

*Wildlife*

MANAGEMENT PUBLIC EDUCATION ADVISORY

COUNCIL

# **Extra Strength – Wildlife Management Public Education Advisory Council**

*A Survey of Colorado Voters*

*Presented August 6, 2010*

# Introduction

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- Kupersmit Research is pleased to present this overview of the July, 2010 survey completed on behalf of the PEAC
- Goals
  - Measure any improvement/stability/decline in core metrics
    - Awareness of messaging
    - Understanding of the role played by licenses in funding CO wildlife management
    - Belief in the positive impact of hunting and fishing
  - Evaluate interest in information/programs for beginners to learn about hunting

# Summary

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- The economy continues to dominate voter concerns
  - We have seen a shift toward a greater emphasis among the electorate regarding taxes and government spending and away from education and health care
- Awareness of advertising remains about the same overall (at 68% of voters), but the percentage who now recall “Colorado Sportsmen” (versus the DOW) has increased by 13 points
- We see little change in terms of specific recall from the ads, with a slight increase in the percent who cite a “fisherman” versus 11/09, but no major change in terms of the visual recall specifically.
  - The vast majority continue to recall seeing the ad on Television.

# Summary

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- Views of fishing and hunting are generally consistent with 11/09
  - We see a continued resistance to increased regulation
  - Overall levels of recognition regarding benefits remains solid; fishing continues to be relatively stronger
    - We do see a slight trend downward on some key metrics regarding hunting in terms of its impact on tourism and the economy that bear watching
- By a 64%-21% margin, voters say “fees from hunting and fishing licenses” are more significant to funding wildlife management than “taxes” (up from 61%-26%)
- We see substantial agreement (with a 5 point increase in *strong vs. somewhat* agreement) that hunting and fishing licenses are the primary source of funding for wildlife management, along with a shift from *disagree to not sure*

# Summary

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- Overall, one-third say they are interested in information about hunting
  - Interest is stronger (and messages more compelling) in the Plains, West Slope, and North/South Front Range (as opposed to Denver or the Suburban Counties)
- The strongest testing message, especially among the more inclined target audience outside of the Denver area, is around the concept of “generations” and family:
  - *Colorado families that enjoy hunting together share an invaluable outdoor experience that has bonded fathers and mothers with their children across generations. Fathers and mothers teach their children the value of protecting, enjoying and utilizing the gift of wildlife.*
- Approximately one-half say they are interested in information about fishing.

# Mood

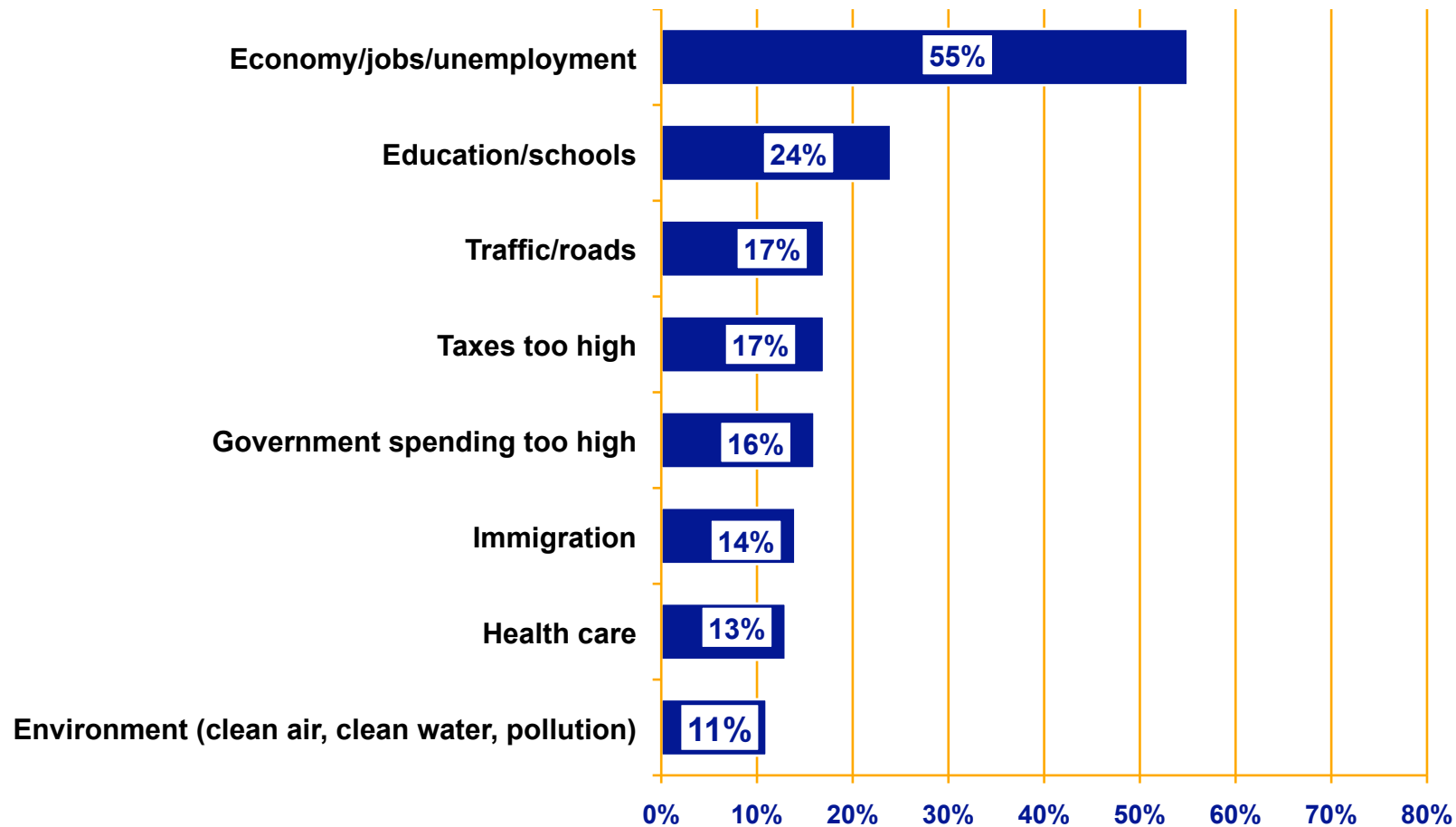
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- We continue to see significant concerns about the direction of Colorado's economy.
- Percentages have fallen regarding roads, education and health care since November (keeping in mind that this is a survey of *all voters, not just likely voters*) and have risen regarding taxes, government spending and immigration.
- We continue to see “weather/climate/sunny” and “the outdoors/being outdoors/the mountains” as the top things people like MOST about living in Colorado.
- Among those who say “outdoors,” we see an expected increase in the percentages who say they enjoy hiking, camping and just being outside (and a decline in the percent who cite snowboarding/skiing).
  - Fishing/Hunting remained right at 32% (of these 60% who cite “outdoors” only).

# Concerns

Q3. What would you say are the three biggest problems facing Colorado that you would like to see addressed?\*

- Colorado voters continue to cite the economy as the top issue facing the state (up 5 points since November).
  - We see a drop in the percent citing education, though it is still the second most important issue. The percentages citing taxes and government spending have risen as well.

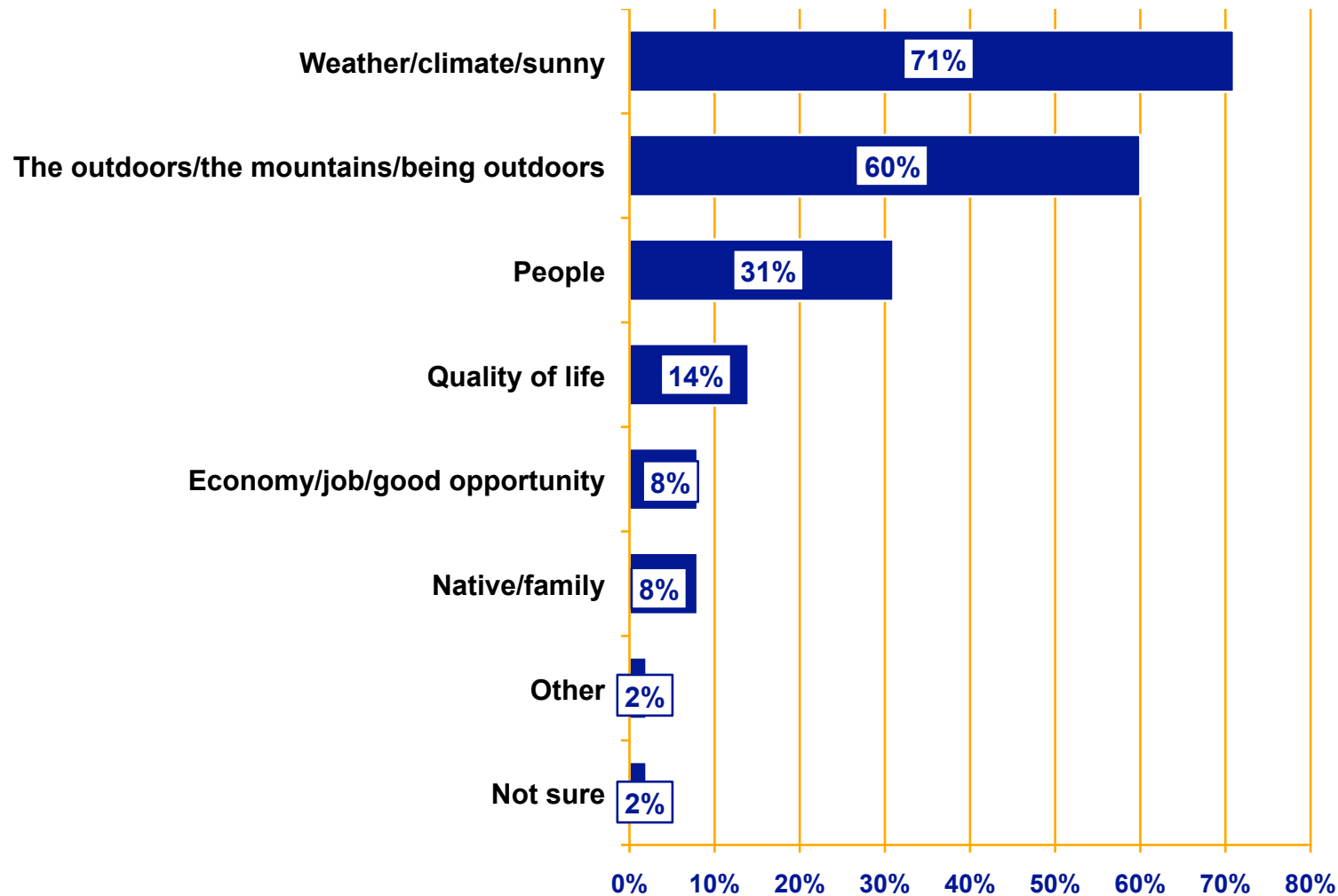


\*Open-Ended with Pre-codes, Multiple Responses

# Favorites

Q4. What would you say are the top three things that you LIKE MOST about living in Colorado?\*

- Voters' favorite things continue to be the weather and outdoors, followed by "the people," and the general quality of life.

