

CITY OF LONDON MUNICIPAL GOLF COURSE SYSTEM

CUSTOMER SATISFACTION SURVEY:

STATISTICAL RESULTS AND CONCLUSIONS

PREPARED BY THE UNDERPAR CONSULTING GROUP

FOR THE CORPORATION OF THE CITY OF LONDON

SEPTEMBER 21, 1999

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EXECUTIVE SUMMARY

The survey was developed in June 1999 by UCG staff, with the assistance of Bob Neskas, Manager of Recreation Services and Attractions, and the head pros (Fred Kern Sr. at Thames Valley, Mike Olizarevitch at Fanshawe and Andy Shaw at River Road). The survey was administered to patrons between mid-July and the end of August 1999. Surveys from each course were sorted and entered into the database to allow differentiation of results by course. Approximately 400 surveys were filled out. While this sample size is somewhat small, we believe the results are representative of the overall municipal golf course clientele.

The survey is a critical tool in determining the level of satisfaction of the municipal golf course clientele. The information collected will serve two primary purposes:

1. To provide the head pros and the Manager of Recreation Services with timely customer feedback regarding the operations of many aspects of the golf courses.
2. Second, this information will assist UCG in reviewing the success of the municipality's existing strategy for its golf course system as measured by its primary users. Any disconnect between the municipality's strategy and overall levels of customer satisfaction may be indicative of key areas for further study and potential action.

With this in mind, we highlight the following as the key takeaways from the customer satisfaction survey:

- Food services receives the lowest ratings in the evaluation.
- Golfers rate enjoyment of their golf experience very highly, but they are not always satisfied with the pace of play or the overall condition of the golf courses.
- A demographic breakdown of survey respondents suggests several issues worthy of further study, including a very low number of women golfers and younger golfers in the 19-35 age group.
- River Road is the highest rated golf course, in terms of enjoyment, course condition and pace of play.
- City of London municipal golfers would like to have better conditions and better facilities. This provides a challenge unique to the municipal system in that the wants of its clients must be balanced against the nature of a municipal enterprise.
- The most important factors to consider when trying to increase the level of satisfaction with the municipal golf courses are:
 - course condition;
 - food selection;
 - pace of play; and,
 - pro shop service.

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INTRODUCTION

The customer satisfaction survey was developed by the UnderPar Consulting Group (UCG) as a means of assessing overall customer satisfaction at the City of London municipal golf courses. The survey itself is divided into five distinct sections, each representing one aspect of golf course operations. The five sections are:

1. Your Round of Golf.

The purpose of this section is to gain an overall impression of the level of satisfaction with the operations of the golf courses.

2. Food/Drink Service.

This section is intended to assess the patrons' happiness with the level of service and selection provided by the food services contractor retained by the City of London.

3. Pro Shop.

This part of the survey is meant to determine the level of customer satisfaction with the service and selection provided under the direct responsibility of the club pros.

4. Overall Impression.

The fourth section asks patrons three important questions with respect to their golf experience and needs, and provides space for non-prompted comments and feedback.

5. Tell us about yourself.

The last section asks questions that help determine the demographic makeup of municipal golf course system patrons, both for the purposes of evaluating the survey results and to assist in the development of future marketing and business plans.

The complete list of questions is provided in Appendix A.

SURVEY METHODOLOGY

The survey was developed in June 1999 by UCG staff. Recommendations regarding the content of the survey were received from Bob Neskas and the three head pros, with Bob Neskas having a greater say in the wording of the questions and the layout of the survey (the actual layout was subcontracted to a professional graphic designer).

The survey was administered to patrons between mid-July and the end of August. Clients were prompted to fill out surveys by club house staff, some staff asking on the final holes of the course (primarily Thames Valley) and others in the clubhouse or pro shop after their round of

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golf. It should be noted that the latter was seen to be a more effective method of getting client participation, with correspondingly higher response rates.

Confidentiality and anonymity were ensured by having a sealed drop box to which only UCG staff had access. Golf course staff were encouraged to get a good sampling of their clientele (members, non-members, tournaments, etc.). Surveys from each course were sorted and entered into the database to allow differentiation of results by course.

Approximately 400 surveys were filled out, though not all questions were answered on every completed questionnaire. In addition, numerous comments were received from clients that will contribute significantly to an understanding of their opinions, attitudes and expectations with respect to the municipal golf system. While this sample size is somewhat small, we believe the results are representative of the overall municipal golf course clientele.

