



**Voice of the Local Golfer Survey Summary:
City of Buffalo
November 18, 2013**

Wendel Companies commissioned a survey to increase knowledge of customer and local golfer behaviors and perceptions of golf courses owned by the City of Buffalo, NY; and in particular the South Park facility. This knowledge will be used to drive more fact-based decisions in positioning, services, marketing and pricing; as well as the positioning of closing the existing facility and building a new one. Following basic consumer behavior and decision patterns, Pellucid's local golfer/customer survey covers Course Selection Criteria, Barriers to Playing More Golf, client facility Awareness and Trial and Preferences, Satisfaction and Barriers, Loyalty and Frequency concluding with Value and Convenience.

Below are summarized the key findings for each consumer decision dimension: all scores and ratings are on a 1-5 point scale (lower is better) while percentage measures are straightforward 1-100 (higher is better). Each key finding is treated in more detail in the Discussion section of this document followed by our Conclusion and Recommendations. Two groups of respondents are identified: Those residents who identify themselves as a golfer (played at least one round in the past 12 months); and non-golfing residents drawn from a 20-minute drive time surrounding the South Park golf course:

- All respondents Course Selection criteria: Primary reasons cited by golfers were Course Condition, Price, Tee time availability, Pace of play, and Course design - challenging.
- All respondents Barriers to Playing More Golf: The dominant barriers to playing golf more often are Time, Money, and I don't have anyone to play with. Similar to the national picture, we're dealing with a largely time-constrained population that wants a quality golf experience but, despite the economy, "Money" is not as dominant a barrier as Time.
- Awareness of South Park Golf Course: South Park is well known with only 18% stating their unawareness of the course.
- Local area golfer facility trial and competitive interaction: Using the golfer responses, we determined which facilities from the named list of competitors have the highest trial rates: Grover Cleveland, Sheridan Park, and Elma Meadows top the list. Cazenovia is fourth, South Park tied for seventh, and Delaware Park tied for 10th.
- Customer facility ratings: We asked ratings questions about the overall facility and on course experience as outlined below:
Overall facility: South Park customers (played in past 12 months) gave top scores for Proximity, Price, and Overall value. At the bottom of the quality ranking, receiving the poorest rating was Golf Academy.

- On course experience: South Park customers gave the highest marks to Overall Enjoyment, Condition of golf carts, Pace of play, and Course layout.
- Barriers to More Frequent Play at South Park include Proximity to home/work, Course conditions, and lack of personal free time.
- Satisfaction, loyalty and evangelism: We asked a series of three questions to gauge the relationship strength of South Park's customers and local golfers to their primary course.
 1. Just 4.9% named South Park as the course they've played most often. Cazenovia led the list with 8.8%.
 2. Net Promoters Ratio (player favorable vs. unfavorable recommendations): Among golfers, South Park received a slightly above average Net Promoter Ratio.
 3. Share-of-Play (SoP): All golfers reported playing a median average of 30 rounds annually giving the course they play most 15 rounds, or a 50% share. South Park customers average 14 rounds annually, giving South Park 10 rounds, or 71% of those rounds.
- Value: When asked about reasonable value for an average 9-hole weekend golf experience, nearly 50% responded above \$16. For a 9-Hole weekday golf experience, 85% answered \$15 or less.
- The hypotheticals: Five critical questions were asked of golfers (3), non-golfers (1), and all respondents concerning the proposed new park.
 - Neither Grover Cleveland, Cazenovia, nor Delaware Park could expect a substantial increase in rounds if South Park closes and is not replaced.
 - Golfers would prefer South Park be replaced with an 18-hole course, but might settle for a full-length 9-hole course that has multiple tees and flexible length.
 - Golfers want a new facility to include practice amenities such as a driving range, putting green, and short game area. Professional instruction is not important.
 - Though not a big percentage, 23% of non-golfers would consider taking up the game if a new facility was built to replace South Park. The New York state participation rates is just 8.5%.
 - Paved walking/biking paths and an amphitheater are the two things people would most like to see added to the new park.

Methodology and Measures:

Invitations to take the survey were emailed to two separate groups sourced by Pellucid’s direct marketing partner, the V12 Group. We established a geography of a 20-minute drive time surrounding 1200 Furhmann Blvd. in Buffalo, NY. The two lists of 10,000 consisted of (1) local golfers suppressed against two email databases provided by both city and county courses, and (2) local residents who were likely not golfers. Both lists received two email invitations.

The incentive for respondents was entry into a drawing for one of three Amazon gift cards with values of \$500, \$150, and \$100. The results yielded a statistically significant number of responses across all questions for our analysis for the two individual groups as well as the respondents in aggregate. Achieving a 5% margin of error and 95% confidence interval required 385 responses. The survey received 433 total responses: 219 from the golfer list, and 214 from the non-golfer list. The survey was completed by 84.3% of the respondents.