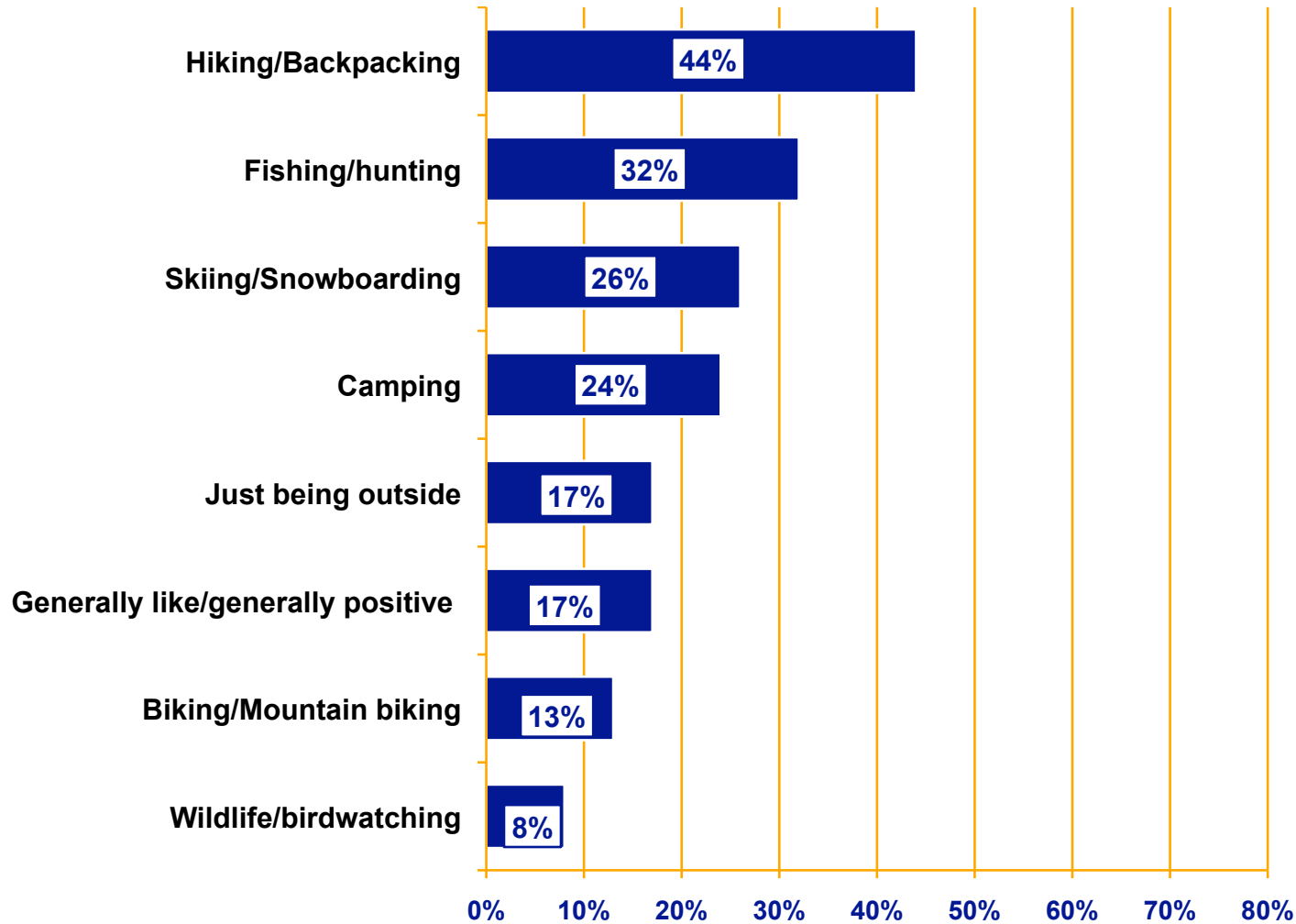


\*Open-Ended with Pre-codes, Multiple Responses, Top Responses Shown

# Outdoors

Q5. What do you mean by (outdoor recreation/the mountains/ being outdoors)? What do you like to do?

- We see an increase in the percent who cite “hiking/backpacking,” and a decrease in the percent who cite snow-sports, since the 11/09 survey.



\*Open-Ended with Pre-codes, Multiple Responses, Top Responses Shown, n=253

# Recall

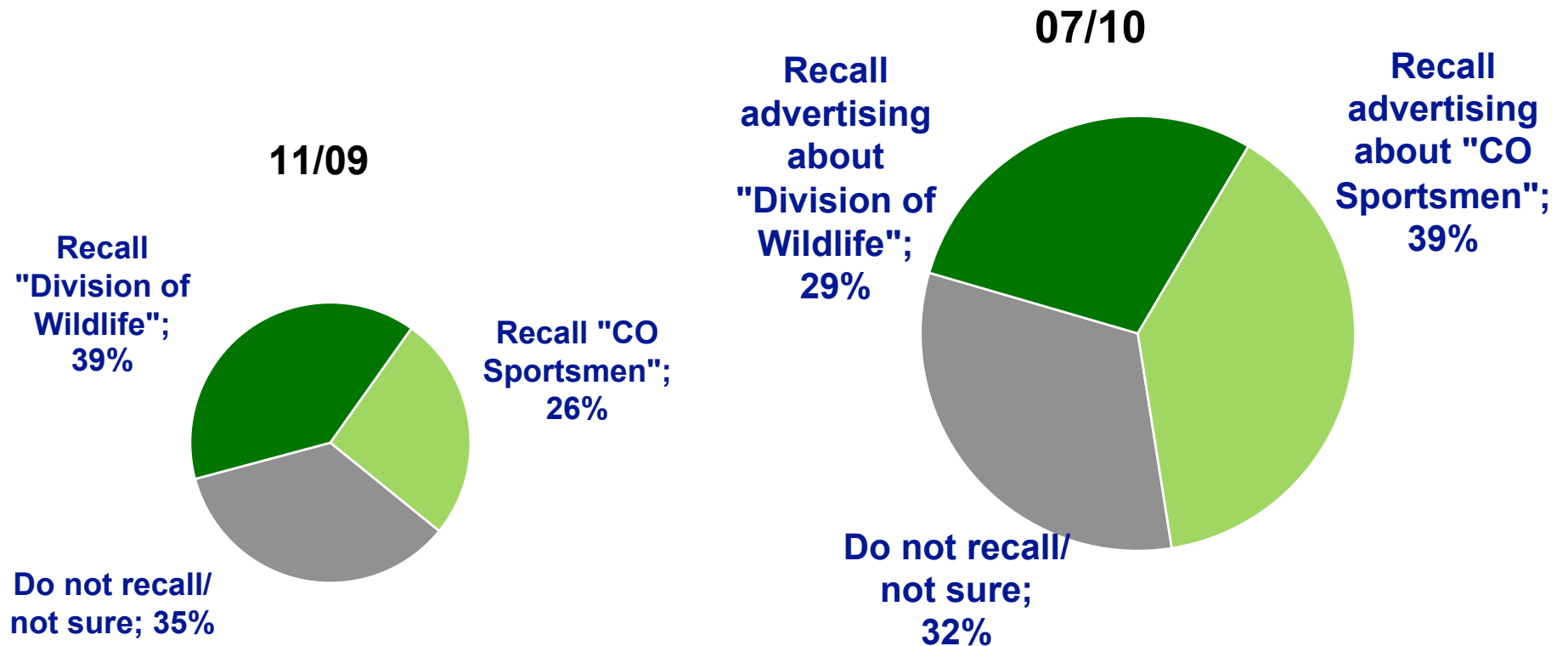
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- Overall, 68% now say they remember seeing an ad or message from either “Colorado Sportsmen” or from “The Division of Wildlife” in the past year.
- There has been an increase in the percentage who recall an ad about “Colorado Sportsmen” specifically.
- There has been a slight increase in the percent who specifically recall that the message is “fees from hunting and fishing pay for wildlife conservation”
- There has been a slight increase in the percent specifically citing “fisherman/fishing.”

# Recall

Q6, Q7. Do you remember seeing or hearing any advertising or educational messages about Colorado Sportsmen in the past year? (IF NO:) Do you recall perhaps seeing or hearing any advertising or educational messages about the Colorado Division of Wildlife in the past year?

