

Golf 2008 and THE ENVIRONMENT

Golfer Perceptions & Attitudes Concerning the Game and its Relationship with the Environment

Prepared by: GOLF DIGEST
PUBLICATIONS



AGENDA

- ▶ Background & Objectives
- ▶ Methodology
- ▶ Overview
- ▶ Headlines
- ▶ A Brief Look At the Respondent Base
- ▶ Significant Findings

Background & Objectives

- ▶ Assess comparisons of Avid Golfers with the General Population regarding the perceptions of the game of golf and its relationship with the environment

Methodology

- ▶ Telephone interviews conducted with Golf Digest Subscribers Typical U.S. Adults
- ▶ 650 completed interviews
- ▶ 12 minutes in length
- ▶ Random Digit Dialing (RDD) Used for U.S. Population; Golfers based on Active Golf Digest Subscribers
- ▶ Projectable to full population within $\pm 5.66\%$ at 95% confidence level

Overview

- ▶ U.S. adult population is more likely to point fingers at golf for environmental ills, than golfers are to “call a penalty” on themselves
 - Less likely to view the game as environmentally friendly
 - More favorable towards heightened government intervention on water consumption
- ▶ While both groups are more “environmentally conscious,” the general population is more “activist”

Headlines

- ▶ Green Has Matured At The Re-cycling Level
 - Recycling has become “A way of life” to a large majority of Americans
- ▶ Golfers And Typical Adults Alike Are Equally Likely To Support Environmental Interests
 - But just as unlikely to join “green” organizations – less than 10%
- ▶ But Golfers Balk At Car-Pooling To Save Energy
 - Perhaps their affluence blinds them to the “green” benefits of sharing a ride!

Headlines

- ▶ Typical Adults Say Golf Is Not As Environmentally Friendly
 - Their biggest concerns are excessive water use and pesticide use
- ▶ Groups Are More Aligned When It Comes To Aesthetics
 - While both populations recognize the importance of strong measures in periods of drought, a clear majority of golfers and typical adults alike appreciate the unique landscape of golf course architecture

Headlines

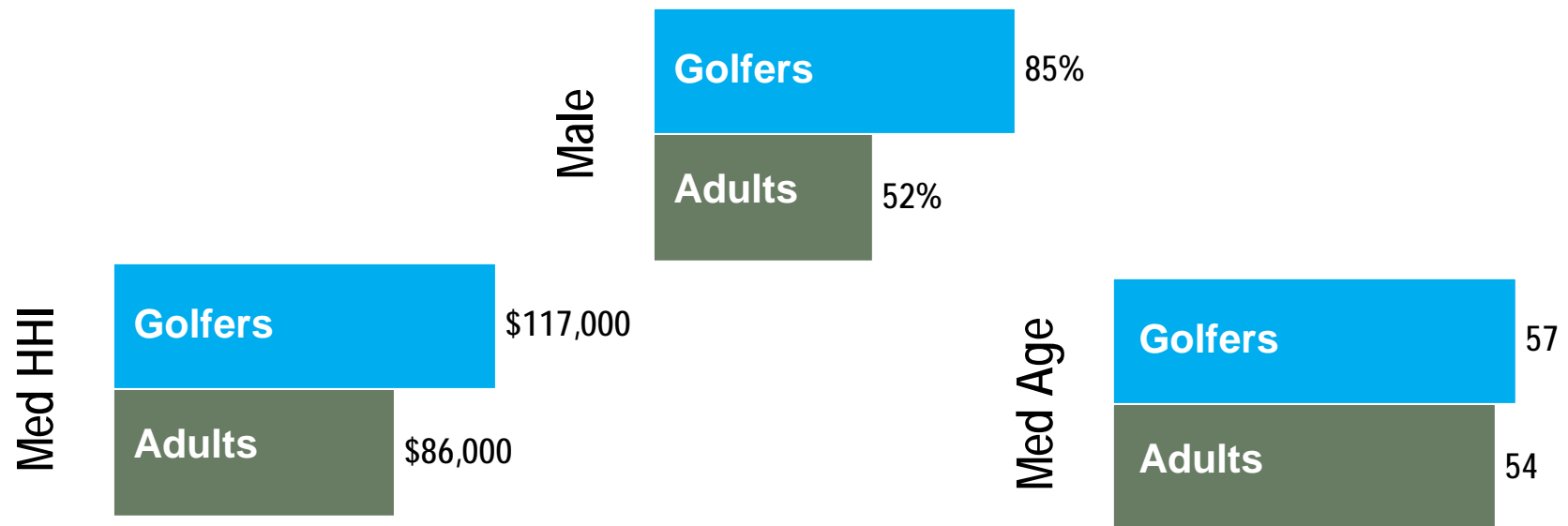
- ▶ “E” Solutions About Golf’s Environmental impact are Philosophically Consistent
 - Good stewards of the environment benefit everyone, but is not necessarily a big plus for increased golf participation
- ▶ Environmental Regulation: Everyone is “On Board” in Theory
 - More than two out of three feel strongly that Government Intervention is Necessary
- ▶ But Golfers Get “E” Leary When It Come To Their Own Turf
 - Golfers are more likely to blame Real Estate Development associated with courses