Most questions were worded in a manner that provided clients with a range of possible answers: 1 (unsatisfactory) to 5 (very satisfied). Where appropriate, questions were designed to solicit only yes or no responses. Calculating a mean response for each question allows the surveyors to determine, on average, how satisfied patrons are with each aspect in the survey. Responses were also tabulated so as to allow direct comparison across the three courses.

It is important to note that taking a mean can at times hide significant discrepancies in responses; that is, one question with a mean of 4 may have answers ranging from 3 to 5, while another with the same mean will have answers ranging from 1 to 5. We have provided an in-depth analysis to show which questions display greater dispersion in answers. This better reflects the range of client satisfaction.

An important characteristic of satisfaction surveys is that survey respondents are often reluctant to award a 'perfect score.' Consequently, although 5 may be 'perfect,' a 4 is a more than acceptable score that can be perceived as very high. A 3 is considered average, 2 below average and 1 unacceptable. For the purposes of this analysis, mean scores in the lower range of 3 suggest that there is significant room for improvement, while any score above 4 is exceptional.

RESULTS OF STATISTICAL ANALYSIS

1. Your Round of Golf

Question 1: Did you start on time? (yes or no)

- Almost 95% of golfers started their round on time. The highest portion of delays occurred at Thames Valley, with the lowest at River Road.

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Question 2: How did you find the pace of play? (1 to 5)

- Pace of play is an extremely important issue for all golf courses, and the survey results bear this out – the response rate for this question was the highest, at virtually 100%. The results, a mean score of 3.68, suggest that pace of play is perceived as a little slow by patrons, with the lowest rating coming from Thames Valley at 3.25. River Road receives the highest rating and, perhaps more importantly, received almost no ratings under 3, while Thames Valley and Fanshawe each received almost 20% and 15% respectively of ratings under 3.
- We compared the response of this question for members and non-members. The results suggest that members are less happy with the pace of play than non-members, 3.5 for members compared to 3.9 for non-members. We have three possible explanations for this discrepancy:
 1. Members expect to play a faster round;
 2. Non-members are a cause of the slow play, and therefore don't find the slow pace of play a problem;
 3. Non-members may have been tournament players who might have been expecting to play a slower round of golf.

Question 3: Did you find the time clocks useful for keeping the pace of play? (yes or no)

- On average, the clocks were perceived as useful, though 40% of respondents did not find them useful. The number at Fanshawe who did not find them useful is much higher at 53%
- Based on comments written in the surveys, there are three likely causes.
 1. Many golfers do not understand how they work – which suggests the need for an education program for infrequent golfers;
 2. Without enforcing the time of play, the clocks are not useful. According to written comments, many think they should be useful but believe that without a marshal there to push groups to go faster, there is little incentive to speed up;
 3. The clocks may not always be set properly.

Question 4: How was the condition of the golf course overall? (1 to 5)

- Average rating for course condition is 3.91, with almost 50% giving a 4 rating and only 6% ratings of 1 and 2. Significant variation exists among the respective courses. River Road received by far the highest rating at 4.35, with Fanshawe receiving 3.81 and Thames Valley only 3.48. It is important to determine the cause of the lower ratings for Fanshawe and Thames Valley; that is, can it be attributed solely to the number of rounds played at these clubs or do maintenance practices or environmental conditions also play a role?

Question 5: How did you find the pricing of your golf green fees? (1 to 5)

- On the whole, patrons were very happy with the pricing of their green fees, providing a rating of 4.15 out of 5. Customers at River Road provide a noticeably higher rating, suggesting that they believe they are getting better value for their green fee dollar than at the other courses – not surprising given the higher rating for course condition and overall satisfaction.

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Summary:

- From an operations perspective, there is a wide range of responses regarding the rating of course conditions.
- Areas of operations with lower ratings include the effectiveness of the clocks and the pace of play in general. These areas, and course condition, are issues of particular importance for Thames Valley.
- Education programs for pace of play and the use of the clocks may be necessary.

2. Food/Drink Service

Question 6: How did you find the service in the restaurant/snack bar? (1 to 5)

- Food/drink service receives a mean score of 3.5, with Thames Valley and Fanshawe receiving lower grades than River Road.

Question 7: How did you find the service from the food/drink cart? (1 to 5)

- Average rating for the cart service was 3.53, though approximately 30% of respondents gave a 3 or lower grade. This suggests that cart service should be improved, with most written comments referring to the selection on the carts or simply the intermittent cart service (particularly at Fanshawe).
- This question did not apply to Thames Valley, though it should be noted that a number of written responses strongly suggested that cart service would be appropriate even with the snack bar facility at the ninth hole.