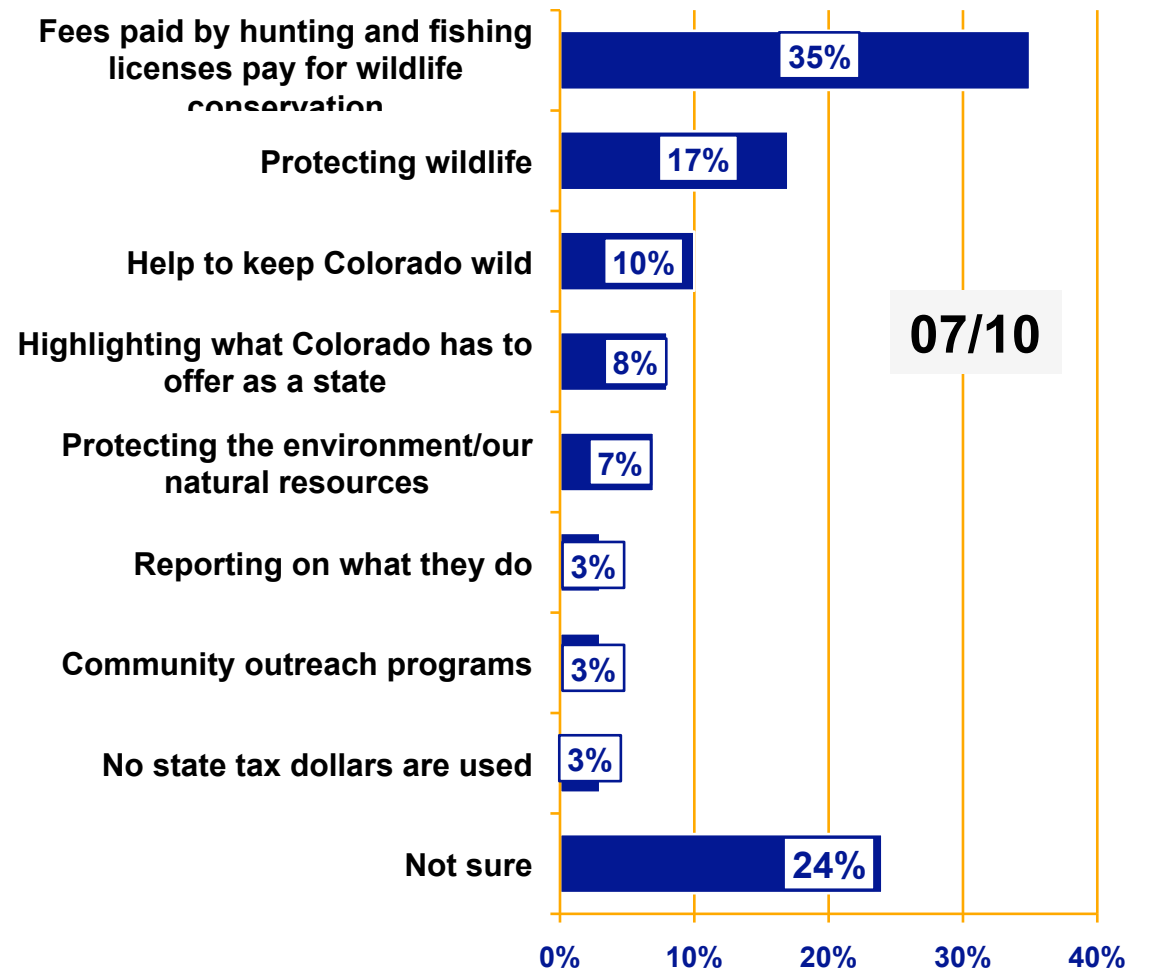
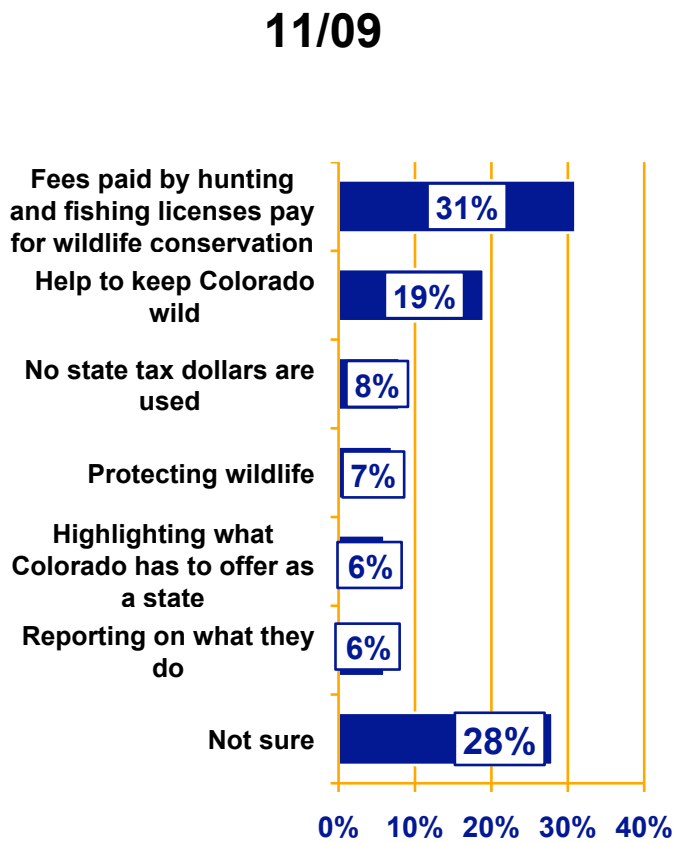
- Recall of advertising for “Colorado Sportsmen” or “the Division of Wildlife” among Colorado voters stands at 68%.
  - The percentage who recall an ad about “Colorado Sportsmen” on the question has risen from 26% to 39%.



# Unaided Message

Q8. What do you remember from the ad or message in terms of the main message or idea it was trying to show? Do you remember any other ideas or messages?

- We see a slight increase in the percent who say the main message of the ad is about “fees” since November.

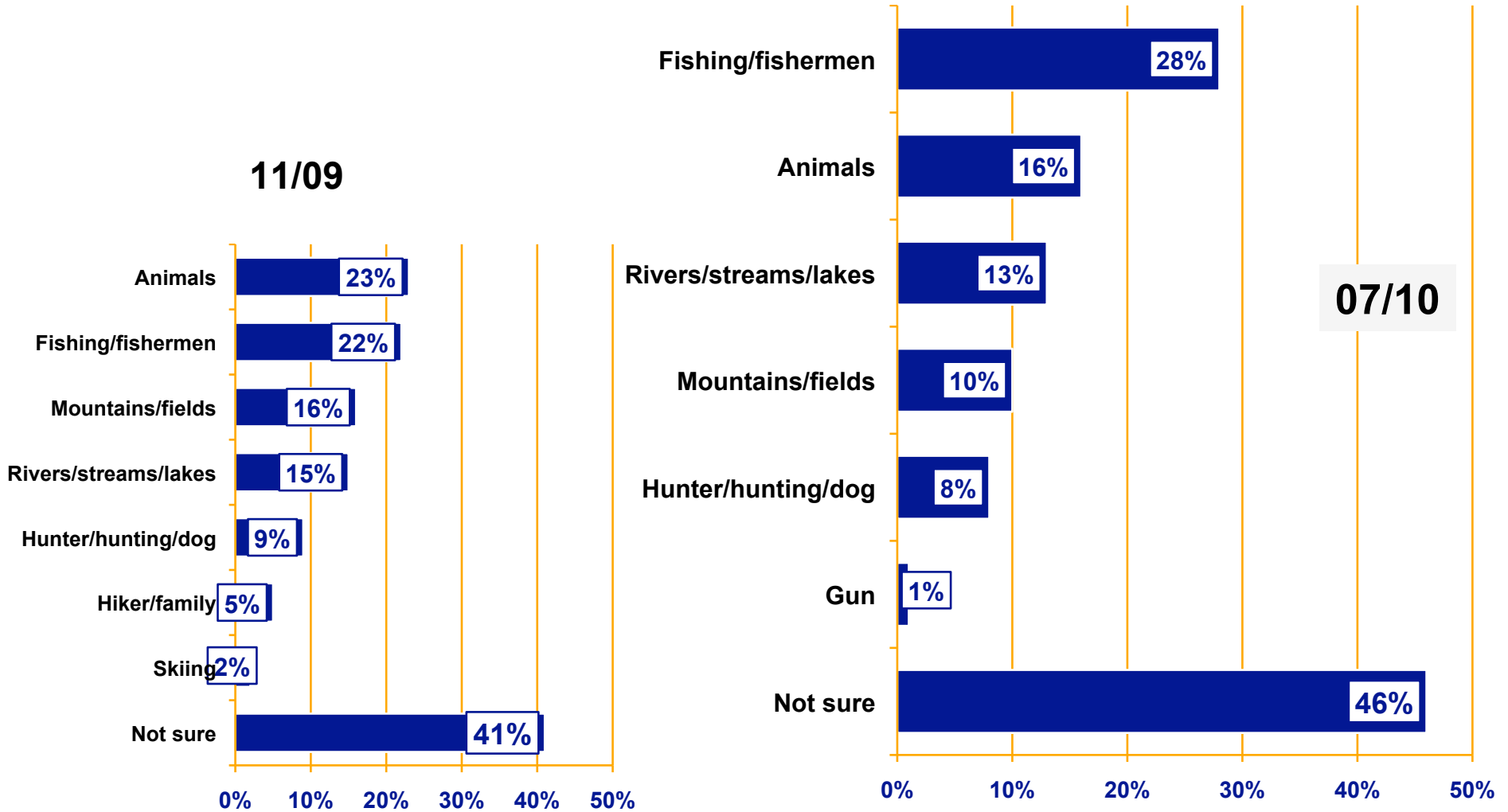


\*Open-Ended with Pre-codes, Multiple Responses, n=264

# Unaided Visuals

Q9. Do you remember any images or visuals from the ad or messages?

- A greater percentage now recall seeing a “fisherman” in the ad as well; just 1% say they specifically recall seeing a “gun” (and the percent who say “hunting” has not changed since November).