Several questions ask the survey respondents to rate either facility features or decision factors for quality or importance. The rating questions provided multiple answers from favorable to unfavorable which we converted into a point scale to determine a Quality Score for each facility or an Importance Score for attribute questions like “what matters” factors. In Quality/Importance Score, lower scores are better (for example Quality Score of 1 on the Rating Courses question = Excellent while a Quality Score of 5 = Poor). In analyzing the range of scores for questions on the 1-5 point scale, responses with a Rating Average <2 are considered notably important/strengths (this means that the majority of responses were either 1s or 2s). Rating Averages between 2.0-2.4 are also favorable signifying a mix of 2s and 3s but more heavily weighted to the 2s. Rating Averages between 2.5-2.9 are considered neutral (mix of 2s and 3s but more heavily weighted to the median response value of 3). Rating Averages of 3.0 or above are considered not very important to golfers or an area for improvement on the facility features questions.

Discussion:

The following are the summaries of each individual section of the survey:

- The first question was designed as both a filtering mechanism and to verify the veracity of the two lists used, golfer and non-golfer. The responses indicate the lists were for the most part accurate, as slightly more people responded as a golfer than the 219 responses coming from that collector:

Do you consider yourself a golfer (play at least one round a year)?	
Answer Options	Response Percent
Yes	55.0%
No	43.9%
Not sure	1.2%

- Demographics and golf involvement – The tables below outline the entire respondent demographic profile and golf involvement level. The gender split is biased to males vs. the national composition (49% male/51% female). Amongst golfers, the gender split was 85% male/15% female, a 113 index against the national golf population. The survey was completed by a very high number of Core golfers (8+ rds/yr) both in the absolute (80% of respondents) and relative to the national distribution of Core golfers (45%). Respondents reported playing a median of 19 18-hole rounds in the past 12 months; and a median of six nine-hole rounds. Total rounds median is 30. Household income of the respondents skewed to the \$75K-\$149.9K range relative to the facility draw area (which the survey targeted) with the largest share of respondents being in the \$75-\$99.9K range (26%). Respondent age skewed older than the facility draw area with 92% of respondents being 35+ vs. only 55% of the draw area.

What is your gender?	
Answer Options	Response Percent
Male	59.0%
Female	41.0%

What is your age group?	
Answer Options	Response Percent
1-19	0.3%
20-34	8.2%
35-54	37.0%
55-64	37.2%
65 and older	17.4%

What is your household income range?	
Answer Options	Response Percent
\$0-34,999	13.1%
\$35,000-49,999	15.6%
\$50,000-74,999	19.1%
\$75,000-99,999	18.3%
\$100,000-149,999	11.7%
\$150,000 or more	5.7%
Prefer not to answer	16.4%

How many rounds of golf have you played in the last 12 months? Please give us your best estimate as one number.			
Answer Options	Response Percent	National Average	Index
1-7	19.4%	55%	35
8-23	20.1%	24%	84
24 or more	60.5%	21%	288

- Ethnicity - The survey was answered by an overwhelming percentage of White respondents. No other ethnic group makes up a significant customer group, and in total minorities make up much less of the representative sampling compared to the total population:

What is your race/ethnicity?			
Answer Options	Response Percent	Local Area	Index
White, non-Hispanic	94.1%	74.2%	127
African-American	2.2%	18.6%	12
Hispanic	1.6%	7.7%	21
Asian or Pacific Islander	0.5%	2.0%	25
Other	1.6%	2.5%	64

