



**D E C I S I O N**  
R E S E A R C H I N C

**A Report to  
City of Regina  
regarding  
City Golf Courses  
Customer Satisfaction**

**July, 1999**

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## **EXECUTIVE SUMMARY**

- ★ Regina golfers exhibit a high level of satisfaction with the golfing experience offered by the City of Regina's six golf courses.
- ★ Golfers rate key aspects of the golfing experience positively. The only areas attracting any significant negative assessment were obtaining tee times (22% negative) and marshalling (30% negative). Attitudes towards marshalling have changed little since 1991.
- ★ Golfers are very satisfied with the maintenance at City golf courses. There is some minor concern with the condition of greens, particularly at the Murray.
- ★ There does appear to have been some deterioration in the assessment of service offered at the Lakeview par-three course.
- ★ Regina golfers find the cost of golfing on City courses to be inexpensive relative to other public courses in the area. There were 44 percent who consider City rates relatively "inexpensive" and only 19 percent who consider City rates to be "expensive".
- ★ While a majority of golfers as a general principle oppose an additional fee targeted to an improvement for a particular course, it is likely the City would garner support for a specific proposal with appropriate consultation and presentation.
- ★ Regina golfers are predominantly older, upper middle class males. The average age is 44.5 years and average annual household income is in the order of \$65,700. Males make up 4 of 5 green fee players and among the passholders, the split is 60/40 male.
- ★ The primary motivation for selecting City of Regina courses is convenience but price and course conditions also play a significant role. Other area courses suffer competitively due to travel time but also due to the nature of the product offered (length, open, difficulty, etc.).
- ★ The study did not identify significant differences in attitude among those who purchase passes and green fee players. Green fee players show slightly higher levels of concern for some aspects of course management.
- ★ Given the nature of the clientele, positive assessment of the product, and a perception of relatively inexpensive current rates, the City would appear to have considerable flexibility in establishing fees for City golf courses. Other area courses appear to have no competitive advantage that would dampen the City's ability to institute a fee structure that will ensure an improved product that is financial viable.

## I. INTRODUCTION

Decision Research Inc. was commissioned by the City of Regina to conduct a study of Regina area golfers who golf at City courses. The study consisted of the administration of a questionnaire by telephone and through personal intercepts at the City's courses.

The objective for the study was to assess customer satisfaction with the condition and operations at City courses and to determine an appropriate pricing strategy for green fees and pass rates.

The City provided Decision with a list of 1998 passholders. This list was used to administer telephone interview surveys and obtain 1999 passholders for the sample. Booking sheets from the Tor Hill and Murray golf courses were also used to conduct telephone surveys. Players were approached as they completed rounds of golf at various times of day to obtain golfers from other courses. Poor weather during the weekends and low volume at other times led to a slight under representation for both the Craig and Regent Park courses.

Interviewing took place during the period of July 7th to July 20th, 1999. A copy of the questionnaire administered in the survey is attached, Appendix "A".

Selected data generated from the survey has been attached, Appendix "B". A complete set of tables has also been forwarded to the City under separate cover.

The City of Regina commissioned a similar study in 1991. Where applicable, comparisons have been made to the results of the earlier study.

## II. GOLFER PROFILE

Nearly three-quarters of Regina golfers are male. The average age of golfers is 44.5 years and they have an average annual household income of \$65,700.

In comparison to the situation in 1991, there has been very little change in the gender mix and the average age of those golfing is slightly lower. In 1991, the income was estimated from postal codes and census data to be \$46,730. Current figures are much higher reflecting a client base that is clearly upper middle class.

The south end of the City and the newer suburban areas are over represented in the golfing population, again reflecting the middle class population.

The Lakeview course, a par-three, attracts a much older clientele while the Goulet appears to have a younger golfing population. The Par-Three courses and the Craig attract a less wealthy clientele while the Lakeview is the only course showing a significant presence of female golfers.

