

COLORADO *Wildlife* COUNCIL

Wave 1 Tracking Research - Quantitative
November 2016



COLORADO WILDLIFE COUNCIL

What we did

A benchmark study was conducted from October 24 to November 4, 2016 among Colorado residents to measure awareness and education of wildlife management, and the benefits of hunting and fishing. This benchmark serves as the first in a series of research waves to evaluate campaign effectiveness, optimize efforts, and monitor changes over time.

Who we surveyed

A total of 403 Colorado residents completed the survey. All participants were registered voters. Data were weighted for a census representation on key demographics and congressional districts. Sample size yields a +/- 4.9 percent margin of error at a 95 percent confidence level of 5.4 million Colorado residents. Base for all questions is 403, unless otherwise stated.

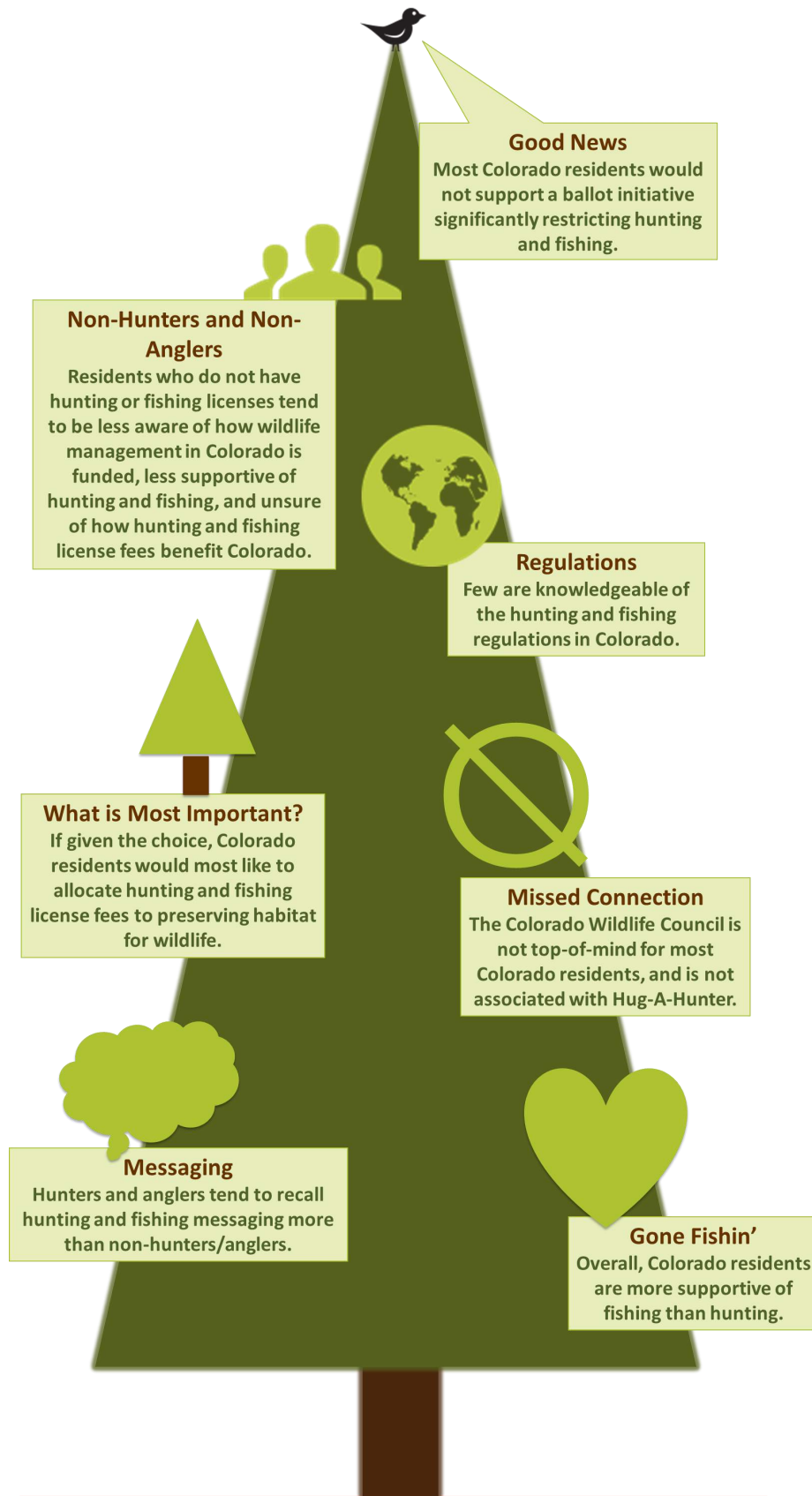
- Anglers are defined as participants who currently have or had a fishing license in the past three years.
- Hunters are defined as participants who currently have or had a hunting license in the past three years.

Why we did it

By statute, the Colorado Wildlife Council's mission is to oversee the design of a comprehensive media-based public information program to educate the general public about the benefits of wildlife, wildlife management, and wildlife-related recreational opportunities in Colorado, specifically hunting and fishing. To that end, it is important to understand message impact among Colorado residents.



KEY FINDINGS



RECOMMENDATIONS



Colorado residents are highly active on various media channels—not just TV. Use diverse media campaigns, such as social media, radio streaming, and other digital mediums to increase reach to the target audience.

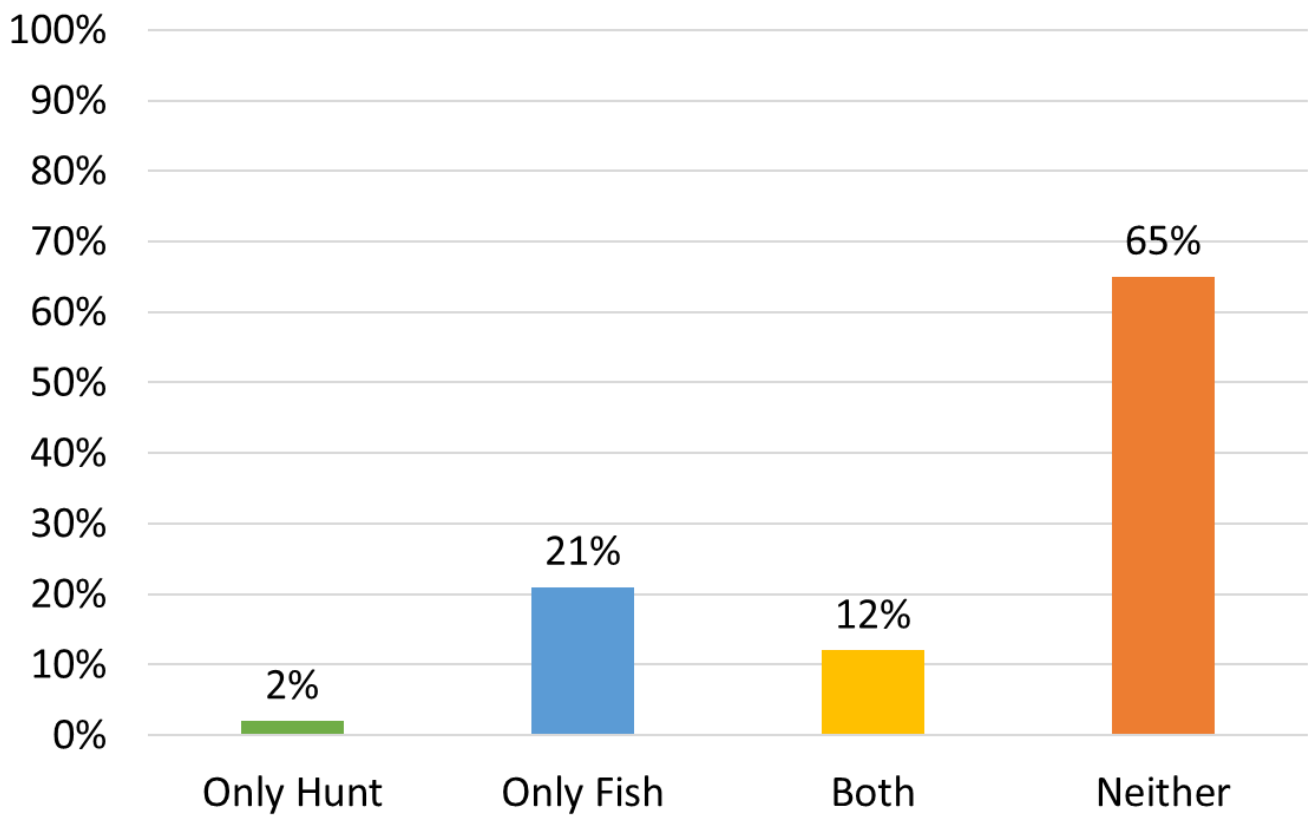


Create messaging that resonates with non-hunters/non-anglers. Coloradoans care about preserving habitat for wildlife but do not make the connection between license fees and conservation. Messaging should speak to how hunting, fishing and license fees help preserve habitat for wildlife, and will hit closer to home for non-hunters/anglers.