Question 8: Overall, how did you find the food/drink selection? (1 to 5)

- The food/drink selection receives an overall 3.37 rating, with over half of respondents provide a rating of 3 or lower. This is a relatively low grade. Comments referred in particular the selection of chips and chocolate bars, which is perceived as very poor. This may be an easily rectifiable shortcoming.

Question 9: Was the food and drink selection appropriately priced? (yes or no)

- Approximately 65% of respondents thought the pricing of food/drinks appropriate, with virtually no variation according to course. Written comments suggest that the dissatisfaction arises from what is perceived as over-priced water, coffee and hot dogs.

Summary:

- The overall ratings for food services are undeniably low when compared to the ratings given to operations controlled by the City or club pros. Moreover, almost half of the written comments pertain to the poor quality of service and/or selection provided by the contractor.
- Food/drink service is an important area of improvement for the City.

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3. Pro Shop

Question 10: How was the service in the Pro Shop? (1 to 5)

- Service in the pro shop was, on average, rated as outstanding. The overall rating was 4.43, with little variation between clubs.

Question 11: Did you purchase anything in the Pro Shop? (yes or no)

- Unfortunately, it would seem that a minority of golfers, about 30%, are purchasing items in the pro shop. A slightly greater number of clients seem to be purchasing at River Road (probably golf balls at the turn!) than at the other two courses (this may be due to sampling bias and can be verified against cash register sales).

Question 12: If yes, how did you find the selection of golf merchandise? (1 to 5)

- An important reason for the lack of purchasing in the pro shop is the selection, which is perceived to be lacking by patrons since almost half gave a rating of 3 or lower. The small number of customers purchasing in the Pro Shop may in part be explained by the perceived poor selection of merchandise.

Summary:

- The service in the pro shop is excellent. Given the importance of the merchandise, as a source of revenue for pros, as an important means of advertising for the municipal golf courses and as a component in overall customer satisfaction, the club pros should review their selection and pricing of merchandise to better match customer demand.

4. Overall Impression

Question 13: Did you enjoy your golf experience? (1 to 5)

- Enjoyment of their golf experience is the most important question asked on the survey. The mean score for the courses was 4.24, an excellent score. Only 15% of respondents provided a rating of 3 or lower. River Road received the highest enjoyment rating, while Thames Valley received the lowest (though the latter is still very good), and by far the most 1 and 2 ratings. Possible reasons for the lower ratings for Thames Valley can be seen in the answers to the other questions, that is, pace of play, course conditions, etc.

Question 14: Will you return to a London Municipal Golf course in the future? (yes or no)

- Overwhelmingly, golfers said they would return. In fact, only 9 out of almost 400 said they would not return. The primary reason stated was that they are out of town visitors and not likely to return to the London area. Only 3 said they did not enjoy the golf and so would not come back.

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Question 15: Would you make use of a driving range if one was available at this facility? (yes or no)

- The survey provides an unequivocal answer to the question: absolutely and the sooner the better! Almost 90% of users would like to have a range, with 96% at Thames Valley and 93% at River Road wanting access to a range.
- Perhaps more importantly, the written comments that did not refer to food services almost always requested a driving range and practice facilities.
- The lower demand at Fanshawe is puzzling, though it is important to note that even there 87% of respondents would like a practice facility. A possible reasons might be it's location, in that golfers may be stopping at driving ranges on their way out to Fanshawe.

Summary:

- Most customers are happy enough with their golf experience that they will return.
- Interestingly, the City can further increase golfers enjoyment by catering to their needs by providing on-site driving ranges. This topic will be addressed further in the project report.

5. Tell us about yourself

Question 16: Male or Female?

- Almost all the golfers surveyed were male. Though a bias toward male golfers was expected given the demographics of golfers in general, the low number of females was surprising – only 10% of survey respondents were female.
- The number of female golfers, 6%, at River Road was even lower than the other two courses. The relative difficulty of the course may have been a factor in the lower number of female golfers.

Question 17: Age Group? (under 19, 19-25, 26-34, 35-54, 55-64, 65+)

- Average age of clients is in the 35-54 age group, with 37% in this age class and 15% and 17% in the 55-64 and 65+ age categories respectively.
- There is a relatively low number of 19-25 and 26-34 year olds. This group is an important demographic, suggesting that more should be done to target golfers at this age to ensure a sufficient future supply of members and golfers.

