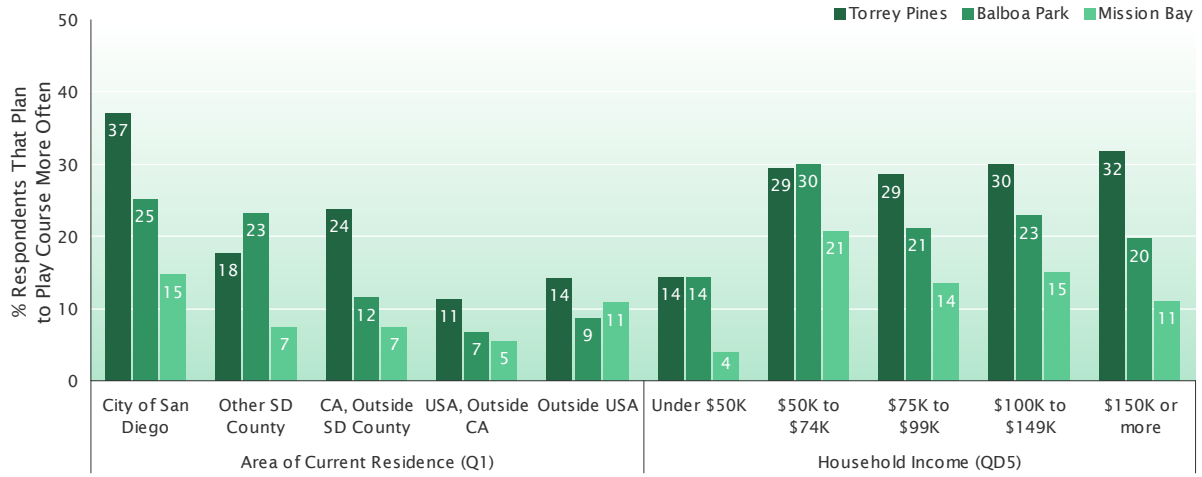


FIGURE 39 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS

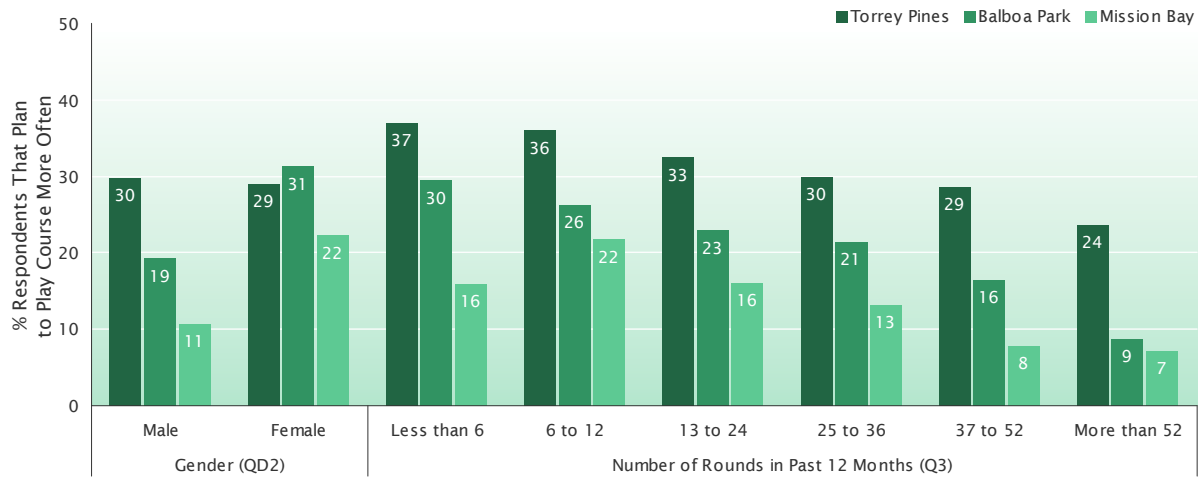
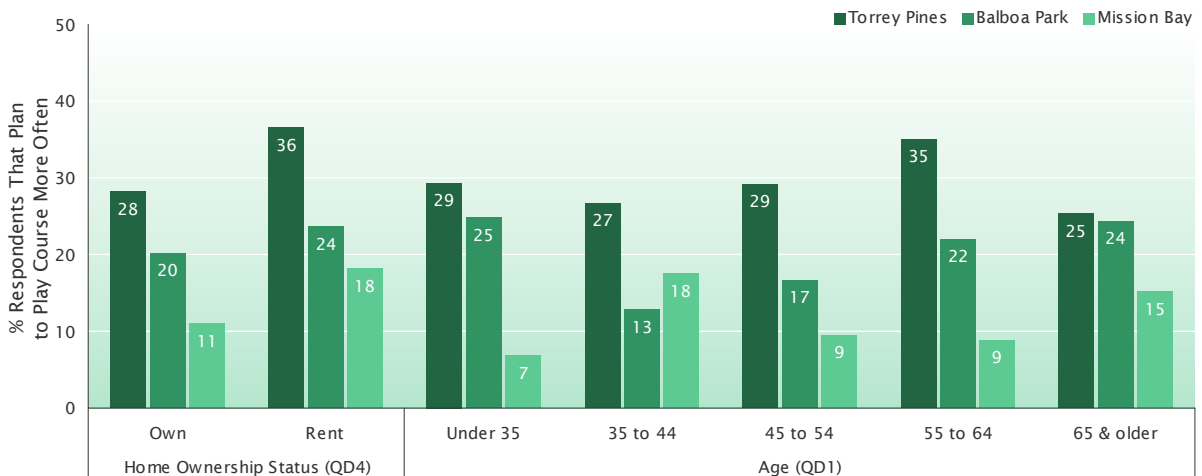


FIGURE 40 FREQUENCY OF PLAY EXPECTED OVER NEXT 12 MONTHS BY HOME OWNERSHIP STATUS & AGE



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

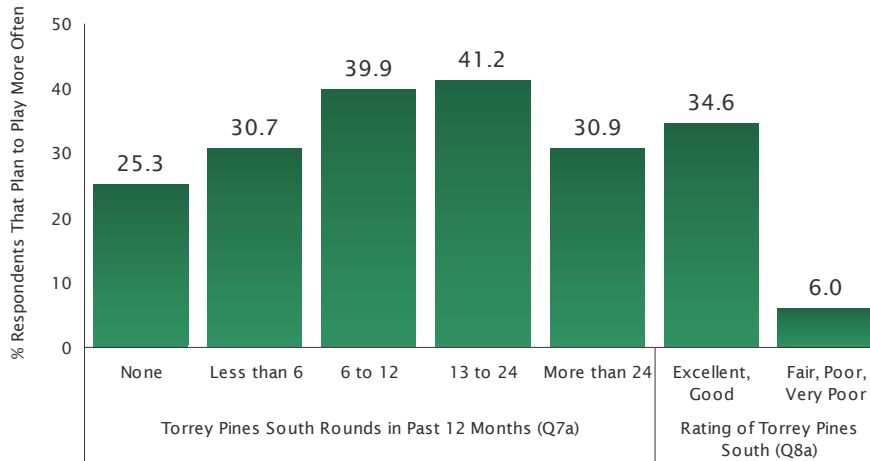


FIGURE 42 PLAN TO PLAY TORREY PINES MORE OFTEN BY TORREY PINES NORTH ROUNDS IN PAST 12 MONTHS & RATING OF TORREY PINES NORTH