Non-hunters/non-anglers show more support for fishing than hunting. Combining both in advertising will help create a complete picture, and leverage the support from fishing to garner more positive perceptions of hunting.

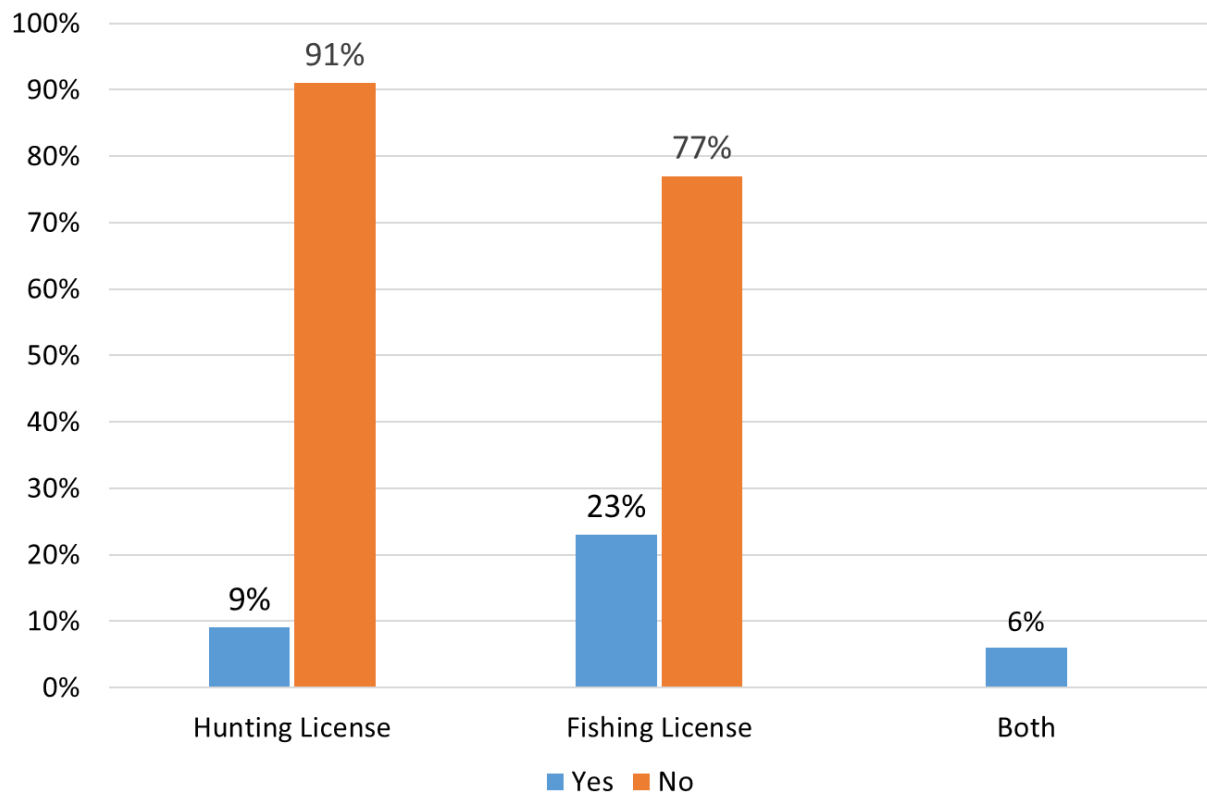
HUNTERS/ANGLERS



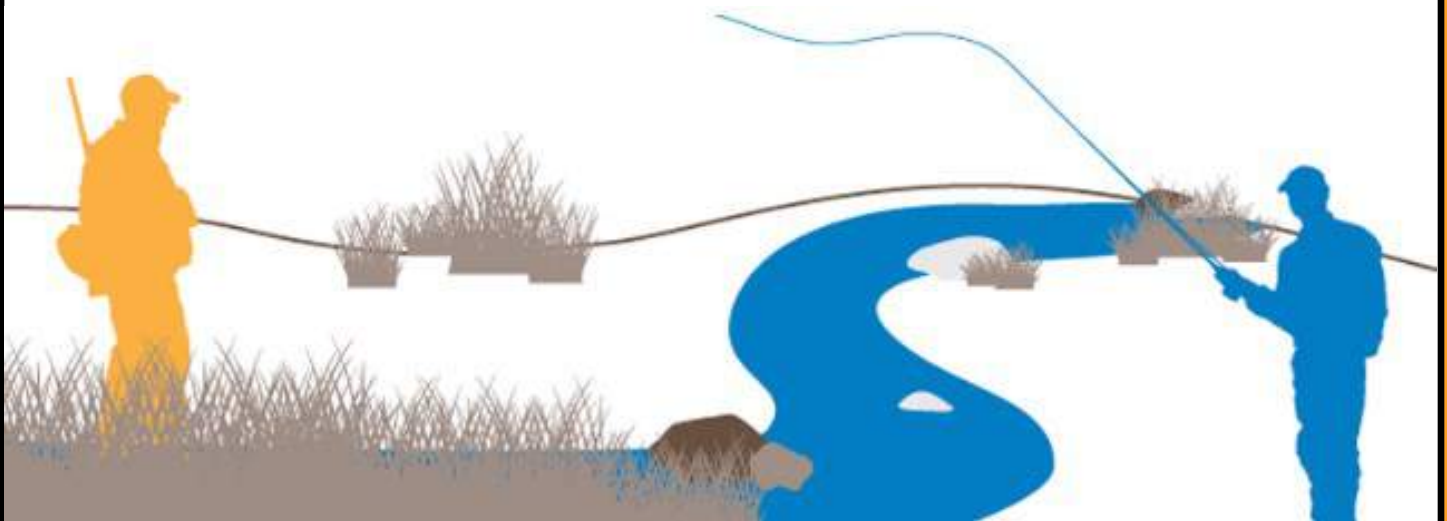
In this study, Hunters and Anglers are defined as those that currently, or in the past 3 years, have held a hunting and/or fishing license. Thirty-five percent of the respondents either hunt or fish.