A majority of City course golfers golf almost exclusively, over 80 percent of them, at City courses. Those with a season's pass average 62 rounds of golf a year. Those who purchase the 11-punch pass average 33 rounds of golf a year. Non-passholders, the green's fee players, average approximately 27 rounds a year. There is very little difference in golfing frequency today as compared to 1991.

Those who golf the most rounds tend to be older and there are a significant number of females, primarily golfing at the Lakeview, who exceed 100 rounds a year.

Golfers were also asked if their frequency of golfing over the past while has increased, decreased or stayed the same. They were asked to ignore the impact of weather.

GOLFING FREQUENCY			
Increased	-	129	(33.7%)
Stayed the Same	-	183	(47.2%)
Decreased	-	71	(18.3%)

They were then asked if there was a particular reason for any change in the frequency of golfing.

<b>REASONS FOR INCREASED FREQUENCY OF GOLFING</b>		
More Time Available	-	50
Better Finances	-	4
People to Golf With	-	10
Enjoying It More	-	17
Getting Better/Improving	-	14
Other	-	18

Other responses included being new to the game and just making more "effort" to get out.

<b>REASONS FOR DECREASED FREQUENCY OF GOLFING</b>		
Lack of Time	-	28
Age/Health Reasons	-	18
Poor Tee Times	-	1
Other Activities	-	12
Green Fees	-	5
Other	-	6

Three of the others were "weather", and there was one mention each for "bad management", "restricted membership now" and "no golfing partner".

No golfer mentioned course conditions as a reason for either more frequent or less frequent golfing. There was one mention of tee times and one of bad management as reasons for less frequent golfing and only five persons found green fees as a cause for reducing their golfing.

The courses golfed most often by the 388 persons surveyed were:

<b>COURSES GOLFED MOST OFTEN</b>			
Tor Hill	-	150	(38.7%)
Murray	-	113	(29.1%)
Goulet	-	76	(19.6%)
Lakeview	-	38	(9.8%)
Craig	-	8	(2.1%)
Regent	-	3	(0.8%)

In comparison to 1991, patronage at the Goulet is up considerably (from 7.6%) while the Craig and the par-threes are lower in this study. There was also some difference in the play patterns in terms of the time of day one usually golfs.

<b>COMPARISON OF PLAY PATTERNS IN TERMS OF THE TIME OF DAY ONE USUALLY GOLFS</b>			
	<b>1991</b>	<b>1999</b>	
Early a.m.	52%	139	(35.8%)
Morning	29%	148	(38.1%)
Afternoon	14%	75	(19.3%)
Twilight	6%	17	(4.4%)

### III. COURSE SELECTION

Regina golfers were asked if there are particular reasons that they choose to golf at City of Regina courses, if they golf at other area courses (Flowing Springs, Emerald Park, Avonlea, etc.) and if there is a particular reason they do not golf at other area courses more often.

Up to three reasons for selecting City of Regina courses were recorded:

REASONS FOR SELECTING CITY OF REGINA COURSES			
	1st Mention	2nd Mention	3rd Mention
Location/Convenience	155	27	5
Price/Cost	86	24	5
Course Conditions	26	32	10
Course Design	26	28	12
Social Aspects	16	8	6
Available Tee Times	9	4	1
Time Required	8	8	3
Variety	3	–	–
Service/Staff	2	2	–
Other	14	4	2

Just under one-half of golfers surveyed referred to location or convenience as their reason for selecting City courses and just under 30 percent referred to cost. A similar total mentioned course design or conditions. For those with a season's pass, price/cost was as often mentioned as the primary reason for their selection as was location.

While most of those surveyed golf almost exclusively at City of Regina courses, there are a majority who do golf at other area courses if only occasionally.

GOLF AT OTHER AREA COURSES			
Fairly Often	–	84	(21.6%)
Only Sometimes	–	193	(49.7%)
Never/Almost Never	–	108	(27.8%)

Green fee players are more likely to patronize other area courses than are passholders.