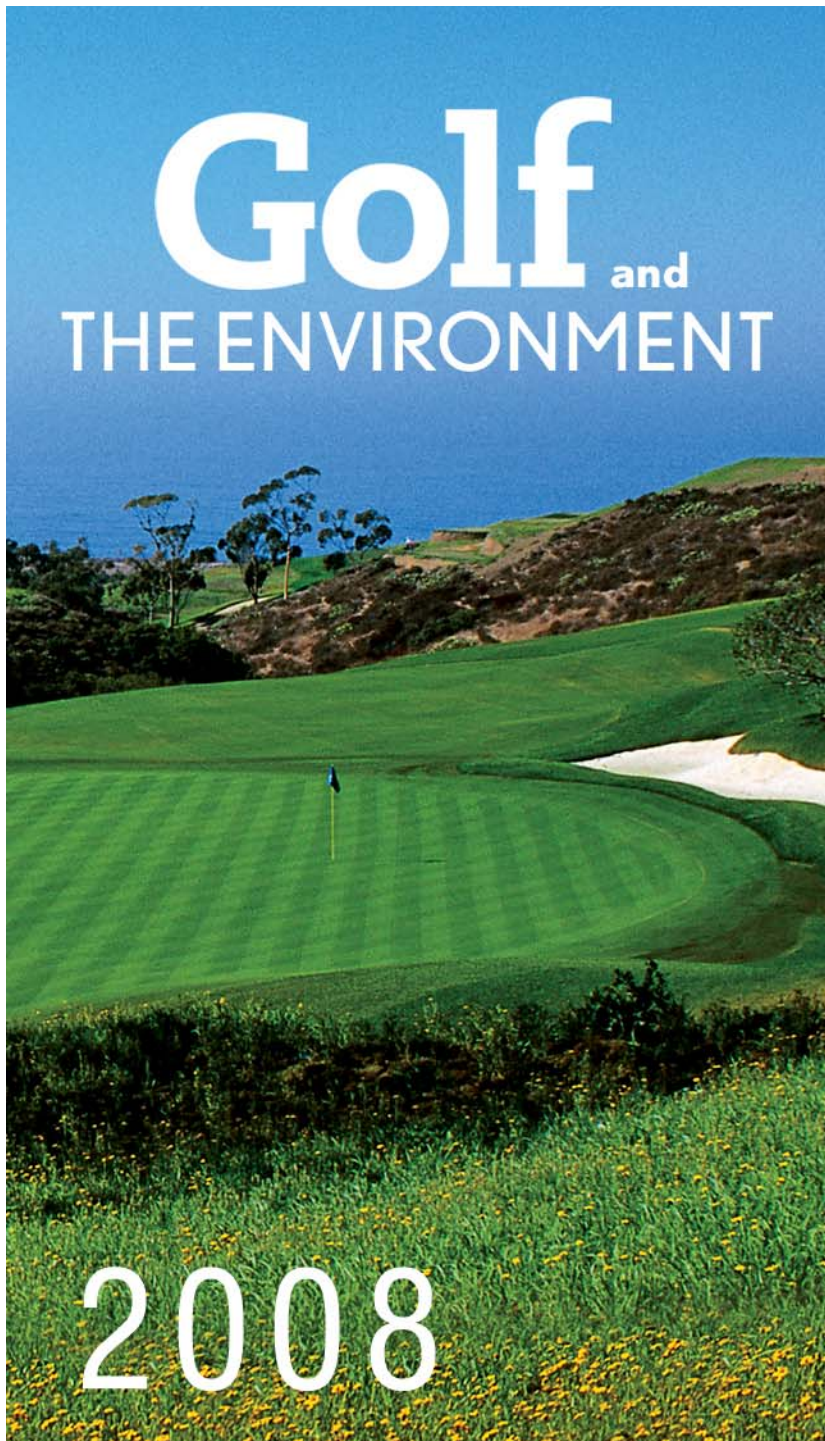
Headlines

- ▶ Global Warming: Perception Versus Reality
 - Women are significantly more likely to view “global warming” as a threat accounting for the unbalanced view among the two groups
 - Golfers are undecided about global warming’s origins; natural or man-made; typical adults are convinced we’re at fault
- ▶ The Bottom Line Conundrum Is A Catch 22
 - Passionate Activists (Sic. Golfers) will always be more sympathetic to their own interests; however, typical adults are in the minority in “pointing the finger” at Golf as a “villain.”