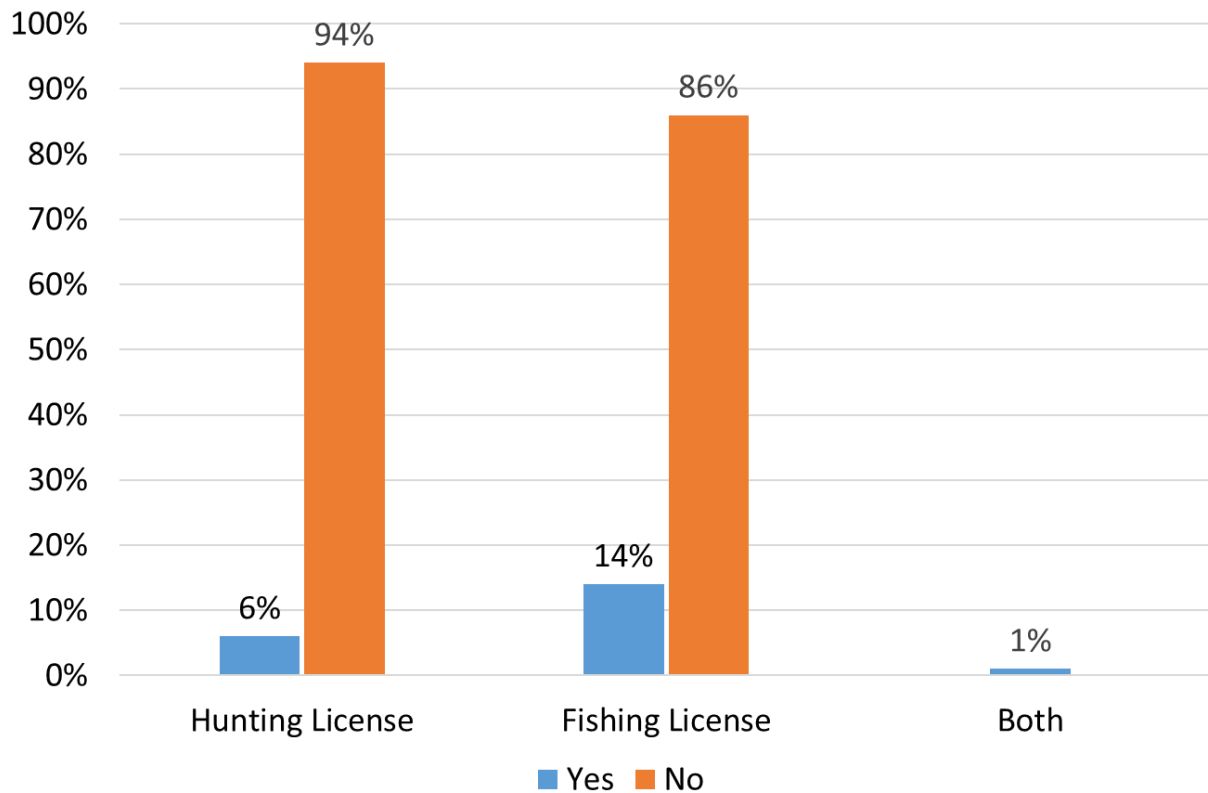
CURRENT LICENSE STATUS



Most participants do not currently have hunting or fishing licenses. Participants living in congressional district 3, a fairly rural district, tend to have more hunting licenses than participants from other congressional districts.



PREVIOUS LICENSE STATUS



Of participants who do not currently have a hunting (n=368) or fishing (n=309) license, very few have had a license in the past three years.

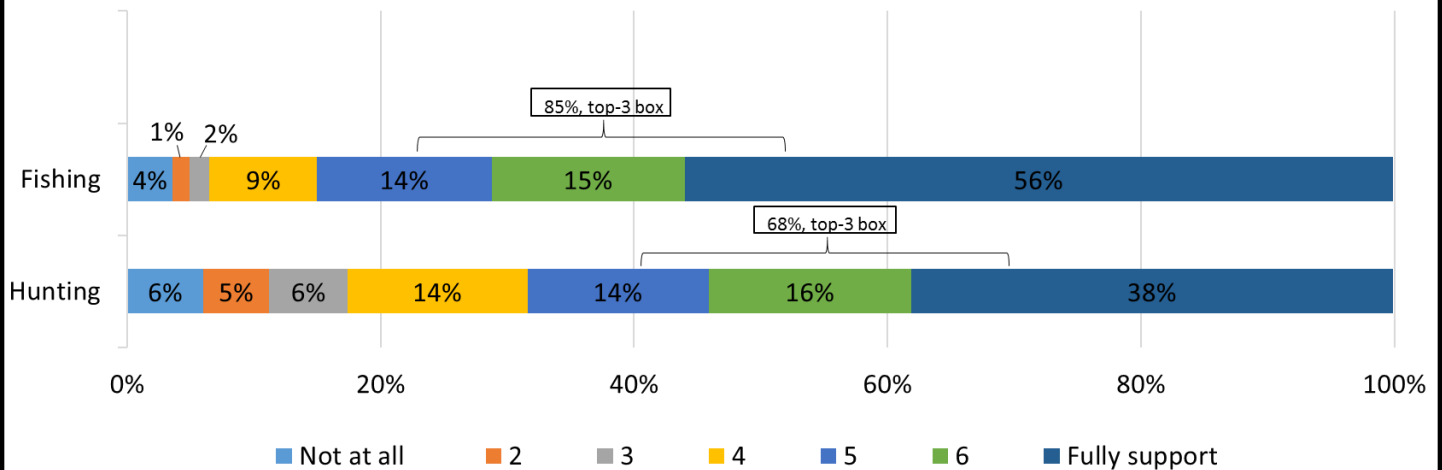
Participants living in the urban congressional district 7 are least likely than others to say they have had a hunting license. As city dwellers, hunting licenses may be less of a necessity.

Those from congressional district 5 are most likely to have had a fishing license in the past three years. This district is home to many reservoirs including Spinney Mountain State Park, which is considered a Gold Medal fishing location.



SUPPORT OF HUNTING & FISHING

Overall, Coloradoans are more likely to support fishing than hunting.



Congressional districts 3 through 7, which tend to be more rural, are more likely to support hunting than the urban congressional district 1.

Overall, Hunters and Anglers tend to show more support for hunting and fishing than those without a license.

Interestingly, Generation X and Baby Boomers are more likely to support hunting than Millennials. It may be that they have lived in Colorado longer; and therefore, have had more exposure to hunting and the benefits it provides to the state.

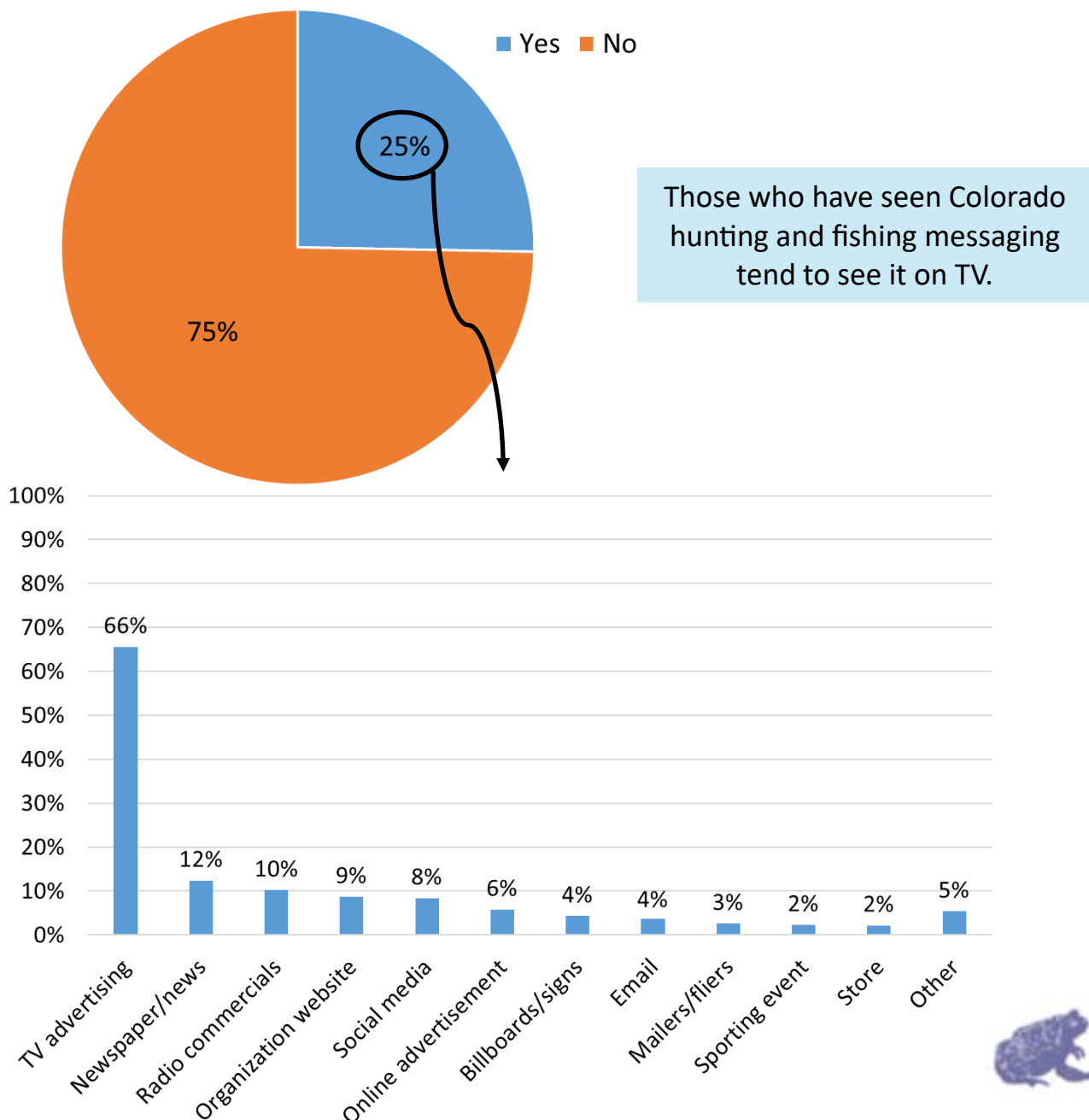


MESSAGING

Only 1 in 4 respondents have heard or seen messaging regarding hunting and fishing in Colorado.