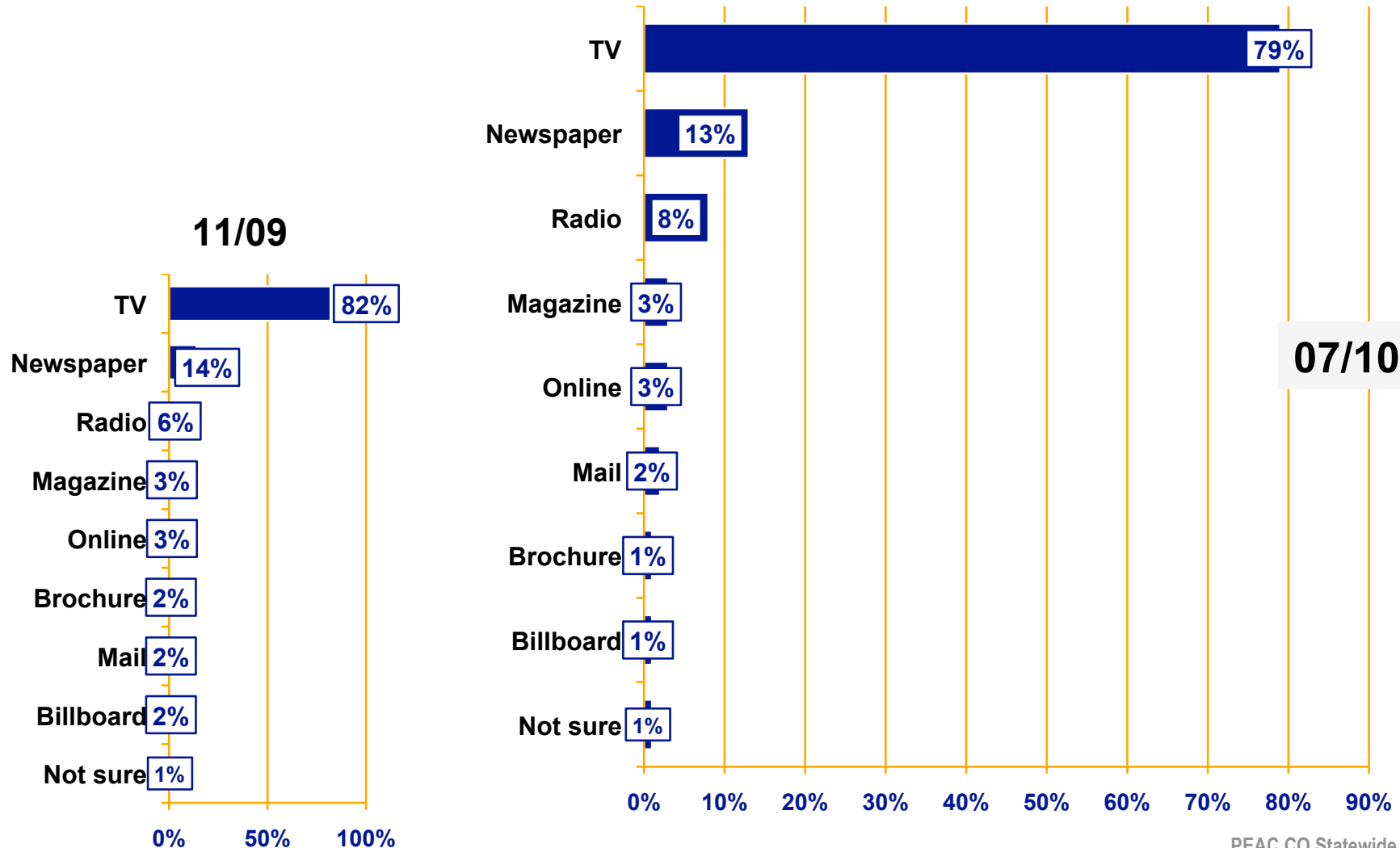


\*Open-Ended with Pre-codes, Multiple Responses, n=264

# Unaided Channel

Q10. Where did you see or hear the ad or message?

- There is little movement on the source of seeing or hearing the ad, with TV continuing to be (by far) the primary source.



\*Open-Ended with Pre-codes, Multiple Responses, n=264

# Wildlife and Sportsmen

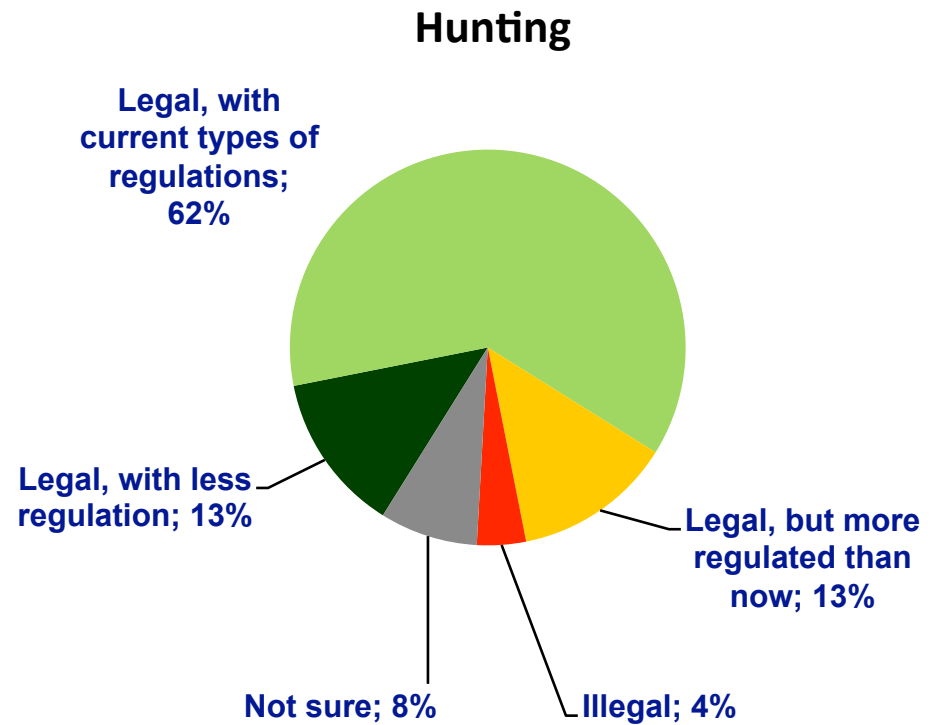
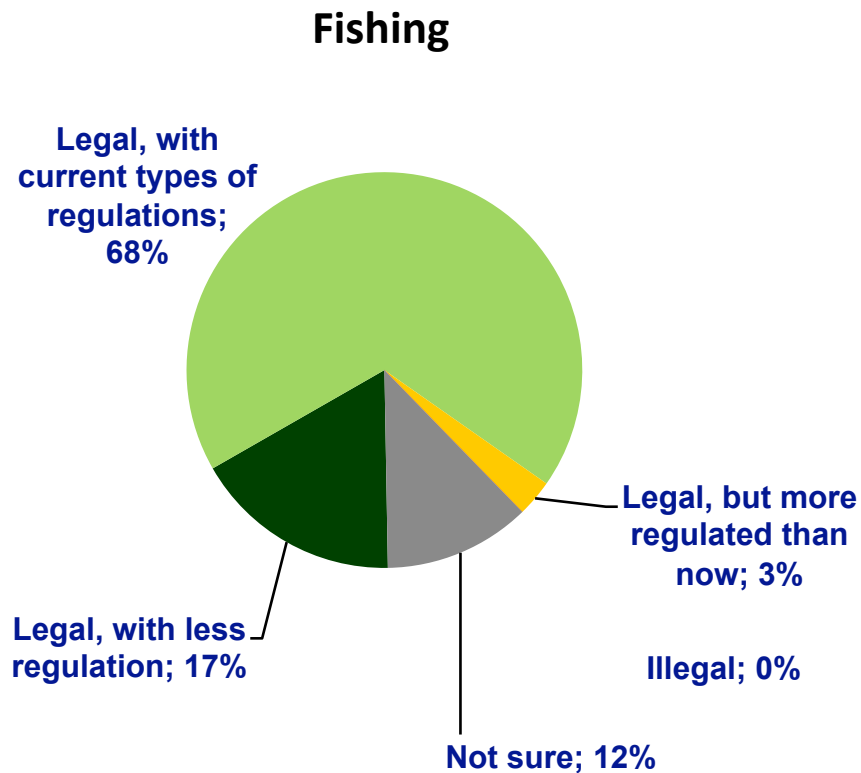
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- Our overall picture has changed little, with nearly all questions moving near the margin of error or slightly outside it.
- Voters continue to feel that fishing and hunting should continue under the regulation they have today (or less), and continue to agree that both fishing and hunting bring significant benefit to the state in terms of the economy, tourism, quality of life and preserving what makes CO wild.
  - There has been some slight slippage on “hunting and the economy/ tourism” which bears watching moving forward
- Although favorability ratings remain generally quite strong (at 77% favorable, 20% “neutral” for “people who fish,” and 55% favorable, 28% “neutral” for “people who hunt”), we have seen a significant change since the 11/09 survey on these questions.
  - In the prior two surveys, the questions about “Priorities for Wildlife Management” had been asked *before* these questions.
    - These included attributes like “responsible, legal hunting/fishing”
    - We believe these attributes “colored” people’s answers on these questions, and the responses are now more in line with the other views we see across the poll.

# Regulation

Q13 and Q20. Thinking about (fishing)/(hunting), would you say you think they should be: (READ LIST, ROTATE TOP TO BOTTOM AND BOTTOM TO TOP)

- We continue to see few voters say that either fishing or hunting need “more regulation” or “should be illegal.”
  - Regarding hunting in the 11/09 survey: at the time, 70% said “less/current regulation,” while today 75% say as such.