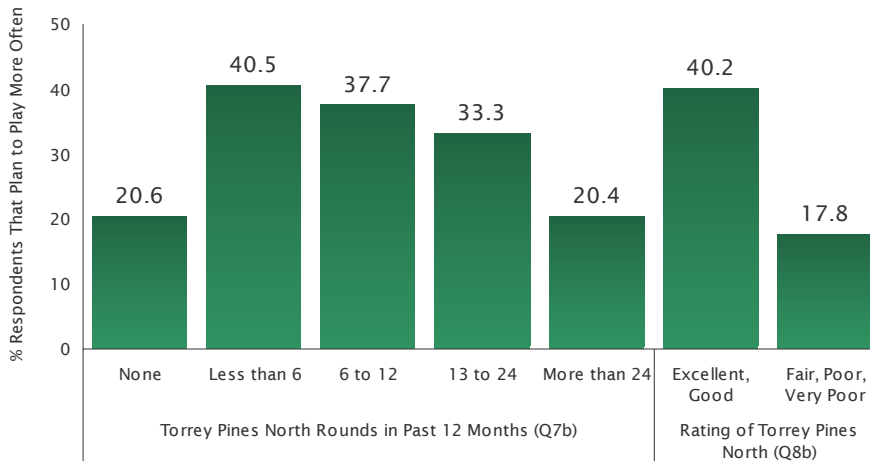


FIGURE 43 PLAN TO PLAY BALBOA PARK MORE OFTEN BY BALBOA PARK ROUNDS IN PAST 12 MONTHS & RATING OF BALBOA PARK

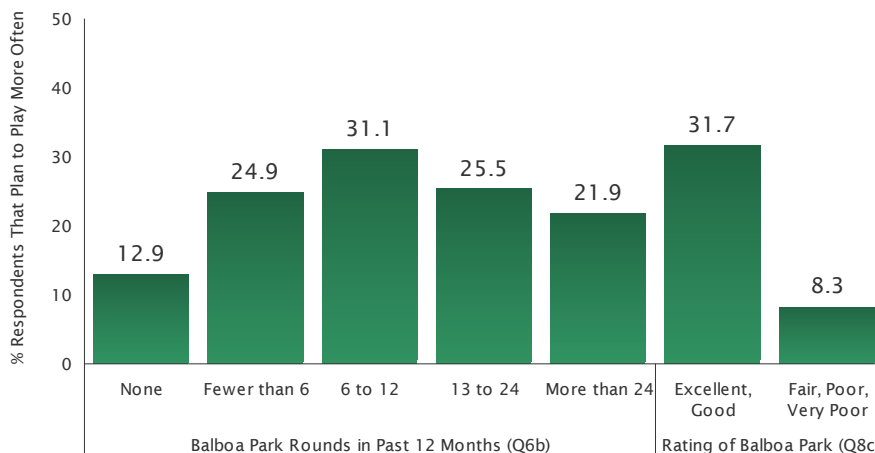
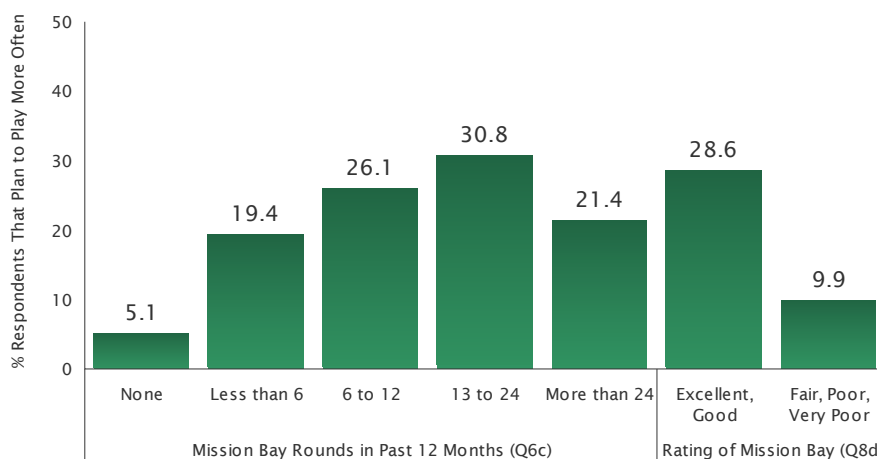
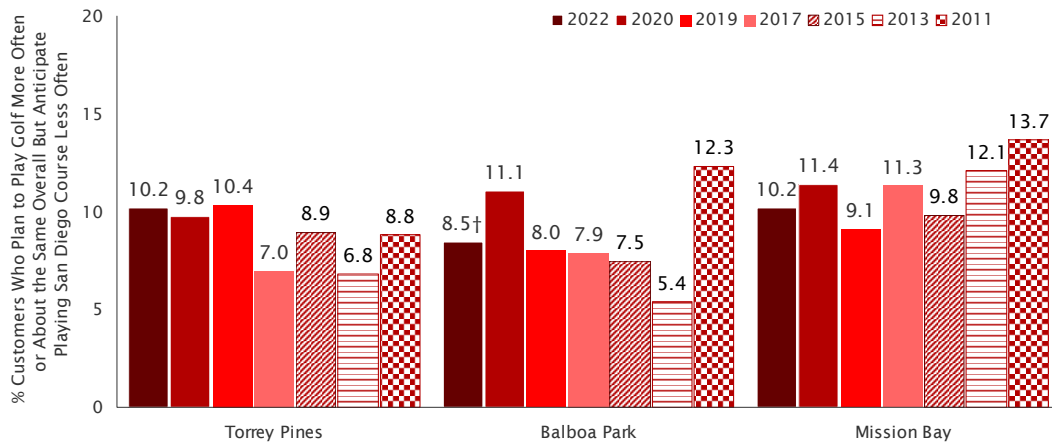


FIGURE 44 PLAN TO PLAY MISSION BAY MORE OFTEN BY MISSION BAY ROUNDS IN PAST 12 MONTHS & RATING OF MISSION BAY



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) yet anticipated playing one or more San Diego courses *less often* in the coming year (Question 15) were asked the reason for their expected reduction in play. These questions were asked in an open-ended manner, allowing customers to mention any reason that came to mind. True North later grouped the verbatim responses into the categories shown on the next pages in figures 46 through 48. It must be noted that the percentages shown in these three figures are among the *minority* of customers who plan to play a city course *less often* in the coming year—Figure 45 displays the percentage of customers from each course that anticipate playing less often and thus received the follow-up question as to why.

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



† Statistically significant change (p < 0.05) between the 2020 and 2022 studies.

The most commonly mentioned reasons for playing Torrey Pines less often in the next year were not living near the course (39%), concerns about cost of play (33%), and difficulties getting a tee time (24%). The most common specific reasons for playing Balboa Park less often included not living near the course (30%), concerns about the condition of the course (22%), and the pace of play (14%). The top specific reasons for choosing to play Mission Bay less often were concerns about the condition of the course (21%), that they don't live near the course (16%), and dislike of the course in general (14%).

