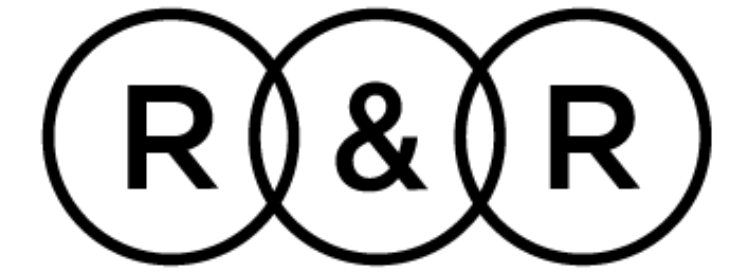


Colorado Wildlife Council

Research Report



Prepared by:

R&R Partners

Company Representative:

Strategy & Insights

Date Issued:

October 2021

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Background

By statute, the Colorado Wildlife Council's (CWC) 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's important to understand message impact among Colorado residents.

Methodology

As such, R&R conducted an additional wave of an ongoing tracking study to continue measuring Coloradoans' attitudes and perceptions of hunting and fishing. Please note, the survey was revised in 2020; therefore, only two waves are compared in this report. A total of 680 Colorado residents completed the questionnaire, which has been adapted from other state and national surveys. All participants were screened to ensure that they are 18 years or older and are registered to vote in Colorado. Sample size yields a $\pm 3.76\%$ margin of error at a 95% confidence level of 3.59 million Colorado registered voters.

This research study entailed an SMS Text-to-Web methodology and was fielded from Aug. 30 to Sept. 10, 2021. Data were weighted on key demographics and congressional districts to ensure that the results were representative of Colorado voters. Please note, the raw data collected in this research study were relatively close to actual voter population proportions; therefore, weighting resulted in minimal adjustments to the results.

For all questions in the survey, crosstabulations were conducted to compare differences among various subgroups. Data were tested for significant differences at the 95% confidence level and noted throughout. When comparing waves and subgroups, statistically significant differences are indicated with a green  or red  arrow. If no indication is made, the data is not statistically different, and is considered to be at parity.

Executive Summary

This is the Wild Life remains a strong brand platform and is effective in driving the message home.

Overall, the data is holding steady – in fact, it's trending upward on every metric. If the impact of the campaign was diminishing, it is unlikely there would be consistent YOY increases. And, though ad recall remains relatively low, those who see the ads tend to remember the information it's trying to convey – very few cannot recall details – suggesting that the message resonates.





This is the Wild Life continues to make headway among younger voters.

A viable target audience, 18- to 34-year-olds, remains to be relatively open to the idea of hunting.

In fact, they're more likely than 35 and older to say, "I have never been hunting, but I would consider it." And, they're even more likely than 35+ to feel hunting should be legal – suggesting messaging and targeting efforts are having a positive impact among this age group.



Messages focused on conservation and wildlife management have broad appeal; younger voters resonate the most with funding.

When it comes to supporting hunting and fishing, messages that focus on conservation and wildlife management are the most convincing overall. In fact, the top 5 most convincing statements appear to all center around key thematic – protecting and conserving wildlife, maintaining and managing wildlife, and supporting relevant programs – that can be threaded into future messaging.

Importantly, many who feel hunting should be illegal tend to say wildlife and the environment need to be protected. Yet, hunting and fishing protect both, suggesting an opportunity to bridge that gap and build support among these voters.

Further, there are key nuances among younger voters that may provide further insight into more tactical messaging guidance.

The age group of 18 to 34 is the most convinced by statements revolving around funding. They seem to resonate more with the human aspect – how hunting, fishing and license fees impact jobs and peoples’ livelihood. As a bonus, messages focused on funding are also the most convincing to newer residents.

Additionally, messages that focus on hunting/fishing behaviors are the least convincing across the board. This reinforces the fact that messaging should avoid the acts of hunting and fishing and focus more on how license fees benefit both the individual and the greater good.



Top issues in Colorado are starting to shift; This is the Wild Life messaging aligns with the electorate's priorities.

The message recommendation aligns with the evolution of the Colorado electorate who are more concerned with issues that hunting and fishing help to address.