Further, Hunters and Anglers are more likely to have heard or seen messaging than those without. Perhaps they are most exposed to it as they actively participate in the sport.

Participants living in Denver are more likely to see messaging on social media sites (e.g., Facebook, Twitter) than those living in more rural areas.



MESSAGING



"They provide value from our fees. Hug a hunter/fisherman!"

"Fees for hunting and fishing go to supporting Colorado's parks, etc."

"Reducing predators to aid deer population."

"Hug a hunter and hug a fisherman commercials."

“That the cost for licenses are going to go up to pay for the programs that allow people to hunt and fish.”

"That hunters help save the environment and wildlife."



TOP-OF-MIND AWARENESS

There seems to be confusion between the state agency names since it was changed in 2011. Unaided, the Colorado Division of Wildlife is top-of-mind among Colorado residents, while few are aware of the Colorado Wildlife Council.

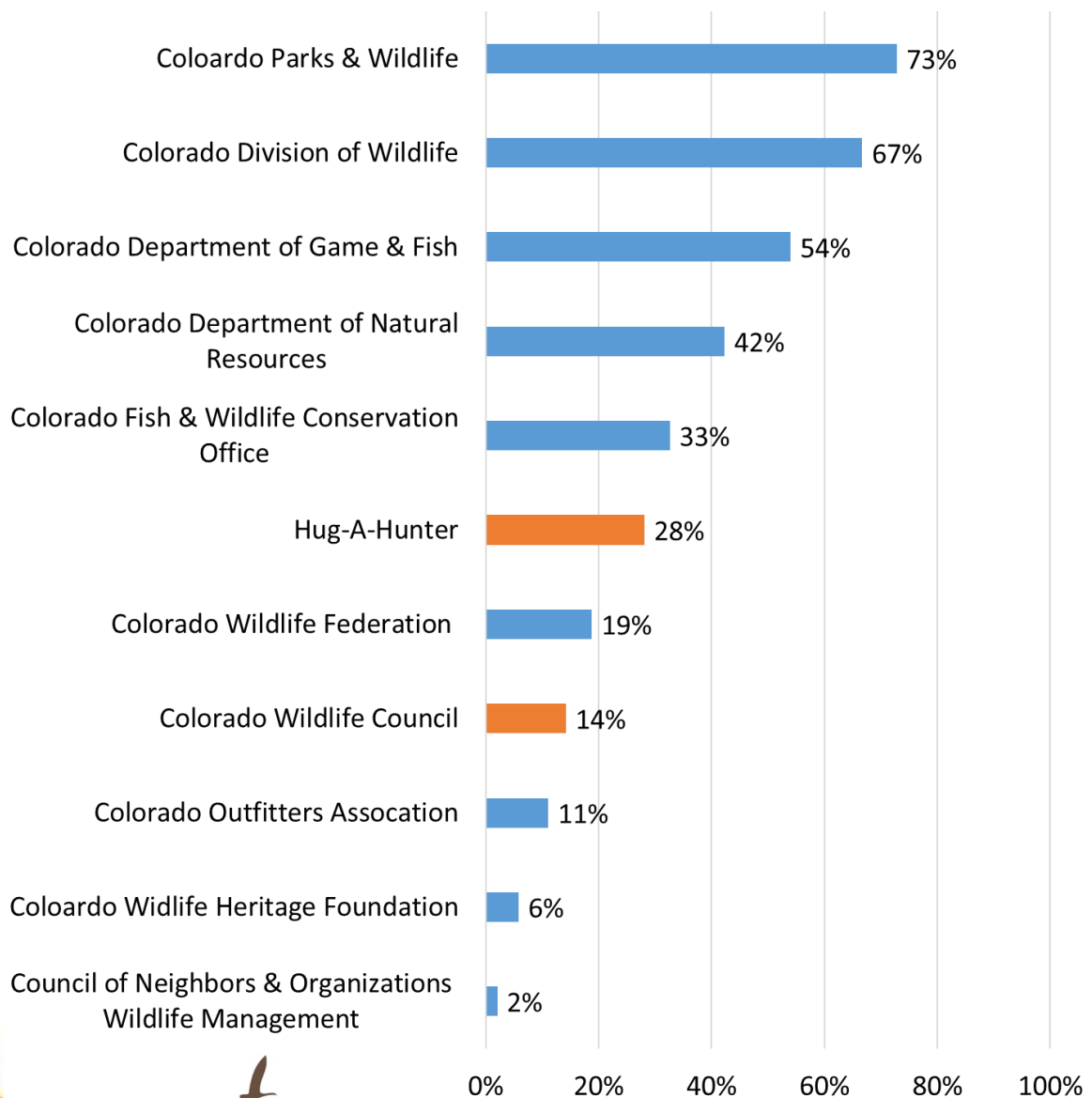
Top-of-Mind Government Entities *Table excerpt	
CO Division of Wildlife	24%
CO Parks and Wildlife	12%
CO Department of Game and Fish	11%
Wildlife Conservation	9%
Parks Service and Recreation	8%
Bureau of Land Management	7%
Forest Service	6%
National Park Service	4%
CO Department of Natural Resources	4%
Environmental Protection Agency	2%
Park Rangers	2%
CO Wildlife Council	>1%