REASONS FOR NOT GOLFING AREA COURSES		
Time/Distance	–	135
Cost/Pricing	–	25
Pass/Membership Here	–	27
Course Conditions	–	38
Difficult Bookings	–	9
Social Aspects	–	8

For many golfers, with the exception of Avonlea, travel time is likely more of a perception than a reality. Among those classified as "course conditions" were several who referred to the length of the other courses and (the wind in Emerald Park's case) but also many who simply stated a particular City course is better.

## IV. SERVICE RATINGS

Golfers were asked to rate various aspects of the course they golf most often. They were asked to rate each aspect using excellent, good, fair, poor or very poor. The ratings provided are presented here by course in percentages. The 1991 ratings are also presented for comparison. The Craig and Regent Park are shown separately due to the smaller numbers.

PRO SHOP SERVICE RATINGS						
	Year	Excellent	Good	Fair	Poor	Very Poor
Total	1991	35.3%	50.5%	11.1%	2.4%	0.5%
	1999	28.6%	65.4%	3.8%	1.4%	0.8%
Goulet	1991	33.3%	59.3%	7.4%	–	–
	1999	15.3%	76.4%	5.6%	2.8%	–
Tor Hill	1991	42.7%	49.2%	8.1%	–	–
	1999	31.8%	64.9%	2.7%	–	0.7%
Murray	1991	26.4%	55.7%	11.3%	6.6%	–
	1999	36.9%	59.5%	1.8%	0.9%	0.9%
Lakeview	1991	48.4%	43.5%	8.1%	–	–
	1999	13.8%	65.5%	13.8%	6.9%	–

Season passholders and older golfers are more likely to be positive about pro shop services.

<b>FOOD SERVICE RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1991	27.4%	56.2%	14.0%	1.6%	0.8%
	1999	15.2%	68.5%	6.3%	8.9%	1.1%
<b>Goulet</b>	1991	37.0%	55.6%	7.4%	–	–
	1999	13.6%	69.7%	4.5%	10.6%	1.5%
<b>Tor Hill</b>	1991	24.8%	57.9%	16.5%	0.8%	–
	1999	14.5%	71.0%	7.2%	7.2%	–
<b>Murray</b>	1991	18.3%	60.6%	19.3%	0.9%	0.9%
	1999	17.1%	72.4%	2.9%	7.6%	–
<b>Lakeview</b>	1991	47.3%	48.6%	2.7%	1.4%	–
	1999	16.1%	48.4%	19.4%	12.9%	3.2%

Passholders tended to be more opinionated on the question of food service with both higher positive and higher negative response levels. This likely reflects higher patronage levels.

<b>LESSONS RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1991	31.2%	46.1%	14.1%	3.9%	4.7%
	1999	42.6%	52.9%	2.9%	1.5%	–
<b>Goulet</b>	1991	64.3%	28.6%	7.1%	–	–
	1999	57.7%	42.3%	–	–	–
<b>Tor Hill</b>	1991	32.5%	48.8%	7.0%	4.7%	7.0%
	1999	32.1%	64.3%	3.6%	–	–
<b>Murray</b>	1991	26.5%	52.9%	17.6%	3.0%	–
	1999	33.3%	58.3%	–	8.3%	–
<b>Lakeview</b>	1991	23.5%	64.7%	11.8%	–	–
	1999	(1 response)	–	(1 response)	–	–

Females and younger respondents were more positive towards lessons and more likely to express opinions, likely a reflection of experience.

<b>BOOKINGS RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1991	18.7%	50.1%	17.8%	10.3%	3.0%
	1999	17.6%	52.6%	7.7%	17.3%	4.8%
<b>Goulet</b>	1991	50.0%	50.0%	–	–	–
	1999	27.4%	64.4%	5.5%	1.4%	1.4%
<b>Tor Hill</b>	1991	15.0%	50.8%	15.0%	14.2%	5.0%
	1999	11.0%	46.6%	9.6%	24.0%	8.9%
<b>Murray</b>	1991	14.3%	43.8%	27.6%	11.4%	2.9%
	1999	14.2%	56.6%	5.7%	20.8%	2.8%
<b>Lakeview</b>	1991	30.0%	60.0%	10.0%	–	–
	1999	33.3%	42.9%	9.5%	14.3%	–

Females were more positive concerning bookings than were males. Of females with a season's pass, 29 percent rated this as "poor" or "very poor" and only 58 percent gave positive ratings compared to over 70 percent among others.