As a policy issue, concerns about environment and sustainability are becoming more of a priority. In fact, environment/sustainability is now the No. 2 issue overall, and is the top ranked issue among 18- to 34-year-olds. This is a good sign for Colorado Wildlife Council, as it provides an opportunity to build on shared values, and directly relates to the conservation/wildlife management message.

Additionally, approval of motivations to hunt, such as “to be outdoors” and “to spend time with family/friends,” have significantly increased. In the past year, national parks have experienced record visitation, with more people camping, road tripping and spending time in nature. Thus, it makes sense why attention on environment/sustainability has increased. Though this may potentially be a temporary trend due to the current circumstances of the pandemic, it remains a strong leverage point to help build positive sentiment and support.

**Though the campaign is currently working,
research is needed to ensure future
momentum.**

While the recommendation is to continue targeting younger voters with *This is the Wild Life*, we must acknowledge that the landscape has changed. Robust exploratory research is needed to explore the evolution of this campaign – and potential alternatives – to ensure that we do not become complacent or lose ground.

Ultimately, we need to understand if *This is the Wild Life* has longevity past this year, and if there are new messages, issues and/or audiences of which we need to be cognizant.

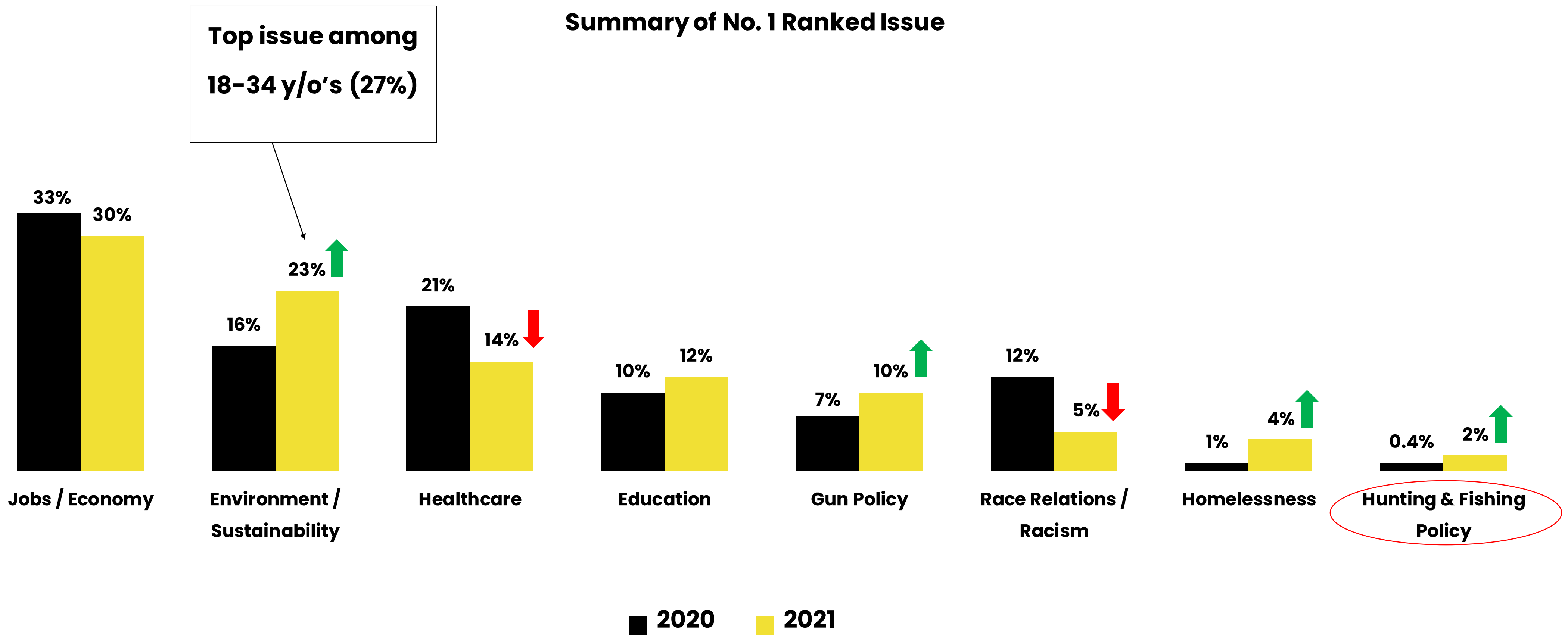


Appendix

Support of Hunting and Fishing

Important Issues

Overall, Colorado voters tend to prioritize jobs/economy as well as the environment/sustainability. While hunting and fishing policy continues to be of low importance, it has gained traction in the past year.