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

FIGURE 46 REASONS FOR PLANNING TO PLAY TORREY PINES LESS OFTEN

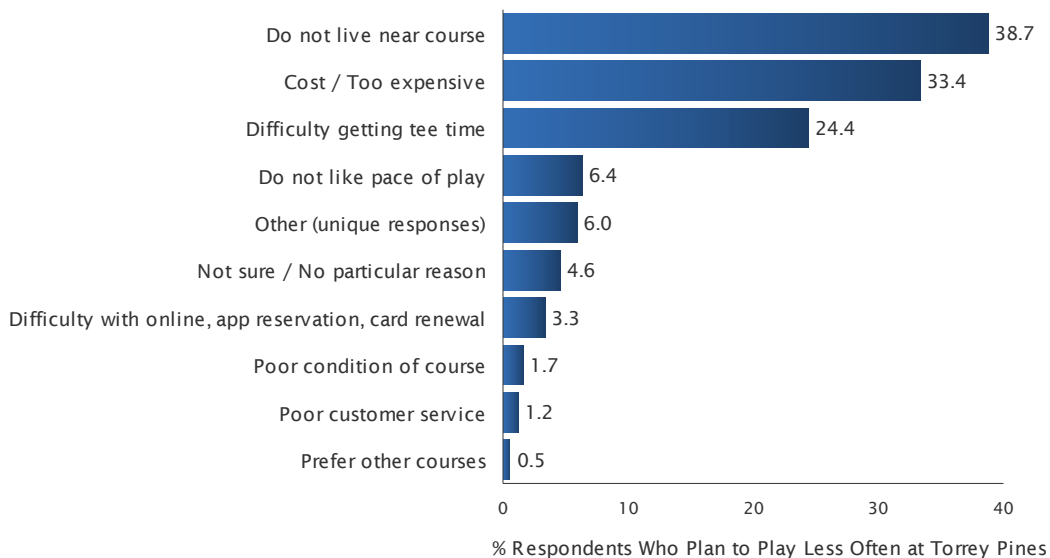


FIGURE 47 REASONS FOR PLANNING TO PLAY BALBOA PARK LESS OFTEN

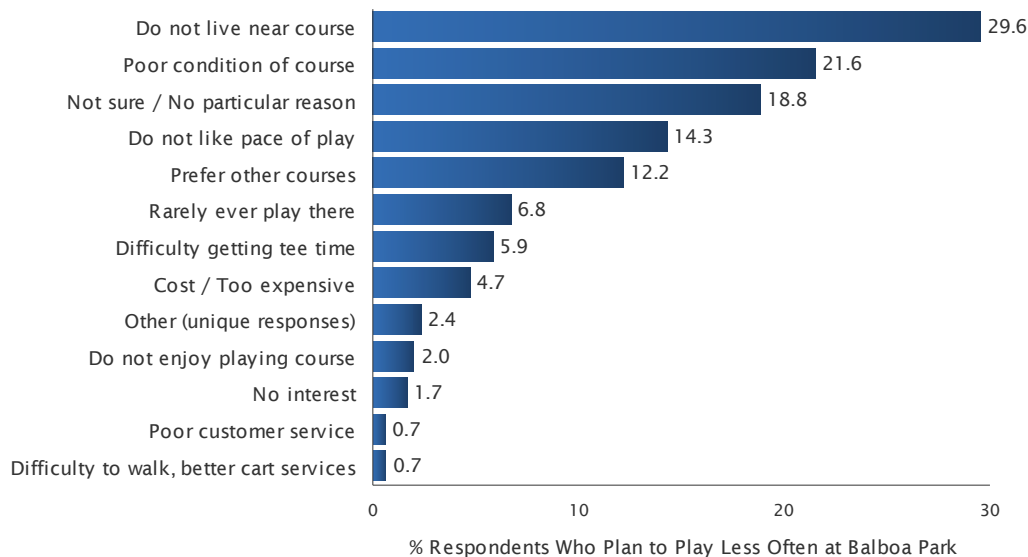
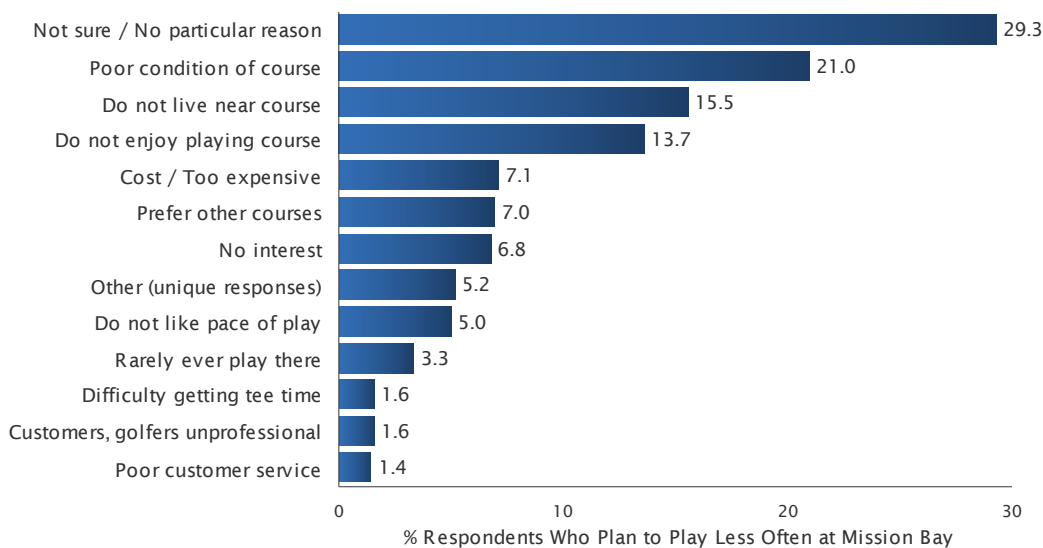


FIGURE 48 REASONS FOR PLANNING TO PLAY MISSION BAY LESS OFTEN



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

Ninety-three percent (93%) of customers who played Torrey Pines were very (74%) or somewhat (18%) likely to recommend the course to a friend or colleague, compared with 88% of customers who played Balboa Park (51% very and 37% somewhat) and 79% who played Mission Bay (39% very and 40% somewhat). There were no statistically significant changes from 2020 (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