Question 18: Are you a member of the London Municipal Golf Courses? (yes or no)

- Most golfers, 70%, answering the survey are members, with the highest proportion not surprisingly at Thames Valley at 87%.

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Question 19: If yes, membership type? (student, regular, senior, unlimited)

- The type of membership was skewed toward senior membership, which is somewhat surprising given the answers provided in the age question which point to a younger clientele. An almost equal number of members, 36%, had regular memberships.
- This discrepancy may be due to a lack of understanding of the membership structure (for example, marking unlimited on the questionnaire even though senior may be the correct answer). These results should be verified against actual data from course operations.

Question 20: What is your home course? (Thames Valley, River Road, Fanshawe, other private, other public)

- The home course question suggests that most golfers tend to play their home course.
- Out of the three courses, River Road experienced the highest percentage of golfers whose membership did not originate at its course, both in terms of having golfers from other municipal courses and other private and public golf courses.

Question 21: Do you play all three London Municipal courses? (yes or no)

- Most golfers play all three municipal courses. Only 27% say they do not play other municipal courses. Further research should be to explore the cause(s) of the high number of golfers who don't play all three courses.

Question 22: How often do you play golf? (once per year, a few times per year, a few times per month, more than once per week)

- The last question supports previous demographic studies in that most survey respondents are avid golfers, playing more than once per week. The number of avid golfers is highest at Thames Valley, with 84% saying they play more than once per week.
- It should be noted that part of this differential may be the result of how the questionnaire is administered. For example, if staff at Fanshawe asked more tournament golfers to fill it out compared to Thames Valley, then the results at Fanshawe would be more likely to be skewed toward infrequent golfers.

Summary:

- Few women golfers filled out the survey. This suggests that more should be done to encourage female golfers.
- Most survey respondents are avid golfers, above 34 years old and play all three courses, though they tend to prefer their home course.

OVERALL RESULTS

The following table provides a comprehensive listing of the results of the customer satisfaction survey questionnaire. Numbers without percentages represent the mean (average) of the

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responses and should be compared against the highest number in the answer key. Note that percentages may not add to 100% due to rounding and unanswered questionnaires.

We have also provided the results separately for each course in the appendices to allow easier comparison to the overall average.

Question	Thames Valley	River Road	Fanshawe	Overall Average	Answer Scale
Start on time?	Yes = 88% No = 12%	Yes = 98% No = 2%	Yes = 96% No = 4%	Yes = 95% No = 5%	1 = Yes 2 = No
Pace of play?	3.25	4.02	3.67	3.68	1 = Very slow 5 = Very good
Clocks useful?	Yes = 63% No = 37%	Yes = 71% No = 29%	Yes = 46% No = 53%	Yes = 60% No = 40%	1 = Yes 2 = No
Condition of course?	3.48	4.35	3.81	3.91	1 = Very poor 5 = Very good
Pricing of green fee?	4.06	4.34	4.06	4.15	1 = Very poor 5 = Very good
Food/drink service?	3.37	3.80	3.39	3.53	1 = Very poor 5 = Very good
Cart service?	N/A	4.26	3.22	3.75	1 = Very poor 5 = Very good
Food/drink selection?	3.35	3.50	3.25	3.37	1 = Very poor 5 = Very good
Pricing of food/drink?	Yes = 67% No = 32%	Yes = 64% No = 36%	Yes = 66% No = 34%	Yes = 66% No = 34%	1 = Yes 2 = No
Pro shop service?	4.49	4.44	4.40	4.43	1 = Very poor 5 = Very good
Purchase anything?	Yes = 31% No = 68%	Yes = 32% No = 68%	Yes = 28% No = 72%	Yes = 30% No = 70%	1 = Yes 2 = No
Pro shop selection?	2.96	3.79	3.67	3.54	1 = Very poor 5 = Very good
Enjoy golf experience?	4.12	4.36	4.20	4.24	1 = not at all 5 = Very good