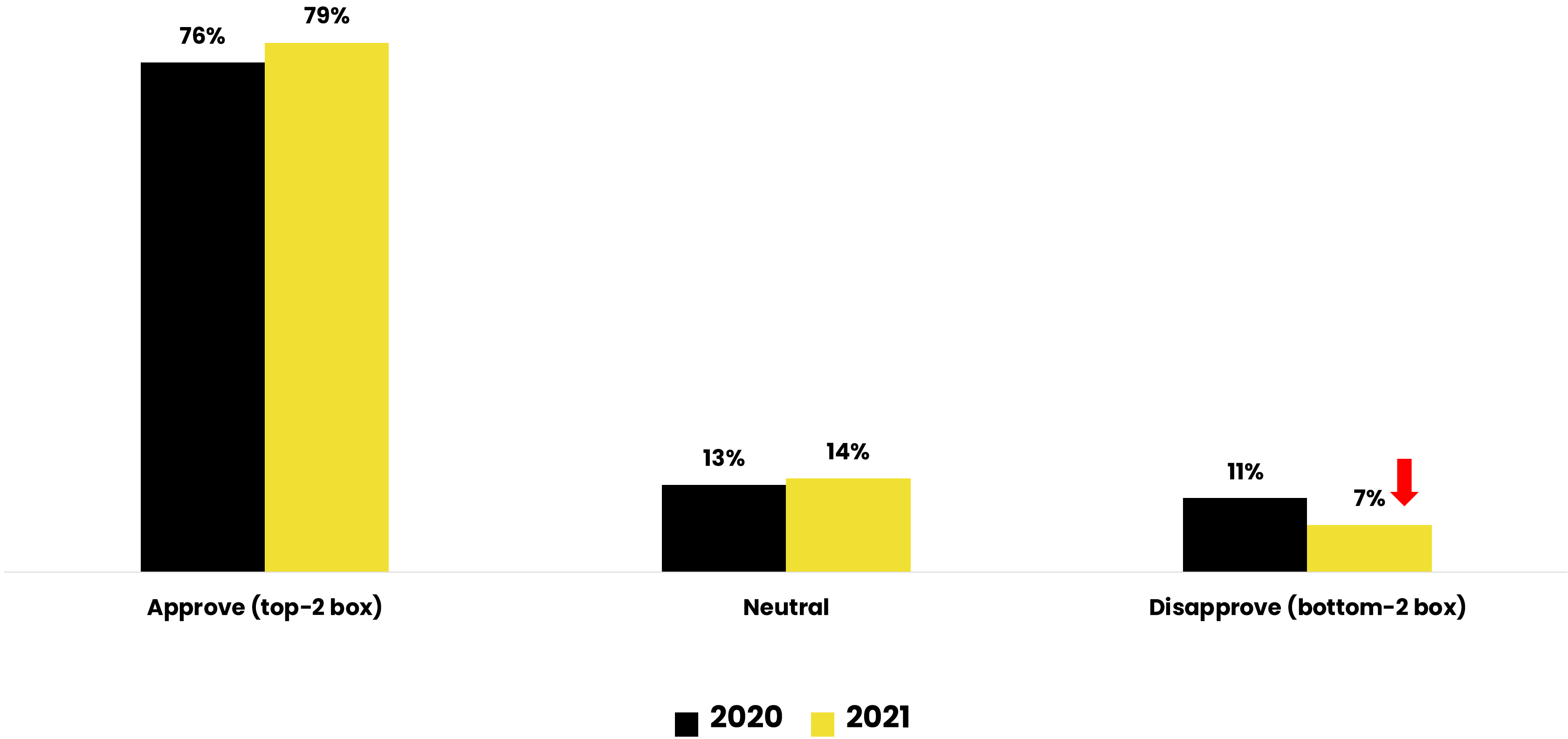


Base: Total answering (2020:n=931; 2021:n=680)

Please rank the following political, economic and social issues from most important to least important to you, personally.