AIDED AWARENESS

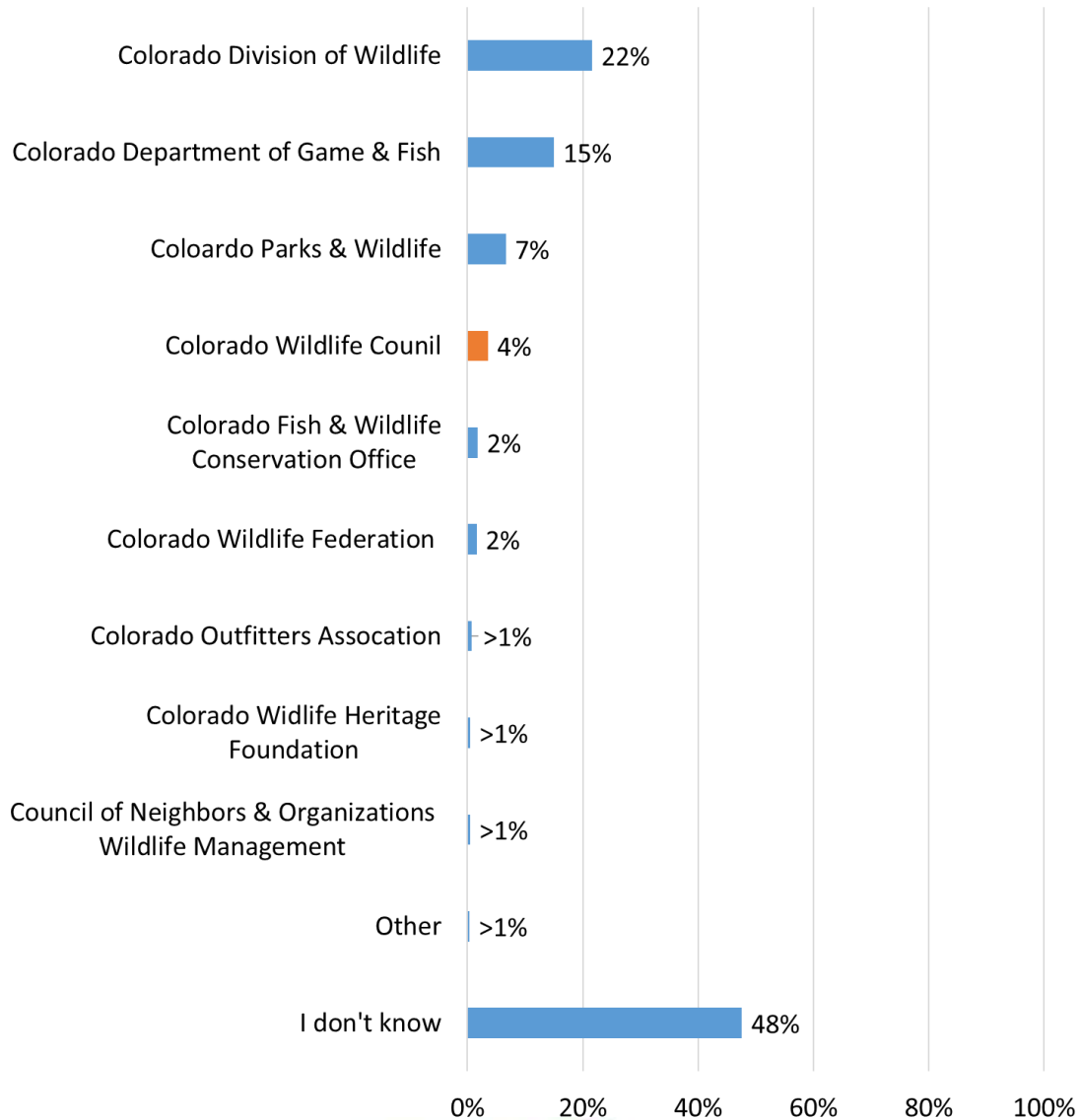
When aided, Colorado Parks and Wildlife is the most recognized government entity. Interestingly, Hug a Hunter is more well known than the Colorado Wildlife Council.

Participants living in more rural areas are more likely to know of Hug a Hunter. Further, Generation X and Baby Boomers are also more likely than Millennials to recognize this.



HUG A HUNTER

Those who are aware of Hug-A-Hunter (28%, in total) tend to say it is affiliated with Colorado Division of Wildlife. Very few are aware that Hug-A-Hunter is related to Colorado Wildlife Council.

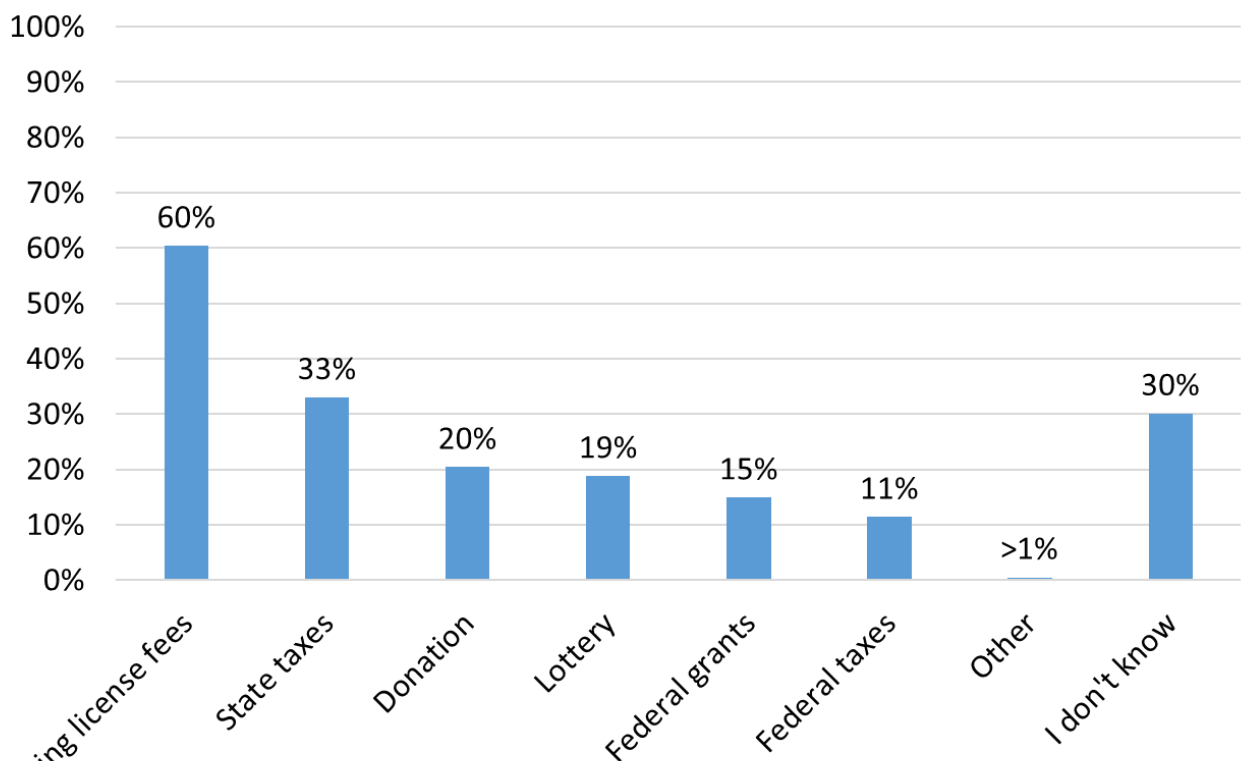


Base: Aware of Hug a Hunter (n=113); "You mentioned that you are aware of Hug a Hunter. To the best of your knowledge, with which government entity are they affiliated?"

FUNDING WILDLIFE MANAGEMENT

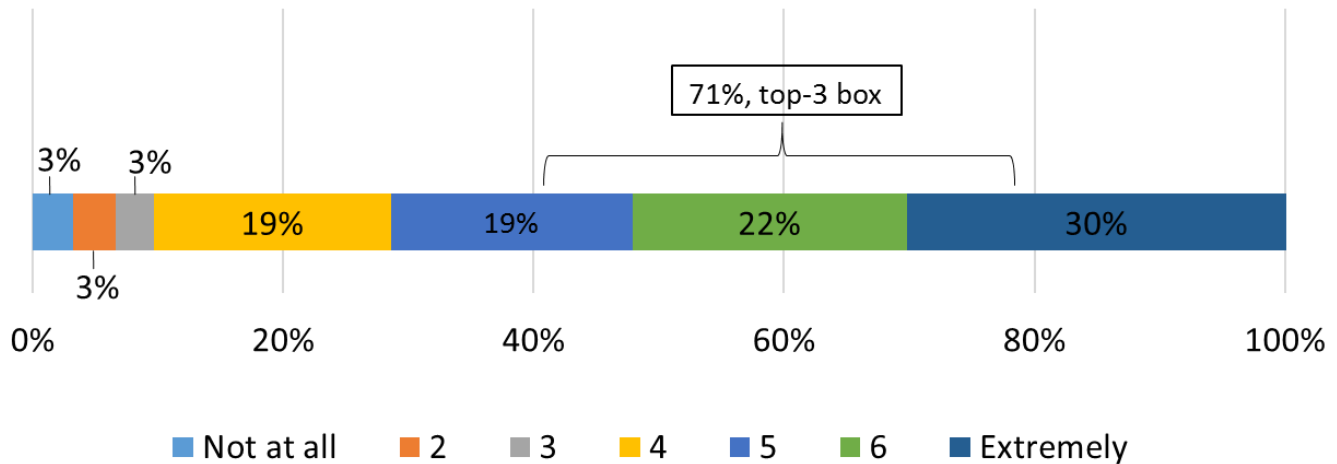
The majority of respondents believe that wildlife management is mostly funded by hunting and fishing license fees, as well as state taxes and donations.

Those without a license (current or past three years) tend to say they don't know how it is funded, while Hunters and Anglers are more likely to say that wildlife management is funded by license fees.