<b>MERCHANDISE AVAILABLE RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1991	15.9%	55.7%	22.3%	5.2%	0.9%
	1999	12.4%	72.8%	5.7%	7.7%	1.3%
<b>Goulet</b>	1991	16.7%	66.7%	12.5%	4.2%	–
	1999	18.6%	62.7%	8.5%	8.5%	1.7%
<b>Tor Hill</b>	1991	19.1%	60.0%	18.3%	2.6%	–
	1999	11.6%	81.0%	4.1%	3.3%	–
<b>Murray</b>	1991	14.1%	60.0%	23.2%	2.7%	–
	1999	11.7%	74.5%	4.3%	8.5%	1.1%
<b>Lakeview</b>	1991	20.0%	48.9%	24.4%	4.4%	2.2%
	1999	5.0%	50.0%	15.0%	25.0%	5.0%

Females were less impressed with the merchandise available than were male golfers and passholders were also less positive.

<b>MARSHALLING RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1991	9.7%	38.3%	19.7%	22.9%	9.4%
	1999	7.3%	51.4%	11.0%	21.2%	9.0%
<b>Goulet</b>	1991	11.5%	50.0%	19.2%	15.4%	3.8%
	1999	7.5%	50.7%	6.0%	23.9%	11.9%
<b>Tor Hill</b>	1991	11.0%	25.4%	24.6%	25.4%	13.6%
	1999	9.0%	57.9%	11.0%	15.2%	6.9%
<b>Murray</b>	1991	4.7%	33.6%	19.6%	33.6%	8.5%
	1999	7.3%	47.3%	16.4%	24.5%	4.5%
<b>Lakeview</b>	1991	21.1%	61.4%	10.5%	5.3%	1.8%
	1999	–	40.7%	3.7%	33.3%	22.2%

The combined "poor" and "very poor" responses to this question by player type were:

<b>Combined "Poor" and "Very Poor" Ratings on Marshalling Question by Player Type</b>		
Season's Pass	–	41%
11-Punch Pass	–	39%
Green Fees	–	36%

Marshalling appears to be of less concern to those over 60, likely reflecting the time of day they usually play.

<b>EQUIPMENT RENTALS RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1991	13.2%	64.5%	18.2%	1.8%	2.3%
	1999	15.4%	79.4%	2.9%	2.2%	–
<b>Goulet</b>	1991	14.3%	71.4%	14.3%	–	–
	1999	17.2%	75.9%	–	6.9%	–
<b>Tor Hill</b>	1991	15.6%	64.1%	14.1%	1.6%	4.7%
	1999	16.3%	77.6%	6.1%	–	–
<b>Murray</b>	1991	11.9%	70.1%	16.4%	1.6%	–
	1999	15.8%	81.6%	–	2.6%	–
<b>Lakeview</b>	1991	25.0%	65.6%	9.4%	–	–
	1999	11.8%	82.4%	5.9%	–	–

While 6 of the 7 golfers providing "poor" responses were green fee players more likely to use the service, the rating was extremely positive among this group as well.

The final two questions were not placed on the 1991 survey questionnaire.

<b>OBTAINING DESIRABLE TEE-OFF TIMES RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1999	13.4%	55.6%	8.8%	18.2%	4.0%
<b>Goulet</b>	1999	20.0%	66.7%	8.0%	4.0%	1.3%
<b>Tor Hill</b>	1999	6.9%	51.7%	12.4%	22.8%	6.2%
<b>Murray</b>	1999	9.1%	52.7%	6.4%	28.2%	3.6%
<b>Lakeview</b>	1999	27.3%	60.6%	6.1%	3.0%	3.0%

There was little difference in response from passholders and green fee players. Tor Hill accounts for over half of the "poor" and "very poor" ratings. Females were more positive on this aspect. 11-punch passholders were the most satisfied group.