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Question	Thames Valley	River Road	Fanshawe	Overall Average	Answer Scale
Return to Municipal golf course?	Yes = 99% No = 1%	Yes = 98% No = 2%	Yes = 97% No = 3%	Yes = 98% No = 2%	1 = Yes 2 = No
Make use of a driving range?	Yes = 96% No = 4%	Yes = 93% No = 7%	Yes = 87% No = 13%	Yes = 89% No = 11%	1 = Yes 2 = No
Male or female?	Yes = 90% No = 10%	Yes = 94% No = 6%	Yes = 87% No = 13%	Yes = 90% No = 10%	1 = Male 2 = Female
Age group?	1 = 14% 2 = 9% 3 = 3% 4 = 35% 5 = 16% 6 = 23%	1 = 7% 2 = 4% 3 = 16% 4 = 39% 5 = 17% 6 = 11%	1 = 16% 2 = 4% 3 = 16% 4 = 35% 5 = 12% 6 = 16%	1 = 12% 2 = 5% 3 = 13% 4 = 37% 5 = 15% 6 = 17%	1 = Under 19 2 = 19-25 3 = 26-34 4 = 35-54 5 = 55-64 6 = 65+
Member?	Yes = 87% No = 13%	Yes = 64% No = 36%	Yes = 61% No = 39%	Yes = 70% No = 30%	1 = Yes 2 = No
Membership type?	1 = 8% 2 = 33% 3 = 22% 4 = 37%	1 = 2% 2 = 34% 3 = 20% 4 = 42%	1 = 6% 2 = 41% 3 = 13% 4 = 39%	1 = 5% 2 = 36% 3 = 19% 4 = 40%	1 = Student 2 = Regular 3 = Senior 4 = Unlimited
Home Course?	1 = 33% 2 = 1% 3 = 11% 4 = 2% 5 = 2%	1 = 8% 2 = 50% 3 = 23% 4 = 9% 5 = 10%	1 = 4% 2 = 2% 3 = 77% 4 = 5% 5 = 12%	1 = 30% 2 = 18% 3 = 38% 4 = 5% 5 = 8%	1 = Thames Valley 2 = River Road 3 = Fanshawe 4 = Other private 5 = Other public
Play all three?	Yes = 79% No = 21%	Yes = 70% No = 30%	Yes = 70% No = 30%	Yes = 73% No = 27%	1 = Yes 2 = No
How often do you play?	1 = 2% 2 = 5% 3 = 9% 4 = 84%	1 = 2% 2 = 6% 3 = 19% 4 = 73%	1 = 2% 2 = 5% 3 = 9% 4 = 84%	1 = 3% 2 = 7% 3 = 16% 4 = 73%	1 = Once per year 2 = Few times/year 3 = Few times/month 4 = More than once/week

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REGRESSION RESULTS

As part of the survey evaluation, a statistical technique called regression analysis was used. The purpose of the regression was to determine what impact variables such as course condition, pace of play and food service have on whether patrons enjoy their golf experience. The regression analyzed the impact of the following variables on enjoyment:

- Frequency of play;
- Age group;
- Pricing of green fees;
- Pace of play;
- Pro shop service;
- Course condition;
- Food selection;
- Cart service; and,
- Food service.

The results of the regression demonstrate that all of these factors explain only about 33% of patrons' level of enjoyment with their golf experience. Numerous other factors are critical to providing golfers an enjoyable golf experience, many of which are outside the control of the golf courses. Likely factors include: how well the golfer played during his/her round; the weather; with whom the golfer played his/her round; and, the mood of the golfer. However, the regression results do show that there is a relationship between a golfer's enjoyment of his/her round and the following variables:

- Course condition;
- Food selection;
- Pace of play; and,
- Pro shop service.

Pace of play contributes to enjoyment in that for every one percent increase in a customer's satisfaction with the pace of play, their enjoyment increased by .23. Similarly, one percent increases in course condition, food selection and pro shop service, imply respective .22%, .12% and .15% increases in enjoyment. To put this another way, if the answer to the course condition question were to increase by, for example, 10% (ie. a 10% increase from 3.91 to 4.3), then customer enjoyment would increase by 2.2%, from 4.24 to 4.33.

This suggests that these areas are key components which should be targeted when trying to improve the golf experience for London Municipal Golf Course patrons. The regression analysis helps to determine the expected impact of changes to customer service, and the relative importance of future priorities for action.

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CONCLUSIONS AND KEY TAKEAWAYS

The survey is a critical tool in determining the level of satisfaction of the municipal golf course clientele. It provides management with information regarding golf course customers which could not otherwise be collected from day-to-day operations.