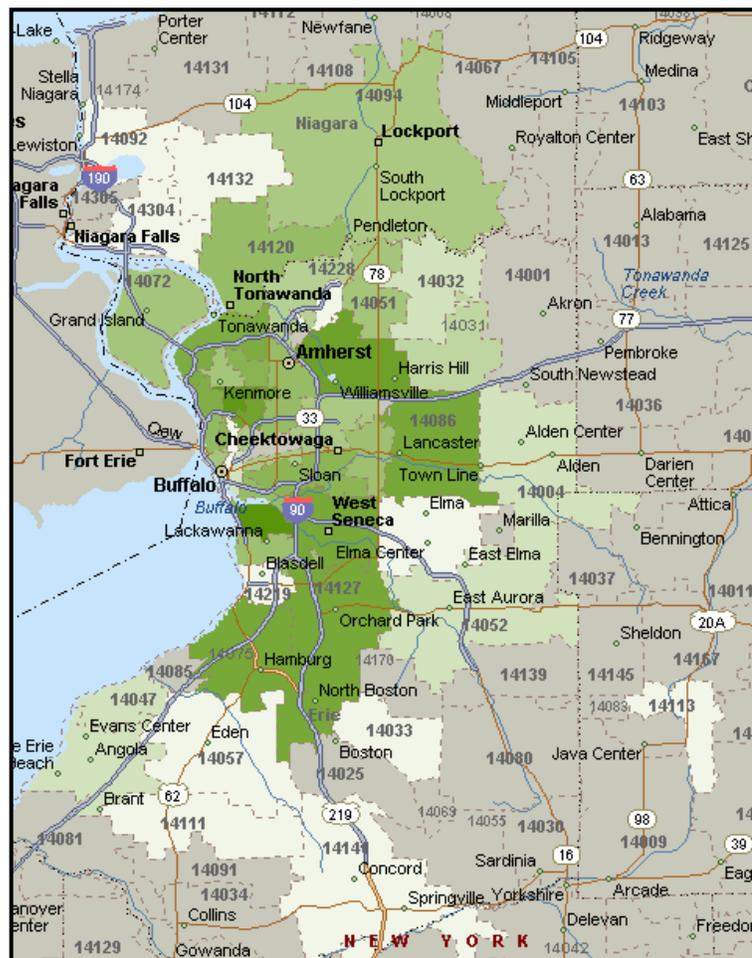
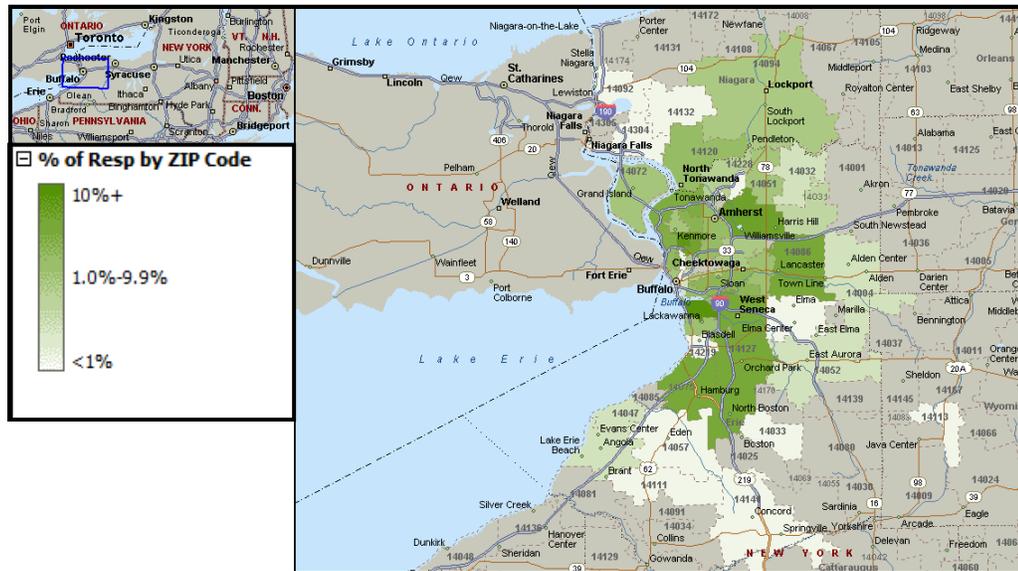
- Family structure – Of the 433 respondents, just 120 (28%) have children living at home. Of those, the number of children is shown below. We’ll see later how this affects what activities people would like to see available in the new park.

If you have children under 18 years old living in your home, please tell us how many?	
Answer Options	Response Percent
1	50.8%
2	39.2%
3	6.7%
4 or more	3.3%

- Geography dispersion - The following table shows the percentage total and running cumulative value of **all respondents** for those ZIP Codes with 10+ respondents and representing 64% of all responses.

ZIP	# of Resp.	% to Tot.	Cume % to Tot.	City(ies)
14220	33	9%	9%	Buffalo, NY
14216	28	8%	17%	Buffalo, NY
14221	21	6%	22%	Buffalo, NY
14214	19	5%	27%	Buffalo, NY
14224	17	5%	32%	Buffalo, NY
14075	16	4%	36%	Buffalo, NY
14086	16	4%	41%	Lancaster, NY
14127	16	4%	45%	Hamburg, NY
14150	14	4%	49%	Orchard Park, NY
14207	13	4%	52%	Buffalo, NY
14223	11	3%	55%	Buffalo, NY
14206	10	3%	58%	Buffalo, NY
14222	10	3%	61%	Buffalo, NY
14227	10	3%	64%	Buffalo, NY

- The map below shows the geographic distribution and concentration of **All Respondents** by ZIP codes. The darker green represents ZIP codes with the highest concentrations which become gradually lighter as concentration decreases (see Legend for value ranges).



- Number of courses played in past year: Golfers reported playing fewer courses than the average number seen in most of our other surveys. Customer respondents were given five ranges from which to choose, the most often cited course consideration set was 1-3 (chosen by 36% of respondents). The median value for the total group of respondents (the midpoint across the range) falls in the 4-6 courses played range (half the respondents below that number of courses, the other half above), and is likely closer to four courses than five or six. Nationally, we typically see the midpoint in the 7-9 range and as many as 10. This might indicate that courses have built a loyalty amongst their customers, either with aggressive loyalty programs or simply with solid value propositions that keeps them from sampling other courses.

How many different golf courses have you played in the last 12 months?	
Answer Options	Response Percent
1-3	36.4%
4-6	30.4%
7-9	14.5%
10-12	8.9%
13 or more	9.8%

- Nearly 50% of the golfers are available to play three or more days a week, not surprising considering 55% are 55 and older and many are likely retired. The largest percentage - 32% - is available two days a week, likely one weekday and one weekend day. This is a good indication of the presence of golfers with time available to play more golf, and programs designed to make it easy and rewarding to do so must be created and implemented.