LICENSE FEES

About 3 in 4 respondents believe that hunting and fishing license fees benefit Colorado. Millennials and those who do not have a license are more likely to say fees do not benefit Colorado (bottom 3-box).



Colorado residents have mixed responses when asked to explain their rating.

Positive Comments *Table excerpt	
Economic support	25%
Support hunting and fishing programs	12%
Manage wildlife	11%
Support conservation	8%
Conservation of land and water	7%

Negative/Neutral Comments *Table excerpt	
Don't know where money goes	3%
Amount of fees collected is small	2%
No benefit to state	2%
Fees are low	2%
Fees are not paid because of illegal hunting & fishing	1%

"It pays for many things to maintain fish and game habitat, as well as recreational opportunities."

"I'm sure the revenue helps but I doubt the actual money is as much as they seem to imply."

"I'm sure they partially help, but don't know if they totally help."

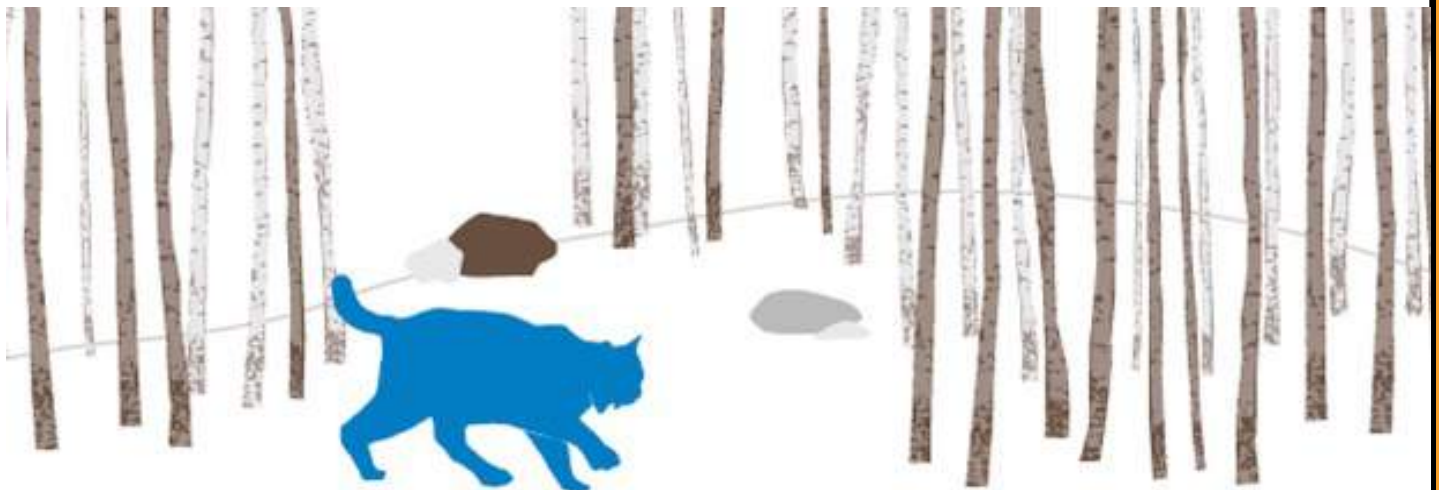
"It kills animals, which does not benefit the state."

PROGRAMS AND SERVICES

Unaided, participants believe that wildlife management benefits most from hunting and fishing license fees.

Those without a license are more likely to say they do not know which programs or services benefit from license fees.

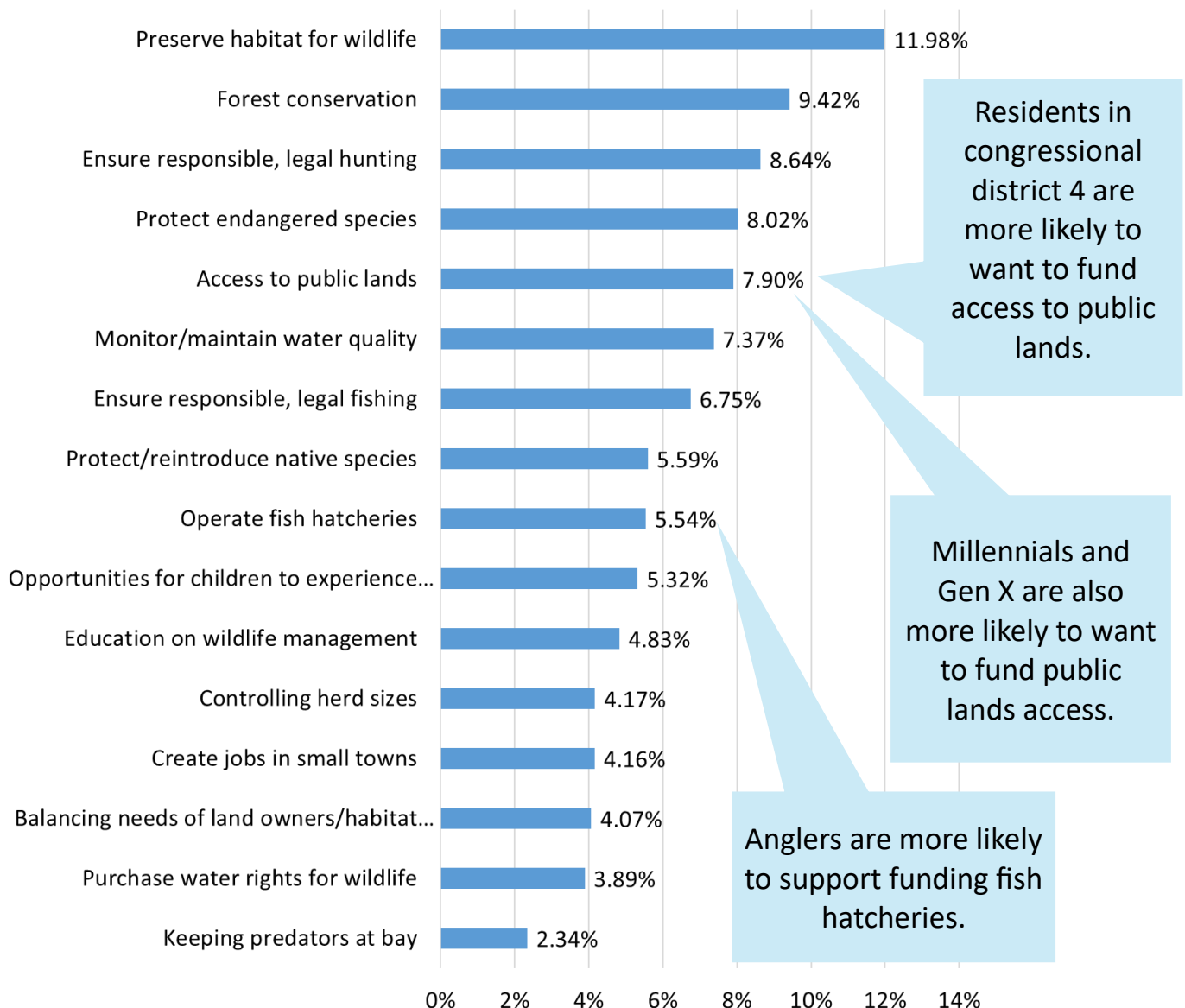
Programs and Services *Table excerpt	
Wildlife management	15%
Park service and recreation	9%
Natural resources	5%
Hunting and fishing	4%
Parks and wildlife	4%
Hug-A-Hunter	>1%
Don't Know	41%