The information collected will serve two primary purposes:

1. It provides the Head Club Pros and the Manager of Recreation Services with timely customer feedback regarding the operations of many aspects of the golf courses. Moreover, analysis of the survey results will help UCG determine the most urgent areas for action, helping to locate areas of weakness which can be rectified in the short and long terms.
2. This information will assist UCG in elucidating the existing strategy of the municipal golf courses. The results can also help UCG and golf course management evaluate the execution of current strategy, particularly as it relates to their mandate. More importantly, the survey provides an important tool for determining the priorities of golf course clientele, which in turn assists in the development of future strategy.

With this in mind, we highlight the following as the key takeaways from the customer satisfaction survey:

- Food services receives the lowest ratings in the evaluation, and is arguably the weakest element.
- Golfers rate enjoyment of their golf experience very highly, but they are not always satisfied with the pace of play or the overall condition of the golf courses. This highlights an inherent conflict in the mission and mandate of City of London municipal golf. That is, should customers expect a superior golf experience given the 'affordable, accessible' mandate? Can the municipal deliver on both counts given its budget and operational constraints?
- A demographic breakdown of survey respondents points to a very low number of women golfers, as well as younger golfers in the 19-35 age group. These are important cohorts and we intend to look at avenues to increase their use of the municipal golf course system.
- River Road is the highest rated golf course, in terms of enjoyment, course condition and pace of play. A probable reason when compared to Thames Valley is that it does not put through the same number of golfers and therefore should be expected to have better conditions and pace of play. That said, this also serves to highlight certain contrasting goals; can the courses increase the number of rounds played while still providing a highly enjoyable golf experience at an affordable price?
- The vast majority of City of London municipal golfers would like to have better conditions and better facilities. There seems to be an inherent clash between the commercial principles of responding to customer needs and meeting its mandate. This provides a challenge unique

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to the municipal system in that the wants of its clients must be balanced against the nature of a municipal enterprise. Opportunities exist to meet both the needs of the golfing public and those of policymakers, and UCG will examine these options over the course of the coming months.

- The most important factors to consider when trying to increase the level of satisfaction with the municipal golf courses are:
 - ❖ course condition;
 - ❖ food selection;
 - ❖ pace of play; and,
 - ❖ pro shop service.

Two of these factors are somewhat easily controllable (food selection and pro shop service), while pace of play and course condition may require significant investments of time and financial resources. UCG will work to develop strategies addressing these key areas in the coming months.

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APPENDIX A

List of Customer Satisfaction Survey questions.

1. Your Round of Golf.

- Question 1: Did you start on time? (yes or no)
- Question 2: How did you find the pace of play? (1 to 5)
- Question 3: Did you find the time clocks useful for keeping the pace of play? (yes or no)
- Question 4: How was the condition of the golf course overall? (1 to 5)
- Question 5: How did you find the pricing of your golf green fees? (1 to 5)

2. Food/Drink Service.

- Question 6: How did you find the service in the restaurant/snack bar? (1 to 5)
- Question 7: How did you find the service from the food/drink cart? (1 to 5)
- Question 8: Overall, how did you find the food/drink selection? (1 to 5)
- Question 9: Was the food and drink selection appropriately priced? (yes or no)

3. Pro Shop.

- Question 10: How was the service in the Pro Shop? (1 to 5)
- Question 11: Did you purchase anything in the Pro Shop? (yes or no)
- Question 12: If yes, how did you find the selection of golf merchandise? (1 to 5)

4. Overall Impression.

- Question 13: Did you enjoy your golf experience? (1 to 5)
- Question 14: Will you return to a London Municipal Golf course in the future? (yes or no)
- Question 15: Would you make use of a driving range if one was available at this facility? (yes or no)

Please provide any further comments or suggestions that will help us to serve you better in the future.

5. Tell us about yourself.

- Question 16: Male or Female?
- Question 17: Age Group? (under 19, 19-25, 26-34, 35-54, 55-64, 65+)
- Question 18: Are you a member of the London Municipal Golf Courses? (yes or no)
- Question 19: If yes, membership type? (student, regular, senior, unlimited)
- Question 20: What is your home course? (Thames Valley, River Road, Fanshawe, other private, other public)
- Question 21: Do you play all three London Municipal courses? (yes or no)
- Question 22: How often do you play golf? (once per year, a few times per year, a few times per month, more than once per week)

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APPENDIX B – THAMES VALLEY RESULTS