A Brief Look At the Respondent Bases

- ▶ Golfers are more Male oriented, Affluent and Older than the General Population

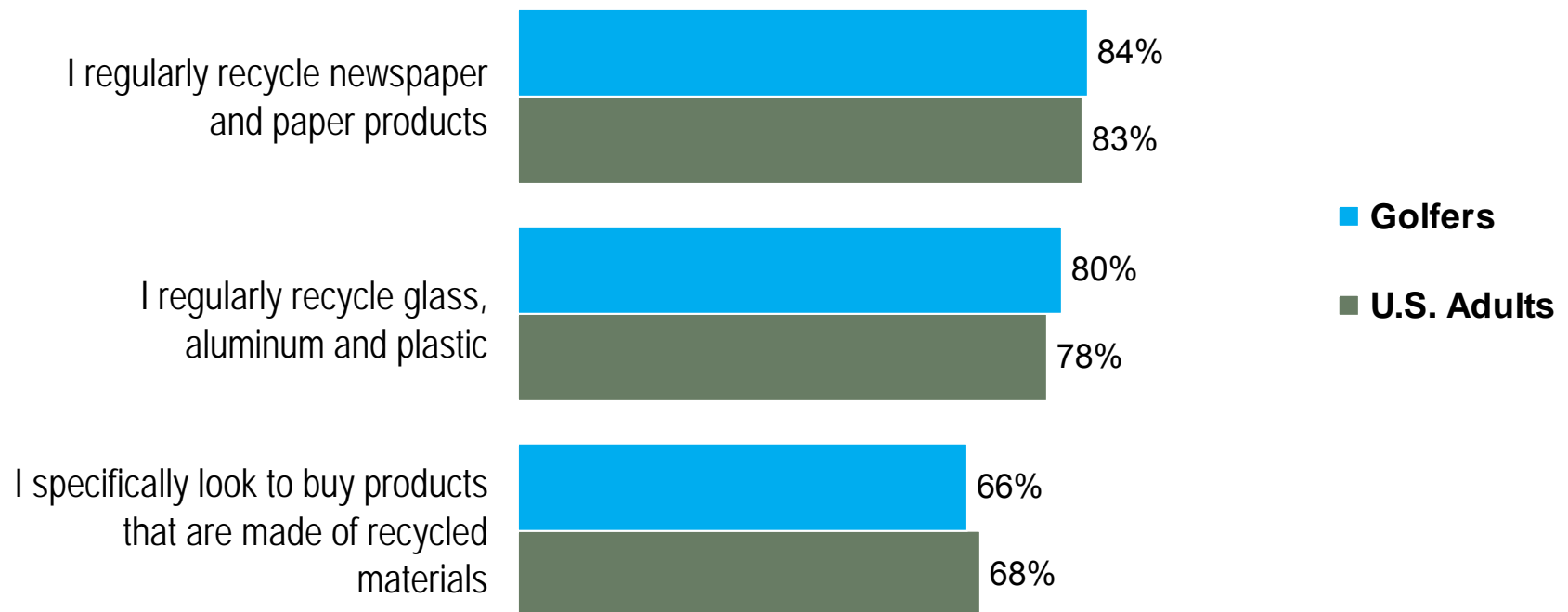




Personal Involvement, Interest and Participation in Environmental Activities

Green Has Matured At The Re-cycling Level!