PREFERRED PROGRAMS & SERVICES

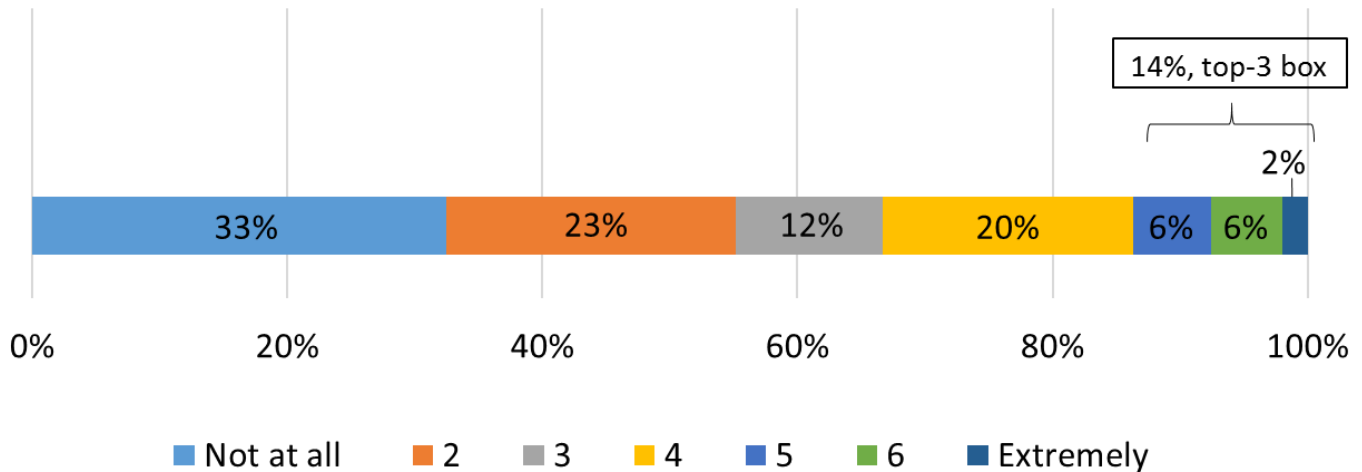
When asked how they would allocate money from license fees, participants are most likely to spend money on preserving habitat for wildlife. They also tend to allocate money to forest conservation and ensuring responsible hunting.

Allocation out of 100%, Mean Summary



COLORADO REGULATIONS

Few respondents feel they are knowledgeable on hunting and fishing regulations in Colorado.



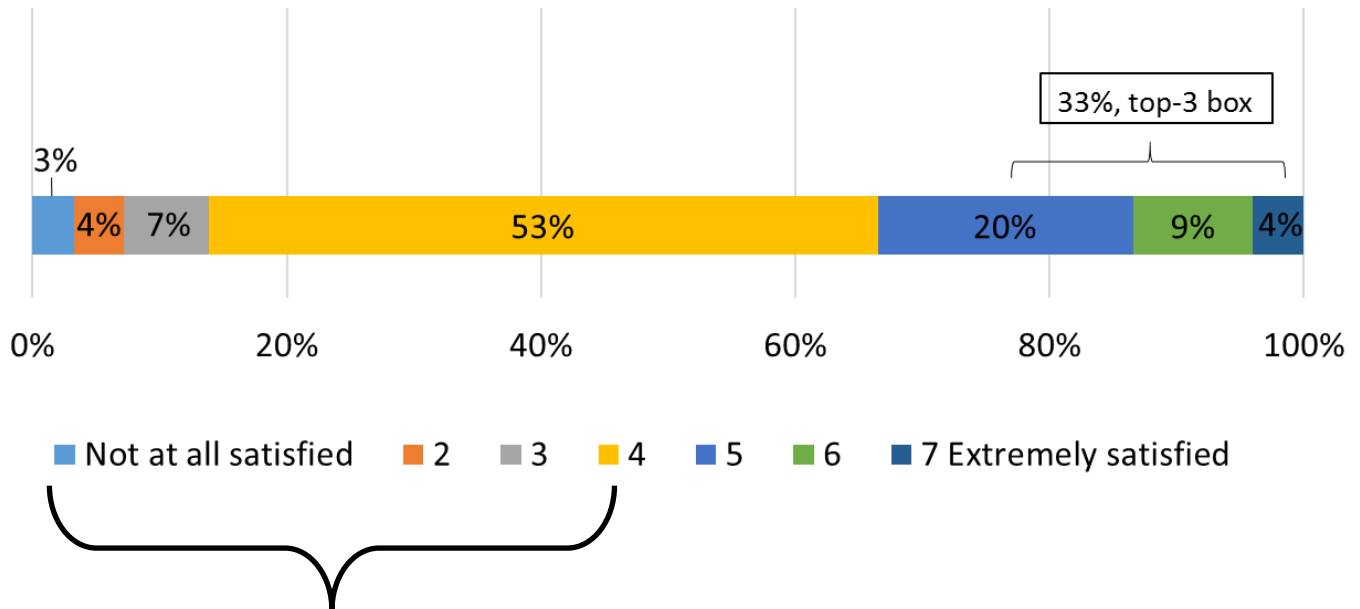
Participants living in more rural parts of Colorado (outside of Denver) say they are more knowledgeable of the regulations (top 3-box).

Additionally, Hunters and Anglers are more likely to say they are knowledgeable (top 3-box) than those without a license.

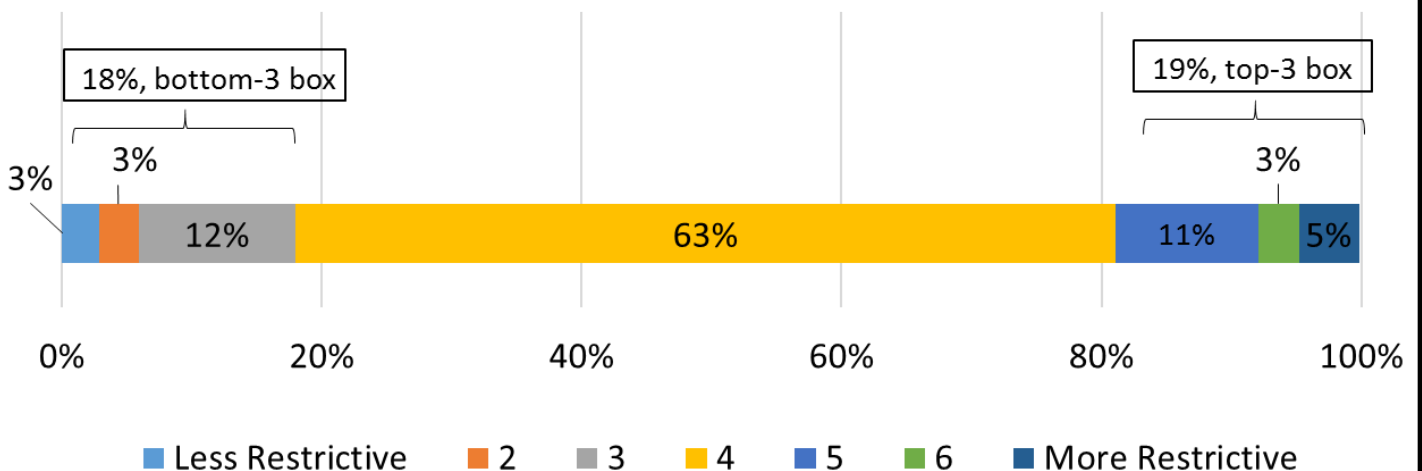


COLORADO REGULATIONS

About 1 in 3 are satisfied with the current hunting and fishing regulations in Colorado. Overall, participants from rural areas tend to be more satisfied than those from more urban parts in Colorado.



Those not satisfied with the current hunting and fishing regulations (bottom 4-box, n=268) are fairly split on how they would like to change the current restrictions.



COLORADO REGULATIONS

Those same participants (bottom 4-box, n=268) are mixed regarding what, specifically, they would change about the current regulations.

Desired Change *Table excerpt	
Wildlife conservation (e.g. protect wildlife, control herd sizes, reintroduce native species)	11%
Hunting and fishing laws (e.g. too strict, stronger enforcement)	11%
Licenses (e.g. Increase fees, stronger background checks, too expensive)	8%

“Raise more awareness about hunting and fishing practices.”

“Limits on what can be killed and to maintain that what is killed is legal.”

“Protect the animals and quit taking all the fish out of the lakes and streams.”

“There needs to be more officers to regulate illegal hunting.”