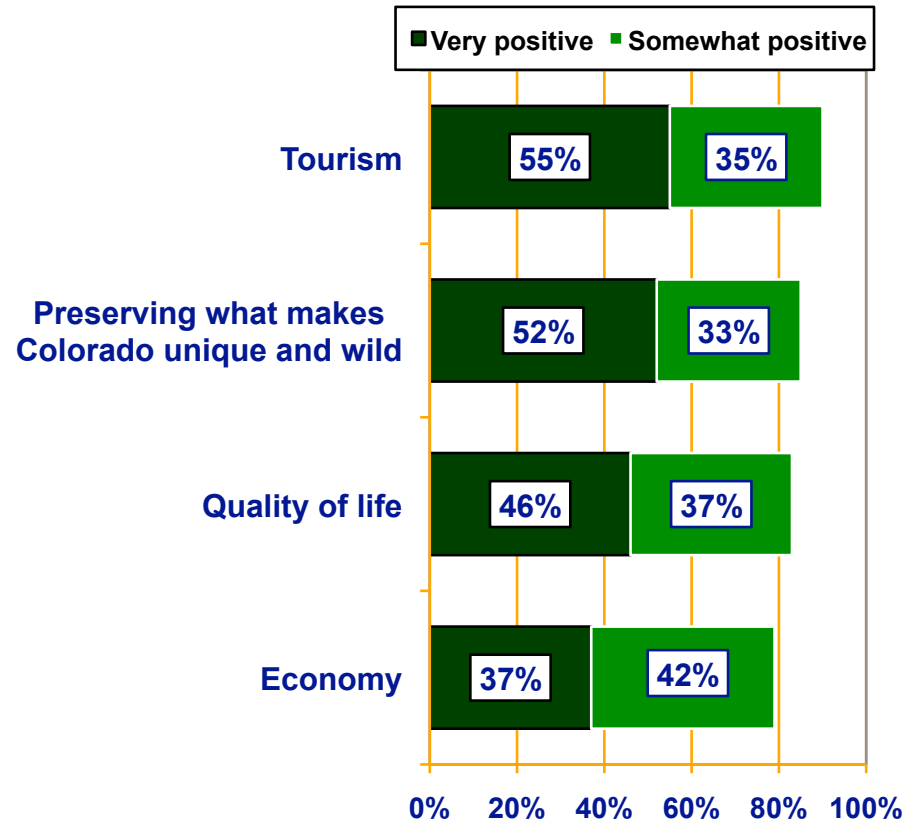
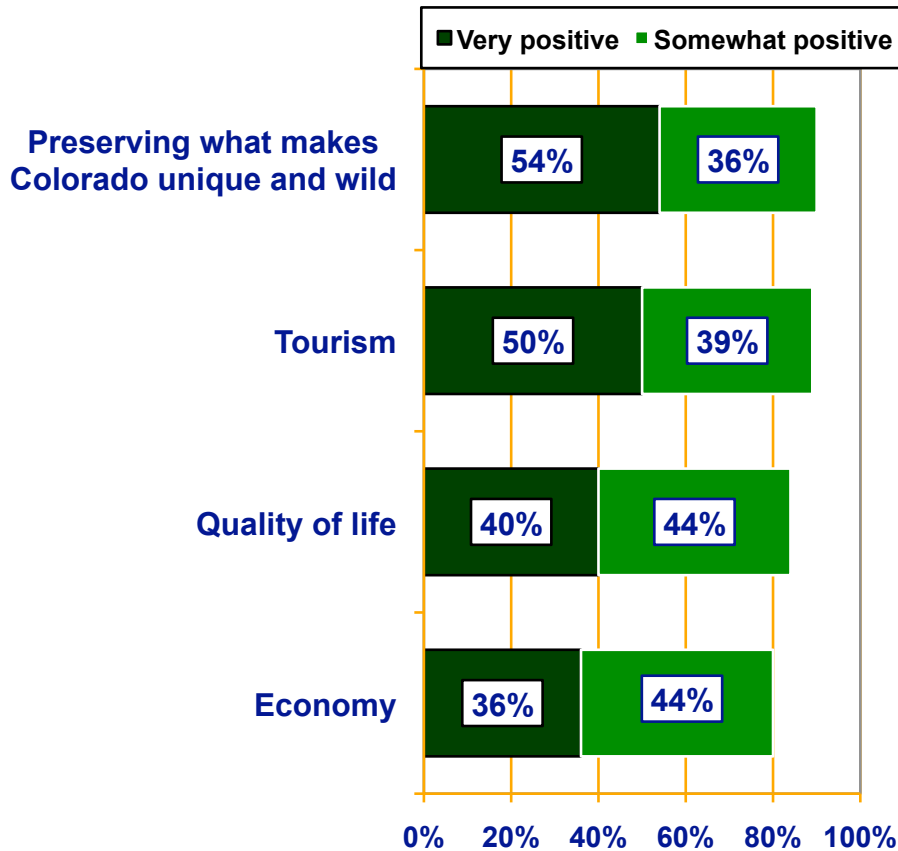
# Impact: Fishing

Q14-17. Do you think (fishing)/(hunting) has a very positive, somewhat positive, somewhat negative, very negative or no impact on Colorado in terms of the following:

- Overall, figures remain very much the same as in November, with a slight shift in the percentages saying “very” or “somewhat,” but little movement overall.

11/09

07/10

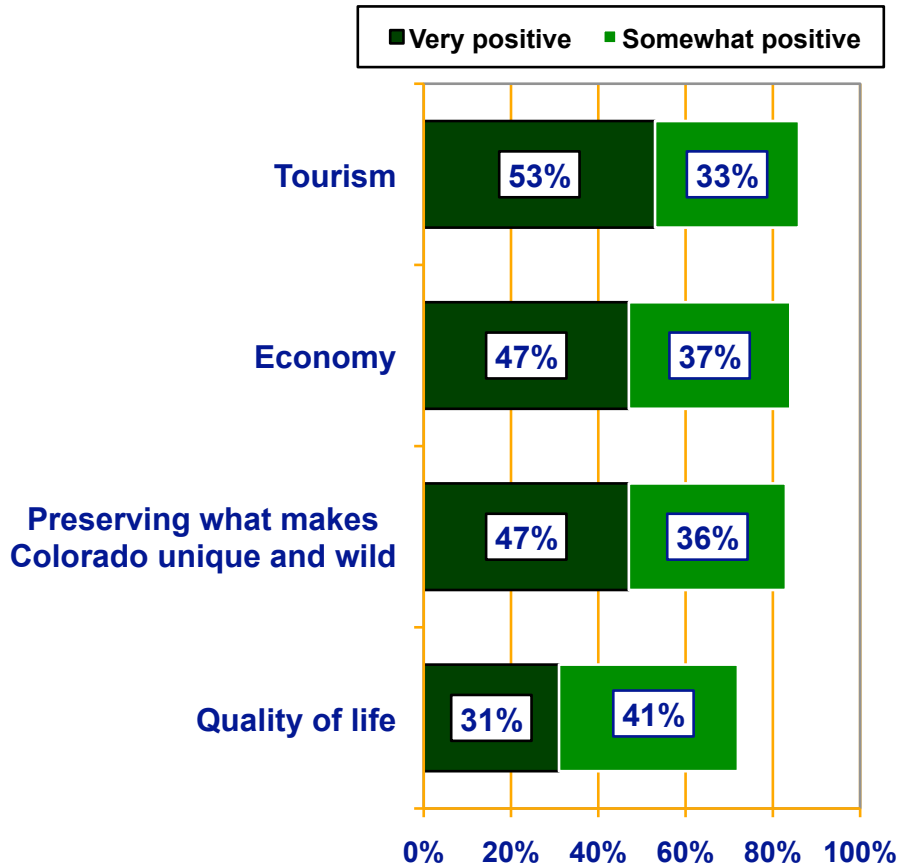


# Impact: Hunting

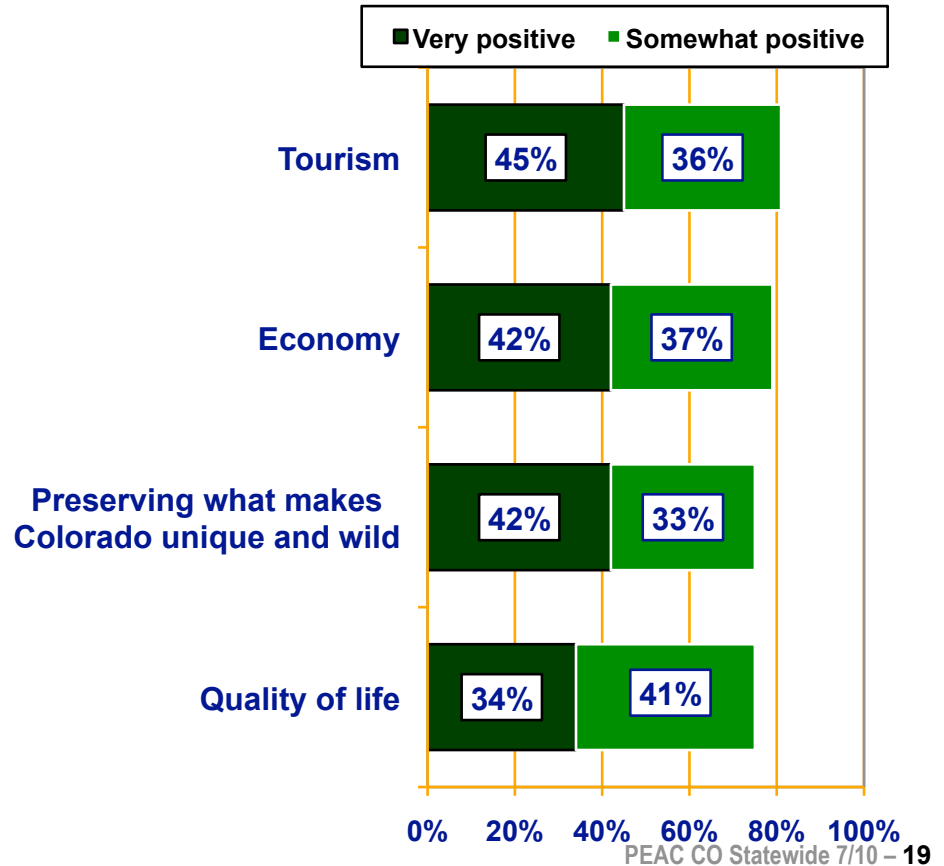
Q21-23. Do you think (fishing)/(hunting) has a very positive, somewhat positive, somewhat negative, very negative or no impact on Colorado in terms of the following:

- We have, however, seen a slight decline in the percent saying that hunting has a positive impact on tourism and the economy since November (which bears watching over time).