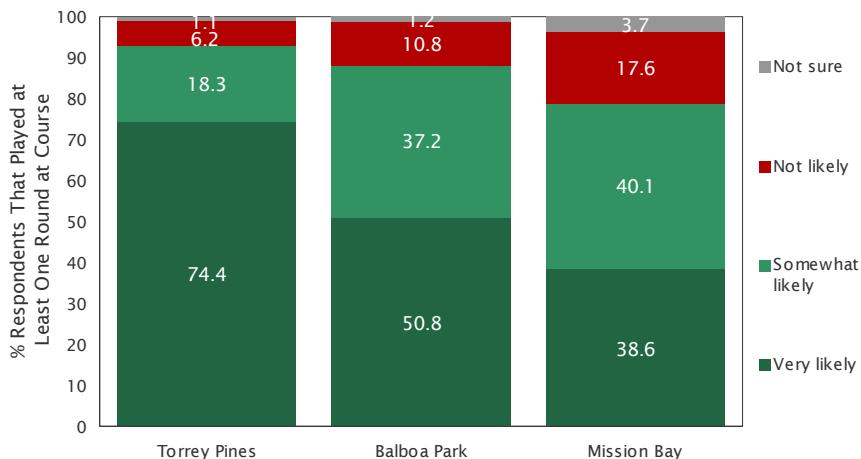
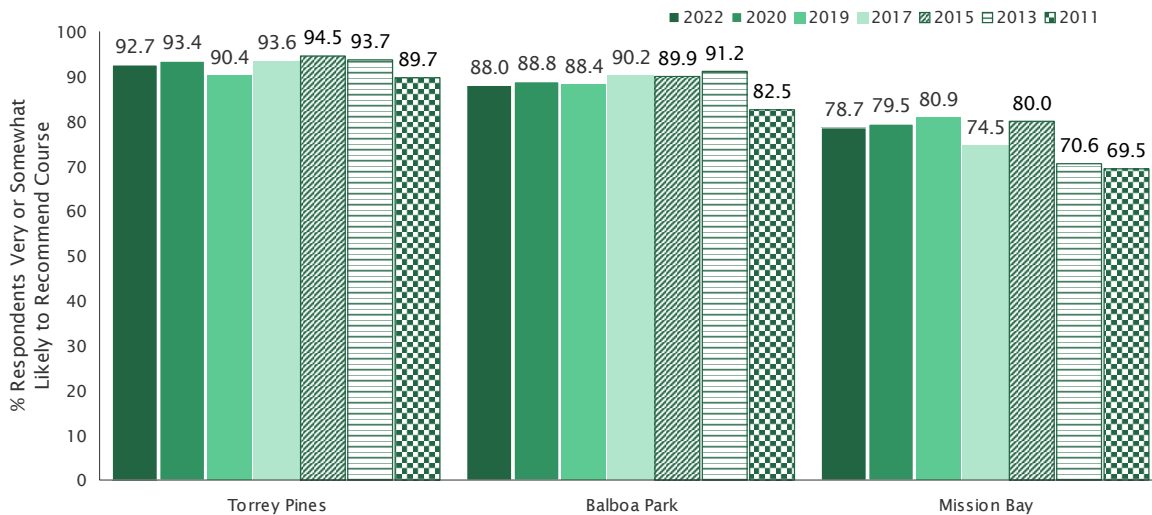


FIGURE 50 VERY LIKELY TO RECOMMEND COURSES BY STUDY YEAR



Figures 51 through 53 display the percentage of customers at each of the three San Diego courses that would be *very likely* to recommend the course by a variety of demographic subgroups. The most obvious finding is that the majority of *all* subgroups indicated they would be very likely to recommend Torrey Pines Golf Course to a friend or colleague, ranging from a low of 50% among California residents who live outside San Diego County to a high of 98% among those who live outside the United States. The percentage of customers who would be very likely to recommend Balboa Park Golf Course varied from a low of 34% among those who live outside the United States to a high of 66% among those with a household income of \$50,000 to \$74,999 and female golfers. Mission Bay Golf Course exhibited the most variation among customers very likely to recommend the course, ranging from a low of 0% among those who reside outside the country to a high of 54% among women.