On average, how many days a week are you available to play golf?	
Answer Options	Response Percent
0	4.2%
1	14.6%
2	31.5%
3	24.9%
4	8.5%
5	7.0%
6	0.9%
7	8.5%

What matters in course selection and barriers to play:

In this section are responses to the overall questions about what facility features and services are most critical in choosing one local course over another. We also probe regarding the critical barriers to playing golf more frequently.

- Course selection – Primary reasons cited by golfers were Course Condition, Price, Tee time availability, Pace of Play, and Course design - challenging. Customer Service, Availability of special prices, and Proximity to home/work followed closely, all with scores better than 2.2. These rankings characterize the local market as price conscious but very discerning about several factors, especially course conditions. The spread between it and Price is significant. This is similar to what we have seen in most of our other surveys. While on a relative basis factors such as clubhouse amenities and practice facilities seem less important, overall there is little room for slippage on any factor. Last, the score for Tee Time Availability is interesting and an indication that giving residents a program that includes advanced tee time reservation capabilities might be a critical component in increasing their loyalty and rounds played. Finally, don't put GPS on golf carts.

Please rate the following aspects of how you choose one course over another. (Select only one response per line)	
Answer Options	Rating Average
Course condition	1.47
Price	1.69
Tee Time Availability	1.76
Pace of play	1.77
Course design-challenging to play	1.91
Customer service	2.04
Availability of special prices	2.05
Proximity to home/work	2.14
Condition of golf carts	2.33
Clubhouse amenities (Food/beverage, golf shop)	2.47
Course design-easy to play	2.69
Availability/quality of practice facilities	2.79
Rewards/Loyalty Program	2.84
Social connections (leagues, men/women's clubs)	3.00
Course-customized smartphone app (GPS, scorecard, tee times)	3.14
Influence of email or advertisement from course	3.15
GPS on golf carts	3.40
Availability of player improvement programs	3.59

Red = Quality score <2.0 or Excellent
 Yellow = Quality score 2.0-2.49 or Above Average
 Green = Quality score 2.5-2.99 or Below Average
 Blue = Quality score 3.0+ or Poor

- Barriers to more frequent play– Of the five barriers offered to respondents, time constraint was the most-cited barrier with 65% of respondents choosing it as one of their two choices. Not Enough Money is the second rated barrier (26%), both about the same as we have seen nationally. Also, 15% of golfers would play more often if they had someone to play with, presenting an opportunity to create programs which are consumer time-friendly as well as connecting lonely golfers with others. The chart below presents the relationship of the seven factors:

What are the primary barriers that prevent you from playing golf more often? (Choose up to two answers)	
Answer Options	Response Percent
I don't have enough time	64.5%
I don't have enough money	25.7%
I don't have anyone to play with	15.4%
I cannot easily get a tee time when I want it	14.0%
I am not very good	12.1%
I have physical conditions that prevent me from playing	10.7%
I've lost interest in the game	3.3%

- Trial rate – In this portion of the analysis, we use the responses from golfers to determine if South Park along with Cazenovia and Delaware Park courses is getting good trial levels both in the absolute and relative to other area facilities. As shown below, Grover Cleveland leads the list with 70% of local golfer respondents saying they've played the facility in the past 12 months. Cazenovia is fourth with 64%, South Park tied for seventh with 60%, Delaware Park tied for 10th with 59%. The good news is all have trial rates higher than the list average of 56%.

Facility	Trial Rate	Rank
Grover Cleveland Golf Course	70%	1
Sheridan Park Golf Course	68%	2
Elma Meadows Golf Club	68%	2
Cazenovia Golf Course	64%	4
Beaver Island State Park Golf Course	62%	5
Amherst Audubon Golf Course	62%	5
Brighton Park Golf Course	60%	7
Deerwood Golf Course	60%	7
South Park Golf Course	60%	7
Delaware Park Golf Course	59%	10
Buffalo Tournament Club	59%	10
All Fac. Avg.	56%	
Eden Valley Golf Course	52%	12
18 Mile Creek (Hamburg Town Golf Course)	52%	12
Bright Meadows Golf Course	50%	14
Oakwood Golf Course	47%	15
Hyde Park Municipal Golf Course	43%	16
Greenwood Golf Course	42%	17
Kis-N-Greens Golf Course	41%	18

- Competitive facility interaction and quality score – In this portion of the analysis, we use the responses of the golfers to determine what other courses they name most often as “also played” (% interaction, the higher the percent, the more crossover golfers between the facilities). Secondly, the golfers rated those competitive courses where they’ve played in the past year, providing a Quality Score for those facilities. The chart below shows the two measures of interaction and relative quality scores. The most direct competitors are those with the highest % Interaction (75%+ as a benchmark) and with Quality Scores lower than South Park.