<b>HANDLING OF CUSTOMER SUGGESTIONS OR CONCERNS RATINGS</b>						
	<b>Year</b>	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Total</b>	1999	13.4%	59.9%	13.9%	11.2%	1.6%
<b>Goulet</b>	1999	11.9%	57.1%	16.7%	14.3%	–
<b>Tor Hill</b>	1999	16.1%	64.5%	9.7%	8.1%	1.6%
<b>Murray</b>	1999	13.5%	53.8%	17.3%	13.5%	1.9%
<b>Lakeview</b>	1999	8.3%	66.7%	8.3%	12.5%	4.2%

Green fee players were more likely to give a poor rating on this aspect. There were no poor ratings for either tee times or handling of customers from either the Craig or Regent Park.

Where there were "poor" or "very poor" ratings assigned to a certain aspect of a course, there was a particular reason for this assessment.

A spreadsheet showing the course rated, aspect rated poorly and comments follows at the end of this section.

The overall assessment of these aspects of the golfing experience remains very positive for City of Regina courses. There does appear to have been a deterioration in the ratings provided to Lakeview across the board.

With the exception of the Goulet (Thompson) course where play has increased, marshalling appears to be of less concern than in 1991. Bookings and obtaining tee-off times are a greater concern now than in 1991 for the Tor Hill and Murray courses.

## V. CUSTOMER SATISFACTION

It can be inferred from the positive ratings provided for the various aspects of the golfing experience on Regina courses that there is a considerable level of satisfaction with the product offered by the City and the contracted management firms.

Golfers were specifically asked, considering the whole experience, how satisfied they were with the quality of golf offered at City of Regina courses for the price they pay.

<b>SATISFACTION LEVEL</b>				
	<b>Very Satisfied</b>	<b>Somewhat Satisfied</b>	<b>Somewhat Dissatisfied</b>	<b>Very Dissatisfied</b>
<b>Overall</b>	154 (39.7%)	189 (48.7%)	35 (9.0%)	10 (2.6%)
<b>Type</b>				
Season's Pass	46.2%	39.7%	11.5%	2.6%
11-Punch Pass	48.7%	46.2%	2.6%	2.6%
Green Fees	36.5%	51.7%	9.2%	2.6%
<b>Course</b>				
Goulet	40.8%	50.0%	9.2%	—
Tor Hill	41.3%	50.0%	8.0%	0.7%
Murray	37.2%	44.2%	11.5%	7.1%
Lakeview	44.7%	47.4%	5.3%	2.6%
Craig	(2)	(5)	(1)	(0)
Regent Park	(—)	(3)	(0)	(0)

Female golfers and older golfers exhibit higher levels of satisfaction with the golfing experience. Eight of the 10 expressing "very dissatisfied" golf at the Murray and 7 of these 10 are green fees players.

Overall, more than 7 of 8 golfers are satisfied with the golf offered by the City of Regina.

Golfers were also asked to rate the maintenance at the course they golf most often and if they gave a "poor" or "very poor" rating, they were asked to identify any particular aspects of the maintenance that bothered them.

<b>COURSE MAINTENANCE</b>					
	<b>Excellent</b>	<b>Good</b>	<b>Fair</b>	<b>Poor</b>	<b>Very Poor</b>
<b>Overall</b>	69 (17.9%)	218 (55.8%)	62 (16.1%)	29 (7.5%)	8 (2.1%)
<b>Course</b>					
Goulet	15.8%	56.6%	22.4%	5.3%	–
Tor Hill	22.8%	61.1%	12.1%	3.4%	0.7%
Murray	8.0%	52.7%	17.9%	15.2%	6.3%
Lakeview	31.6%	55.3%	10.5%	2.6%	–
Craig	(–)	(4)	(2)	(2)	(–)
Regent Park	(2)	(–)	(1)	(–)	(–)

Of the 37 persons who gave a "poor" or "very poor" rating, 24 golf at the Murray most often. The problem appears to relate mostly to the condition of greens. Twenty (20) of the 24 Murray golfers specified this as a negative impact.