FIGURE 51 VERY LIKELY TO RECOMMEND COURSES BY AREA OF RESIDENCE & HOUSEHOLD INCOME

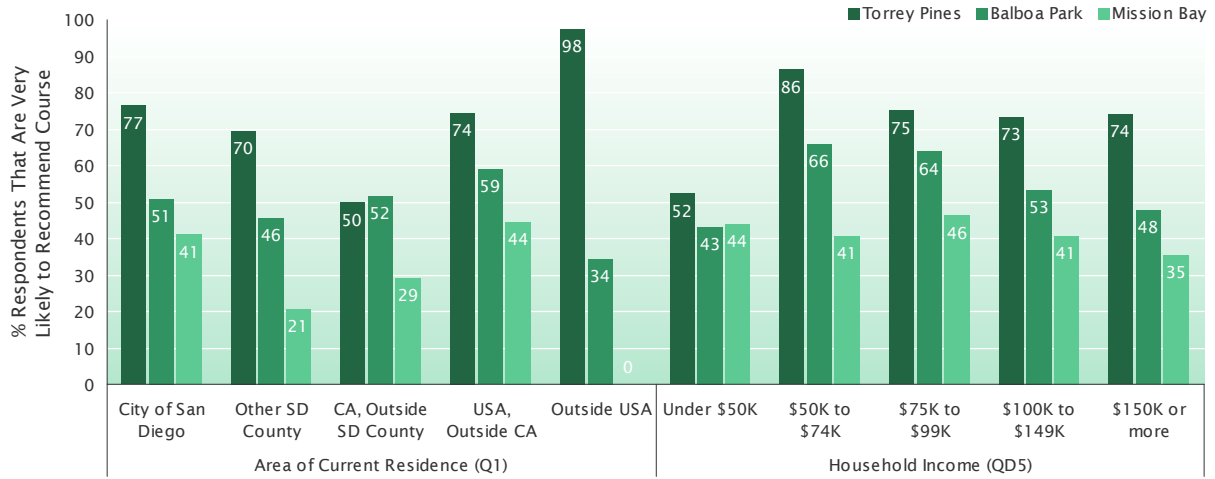


FIGURE 52 VERY LIKELY TO RECOMMEND COURSES BY GENDER & NUMBER OF ALL ROUNDS IN PAST 12 MONTHS

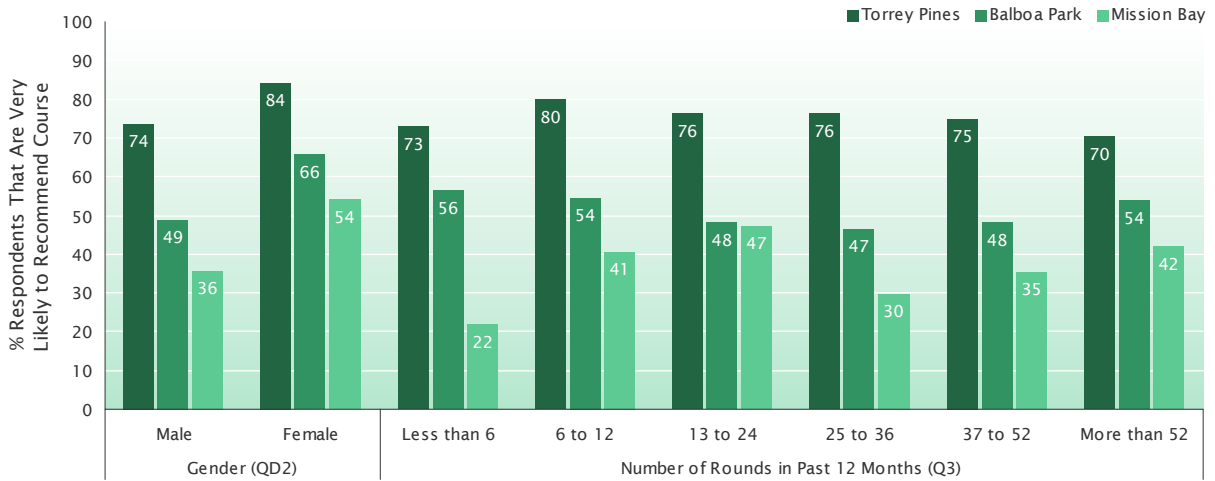
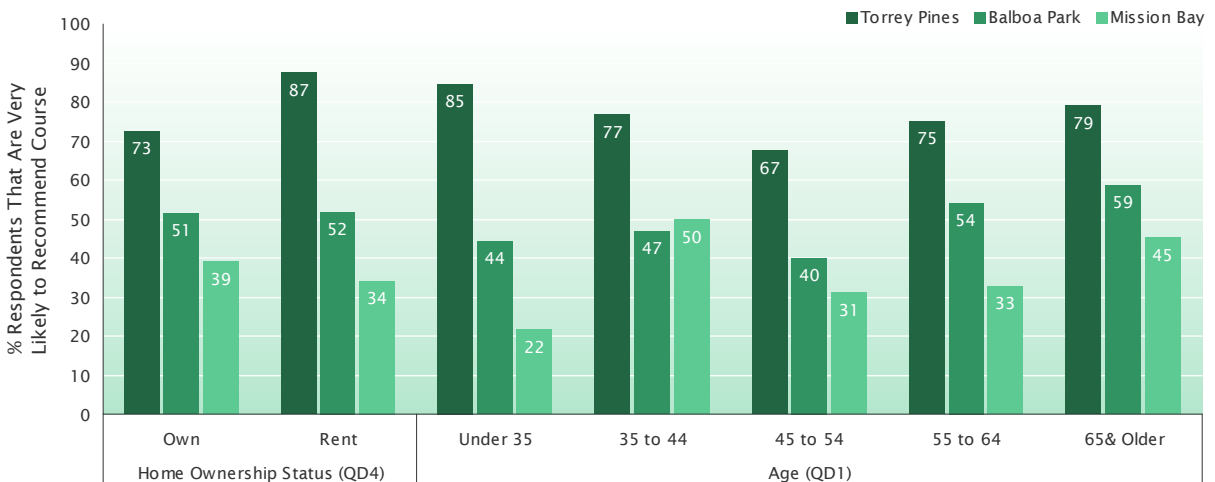


FIGURE 53 VERY LIKELY TO RECOMMEND COURSES BY HOME OWNERSHIP STATUS & AGE



BACKGROUND & DEMOGRAPHICS

Table 13 presents the key demographic and background information collected in the survey of San Diego golf customers. Because of the probability-based sampling methodology used in this study, the results shown in the table are representative of customers who played at least one round of golf at Torrey Pines, Balboa Park, and/or Mission Bay golf courses between June 2021 and June 2022. 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						
	2022	2020	2019	2017	2015	2013	2011
<i>Total Respondents</i>	<i>1,247</i>	<i>1,207</i>	<i>1,228</i>	<i>1,874</i>	<i>1,464</i>	<i>1,444</i>	<i>1,306</i>
Q1 Area of Current Residence							
City of San Diego	64.3	75.0	68.8	73.3	73.3	78.3	75.7
Other SD County	9.7	8.0	6.4	7.9	7.7	5.2	7.5
CA, Outside SD County	5.5	3.4	4.8	3.7	4.6	4.4	4.9
USA, Outside CA	18.7	12.0	16.3	12.6	12.0	9.0	10.3
Outside USA	1.8	1.7	3.7	2.5	2.4	3.1	1.6
QD1 Age							
Under 35	6.0	5.2	9.1	8.1	7.9	14.3	18.1
35 to 44	10.7	13.2	10.6	14.2	14.5	18.1	15.2
45 to 54	16.7	17.0	14.3	16.6	20.2	19.6	20.5
55 to 64	23.1	21.8	27.3	24.2	25.6	26.1	20.2
65+	33.2	32.1	36.3	30.5	31.3	20.9	19.9
Prefer not to answer	10.3	10.6	2.4	6.4	0.5	1.0	6.1
QD2 Gender							
Male	85.0	87.1	84.3	89.2	88.3	90.0	84.5
Female	11.7	9.9	14.0	9.0	10.8	8.5	14.1
Prefer not to answer	3.4	3.0	1.7	1.8	1.0	1.6	1.5
QD3 Golf Club Member							
Yes	44.8	48.1	49.5	47.9	41.2	39.5	36.1
No	52.0	49.4	48.4	50.0	57.1	59.2	62.5
Prefer not to answer	3.2	2.6	2.1	2.1	1.8	1.3	1.4
QD4 Home Ownership Status							
Own	80.9	77.1	81.7	77.3	77.0	74.6	72.9
Rent	12.0	14.3	11.1	15.9	16.0	18.5	20.6
Prefer not to answer	7.1	8.6	7.2	6.8	7.1	6.9	6.4
QD5 Household Income							
Under \$35K	0.6	1.6	0.9	1.6	1.6	1.4	3.0
\$35K to \$49K	0.8	1.6	2.6	2.5	2.1	2.8	4.1
\$50K to \$74K	4.8	5.0	7.1	5.6	6.1	7.9	9.7
\$75K to \$99K	9.7	7.9	7.7	9.5	9.8	10.7	12.1
\$100K to \$149K	16.5	17.2	16.9	16.9	18.0	22.0	18.6
\$150K or more	42.9	42.7	38.6	40.1	38.8	35.9	31.6
Not sure / Prefer not to answer	24.9	24.0	26.3	23.8	23.5	19.3	20.9
City of San Diego Resident							
Resident	64.3	75.0	68.8	73.3	73.3	78.3	75.7
Non-resident	35.7	25.0	31.2	26.7	26.7	21.7	24.3



M E T H O D O L O G Y

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

ONE-ON-ONE INTERVIEWS During the initial design stage of the study, which occurred prior to the 2011 study, Dr. McLarney of True North conducted interviews with individuals familiar with golf operations at Torrey Pines, Balboa, and/or Mission Bay courses through their association with local golf clubs and frequency of play. The interviews were informal, open-ended discussions designed to identify various factors that customers value when assessing the overall quality of their golfing experiences. This information was helpful in developing the 2011 questionnaire, which formed the basis for the 2013, 2015, 2017, 2019, 2020, and 2022 tracking studies.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney worked closely with the City of San Diego to develop a questionnaire that covered the topics of interest and avoided the many possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias, the items were asked in a random order for each respondent. The 2022 questionnaire was identical to the 2020 questionnaire, which differed very little from the original survey developed for the 2011 study to allow for direct comparisons in customer responses over time.

Many questions asked in this study were presented only to a subset of respondents. For example, only those who had played at one or more San Diego courses (Question 6) were asked about their perceptions of and experiences with each course they had played (Question 8). The questionnaire included with this report (see *Questionnaire & Toplines* on page 53) identifies skip patterns used during the interview to ensure each respondent received the appropriate questions.