Facility	% Interaction	Quality Score
Grover Cleveland Golf Course	70%	2.6
Sheridan Park Golf Course	68%	2.3
Elma Meadows Golf Club	68%	2.4
Cazenovia Golf Course	64%	2.7
Beaver Island State Park Golf Course	62%	2.6
Amherst Audubon Golf Course	62%	2.9
Brighton Park Golf Course	60%	2.8
Deerwood Golf Course	60%	2.8
South Park Golf Course	60%	2.8
Delaware Park Golf Course	59%	3.1
Buffalo Tournament Club	59%	2.6
All Fac. Avg.	57%	2.8
Eden Valley Golf Course	52%	3.3
18 Mile Creek (Hamburg Town Golf Course)	52%	2.8
Bright Meadows Golf Course	50%	3.1
Oakwood Golf Course	47%	3.0
Hyde Park Municipal Golf Course	43%	3.1
Greenwood Golf Course	42%	3.5
Kis-N-Greens Golf Course	41%	3.4
Legend	75%+ Interaction	Better Qual. Score
	50-74% Interaction	Parity Qual. Score (+/- 0.2 pts)
	25-49% Interaction	Worse Qual. Score
	<25% Interaction	

- The competitive set is marked by having no courses with Quality Scores better than 2.3. We always see at least one course with a QS better than 2.0, but not here – not even close. Delaware Park scores the worst of the three City courses, and Grover Cleveland the best on the list. But it shouldn’t take much improvement to outclass and outscore the competitors.

Facility satisfaction and barriers to playing more often:

This section provides feedback on South Park strengths, barriers to playing/playing more and the level of customer endorsement for South Park as well as its competitors. This section focuses on responses from people who played South Park in the past 12 months.

- Current customers’ evaluation of facility strengths/weaknesses – The below charts illustrate and provide data for South Park on its relative strengths (lower Quality Score) and weaknesses (higher Quality Score):

Have you played South Park Golf Course in the past 12 months?	
Answer Options	Response Percent
Yes	21.1%
No	78.9%

Over 21% of responding golfers have played South Park in the past 12 months, a comparable percentage compared to the average we see of 18-22%.

Overall, golfers who played South Park in the past 12 months give Good to Very Good marks for Proximity and Price. Other aspects received lower scores, most notably Customer service. We don’t believe good customer service is what attracts people to play a course, while bad customer service will keep them from coming back.

If you played South Park Golf Course in the past 12 months, please evaluate the following aspects:	
Answer Options	Rating Average
Proximity to home/work	1.98
Price	2.22
Overall value	2.53
Availability of desirable tee times	2.63
Customer service	2.68
Social connections (leagues, where friends play)	2.80
Rewards/Loyalty Program	3.38
Availability/quality of practice facilities	3.53
Clubhouse amenities (Food/beverage, golf shop)	3.62
Golf Academy	3.73

Red = Quality score <2.0 or Excellent
Yellow = Quality score 2.0-2.49 or Above Average
Green = Quality score 2.5-2.99 or Below Average
Blue = Quality score 3.0+ or Poor

Quality scores for South Park are fair to poor. Usually bunkers get the worst rating and we see that here. We consider this a reflection that nobody likes bunkers and most don’t know how to play out of them. But considering the poor scores for other course condition aspects, it’s likely bunkers are just bad, period. Overall enjoyment gets the best rating and considering the poor conditions, we might assume this is about friends playing together. It’s interesting to note that Overall enjoyment gets nearly the same score as Overall value in the previous question.

Considering the South Park Golf Course, please evaluate the following aspects:	
Answer Options	Rating Average
Overall enjoyment	2.57
Condition of golf carts	2.83
Pace of play	2.85
Course layout	2.88
Condition of greens	3.00
Condition of fairways	3.05
Condition of tees	3.15
Condition of rough	3.25
Condition of bunkers	3.60

Red = Quality score <2.0 or Excellent
 Yellow = Quality score 2.0-2.49 or Above Average
 Green = Quality score 2.5-2.99 or Below Average
 Blue = Quality score 3.0+ or Poor

- We next asked golfers what barriers existed that prevented them from playing South Park or playing it more often:

What are the primary barriers to playing South Park Golf Course, or playing it more often? (Check up to three)	
Answer Options	Response Percent
Proximity to home/work	25.6%
None	24.6%
Course conditioning	20.5%
Lack of personal free time	18.5%
Was unaware that course exists	17.9%
Pace of play	9.2%
Course design-too easy	7.2%
Tee time availability	6.2%
Customer service	3.6%
Price	3.6%
Clubhouse amenities (Food/beer availability/selection, golf shop merchandise selection)	2.6%
Game improvement opportunities (Adequate practice facilities)	2.6%
Course design-too difficult	1.0%
League opportunities are limited	1.0%

The primary barrier to playing South Park more often is Proximity, followed by None and Course conditions. This is all favorable. Proximity is something out of management’s control, but only 25% see it as a barrier. Nearly the same percentage has no barriers at all; and improved conditions might satisfy another 20%. That the facility has very strong awareness in the market means little if any “awareness” advertising is called for.