About 8 in 10 (79%) Colorado voters approve of legal, regulated hunting – similar to national levels.

Approval of Legal, Regulated Hunting

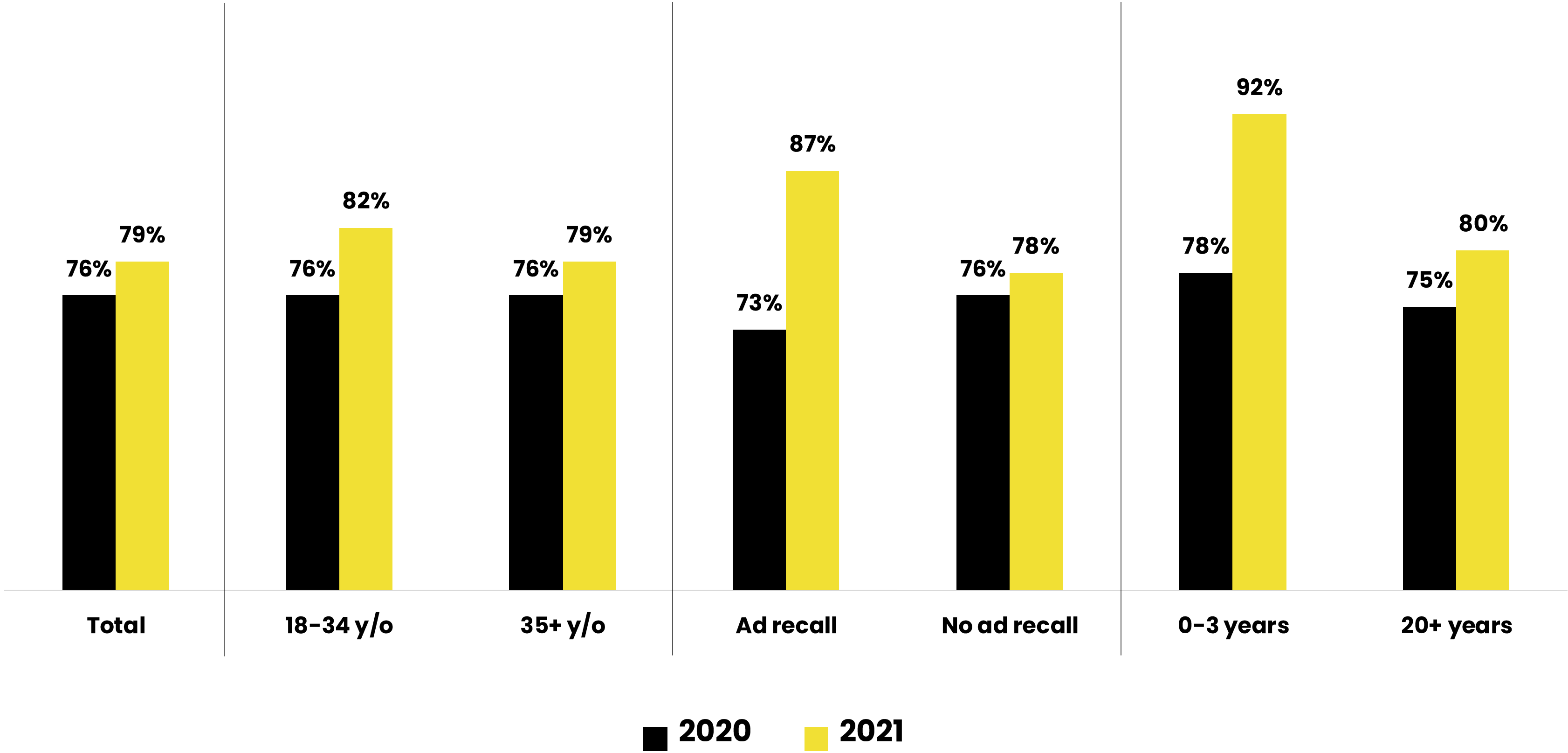


Base: Total answering (2020: n=931; 2021: n=680)

In general, to what extent do you approve or disapprove of legal, regulated hunting? Please select one.

When comparing key subgroups (e.g., age groups, recall of ads, length of residency) in 2020 to 2021, support for legal, regulated hunting has increased across the board.