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

SAMPLE The sample for this study was drawn from the City's golf reservation database, which contains records representing each round of golf played at Torrey Pines North, Torrey Pines South, Balboa Park, and/or Mission Bay Golf Course. All customers who played at least one round of golf at one of the city courses between June 2021 and June 2022 comprised the universe for the study. The database was organized by customer and included the number of rounds played at each course for each customer. Finally, the universe of customers was stratified by the number of rounds a customer had played and their most frequently-played course.

RECRUITMENT AND DATA COLLECTION True North used multiple methods to recruit and encourage participation in the survey. Customer records in the database that contained email contact information were sent email invitations to participate in the study. The invitations included a hyperlink to the survey website, and each link contained a unique passcode. The passcode ensured that only customers formally invited to participate in the survey could participate, and that they could only do so once. In coordination with this effort, phone interviews were conducted on weekday evenings and weekends, with the average interview lasting 14 minutes. The data collection period lasted from August 31 and September 7, 2022, resulting in a total of 1,247 completed surveys.

STATISTICAL MARGIN OF ERROR By using a probability-based sampling design and monitoring sample characteristics as data collection proceeded, True North ensured that the final sample was representative of the universe of San Diego golf customers who played at least one round between June 2021 and June 2022. The results of the survey can thus be used to estimate the opinions of *all* City of San Diego golf course customers who played during that time period. Because not all customers participated in the survey, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in this survey of 1,247 respondents for a particular question and what would have been found if all customers had participated.

FIGURE 54 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING

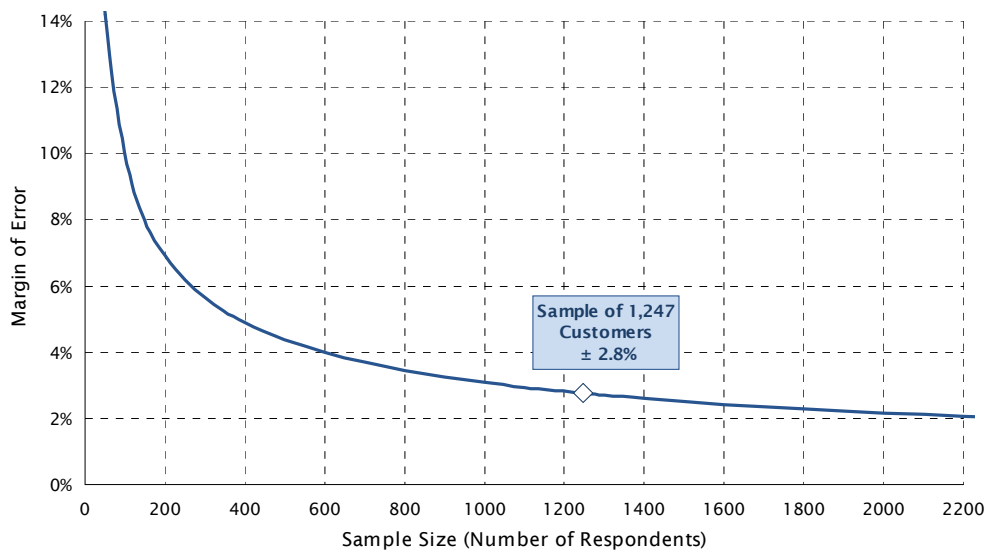


Figure 54 provides a plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is $\pm 2.8\%$ for questions answered by all 1,247 respondents.

Within this report, figures and tables show how responses to certain questions varied by sub-groups such as area of current residence, household income, and age. Figure 54 above is useful for understanding how the maximum margin of error for a percentage estimate will grow as the

number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, categorizing open-ended responses, and preparing frequency analyses and cross-tabulations. Where appropriate, tests of statistical significance were conducted to evaluate changes in responses between the 2020 and 2022 studies. The final data were weighted to match the distribution of customers across the courses, according to the City’s reservation database.

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

QUESTIONNAIRE & TOPLINES



City of San Diego
Golf Customer Survey
Final Toplines (n=1,247)
September 2022

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.

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	64%
2	Other San Diego County city	10%
3	California, outside San Diego County	5%
4	USA, outside California	19%
5	Outside USA	2%

Ask Q2 if Q1 = 2.

Q2 What is the name of the City you live in or live closest to?

City name recorded	Data on file
--------------------	--------------

Section 3: Frequency & Courses Played

Next, I'd like to ask you a few general questions about your golfing experiences.

Q3 In the past 12 months, approximately how many rounds of golf did you play? Number of rounds recorded and later grouped into categories shown below.

Less than 6	6%
6 to 12	12%
13 to 24	15%
25 to 36	16%
37 to 52	23%
More than 52	26%
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	16%
	Balboa Park Golf Course	12%
	Mission Bay Golf Course	10%
	Not sure / Play many courses	5%
	Admiral Baker Golf Course	4%
	Coronado Municipal Golf Course	3%
	Bonita Golf Club	2%
	Encinitas Ranch Golf Course	2%
	Mission Trails Golf Course	2%
	Oaks North Golf Club	2%
	Riverwalk Golf Club	2%
	Arrowood Golf Course	1%
	Fairbanks Ranch Country Club	1%
	Mt. Woodson Country Club	1%
	Rancho Bernardo Inn	1%
	Steele Canyon Golf Club	1%
	Tecolote Canyon Golf Course	1%
	The Crossings at Carlsbad Golf Course	1%
	Cottonwood Golf Club	1%
	Miramar Memorial Golf Course	1%
	Sea 'N Air Golf Course	1%
	Other course (unique mentions)	26%
Q5	Is there a particular reason why you play this course most often? Verbatim responses recorded and later grouped into the categories shown below.	
	1 Location/Close to home or work	26%
	2 Affordable fees/Good value	25%
	3 Course quality	18%
	4 Tee-time availability	13%
	6 Member	9%
	7 Friend, family member	1%
	8 Location, availability, cost	1%
	5 Other reason	4%
	98 Not sure	1%
	99 Prefer not to answer	1%

Q6	Thinking now of courses in the City of San Diego, in the past 12 months, approximately how many rounds of golf did you play at: _____?	
<i>Randomize</i>		
A	Torrey (Torr-ee) Pines Golf Course	
	None	28%
	Fewer than 6	49%
	6 to 12	11%
	13 to 24	6%
	More than 24	6%
	Prefer not to answer	1%
B	Balboa (Bal-BOW-uh) Park Golf Course	
	None	41%
	Fewer than 6	34%
	6 to 12	12%
	13 to 24	5%
	More than 24	7%
	Prefer not to answer	1%
C	Mission Bay Golf Course	
	None	59%
	Fewer than 6	25%
	6 to 12	6%
	13 to 24	3%
	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</i>		
A	South Course	
	None	40%
	Fewer than 6	49%
	6 to 12	6%
	13 to 24	2%
	More than 24	2%
	Prefer not to answer	1%

B	North Course	
	None	50%
	Fewer than 6	34%
	6 to 12	7%
	13 to 24	5%
	More than 24	2%
	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	55%	36%	7%	1%	0%	0%	0%
B	Torrey Pines North Golf Course	51%	41%	6%	2%	0%	0%	0%
C	Balboa Park Golf Course	22%	52%	22%	2%	1%	0%	1%
D	Mission Bay Golf Course	17%	46%	29%	5%	2%	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	28%
Enforce speed of play	15%
Not sure / Cannot think of anything	11%
Reduce fees, costs in general	9%
Increase availability of tee times	9%
Improve access to tee time info	7%
Maintain sand traps, bunkers	4%
Improve green conditions	3%
Maintain roughs	3%
Improve, upgrade driving range	3%
Improve reservation system	2%
Restore holes on putting green	2%
Reduce green fees	1%