Net Promoter Ratio (NPR) - We asked the golfers about endorsement of facilities they have played in the past year. This becomes a measure of the level, strength and direction of word-of-mouth marketing among customers which we call the Net Promoter Ratio. We group responses to the question of course recommendations into “Promoters” (Extremely/Somewhat Likely to recommend the facility), “Neutrals” (Neither Likely nor Unlikely) and “Detractors” (Extremely/Somewhat Unlikely to recommend). By comparing the number of respondents on the Promoter side to the Detractors, we come up with both a distribution of the three respondent groups for each course as well as the key Net Promoter Ratio:

Answer Options	% Promoters	% Neutral	% Detractors	Net Promoters Ratio*
Sheridan Park Golf Course	67%	20%	14%	4.9
Elma Meadows Golf Club	58%	29%	12%	4.8
Beaver Island State Park Golf Course	57%	23%	20%	2.9
Grover Cleveland Golf Course	50%	32%	18%	2.8
Buffalo Tournament Club	52%	29%	19%	2.7
South Park Golf Course	44%	36%	21%	2.1
Cazenovia Golf Course	48%	29%	24%	2
18 Mile Creek (Hamburg Town Golf Course)	44%	33%	23%	2
Deerwood Golf Course	45%	30%	25%	1.8
Brighton Park Golf Course	44%	31%	25%	1.8
All Facility Avg.	42%	33%	25%	1.7
Amherst Audubon Golf Course	40%	33%	26%	1.5
Oakwood Golf Course	30%	45%	25%	1.2
Hyde Park Municipal Golf Course	29%	41%	29%	1
Delaware Park Golf Course	33%	30%	37%	0.9
Bright Meadows Golf Course	27%	41%	32%	0.8
Eden Valley Golf Course	25%	32%	43%	0.6
Kis-N-Greens Golf Course	19%	46%	35%	0.6
Greenwood Golf Course	14%	47%	38%	0.4

* 1.0 Net Promoter Ratio means equal balance of Promoters/Detractors
All Facility Average is 1.7:1 Net Promoter Ratio, higher numbers are better

No course received a strong NPR. We typically see one or two strong market leaders with NPR's higher than 50:1. This verifies the Quality Scores that none of the competitive courses are universally loved; and those golfers play these courses out of convenience, price, or social connections to satisfy their golf game desires. It leaves a big opening for someplace golfers might consider truly special.

Loyalty and frequency for primary facilities:

We asked a series of questions about golfer’s choices and loyalties to the facilities they play most often to determine loyalty and play distribution for South Park and its competitors. The client chose a list of area courses determined to be most similar as competitors to South Park.

- Primary course designations – the table below shows what percentages of the local golfers named each facility as their primary (course they play most often):

In the last 12 months, which course have you played most often?	
Answer Options	Response Percent
Other (please specify)	27.0%
Cazenovia Golf Course	8.8%
18 Mile Creek (Hamburg Town Golf Course)	7.8%
Grover Cleveland Golf Course	6.9%
Elma Meadows Golf Club	6.9%
Delaware Park Golf Course	6.4%
Sheridan Park Golf Course	6.4%
Beaver Island State Park Golf Course	5.9%
South Park Golf Course	4.9%
Brighton Park Golf Course	4.4%
Buffalo Tournament Club	3.9%
Amherst Audubon Golf Course	3.9%
Deerwood Golf Course	2.5%
Hyde Park Municipal Golf Course	1.5%
Kis-N-Greens Golf Course	1.5%
Eden Valley Golf Course	0.5%
Greenwood Golf Course	0.5%
Oakwood Golf Course	0.5%
Bright Meadows Golf Course	0.0%

The number of courses within the geographic area gives a wide number of choices and no clear cut “winner” in where local golfers play most often. The highest vote getter was “Other” at 27%, followed by Cazenovia. The “Other” responses are on the accompanying spreadsheet on the Q8 tab and are led by Glen Oaks and Ivy Ridge.

- Primary reason for preferred facility selection – Proximity is the No. 1 reason why local golfers choose a course to play most often; typically Price, Proximity, or Course Conditions rank in the top three. Second is Course condition followed by Tee time availability, confirming responses to earlier questions.

Please tell us the one reason the course you chose is the one you play most often:	
Answer Options	Response Percent
Proximity to home/work	28.9%
Course condition	12.3%
Tee Time Availability	10.3%
Other (please specify)	9.8%
Social connections (leagues, men/women's clubs)	9.3%
Availability of special prices	7.8%
Price	7.4%
Course design-challenging to play	5.4%
Pace of play	2.9%
Course design-easy to play	2.5%
Availability/quality of practice facilities	1.5%
Customer service	1.5%
Condition of golf carts	0.5%
Availability of player improvement programs	0.0%
Clubhouse amenities (Food/beverage, golf shop)	0.0%
Rewards/Loyalty Program	0.0%
Influence of email or advertisement from course	0.0%
GPS on golf carts	0.0%
Course-customized smartphone app (GPS, scorecard, tee times)	0.0%

- Share of Play - Looking at the results for the Share-of-Play (SoP) given to golfers' primary facility, the good news is that the city courses rank 1-2-5 in SoP, with Cleveland third. The bad news is that only Cazenovia has anywhere near the All Facility Average Total Median Annual Rounds frequency (30). South Park respondents naming it as their "Most often played" course had half the All Facility Frequency (14 rds) and Delaware Park had roughly 1/6 of the All Facility Frequency. Hence, it would appear that loyalty isn't necessarily the challenge for the city facilities but rather it's about attracting a higher frequency golfer. The most comparable competitor to Grove Cleveland when it comes to frequency and loyalty metrics is Sheridan Park with a slightly lower loyalty score but attracting a higher frequency golfer. Cazenovia and Beaver Island are in the 2nd tier of loyalty, lagging Grover Cleveland but posting better numbers in both frequency and loyalty among their golfers naming them as their "most often" course. As noted in the Legend, we saw a number of facilities which did not get five respondents naming them as "most often" and this also produced a relative large number of golfers naming a course not on the list provided as their "most often" (and, looking at the All Other line, you can see that these are generally average frequency golfers and giving average loyalty levels to those "write in" courses).