<b>SPECIFIC MAINTENANCE COMMENTS</b>				
	<b>Goulet</b>	<b>Tor Hill</b>	<b>Murray</b>	<b>Lakeview</b>
Greens	3	5	20	1
Tees	3	–	2	–
Apron	1	–	–	–
Fairways	–	2	1	1
Rough	–	–	2	–
Bunkers	2	–	1	–
Tee ????????	–	1	–	–

Other mentions were just "general maintenance" crews disrupting play and brushes.

Golfers were also asked to rate the pace on the City course they golf most often as being comfortable/good, slow or unreasonably slow. In 1991, 64 percent found the pace comfortable, 28 found it to be slow and 8 percent said it was unreasonably slow. At that time, pace was of greatest concern to golfers at the Murray. This remains the case today but concerns have also grown for the pace on Tor Hill.

<b>PACE ON CITY COURSES</b>			
	<b>Comfortable/ Good</b>	<b>Slow</b>	<b>Unreasonable</b>
<b>Overall</b>	225 (58.1%)	123 (31.8%)	39 (10.1%)
<b>Course</b>			
Goulet	77.3%	17.3%	5.3%
Tor Hill	48.7%	40.7%	10.7%
Murray	46.0%	39.8%	14.2%
Lakeview	84.2%	10.5%	5.3%
Craig	(7)	(-)	(1)
Regent Park	(3)	(-)	(-)
Season Pass	62.8%	30.8%	6.4%
11-Punch Pass	71.8%	25.6%	2.6%
Green Fees	54.8%	33.0%	12.2%

The 39 golfers who find the pace to be unreasonably slow were asked what they felt should be done to increase or improve the pace:

Improve Marshalling	-	22
Space Tee Times	-	7
Green Fees	-	3
Play Through	-	3
Set Times for New Golfers	-	2
Don't Know/Not Sure	--	3

Other suggestions were: don't crowd/over book (3) and build another course.

## VI. PRICING

Golfers were asked to rate the cost of green fees on City of Regina courses, the cost of a season's pass and also to rate the cost of golfing on City courses to comparable public courses in the area. They were asked in each case to do so on a scale of 1 to 10 where a 1 would be very inexpensive and a 10 would be very expensive.

In the following chart, ratings have been combined to make figures comparable to the 1991 study.

<b>COST ASSESSMENT</b>					
	<b>Inexpensive</b>	<b>Moderately Inexpensive</b>	<b>Average</b>	<b>Above Average</b>	<b>Costly</b>
<b>Green Fees</b>					
1991	8.9%	17.6%	60.8%	7.1%	5.6%
1999	9.8%	27.4%	25.8%	31.2%	2.8%
<b>Season's Pass</b>					
1991	6.1%	9.8%	38.9%	6.3%	10.3%
1999	6.2%	13.2%	13.7%	20.9%	4.9%
<b>Comparative</b>					
1999	22.7%	21.1%	26.3%	15.4%	3.1%

The next chart compares the response to this question by type of golfer.

<b>COST ASSESSMENT</b>					
	<b>Inexpensive</b>	<b>Moderately Inexpensive</b>	<b>Average</b>	<b>Above Average</b>	<b>Costly</b>
<b>Green Fees</b>					
Season's Pass	7.6%	24.3%	30.8%	26.9%	–
11-Punch Pass	15.4%	25.7%	38.5%	20.6%	–
Green Fees	9.6%	28.4%	22.5%	23.9%	4.0%
<b>Season's Pass</b>					
Season's Pass	18.0%	29.5%	19.2%	32.1%	1.3%
11-Punch Pass	7.7%	10.3%	15.4%	28.2%	2.6%
Green Fees	2.5%	8.9%	11.8%	16.6%	6.3%
<b>Comparative</b>					
Season's Pass	28.2%	21.8%	17.9%	3.9%	3.9%
11-Punch Pass	15.4%	33.3%	20.5%	15.4%	–
Green Fees	22.1%	17.7%	29.5%	18.7%	3.3%

(There were 160 or 41 percent who could not assess a season's pass and 29 percent in 1991 who could not do so.)