Question	Thames Valley	Overall Average	Answer Scale
Start on time?	Yes = 88% No = 12%	Yes = 95% No = 5%	1 = Yes, 2 = No
Pace of play?	3.25	3.68	1 = Very slow 5 = Very good
Clocks useful?	Yes = 63% No = 37%	Yes = 60% No = 40%	1 = Yes, 2 = No
Condition of course?	3.48	3.91	1 = Very poor 5 = Very good
Pricing of green fee?	4.06	4.15	1 = Very poor 5 = Very good
Food/drink service?	3.37	3.53	1 = Very poor 5 = Very good
Cart service?	N/A	3.75	1 = Very poor 5 = Very good
Food/drink selection?	3.35	3.37	1 = Very poor 5 = Very good
Pricing of food/drink?	Yes = 67% No = 32%	Yes = 66% No = 34%	1 = Yes, 2 = No
Pro shop service?	4.49	4.43	1 = Very poor 5 = Very good
Purchase anything?	Yes = 31% No = 68%	Yes = 30% No = 70%	1 = Yes, 2 = No
Pro shop selection?	2.96	3.54	1 = Very poor 5 = Very good
Enjoy golf experience?	4.12	4.24	1 = not at all 5 = Very good
Return to Municipal golf course?	Yes = 99% No = 1%	Yes = 98% No = 2%	1 = Yes, 2 = No
Make use of a driving range?	Yes = 96% No = 4%	Yes = 89% No = 11%	1 = Yes, 2 = No

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Question	Thames Valley	Overall Average	Answer Scale
Male or female?	Yes = 90% No = 10%	Yes = 90% No = 10%	1 = Male, 2 = Female
Age group?	1 = 14% 2 = 9% 3 = 3% 4 = 35% 5 = 16% 6 = 23%	1 = 12% 2 = 5% 3 = 13% 4 = 37% 5 = 15% 6 = 17%	1 = Under 19 2 = 19-25 3 = 26-34 4 = 35-54 5 = 55-64 6 = 65+
Member?	Yes = 87% No = 13%	Yes = 70% No = 30%	1 = Yes, 2 = No
Membership type?	1 = 8% 2 = 33% 3 = 22% 4 = 37%	1 = 5% 2 = 36% 3 = 19% 4 = 40%	1 = Student 2 = Regular 3 = Senior 4 = Unlimited
Home Course?	1 = 33% 2 = 1% 3 = 11% 4 = 2% 5 = 2%	1 = 30% 2 = 18% 3 = 38% 4 = 5% 5 = 8%	1 = Thames Valley 2 = River Road 3 = Fanshawe 4 = Other private 5 = Other public
Play all three?	Yes = 79% No = 21%	Yes = 73% No = 27%	1 = Yes, 2 = No
How often do you play?	1 = 2% 2 = 5% 3 = 9% 4 = 84%	1 = 3% 2 = 7% 3 = 16% 4 = 73%	1 = Once per year 2 = Few time per year 3 = Few time per month 4 = More than once/week

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APPENDIX C -- RIVER ROAD RESULTS

Question	River Road	Overall Average	Answer Scale
Start on time?	Yes = 98% No = 2%	Yes = 95% No = 5%	1 = Yes, 2 = No
Pace of play?	4.02	3.68	1 = Very slow 5 = Very good
Clocks useful?	Yes = 71% No = 29%	Yes = 60% No = 40%	1 = Yes, 2 = No
Condition of course?	4.35	3.91	1 = Very poor 5 = Very good
Pricing of green fee?	4.34	4.15	1 = Very poor 5 = Very good
Food/drink service?	3.80	3.53	1 = Very poor 5 = Very good
Cart service?	4.26	3.75	1 = Very poor 5 = Very good
Food/drink selection?	3.50	3.37	1 = Very poor 5 = Very good
Pricing of food/drink?	Yes = 64% No = 36%	Yes = 66% No = 34%	1 = Yes, 2 = No
Pro shop service?	4.44	4.43	1 = Very poor 5 = Very good
Purchase anything?	Yes = 32% No = 68%	Yes = 30% No = 70%	1 = Yes, 2 = No
Pro shop selection?	3.79	3.54	1 = Very poor 5 = Very good
Enjoy golf experience?	4.36	4.24	1 = Not at all 5 = Very good
Return to Municipal golf course?	Yes = 98% No = 2%	Yes = 98% No = 2%	1 = Yes, 2 = No
Make use of a driving range?	Yes = 93% No = 7%	Yes = 89% No = 11%	1 = Yes, 2 = No

