

REPORT

**VOLUME I: GENERAL SUMMARY
CUSTOMER PROFILING AT
PARK BOARD GOLF COURSES**

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Prepared by
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2.0 EXECUTIVE SUMMARY

2.1 INTRODUCTION

The Fraserview, Langara and McCleery Golf Courses are operated by Parks Board. The Parks Board commissioned Canadian Facts to conduct a research study with three objectives. These objectives are to:

- Profile current customers at Parks Board golf courses;
- Measure customer satisfaction with all aspects of golf operations; and,
- Assess price sensitivity among current customers.

In total, 1,750 surveys were completed by golfers playing these courses during the second and third weeks of August 2000. An overall response rate of 39% was achieved on the survey. The margin of error for these interviews is $\pm 2.0\%$.

2.2 CUSTOMER PROFILE

Of the customers surveyed at the Fraserview, Langara and McCleery Golf Courses:

- 2% are youth, 71% are adults between the ages of 19 and 64 years and 22% are seniors (5% did not answer this question);
- 78% are male and 20% are female (2% did not answer this question);
- 75% are persons who report their first language is English, 5% report another European language as their first language and 16% report an Asian first language; and,
- 47% are City of Vancouver residents, 42% live in other Lower Mainland municipalities and 4% live outside the Lower Mainland, out of province or outside Canada.

Only a few differences exist in terms of the characteristics of those playing the three golf courses—more seniors were surveyed at Langara, for example, and Fraserview draws from a wider geographic area than the other two courses.

Of the customers surveyed:

- 28% have been playing golf for 5 years or less, 41% between 6 and 20 years and 28% for more than 20 years;
- 7% have no handicap, 24% a handicap of more than 24, 52% between 12 and 24 and 11% have a handicap of less than 12;
- 51% played an average of about 2 or 3 times a month (30 times) or less in the past year on Lower Mainland golf courses, 24% played them between 31 and 50 times, while 18% played an average of about once a week (51 times) or more;
- 34% played more than 80% of their Lower Mainland rounds on Parks Board courses in the past year; and,
- 18% were members of the Men's Club, Ladies' Club or Business Ladies' Club at the golf courses where they completed the survey.

On average, Fraserview golfers have been playing for more years than McCleery or Langara golfers and have lower handicaps. The golfers surveyed at McCleery are more likely to be club members than those surveyed at Fraserview or Langara.

2.3 CUSTOMER USE AND SATISFACTION

Eighty-five percent of the golfers surveyed provide positive satisfaction ratings on the experience at the course they had just finished playing. Just over one-half (54%) rate the course at "8" or more on a ten-point scale where ten means "Very Satisfied" and one means "Not At All Satisfied." An additional 31% provide a positive rating of "6" or "7" using this scale. These satisfaction ratings do not vary significantly between the three courses.

Golfers also rate specific attributes of the courses positively. For example, they give positive ratings of "8" or more on a ten-point scale for course location (75%), course design (55%), clubhouse services (47%), price/green fees (46%), condition of the course (41%), speed of play (38%) and the tee time reservation system (26%). These factors are influencing customers' decisions as to whether or not to play these courses.

Generally, satisfaction with the courses is higher among:

- Seniors than other adults;
- Those who pay less in green fees;
- Those with a higher handicap (or no handicap); and,

- Those who are not club members at these courses.

Two key areas for improvement are the tee time reservation system and the driving ranges.

There is also potential for increasing golfers' use of the clubhouses and pro shops at these courses. While many golfers link increasing their access to the courses to increasing their use of other facilities and services, additional suggestions include changes to the food and beverages available at the courses (6%), as well as to what is available in the pro shops (3%).

2.4 PRICE SENSITIVITY

Use of these three courses is somewhat price sensitive. Price influences about one-half of the decisions by current customers to play these courses (during the summer). There is also evidence that a reduction in price would increase use among one-fifth of current customers, suggesting that an increase in price could reduce use.

However, price is perceived in a positive way by most of these courses' current customers (72% provide a rating of "6" or more on a ten-point scale). Their value, relative to selected other courses in the Lower Mainland, is comparable or high. In particular, Fraserview receives a very high quality ranking relative to its price, when compared against four other Lower Mainland golf courses. McCleery receives a mid-range quality ranking, while Langara receives one in keeping with its price level.

Golfers at all three courses rated six pricing components. Price differences based on season (83%), day of week (70%), time of day (70%) and age group (63%) receive the highest levels of support. Price differences based on tee time preference (32%) and course location (19%) receive much lower levels of agreement (and higher levels of disagreement—44% and 58%, respectively). Golfers who paid green fees of \$20 or more are more likely to agree that prices should vary by all the factors asked about, except age group. In contrast, seniors (88%) and youths (82%) are significantly more likely to agree that price should vary by age group than other adults (55%).

For Detailed Results See General Summary