11/09



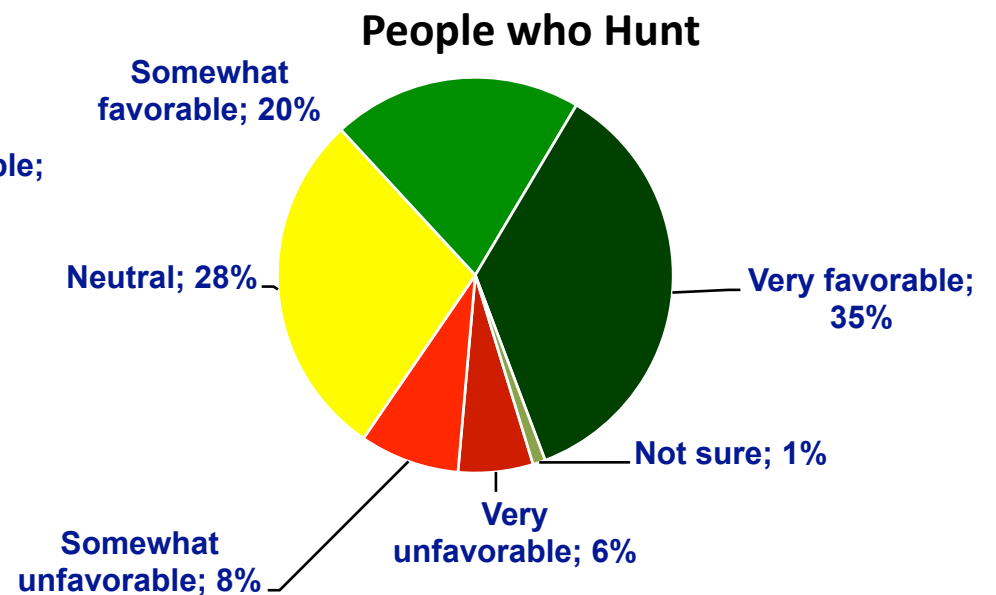
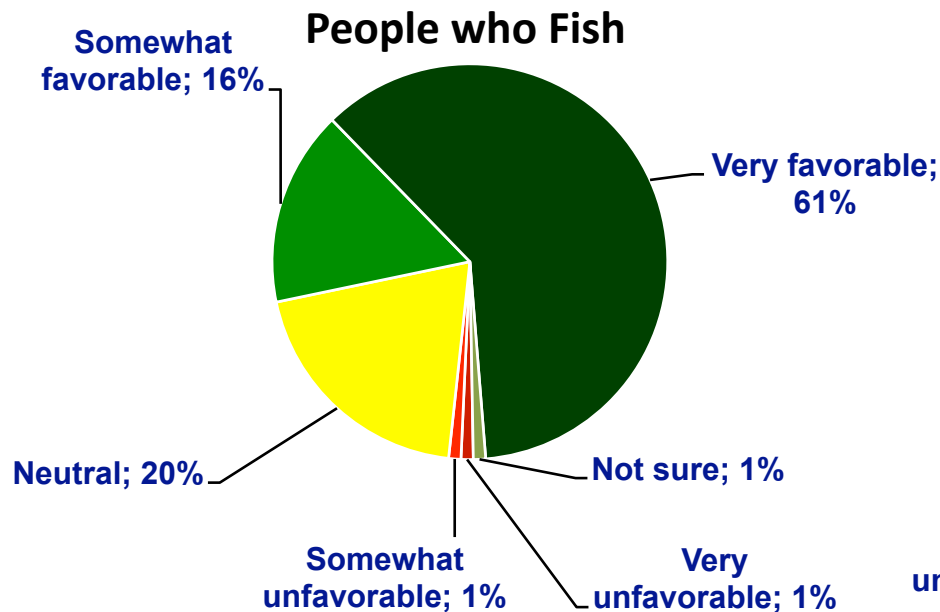
07/10



# General Impression

Q19 and Q25. Would you say you have a favorable or unfavorable view of people who (fish)/(hunt), or neutral? Is that “very” or “somewhat” favorable or unfavorable?

- Two-thirds (61%) of Colorado voters are “favorable” to people who fish, while 35% are “very favorable” to people who hunt (with overall “favorability” at 77% for fishermen and 55% for hunters).
  - Another 20% are “neutral” toward people who fish and 28% are “neutral” towards people who hunt.

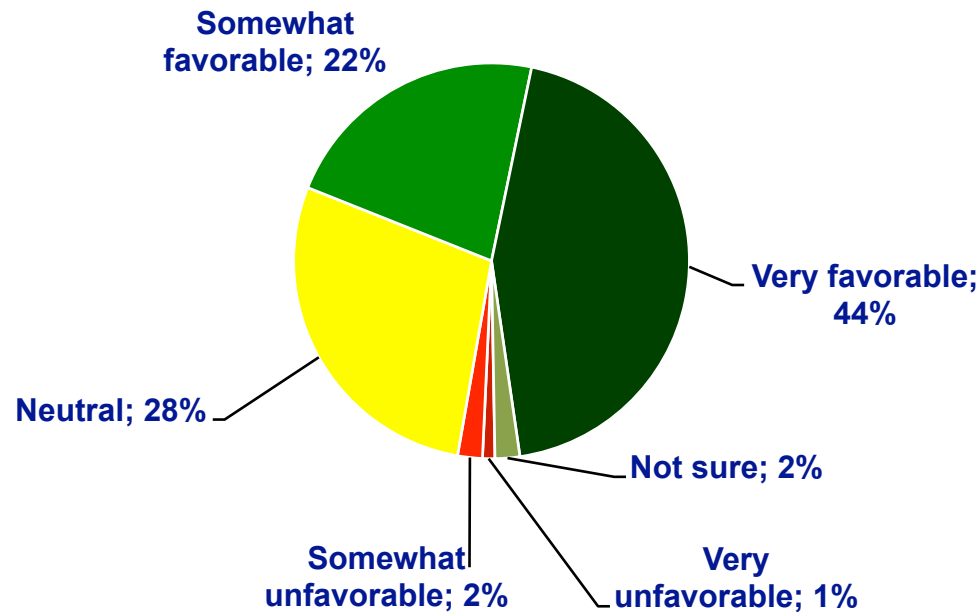


# CO Sportsmen

Q26. *Would you say you have a favorable or unfavorable view of Colorado's Sportsmen, who are the people who fish and hunt in our state, or neutral? Is that "very" or "somewhat" favorable or unfavorable?*

- Two-thirds say they are "favorable," with 44% "very" and 22% "somewhat" favorable toward "the sportsmen who fish and hunt in our state," with another 28% "neutral" (and just 3% "unfavorable").

## The Sportsmen who Fish and Hunt in Our State



# Messages

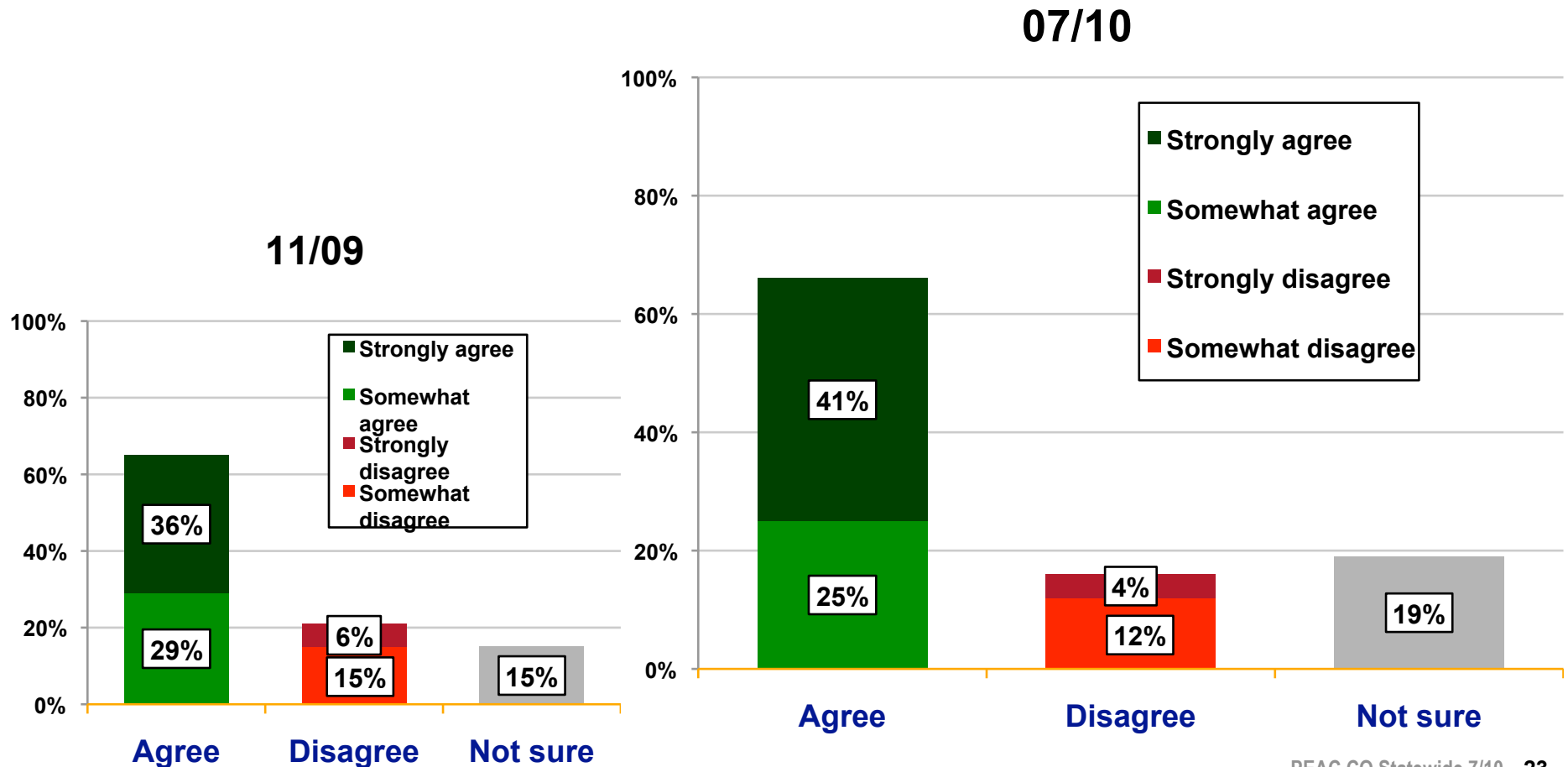
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- We see a slight improvement as to whether hunting and fishing licenses are the primary source of revenue, with an increase of 5 points in “strong” agreement, and a 5 point shift from “disagreement” into “not sure”)
- The idea that “licenses, not tax dollars provides almost all of the funding” for wildlife management has now been heard by 48%, up 7 points (but is now seen as true by 54%, a decline of 7 points)
  - Other messages are also up somewhat in awareness, but are less likely to be seen as believable
- New messages gauging potential interest in hunting are well received by key target audiences.
  - In particular, the theme of “family and generations” tests particularly strongly
  - Messages test more strongly outside of Denver and its suburbs