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Question	River Road	Overall Average	Answer Scale
Male or female?	Yes = 94% No = 6%	Yes = 90% No = 10%	1 = Male, 2 = Female
Age group?	1 = 7% 2 = 4% 3 = 16% 4 = 39% 5 = 17% 6 = 11%	1 = 12% 2 = 5% 3 = 13% 4 = 37% 5 = 15% 6 = 17%	1 = Under 19 2 = 19-25 3 = 26-34 4 = 35-54 5 = 55-64 6 = 65+
Member?	Yes = 64% No = 36%	Yes = 70% No = 30%	1 = Yes, 2 = No
Membership type?	1 = 2% 2 = 34% 3 = 20% 4 = 42%	1 = 5% 2 = 36% 3 = 19% 4 = 40%	1 = Student 2 = Regular 3 = Senior 4 = Unlimited
Home Course?	1 = 8% 2 = 50% 3 = 23% 4 = 9% 5 = 10%	1 = 30% 2 = 18% 3 = 38% 4 = 5% 5 = 8%	1 = Thames Valley 2 = River Road 3 = Fanshawe 4 = Other private 5 = Other public
Play all three?	Yes = 70% No = 30%	Yes = 73% No = 27%	1 = Yes, 2 = No
How often do you play?	1 = 2% 2 = 6% 3 = 19% 4 = 73%	1 = 3% 2 = 7% 3 = 16% 4 = 73%	1 = Once per year 2 = Few time per year 3 = Few time per month 4 = More than once/week

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APPENDIX D – FANSHAWE RESULTS

Question	Fanshawe	Overall Average	Answer Scale
Start on time?	Yes = 96% No = 4%	Yes = 95% No = 5%	1 = Yes, 2 = No
Pace of play?	3.67	3.68	1 = Very slow 5 = Very good
Clocks useful?	Yes = 46% No = 53%	Yes = 60% No = 40%	1 = Yes, 2 = No
Condition of course?	3.81	3.91	1 = Very poor 5 = Very good
Pricing of green fee?	4.06	4.15	1 = Very poor 5 = Very good
Food/drink service?	3.39	3.53	1 = Very poor 5 = Very good
Cart service?	3.22	3.75	1 = Very poor 5 = Very good
Food/drink selection?	3.25	3.37	1 = Very poor 5 = Very good
Pricing of food/drink?	Yes = 66% No = 34%	Yes = 66% No = 34%	1 = Yes, 2 = No
Pro shop service?	4.40	4.43	1 = Very poor 5 = Very good
Purchase anything?	Yes = 28% No = 72%	Yes = 30% No = 70%	1 = Yes, 2 = No
Pro shop selection?	3.67	3.54	1 = Very poor 5 = Very good
Enjoy golf experience?	4.20	4.24	1 = Not at all 5 = Very good
Return to Municipal golf course?	Yes = 97% No = 3%	Yes = 98% No = 2%	1 = Yes, 2 = No
Make use of a driving range?	Yes = 87% No = 13%	Yes = 89% No = 11%	1 = Yes, 2 = No

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Question	Fanshawe	Overall Average	Answer Scale
Male or female?	Yes = 87% No = 13%	Yes = 90% No = 10%	1 = Male, 2 = Female
Age group?	1 = 16% 2 = 4% 3 = 16% 4 = 35% 5 = 12% 6 = 16%	1 = 12% 2 = 5% 3 = 13% 4 = 37% 5 = 15% 6 = 17%	1 = Under 19 2 = 19-25 3 = 26-34 4 = 35-54 5 = 55-64 6 = 65+
Member?	Yes = 61% No = 39%	Yes = 70% No = 30%	1 = Yes, 2 = No
Membership type?	1 = 6% 2 = 41% 3 = 13% 4 = 39%	1 = 5% 2 = 36% 3 = 19% 4 = 40%	1 = Student 2 = Regular 3 = Senior 4 = Unlimited
Home Course?	1 = 4% 2 = 2% 3 = 77% 4 = 5% 5 = 12%	1 = 30% 2 = 18% 3 = 38% 4 = 5% 5 = 8%	1 = Thames Valley 2 = River Road 3 = Fanshawe 4 = Other private 5 = Other public
Play all three?	Yes = 70% No = 30%	Yes = 73% No = 27%	1 = Yes, 2 = No
How often do you play?	1 = 2% 2 = 5% 3 = 9% 4 = 84%	1 = 3% 2 = 7% 3 = 16% 4 = 73%	1 = Once per year 2 = Few time per year 3 = Few time per month 4 = More than once/week

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