	Tot. Med. Ann. Rds	Prim. Fac. Med. Ann. Rds	Prim. Fac. Shr of Rds
Delaware Park Golf Course	5	4	89%
South Park Golf Course	14	10	71%
Grover Cleveland Golf Course	33	23	69%
Sheridan Park Golf Course	40	25	63%
Cazenovia Golf Course	26	15	58%
Beaver Island State Park Golf Course	31	16	50%
Amherst Audubon Golf Course	6	3	50%
All Other	30	15	50%
All Fac Avg	30	15	50%
18 Mile Creek (Hamburg Town Golf Club)	50	19	38%
Elma Meadows Golf Club	40	15	38%
Brighton Park Golf Course	12	4	33%
Buffalo Tournament Club	49	11	21%
Eden Valley Golf Course	N/A	N/A	NA
Greenwood Golf Course	N/A	N/A	NA
Deerwood Golf Course	N/A	N/A	NA
Oakwood Golf Course	N/A	N/A	NA
Hyde Park Municipal Golf Course	N/A	N/A	NA
Bright Meadows Golf Course	N/A	N/A	NA
Kis-N-Greens Golf Course	N/A	N/A	NA
N/A = < 5 respondents naming it as "Most often played" course			

Value and convenience:

In this section, we probe the value points for golf for both groups as well as their shopping habits and other custom questions to this survey.

- Regarding the question of “What is a good value for a 9-hole weekday round of golf, no cart”:

What is a reasonable value for a 9-hole WEEKDAY (Monday-Friday) round of golf (no cart)?	
Answer Options	Response Percent
\$10 or less	41.2%
\$11-\$15	43.7%
\$16-\$20	14.1%
\$21-\$25	0.5%
\$26 or more	0.5%

- Regarding the question of “What is a good value for a 9-hole weekend round of golf, no cart”:

What is a reasonable value for a 9-hole WEEKEND (Saturday-Sunday) round of golf (no cart)?	
Answer Options	Response Percent
\$10 or less	6.5%
\$11-\$15	44.2%
\$16-\$20	33.2%
\$21-\$25	14.1%
\$26 or more	2.0%

Nearly 85% of respondents think \$15 or less is a fair rate for a weekday 9-hole round of golf, and the largest group (44%) said \$11-\$15. Nearly 50% of respondents answered \$16 or more for weekend rates, and the largest group (44%) answered \$11-\$15. However, we’ll note that consumers typically answer one level below what they typically spend, and we have yet to see a response set equal to or greater than the golf facility’s rate structure. Given typical 9-hole rates, this response set should be an encouraging factor for setting rates on the proposed new nine-hole facility; that weekday rates up to \$15 and weekend rates up to \$20 will be widely accepted if the product value delivers at that rate.

The Hypotheticals:

In this section we explore a series of five hypothetical questions. The first three were asked of people who identified themselves as golfers.

- Regarding where golfers might play more often if South Park closed:

Please carefully consider this hypothetical question: If South Park Golf Course were to close and no course built to replace it; how likely is it that you would play, or play more often, at these other courses located within the city?

Answer Options	Rating Average
Cazenovia Park	3.17
Delaware Park	3.52
Grover Cleveland	3.08

Not surprisingly given ratings answers on other questions, Grover Cleveland would benefit most by South Park's closing, followed closely by Cazenovia. However, based on a 1-5 scale with "1" being Highly likely and "5" Highly unlikely, none could expect substantial gains in play.

- Regarding preferences for a new course configuration:

Please carefully consider this hypothetical question: If South Park Golf Course were to close, what would be your preference for a new golf course in the South Buffalo area:

Answer Options	Rating Average
18-hole full length course	1.87
9-hole par-3 course	3.50
9-hole executive length course	3.31
9-hole "full length" course with multiple tee/distance choices	2.83
12-hole course with "loops" of varying number of holes (3, 6, 9, 12)	3.48
Other (please specify)	

An 18-hole course wins, but it always does. Second is a 9-hole full length course with multiple tee and distance choices. The other three choices should not even be considered. The one "Other" response was "Like 18 holes best."