# Agreement

*Q28. Do you agree or disagree with the following statement: Hunting and fishing licenses are the primary source of funding for wildlife management in Colorado. (Is that strongly or somewhat?)*

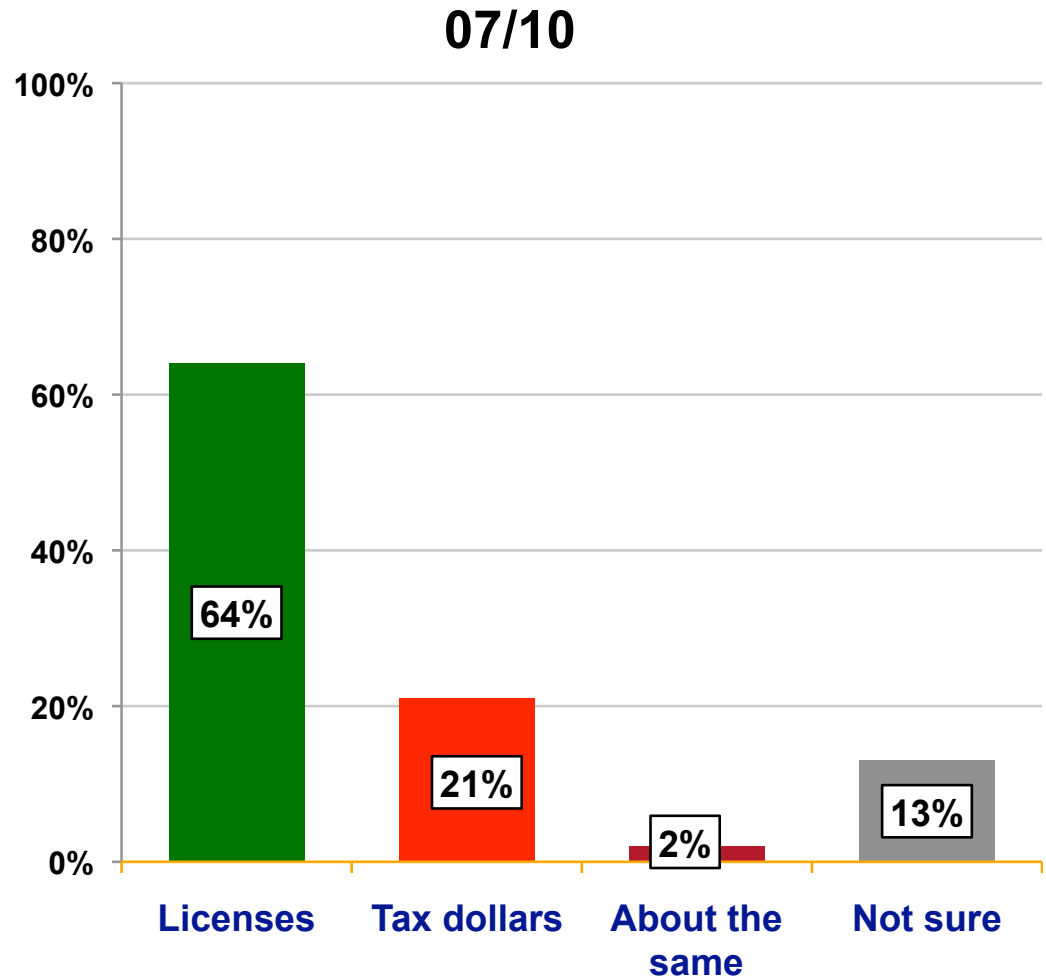
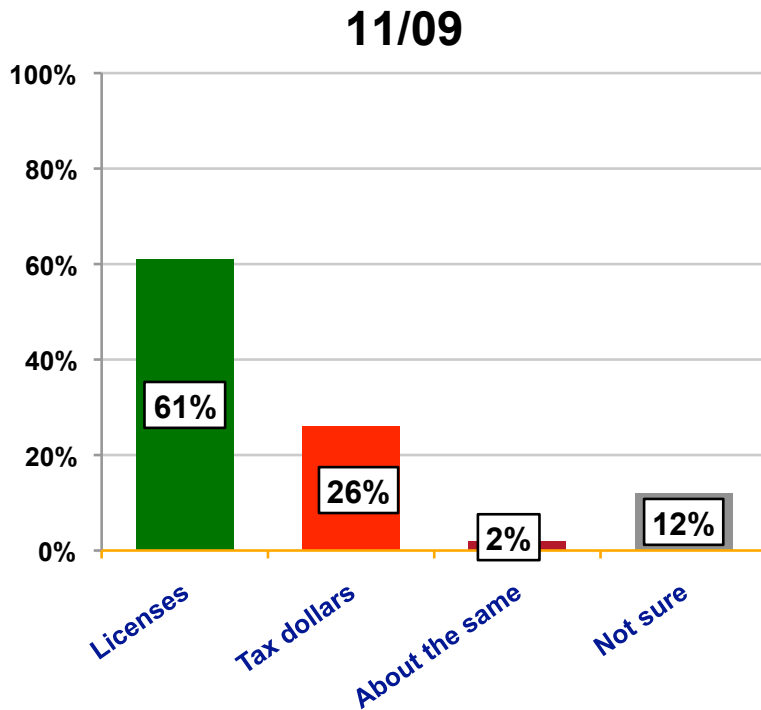
- Overall, 66% agree, with 41% “strongly agreeing,” that hunting and fishing licenses are the primary source of funding for wildlife management, while 16% disagree and 15% are unsure.
  - In 11/09, 65% agreed, with 36% “strongly agreeing” and 21% “disagreed.”



# Direct Choice

Q29. Which do you think is MORE significant, your tax dollars or fees from fishing and hunting licenses?

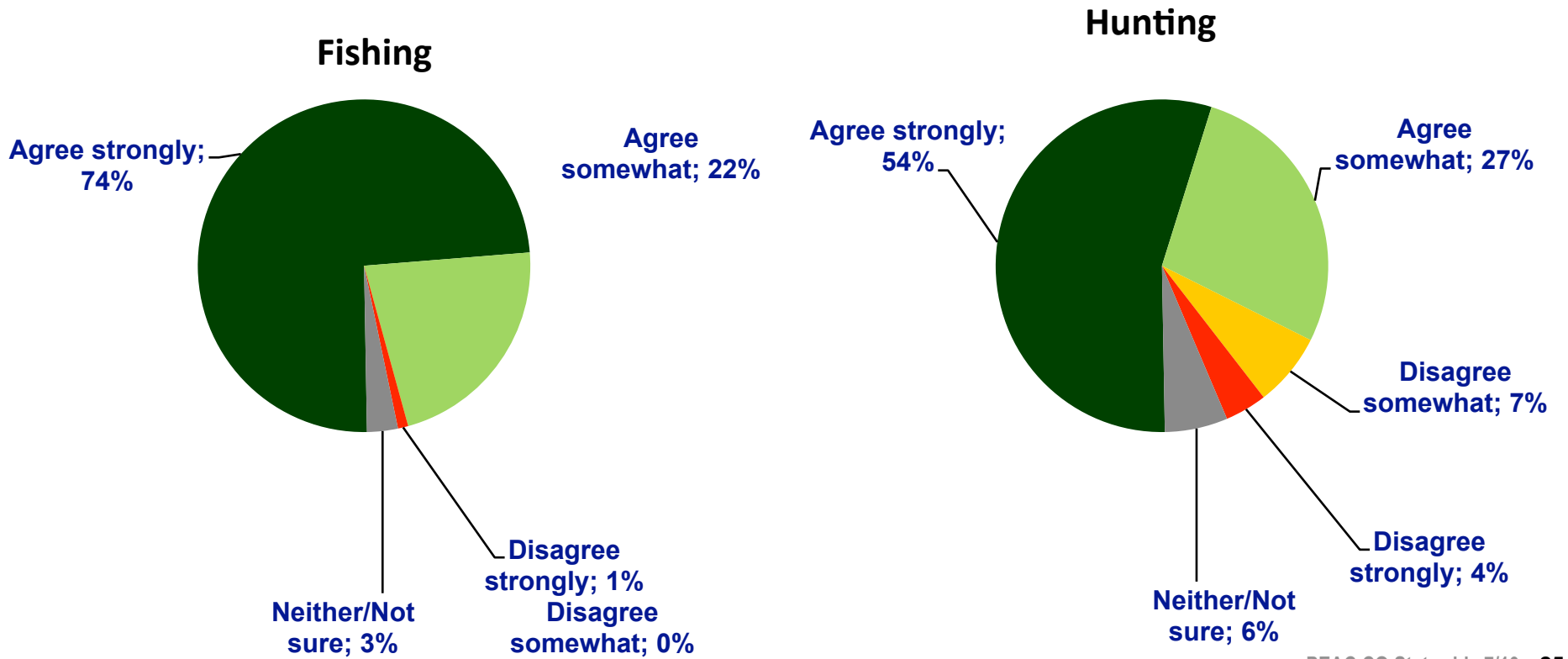
- We see a slight increase in the percent who say “licenses” and a five point drop in the percent who say “tax dollars.”



# Thematic

Q18 and Q25. Do you agree or disagree that (fishing/hunting) has a positive impact on people who (fish/hunt), strengthening the bonds between people and nature, as well as between friends and family members across generations?

- In a new set of questions for the 07/10 survey, we see very broad agreement that fishing and hunting have a positive impact on the people who fish and hunt (with very high intensity regarding fishing).