Reduce cart rental fees	1%
Reduce visitor prices	1%
Maintain tee boxes	1%
Improve fairways	1%
Improve customer service	1%
Improve ball washers	1%
Improve carts in general	1%
Add, improve snack / beverage carts	1%
Offer earlier tee times	1%
Add, expand facilities	1%
Add signage, markers	1%
Improve check-in process	1%
Create additional set of tees	1%
Improve course capacity, too crowded	1%
Reduce cost of food, beverages	1%
Shorter tee option	1%
Improve, provide more restrooms	1%
Ability to get a cart and green fees at the same time	1%
Add benches with shade on tee boxes	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 23%
	Enforce speed of play 20%
	Not sure / Cannot think of anything 13%
	Increase availability of tee times 8%
	Improve access to tee time info 8%
	Reduce fees, costs in general 5%
	Improve green conditions 5%
	Improve reservation system 4%
	Reverse the nines 2%
	Reduce cart rental fees 2%
	Maintain roughs 2%
	Improve intervals between tee times 2%
	Improve fairways 2%
	Add, expand facilities 2%

Reduce green fees	1%
Put holes on putting greens	1%
Maintain tee boxes	1%
Maintain sand traps, bunkers	1%
Reduce cost of food, beverages	1%
Improve, upgrade driving range	1%
Improve, provide more restrooms	1%
Improve practice area	1%
Improve customer service	1%
Improve course quality	1%
Improve ball washers	1%
Divots, ball mark repairs	1%
Create additional set of tees	1%
Add, improve snack / beverage carts	1%
Add trees	1%
Ability to get a cart and green fees at the same time	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 20%
	Not sure / Cannot think of anything 19%
	Enforce speed of play 11%
	Improve course quality 10%
	Improve fairways 8%
	Maintain tee boxes 5%
	Increase availability of tee times 4%
	Improve green conditions 4%
	Improve clubhouse 4%
	Fix, redesign Hole 4 4%
	Improve customer service 3%
	Add, improve snack / beverage carts 3%
	Reduce fees, costs in general 2%
	Reopen, renovate restaurant 2%
	Improve, upgrade driving range 2%
	Maintain sand traps, bunkers 2%
	Improve, provide more restrooms 2%

Improve access to tee time info	1%
Maintain roughs	1%
Improve facility maintenance	1%
Improve ball washers	1%
Improve reservation system	1%
Add, expand facilities	1%
Add signage, markers	1%
Improve course capacity, too crowded	1%
Improve pro shop	1%
Divots, ball mark repairs	1%
Improve time between tee times	1%
Improve, expand parking, allow carts	1%
Better lighting, extended hours	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	26%
Not sure / Cannot think of anything	21%
Complete construction	9%
Improve course quality	7%
Maintain tee boxes	5%
Enforce speed of play	5%
Improve fairways	4%
Improve clubhouse	4%
Better lighting, extended hours	4%
Reduce fees, costs in general	3%
Improve green conditions	2%
Improve facility maintenance	2%
Reopen, renovate restaurant	2%
Improve customer service	2%
Reduce green fees	1%
Improve, upgrade driving range	1%
Improve reservation system	1%
Add, improve snack / beverage carts	1%
Offer earlier tee times	1%
Improve restaurant, food	1%

Improve course capacity, too crowded	1%
Remove foot / soccer golf	1%
Improve pro shop	1%
Improve intervals between tee times	1%
Improve, provide more restrooms	1%
Course, fairways too narrow, needs fences	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 course>. 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 (363 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	50%	35%	11%	2%	1%	1%	0%
B	Directional signage to golf course	32%	43%	17%	1%	0%	7%	1%
C	Availability of tee-times when doing a walk-up reservation	7%	9%	9%	7%	16%	49%	4%
D	Availability of tee-times when making a reservation by phone	10%	11%	14%	14%	22%	26%	2%
E	The value of the course for the fee	36%	29%	21%	7%	6%	0%	0%
F	Overall course condition	47%	43%	8%	1%	1%	0%	0%
G	Condition of the tee boxes	43%	45%	9%	2%	0%	0%	0%
H	Condition of fairways	49%	39%	9%	1%	0%	1%	0%
I	Condition of the rough	36%	51%	10%	2%	1%	1%	0%
J	Condition of the bunkers	36%	46%	12%	4%	1%	1%	0%
K	Condition of the greens	54%	36%	7%	1%	1%	0%	0%
L	Layout of the course	72%	23%	4%	0%	1%	0%	0%
M	Pace of play	24%	34%	22%	10%	9%	0%	0%
N	Quality of the pro shop	52%	38%	6%	1%	1%	2%	0%
O	Quality of food and beverage services	26%	34%	17%	5%	2%	15%	1%
P	Availability and quality of golf instructors	7%	6%	2%	0%	1%	79%	5%
Q	Condition of cart paths	34%	46%	6%	2%	0%	11%	1%
R	Condition of golf carts	35%	30%	9%	4%	1%	19%	2%
S	Availability and condition of restrooms	23%	41%	20%	7%	2%	6%	1%
T	Enforcement of golf course rules and regulations	24%	29%	18%	4%	6%	18%	1%

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U	Availability and condition of driving range facilities	17%	23%	22%	13%	11%	14%	0%
V	Availability and condition of practice putting greens	34%	39%	16%	5%	2%	4%	0%
Torrey Pines North Golf Course (294 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	48%	39%	9%	2%	1%	2%	0%
B	Directional signage to golf course	30%	44%	12%	1%	0%	13%	0%
C	Availability of tee-times when doing a walk-up reservation	4%	6%	11%	15%	17%	45%	2%
D	Availability of tee-times when making a reservation by phone	2%	7%	11%	19%	31%	29%	1%
E	The value of the course for the fee	40%	30%	20%	6%	3%	1%	0%
F	Overall course condition	34%	53%	10%	1%	0%	1%	0%
G	Condition of the tee boxes	33%	52%	11%	3%	0%	0%	0%
H	Condition of fairways	37%	52%	9%	2%	0%	0%	0%
I	Condition of the rough	22%	54%	20%	2%	0%	0%	0%
J	Condition of the bunkers	26%	51%	18%	4%	0%	1%	0%
K	Condition of the greens	35%	48%	10%	4%	1%	1%	1%
L	Layout of the course	60%	32%	6%	0%	0%	1%	0%
M	Pace of play	10%	35%	35%	10%	11%	0%	0%
N	Quality of the pro shop	42%	46%	7%	0%	0%	5%	0%
O	Quality of food and beverage services	18%	32%	20%	4%	1%	25%	1%
P	Availability and quality of golf instructors	4%	9%	3%	0%	0%	80%	4%
Q	Condition of cart paths	33%	43%	10%	0%	0%	14%	0%
R	Condition of golf carts	29%	31%	8%	1%	0%	30%	1%
S	Availability and condition of restrooms	13%	43%	26%	8%	4%	6%	0%
T	Enforcement of golf course rules and regulations	12%	32%	21%	7%	6%	21%	0%
U	Availability and condition of driving range facilities	9%	28%	27%	10%	6%	19%	0%
V	Availability and condition of practice putting greens	29%	46%	16%	7%	1%	2%	0%
Balboa Park Golf Course (305 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	35%	43%	13%	3%	2%	3%	0%
B	Directional signage to golf course	16%	46%	19%	3%	1%	14%	1%
C	Availability of tee-times when doing a walk-up reservation	4%	13%	14%	9%	5%	51%	4%
D	Availability of tee-times when making a reservation by phone	7%	26%	18%	9%	7%	31%	2%
E	The value of the course for the fee	38%	39%	18%	3%	0%	0%	0%
F	Overall course condition	12%	64%	22%	2%	0%	0%	0%