► Recycling Has Become “A Way Of Life” To All Americans



Top 2 Box Score; based on 5 point scale

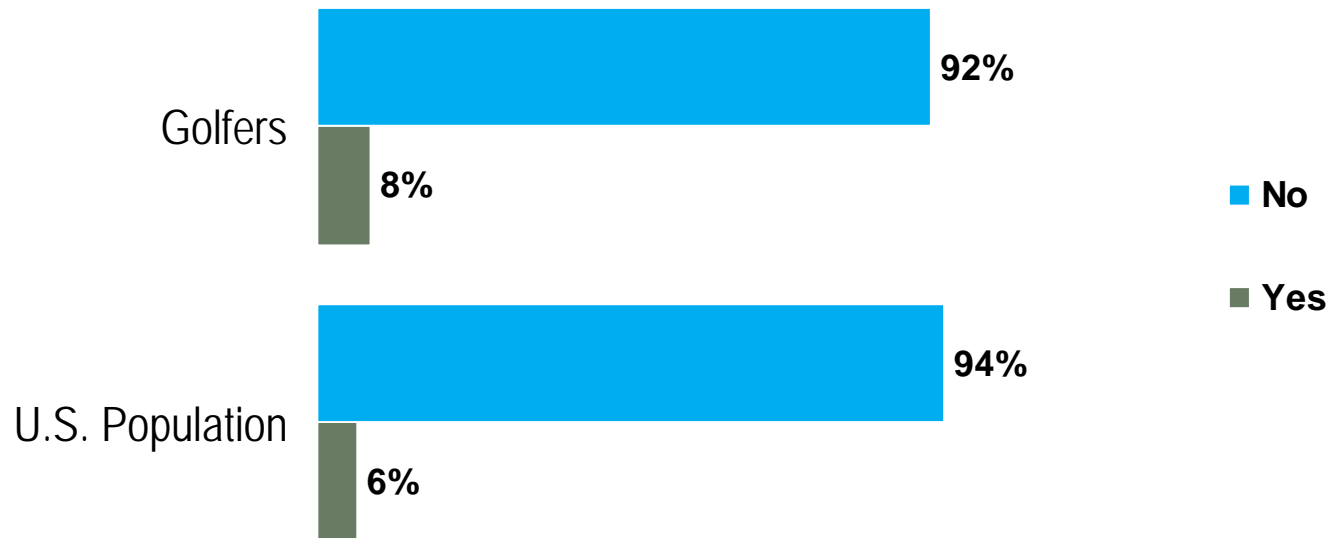
Both Groups Are Equally Likely To Support Environmental Interests



Top 2 Box Score; based on 5 point scale

.... But Just As Unlikely To Join "Green" Organizations!

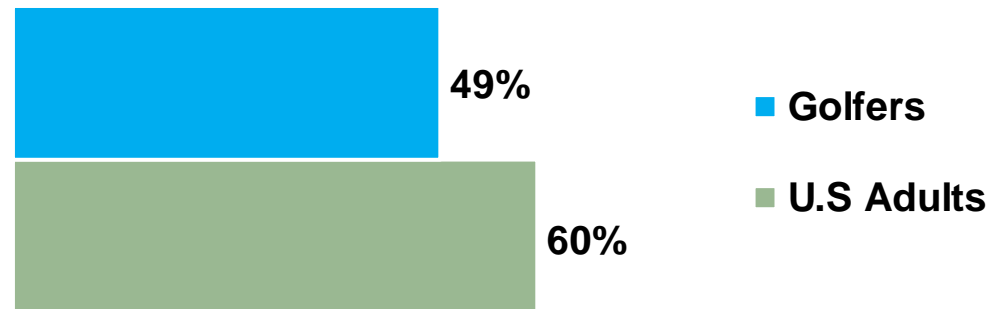
Q Are You Currently A Member Of Any Environmental Organization?