# Core Messages

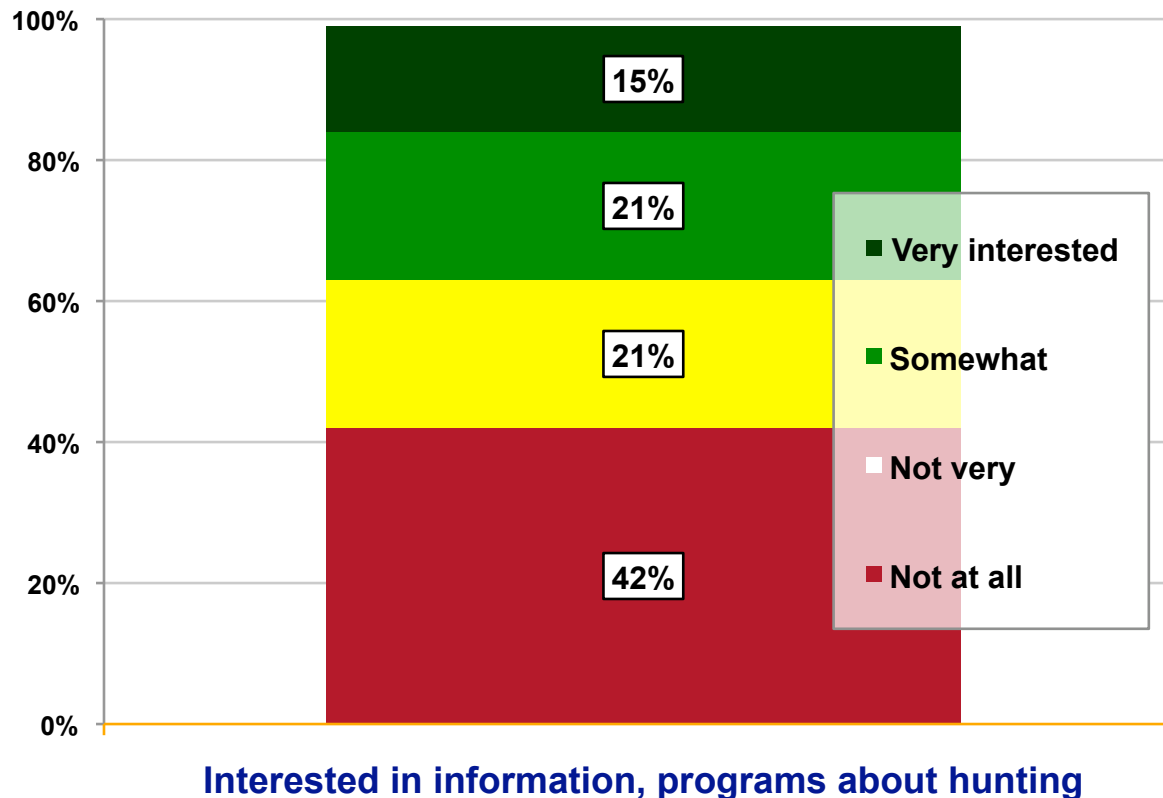
- We tend to see solid increases in the percent who had heard each message, but also greater skepticism from voters that the message is true.

<i>I am going to read you some statements, and ask whether you have heard that statement before, and whether you think it's true.</i>	<u>Metric</u>	11/09	07/10
Revenue from sportsmen's licenses, and not taxpayer dollars, provides almost all of the funding for the conservation, protection and management of Colorado's wildlife.	Heard before?	41	48
	True*?	61	54
Revenue from sportsmen's licenses helps to manage, protect and conserve the animals, birds and fish that make Colorado unique and wild.	Heard before?	55	58
	True	79	71
If you enjoy outdoor recreation, or are simply proud of the unique quality of life and heritage we enjoy as Coloradans, we all benefit from the contribution sportsmen make to our state.	Heard before?	40	48
	True	83	72

# Interest in Hunting

Q37. How interested are you in information, programs or educational opportunities that are available across Colorado to teach individuals about the value and benefits of hunting, and about opportunities beginners to learn about hunting in your area?

- Overall, one-third% say they are interested in programs and information to learn about hunting. Among self-described “hunters,” 59% are interested; among those who are “not hunters, but not opposed,” 39% are interested.
- Outside of Denver/Suburbs, 23% are “very” and 24% are “somewhat” interested for a total of 47% interested; in Denver/Suburbs, a total of 28% is interested (with just 9% “very”).



# Messages

- The strongest message among those who are “not hunters, not opposed” focuses on family and the bonding of generations.

<i>Do you find this statement to be a compelling reason to consider learning more about hunting and about opportunities to hunt in Colorado? N=215</i>	% “Very” compelling
Colorado families that enjoy hunting together share an invaluable outdoor experience that has bonded fathers and mothers with their children across generations. Fathers and mothers teach their children the value of protecting, enjoying and utilizing the gift of wildlife.	43%
The hunting and fishing industry is the largest source of tourism revenue for Colorado, and is the sole source of revenue for the management of Colorado’s wildlife. Participating in hunting helps preserve and protect the things that make Colorado unique and wild.	32%
Participating in hunting instills traditional values that are a major part of many communities across Colorado, such as self-reliance, family and respect for our natural resources.	29%

# Messages

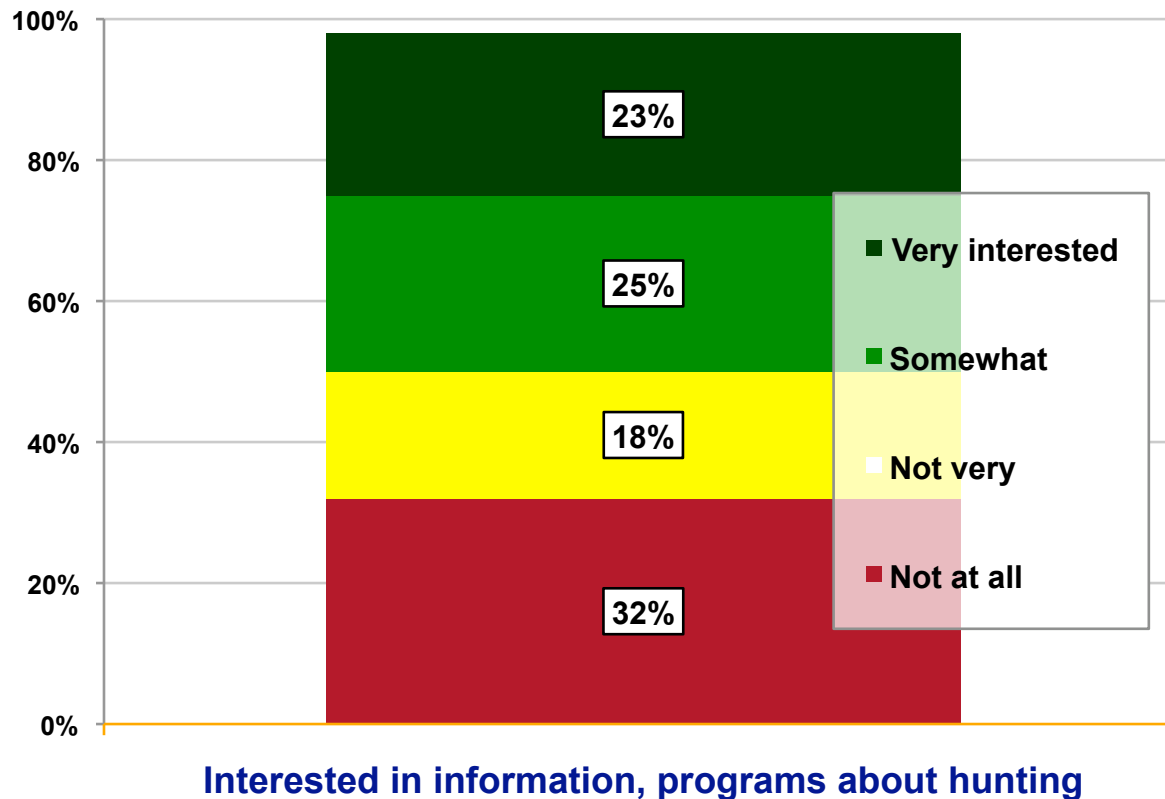
- **Messages test much more strongly outside of Denver/Suburbs.**

<i>Do you find this statement to be a compelling reason to consider learning more about hunting and about opportunities to hunt in Colorado? N=215</i>	% “Very”	
	Denver/ Suburbs	Other CO
Colorado families that enjoy hunting together share an invaluable outdoor experience that has bonded fathers and mothers with their children across generations. Fathers and mothers teach their children the value of protecting, enjoying and utilizing the gift of wildlife.	39%	48%
The hunting and fishing industry is the largest source of tourism revenue for Colorado, and is the sole source of revenue for the management of Colorado’s wildlife. Participating in hunting helps preserve and protect the things that make Colorado unique and wild.	25%	41%
Participating in hunting instills traditional values that are a major part of many communities across Colorado, such as self-reliance, family and respect for our natural resources.	21%	40%

# Interest in Fishing

Q43. How interested are you in information, programs or educational opportunities that are available across Colorado to teach individuals about the value and benefits of fishing, and about opportunities beginners to learn about fishing in your area?

- Among ALL respondents, 48% say they are “very” or “somewhat” interested in learning about opportunities to fish.
- Outside of Denver/Suburbs, 29% are “very” and 26% are “somewhat” interested for a total of 55% interested; in Denver/Suburbs, 19% are “very” and 24% are “somewhat” interested.



# Conclusions

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- Data reflects skeptical nature
  - And it's election season
- Overall results are solid, with more voters having heard your message and identifying it with you
  - But you need to continue to stay on message
- Continue to see stronger scores regarding fishing
- Need to stay on message in “broad” campaign
- Opportunity to educate, expand interest in both fishing and hunting is clear
  - Focus on the right target audience
  - Continue to solidify and reinforce your core messages broadly

# Methodology

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- Sample from population of Colorado Voters
  - 400 telephone interviews, with 20 potential interviews per complete
  - List of voters maintained by Colorado Secretary of State
  - 3 attempts per number (call-backs, reschedules, answering machines, etc.)
  - Phone calls made by Standage Accureach (Denver, CO)
- Survey was conducted July 15-29, 2010
  - Margin of error is  $\pm 4.9\%$  at the 95% confidence level, and is higher for subgroups of analysis
- Geographically:
  - 3% Eastern Plains
  - 14% North Front Range + North/Central Mountains
  - 11% Denver County
  - 44% Metro Suburbs
  - 20% South Front Range + Southern Mountains
  - 8% West Slope