- Regarding what amenities a new facility should provide:

Please carefully consider this hypothetical question: If a new golf facility was built in the South Buffalo area, what other golf-related amenities would you like to see? Choose all that apply

Answer Options	Response Percent
Driving range	72.8%
Practice putting greens	67.2%
Restaurant	65.1%
Short game practice area	59.5%
Bar	55.9%
Golf merchandise shop	29.7%
Professional instruction	26.7%
Indoor practice area	25.1%
Golf fitness	9.7%

Practice, practice, practice. Three of the top four responses are about practice facilities. Driving ranges can be highly profitable. And when finished practicing, golfers want someplace to eat and drink. They'll buy their merchandise elsewhere, likely lots of extra-large shirts as golf fitness is not desired. It's interesting that only 27% want professional instruction. This could be an indictment on the PGA's instruction techniques, or an indication that golfers are getting all the help they need from Golf Channel, golf magazines, and golf videos.

- The next question was asked of people who identified themselves as non-golfers:

If the existing South Park Golf Course was closed, and a brand new South Buffalo golf facility was constructed, how likely is it you'd consider learning to play golf at the new facility?

Answer Options	Response Percent
Very interested	5.2%
Somewhat interested	17.8%
Neither interested nor uninterested	29.3%
Somewhat uninterested	6.3%
Very uninterested	41.4%

On the surface this may not be encouraging, but given that national participation is 9%, and New York state's is slightly lower at 8.5%, having 23% of the local population expressing at least some interest in learning to play golf is a solid indication that new golfers can be attracted to a new facility that provides easy access and an enhanced experience.

- Finally, we asked a hypothetical questions of all respondents:

Under consideration is closing South Park Golf Course and building a new 9-hole course in the South Buffalo area. This would include land available for other recreational activities. Please rate your or your family's likelihood of using any of the following list of possible additions. You'll have a chance at the end to offer "write-in" suggestions:

Answer Options	Rating Average
Paved walking/biking paths	2.31
Amphitheater for concerts and plays	2.39
Unpaved walking/hiking paths	2.86
Sledding/tubing/snowboarding (winter)	2.88
Ice skating	3.07
Snowshoe/cross-country skiing	3.29
Dog park	3.29
Kite flying	3.41
Cross-country running	3.58
Disc golf	3.72
Remote control air/ground vehicles area	3.89
Skateboard park	4.09
Other (please specify)	21

The top responses are activities common to adults and families and not particular to kids (skateboarding, remote control toys, disc golf are at the bottom of choices). This is partly due to the older age skew of the respondents (54% are 55 and older). “Other” responses are shown on the accompanying Excel workbook tab marked Q22.

We offered the opportunity for respondents to provide any other comments about South Park golf course, or golf in general. The 77 responses can be found on the accompanying Excel workbook tab marked Q29.

Finally, 200 (110 from the golfer group, 90 from the non-golfer group) respondents offered their e-mail in return for receiving more information about City of Buffalo and Olmstead Parks Conservancy activities, along with entry into the prize drawing. This list has been included on the accompanying Excel workbook tab marked Q30.

Conclusions and Recommendations

We saw in the Pellucid market analysis that Buffalo is not a healthy golf market measured against several metrics including oversupply, negligible population growth, ethnicity mix, and affordability. If this survey was commissioned to determine if a new course should be built as opposed to replacing an existing one, we'd say don't do it. But the survey responses offer a decent measure of possibility that a replacement for South Park could be successful.

None of the competitive courses received exemplary quality scores, so a new facility could challenge for customers and rounds without being a five-star facility. In other words, it needn't be great, just better than what's currently offered. That may not take much to achieve.

Add to that an existing customer base that, while they might be holding their collective noses when they play, still give decent marks for overall value and overall enjoyment. Upgrading them to a nicer experience, while maintaining affordability, would surely generate some word of mouth and stronger loyalty to their new "home."

Golf starts and grows from muni courses. The survey found 23% of the non-golfers expressing some interest in taking up the game if a new facility were to be built. This is not insignificant, as the immediate draw area is densely populated providing an ample population to draw from. Golfers made their feelings known about having practice amenities at a new facility, and this would attract new golfers as well with appropriate programs. Also, driving ranges can be profitable and many have "practice membership" programs where people who seldom step foot on a course will frequent a practice range just to hit balls for fun and exercise. It should be disappointing to the PGA of America that just 27% desire professional instruction. Even more disappointing is just 10% desiring a golf fitness program. Maybe they think playing and hitting balls is fitness enough.

Another concept that might be explored is what the city of El Segundo, CA negotiated with Top Golf, a hybrid practice facility that includes a bar and restaurant. Check out this link:

<http://www.dailybreeze.com/government-and-politics/20131106/el-segundo-moves-forward-with-topgolf-proposal-for-the-lakes>.

If a replacement for South Park was to be built and 18 holes is out of the question (yet preferred by golfers), the next preferred option is a full-length 9-hole course with multiple tee and length options. Current customers wouldn't be thrilled, necessarily; but they'd likely be satisfied if the nine holes offered design and challenge options coupled with a practice facility.

If South Park disappeared and no replacement built, neither of the other city courses nor Grover Cleveland would benefit much from South Park rounds moving to them. But Grover Cleveland would benefit most.

The entire response group would like to see paved trails for walking and biking, and an outdoor amphitheater for live entertainment included in the new park. These scores are much higher than that of all the other choices.

We believe that you'll find value in the combination of findings that supports some of your previous assumptions and challenges others. We are available for a one hour conference call for further discussion at your convenience.

Submitted by,

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