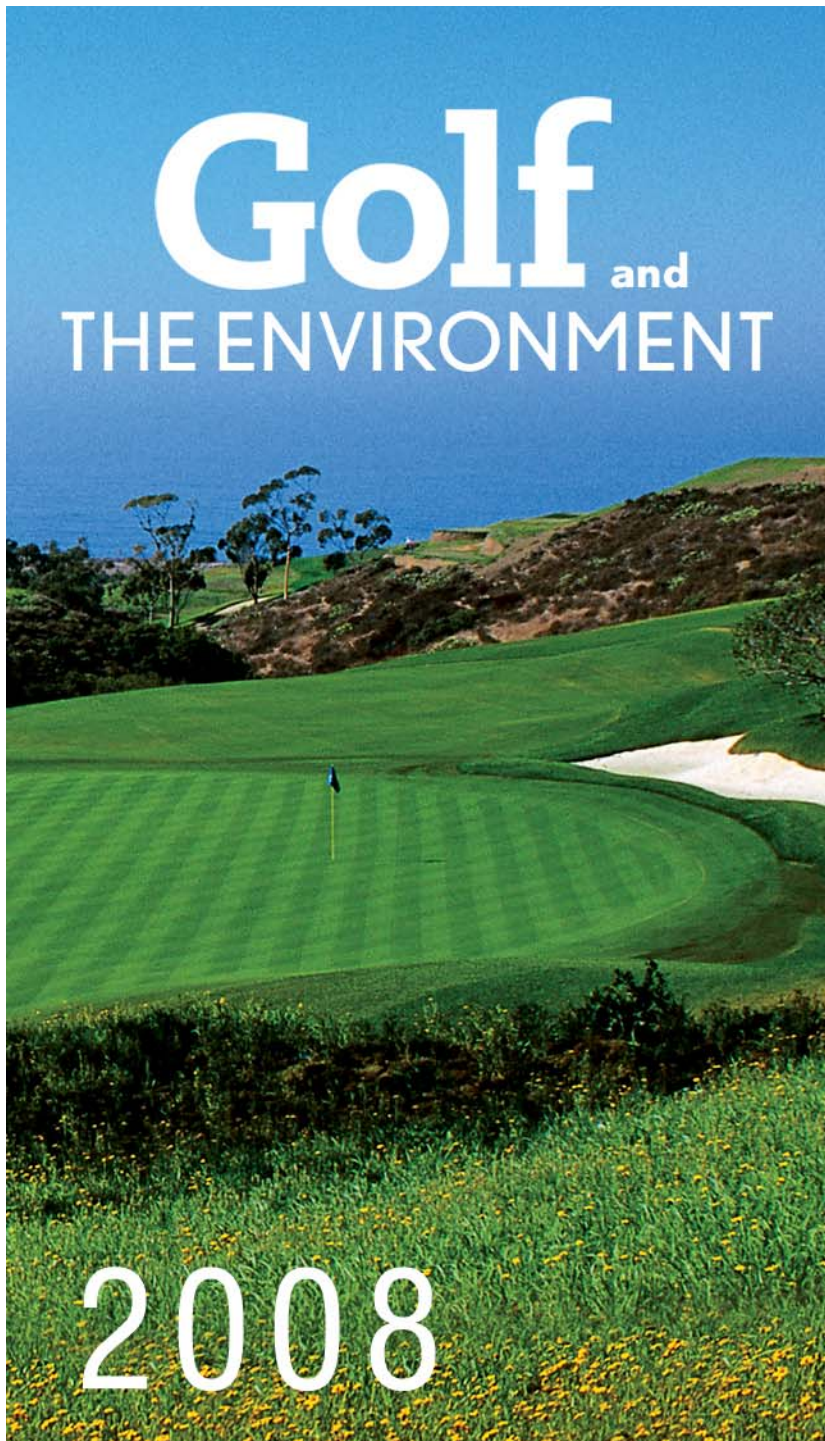
Golfers Balk At Car-Pooling To Save Energy

- ▶ Perhaps Their Affluence Blinds them to the “Green” Benefits Of Sharing A Ride!

I would be willing to carpool/take public transportation to work because I am concerned about the amount of pollution that cars emit into the atmosphere