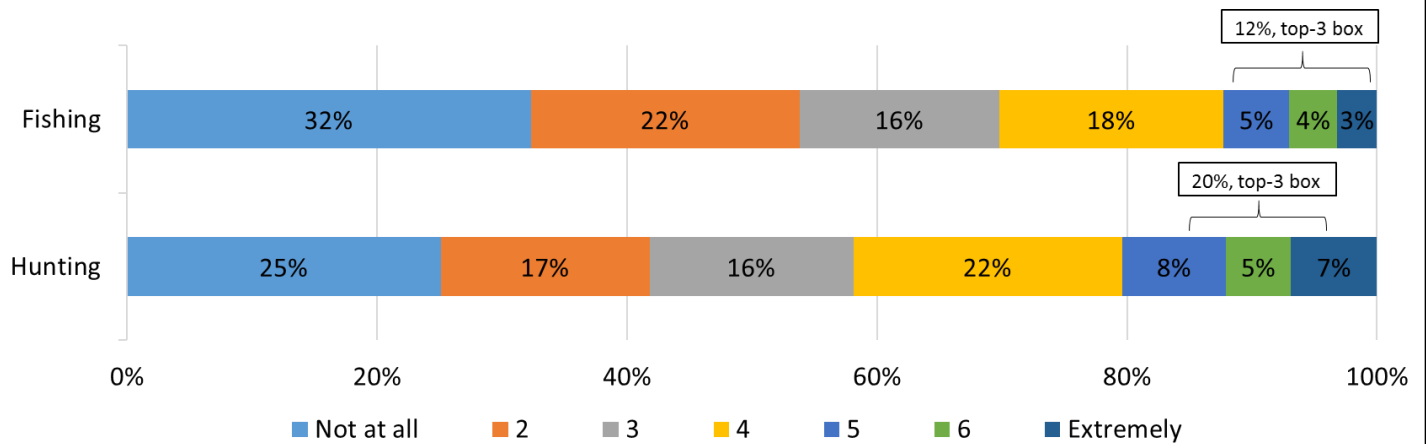
“Need people to manage wildlife.”

Additionally, those from urban areas are more likely to say they do not know or are too unfamiliar with current regulations.



BALLOT INITIATIVES

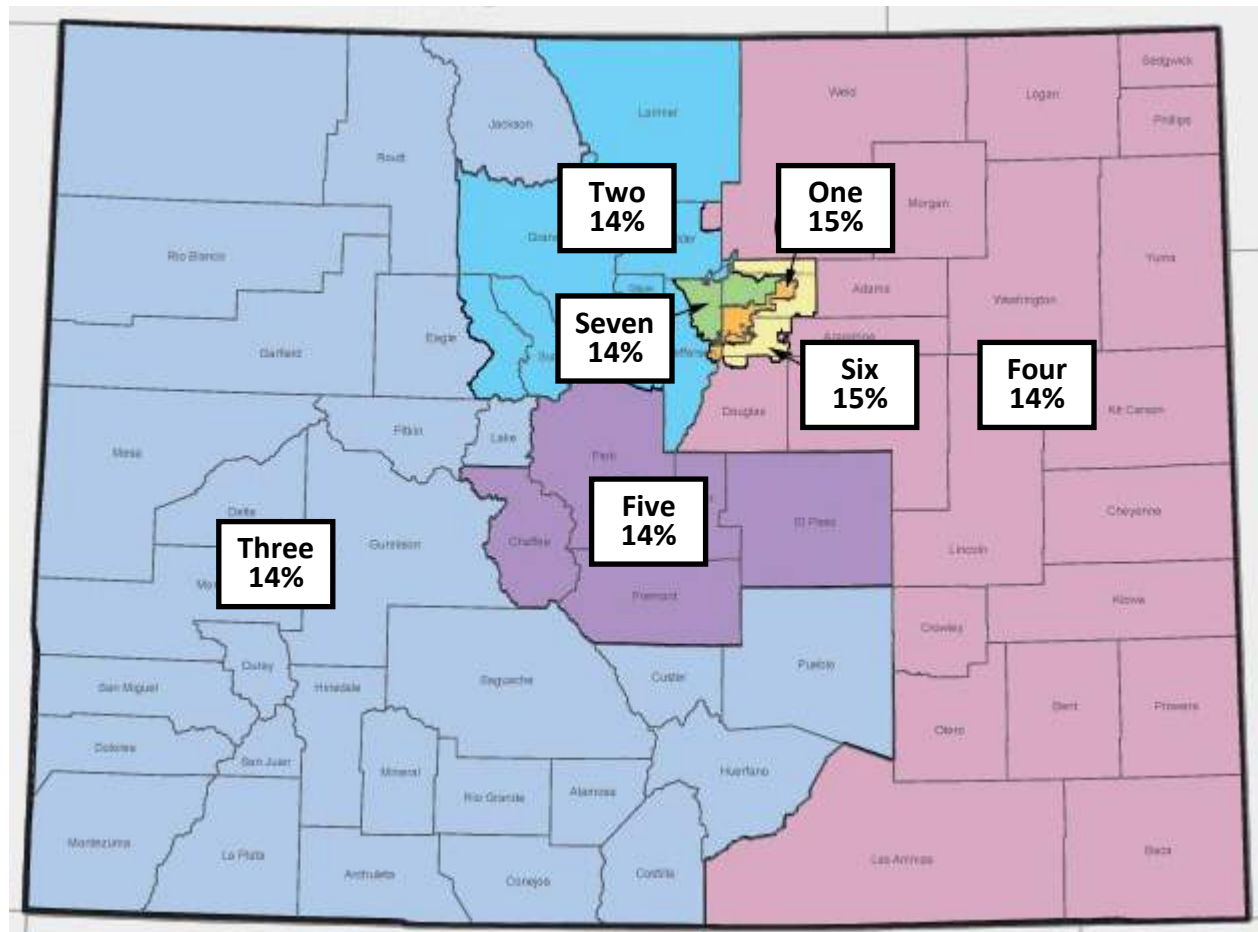
Very few respondents say they would support a ballot initiative that would restrict hunting and fishing.



Base: Total answering (n=403); "How likely would you be to support a ballot initiative in Colorado that would significantly restrict hunting/fishing?"

DEMOGRAPHICS

Congressional District						
One	Two	Three	Four	Five	Six	Seven
15%	14%	14%	14%	14%	15%	14%



DEMOGRAPHICS

Gender	
Male	Female
50%	50%

Income	
Under \$30,000	15%
\$30,000 - \$39,999	7%
\$40,000 - \$49,999	7%
\$50,000 - \$59,999	11%
\$60,000 - \$69,999	11%
\$70,000 - \$79,999	7%
\$80,000 - \$89,999	5%
\$90,000 - \$99,999	6%
More than \$100,000	31%

Millennials	
18-24	12%
25-34	20%
Gen Xers	
35-44	18%
45-54	17%
Boomers	
55-64	16%
65+	17%



Base: Total answering (n=403); "Are you ...?" (Gender)

Base: Total answering (n=403); "Into which of the following groups does your annual household income fall?"

Base: Total answering (n=403); "Are you ...?" (Age)

DEMOGRAPHICS

Ethnicity				
White/ Caucasian	Hispanic/ Latino	Black/African -American	Asian/Asian- American	Other
82%	13%	3%	5%	3%

Hispanic Origin	
Hispanic	Non-Hispanic
21%	79%

This Hispanic demographic includes those who are of Hispanic descent but don't consider themselves Hispanic/Latino.



Base: Total answering (n=403); "Which of the following best describes you? PLEASE SELECT ALL THAT APPLY."

Base: Total answering (n=403); "Do you consider yourself to be of Hispanic ethnic origin or descent?"

HUNTING/FISHING LICENSES

	Hunting License		Fishing License	
Current	Yes	No	Yes	No
	9%	91%	23%	77%
Past 3 Years	Yes	No	Yes	No
	6%	94%	14%	86%



Base: Total answering (n=403); "Do you currently have a Colorado hunting license?"; Base: If no (n=): "Have you had a Colorado hunting license in the past three years?"

Base: Total answering (n=403); "Do you currently have a Colorado fishing license?"; Base: If no (n=): "Have you had a Colorado fishing license in the past three years?"

Who We Are

R&R Partners is a full-service, independent, international agency dedicated to helping clients thrive in complex, fast-moving business climates. From product launches and spin-offs to mergers, line extensions, and complex cause-related marketing efforts, we build value and leadership with every step, turning key moments into critical successes.

For four decades, we've launched some of the world's most innovative companies, created legislation, shaped public opinion and pop culture, and created literally billions of dollars in equity and value for our clients.