The golfers' personal or household income has little impact on their perception of price. The "costly" response for a season's pass for example was highest among those with a household income of less than \$30,000 and those with a household income in excess of \$100,000, the middle ranges were all less likely to say "costly". Tor Hill golfers were somewhat more likely to consider City rates to be on the high side. Younger golfers (under 40) also tended to have a higher proportion seeing rates as expensive.

A majority of respondents place City rates in the middle ranges (4, 5 or 6) but they are almost three times as likely to consider City rates as inexpensive by comparison to other courses than to regard these rates as expensive.

The interviews also advised golfers that current fees allow the City to maintain courses in their current condition. They asked if golfers would support an additional fee that would be specifically targeted to a course improvement that would improve the quality of the golf experience at that course. The example given was the redesign of a hole. A majority would oppose such a fee but there is some support for this approach.

<b>SUPPORT TARGETED FEE</b>			
<b>Yes</b>	–	<b>117</b>	<b>(30.2%)</b>
<b>No</b>	–	<b>206</b>	<b>(53.1%)</b>
<b>Depends</b>	–	<b>54</b>	<b>(13.9%)</b>

Support for this approach was highest among Murray golfers (34.5%), those under 40 years of age (37%) and those with household incomes in excess of \$75,000 per annum (40%). There was a sharp difference by gender where 66 percent of females and only 48 percent of males oppose such a fee.

## VII. PASSHOLDERS

There were 78 persons interviewed who hold a season's pass and another 39 who purchase the 11-punch pass.

A majority of season's passholders were over the age of 60 while only 10 percent of green fee players fall into this category. The age comparisons are:

<b>AGE GROUPINGS</b>			
	<b>Season's Pass</b>	<b>11-Punch Pass</b>	<b>Green Fees</b>
20 and under	2.6%	–	6.6%
21 to 40	10.3%	12.8%	39.1%
41 to 60	25.6%	38.5%	42.4%
Over 60	52.6%	38.5%	10.0%

Season's passholders also tend to have lower annual household incomes than do green fee players. The age difference, however, likely means that differences in disposable income levels are not so distinct.

<b>INCOME LEVELS</b>			
	<b>Season's Pass</b>	<b>11-Punch Pass</b>	<b>Green Fees</b>
Up to \$30,000	14.1%	7.7%	6.6%
\$30,000 to \$50,000	17.9%	23.1%	19.6%
\$50,000 to \$75,000	17.9%	17.9%	26.9%
Over \$75,000	12.8%	20.5%	29.5%

Over 43 percent of the passholders are females reflecting the availability of supplemental passes. Less than 20 percent of green fee players are female.

In general, as the report has examined service assessment ratings and levels of satisfaction, there is little to distinguish passholder attitudes from those held by green fee players. They golf on average twice as many rounds as do non-passholders during the course of a year. This tends to make them more sensitive to some aspects of service (i.e. food and beverage) but their age and time of play tends to make them less sensitive to other issues (bookings, marshalling, etc.).

Passholders were asked the primary motivation for purchasing a pass. As was the case in 1991, economy is the major motivator.

MOTIVATION FOR PASS PURCHASE		
	1991	1999
Economical	67.2%	40 (52.0%)
Social Aspect	13.1%	5 (6.5%)
Tee Time Access	11.5%	8 (10.4%)
Have Time	n/a	5 (6.5%)
Convenience	n/a	13 (16.9%)
Like Golf	n/a	8 (10.4%)