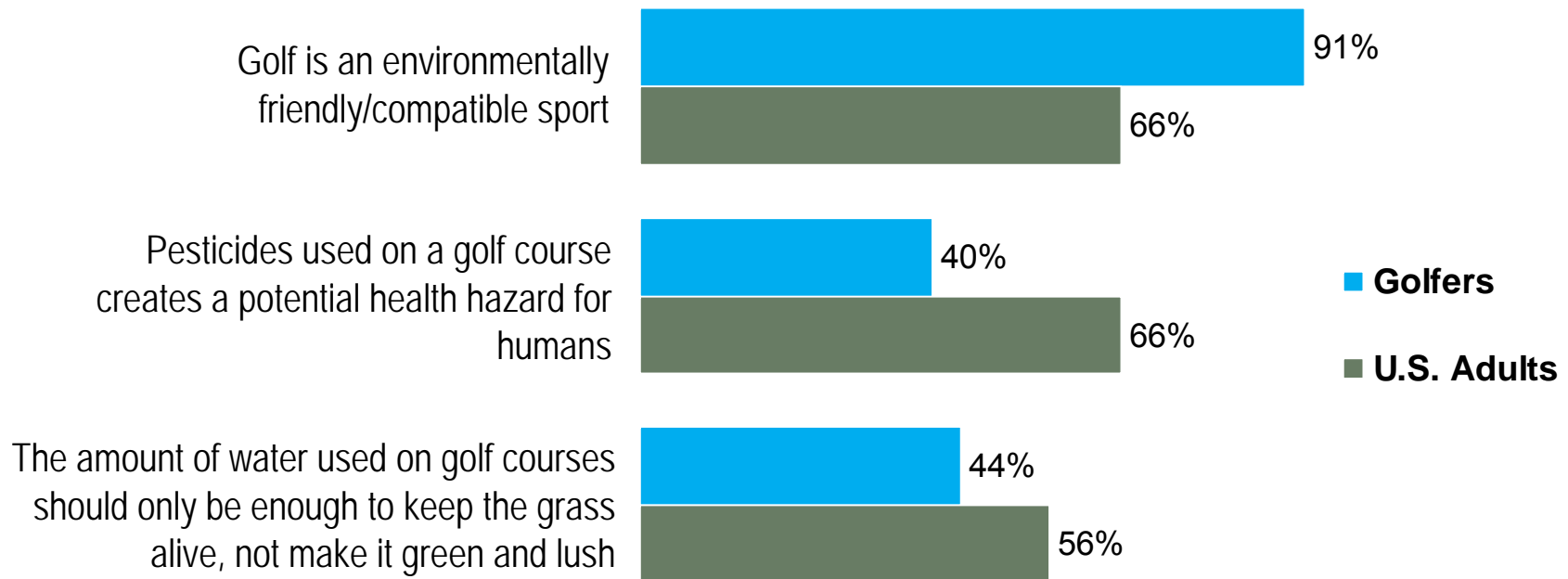
Top 2 Box Score; based on 5 point scale



Perceptions of Golf and Its Relationship with the Environment

U.S Adults Say Golf Is Not As Environmentally Friendly

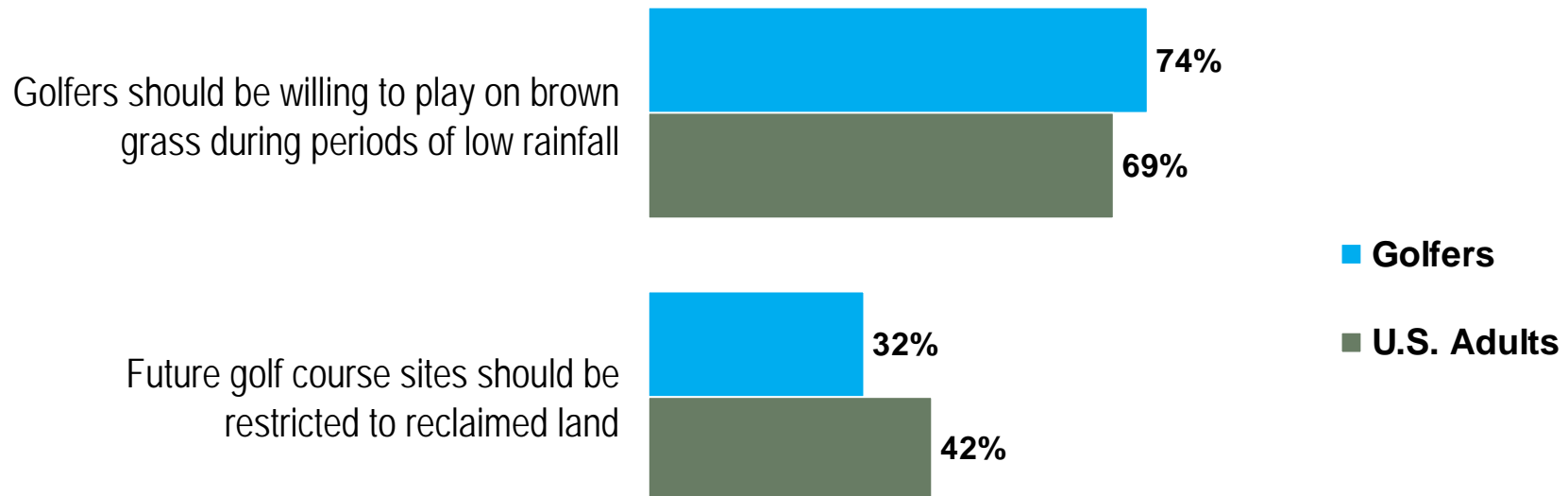
- ▶ Biggest concerns are excessive water use and pesticide use



Top 2 Box Score; based on 5 point scale

Groups Are More Aligned When It Comes To Aesthetics

- ▶ While both groups recognize the importance of strong measures in periods of drought, a clear majority appreciate the unique landscape of golf course architecture



Top 2 Box Score; based on 5 point scale

"E" Solutions About Golf are Philosophically Consistent

- ▶ Good stewardship of the environment benefits everyone, but is not necessarily a big plus for increased golf participation

Golf should be more environmentally friendly:

- to set a good example for other businesses
- to reduce conflicts with environmental groups

Golfers U.S. Pop

72% 74%

74% 63%

If golf courses were more environmentally friendly:

- it would improve golf's image
- it would attract more kids to the game

Golfers U.S. Pop

52% 56%

31% 40%

Top 2 Box Score; based on 5 point scale

Environmental Regulation: Everyone is "On Board" in Theory

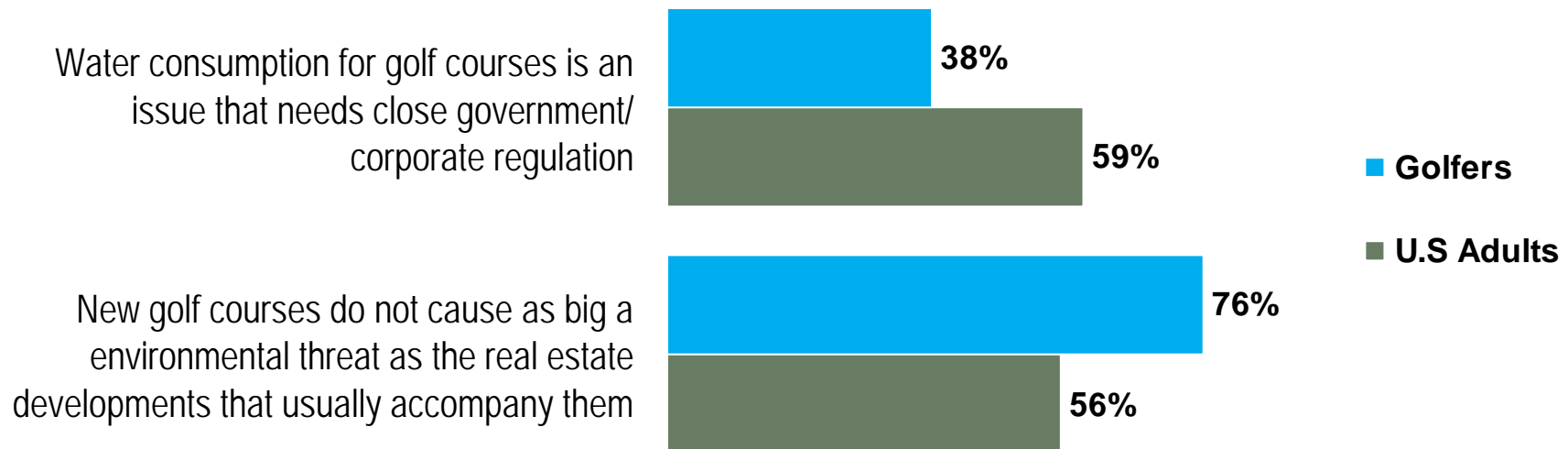
- ▶ More than two out of three feel strongly that government intervention is necessary



Top 2 Box Score; based on 5 point scale

Golfers Get "E" Leary When It Come To Their Own Turf

- Golfers are more likely to blame Real Estate Development associated with courses

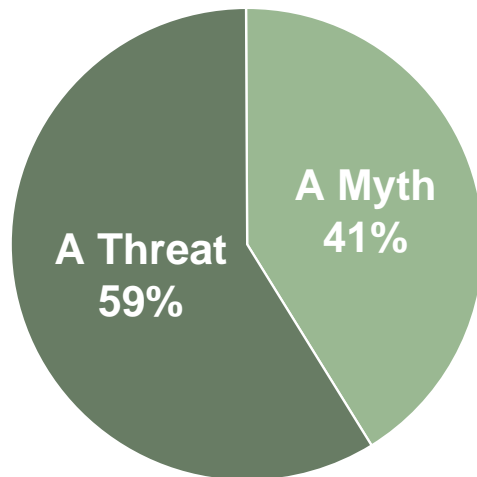


Top 2 Box Score; based on 5 point scale

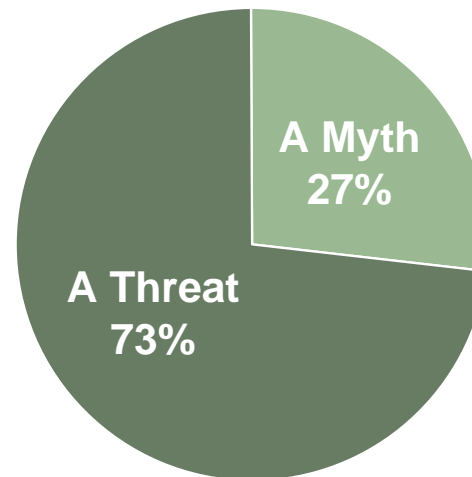
Global Warming: Perception Versus Reality