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G	Condition of the tee boxes	9%	44%	34%	9%	3%	0%	0%
H	Condition of fairways	13%	52%	28%	7%	0%	0%	0%
I	Condition of the rough	8%	45%	39%	6%	1%	0%	1%
J	Condition of the bunkers	7%	35%	37%	13%	4%	3%	1%
K	Condition of the greens	25%	58%	13%	2%	0%	0%	0%
L	Layout of the course	33%	52%	12%	2%	0%	1%	0%
M	Pace of play	10%	44%	27%	10%	7%	1%	1%
N	Quality of the pro shop	7%	32%	38%	11%	5%	6%	1%
O	Quality of food and beverage services	13%	34%	21%	5%	3%	24%	1%
P	Availability and quality of golf instructors	3%	4%	4%	3%	1%	82%	4%
Q	Condition of cart paths	15%	47%	19%	4%	0%	14%	1%
R	Condition of golf carts	17%	39%	14%	2%	1%	25%	2%
S	Availability and condition of restrooms	9%	34%	32%	13%	5%	5%	1%
T	Enforcement of golf course rules and regulations	8%	30%	28%	10%	5%	18%	2%
U	Availability and condition of driving range facilities	4%	23%	30%	18%	8%	18%	1%
V	Availability and condition of practice putting greens	14%	52%	23%	5%	1%	4%	0%
Mission Bay Golf Course (267 respondents)								
A	Courtesy of golf course starters, Marshals and maintenance staff	43%	36%	8%	2%	2%	7%	1%
B	Directional signage to golf course	17%	39%	21%	7%	1%	15%	0%
C	Availability of tee-times when doing a walk-up reservation	9%	18%	15%	5%	1%	51%	1%
D	Availability of tee-times when making a reservation by phone	17%	41%	12%	5%	1%	23%	2%
E	The value of the course for the fee	32%	44%	19%	4%	2%	0%	0%
F	Overall course condition	12%	55%	28%	3%	1%	1%	0%
G	Condition of the tee boxes	6%	36%	35%	16%	6%	1%	0%
H	Condition of fairways	11%	56%	28%	5%	0%	0%	0%
I	Condition of the rough	11%	40%	38%	7%	2%	3%	0%
J	Condition of the bunkers	6%	20%	24%	11%	3%	34%	2%
K	Condition of the greens	18%	53%	26%	2%	0%	1%	0%
L	Layout of the course	18%	58%	22%	1%	0%	1%	0%
M	Pace of play	13%	48%	26%	9%	4%	0%	0%
N	Quality of the pro shop	4%	14%	20%	18%	9%	33%	3%
O	Quality of food and beverage services	6%	15%	20%	14%	5%	37%	3%
P	Availability and quality of golf instructors	3%	5%	4%	1%	1%	81%	4%
Q	Condition of cart paths	6%	24%	29%	11%	5%	24%	1%

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R	Condition of golf carts	10%	28%	11%	1%	1%	48%	2%
S	Availability and condition of restrooms	12%	23%	25%	17%	5%	15%	2%
T	Enforcement of golf course rules and regulations	11%	30%	19%	10%	6%	24%	0%
U	Availability and condition of driving range facilities	15%	44%	20%	5%	2%	13%	1%
V	Availability and condition of practice putting greens	16%	48%	22%	4%	1%	8%	0%

Section 6: Future Expectations & Recommendations

Q14	Including all courses that you may play, in the next 12 months do you anticipate that the frequency with which you play golf will increase, decrease or stay about the same as now?							
	1	Increase						31%
	2	Decrease						3%
	3	Stay about the same						64%
	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		29%	12%	37%	20%	2%	
B	Balboa Park Golf Course		21%	9%	48%	19%	3%	
C	Mission Bay Golf Course		12%	11%	48%	26%	4%	

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

Q16	Is there a particular reason why you expect to play golf less frequently at Torrey Pines Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.							
	Do not live near course							39%
	Cost / Too expensive							33%
	Difficulty getting tee time							24%
	Do not like pace of play							6%
	Not sure / No particular reason							5%
	Difficulty with online, app reservation, card renewal							3%
	Poor condition of course							2%
	Poor customer service							1%
	Prefer other courses							1%

Ask Q17 if Q14 = (1,3) and Q15b = (2).

Q17	Is there a particular reason why you expect to play golf less frequently at Balboa Park Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.	
	Do not live near course	30%
	Poor condition of course	22%
	Not sure / No particular reason	19%
	Do not like pace of play	14%
	Prefer other courses	12%
	Rarely ever play there	7%
	Difficulty getting tee time	6%
	Cost / Too expensive	5%
	Do not enjoy playing course	2%
	No interest	2%
	Other (unique responses)	2%
	Poor customer service	1%
	Difficulty to walk, better cart services	1%
<i>Ask Q18 if Q14 = (1,3) and Q15c = (2).</i>		
Q18	Is there a particular reason why you expect to play golf less frequently at Mission Bay Golf Course in the future? Verbatim responses recorded and later grouped into categories shown below.	
	Not sure / No particular reason	29%
	Poor condition of course	21%
	Do not live near course	16%
	Do not enjoy playing course	14%
	Cost / Too expensive	7%
	No interest	7%
	Prefer other courses	7%
	Do not like pace of play	5%
	Other (unique responses)	5%
	Rarely ever play there	3%
	Difficulty getting tee time	2%
	Customers, golfers unprofessional	2%
	Poor customer service	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	74%	18%	6%	1%	0%
B	Balboa Park Golf Course	51%	37%	11%	1%	0%
C	Mission Bay Golf Course & Practice Center	39%	40%	18%	3%	1%

Section 8: Background & Demographics

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

D1		In what year were you born? Year coded into age categories shown below.	
	Under 35		6%
	35 to 44		11%
	45 to 54		17%
	55 to 64		23%
	65 or older		33%
	Prefer not to answer		10%
D2		Gender	
1	Male		85%
2	Female		12%
99	Prefer not to answer		3%
D3		Are you a member of a golfing club?	
1	Yes		45%
2	No		52%
99	Prefer not to answer		3%
D4		Do you own or rent your home?	
1	Own		81%
2	Rent		12%
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	1%
	3	\$50,000 to \$74,999	5%
	4	\$75,000 to \$99,999	10%
	5	\$100,000 to \$149,999	16%
	6	\$150,000 or more	43%
	98	Not sure / Prefer not to answer	25%

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