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Golfers



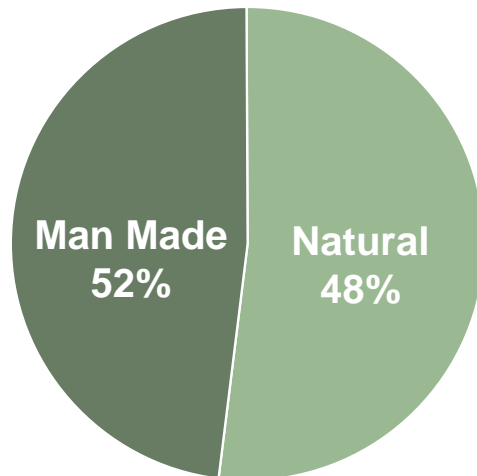
U.S. Population



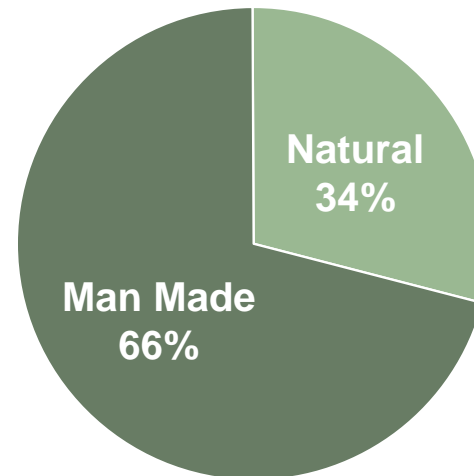
Global Warming: Natural Versus Synthetic

- ▶ Golfers are undecided about global warming's origins; typical adults are convinced we're at fault

Golfers

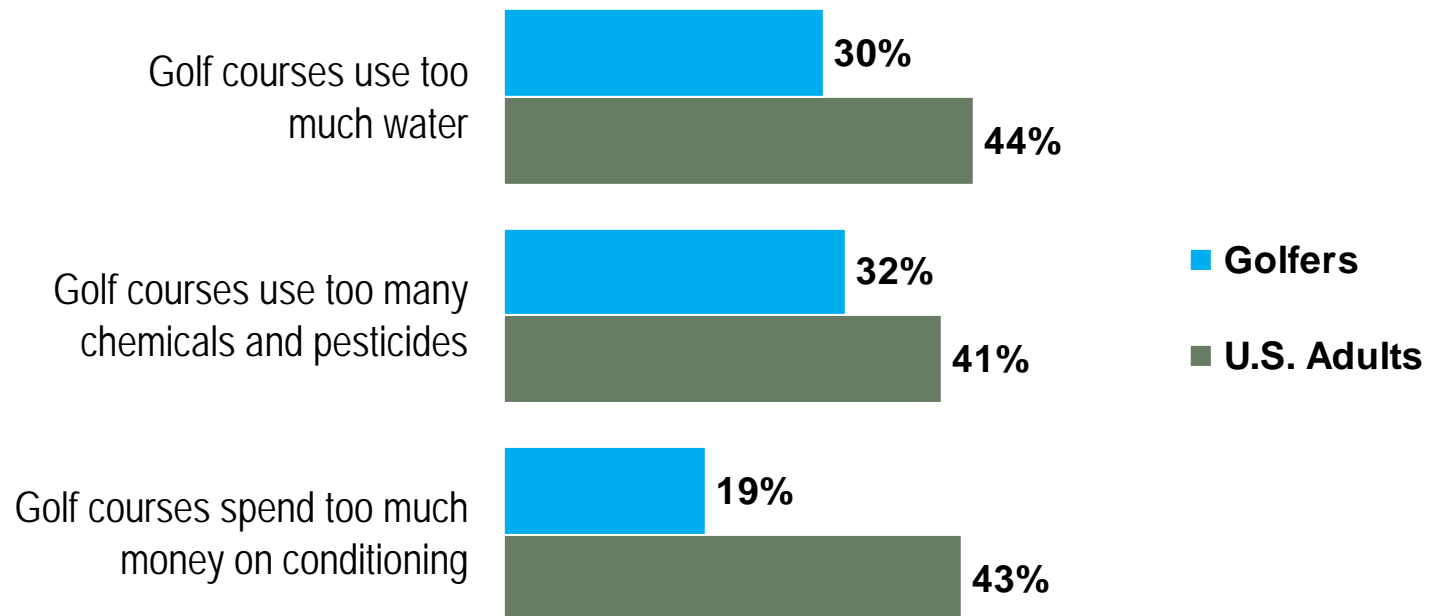


U.S. Population



The Bottom Line Conundrum Is A Catch 22

- ▶ Passionate Activists will always be more sympathetic to their own interests; however, typical adults are in the minority in “pointing the finger” at Golf!



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