% Approve, Top-2 Box Summary

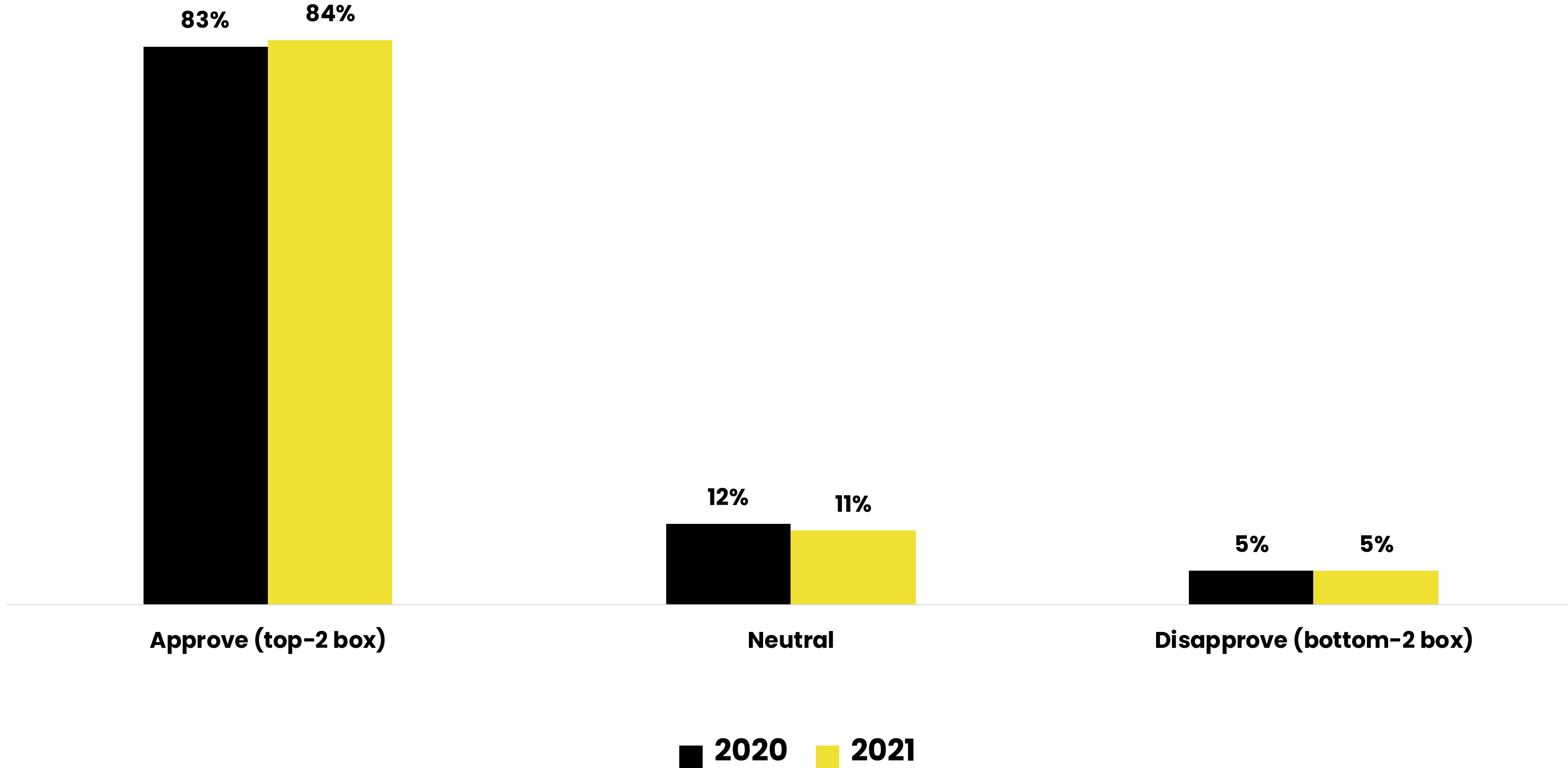


Base: Total answering (2020: n=931; 2021: n=680)

In general, to what extent do you approve or disapprove of legal, regulated hunting? Please select one.

About 8 in 10 (84%) Colorado voters approve of legal, regulated fishing.

Approval of Legal, Regulated Fishing

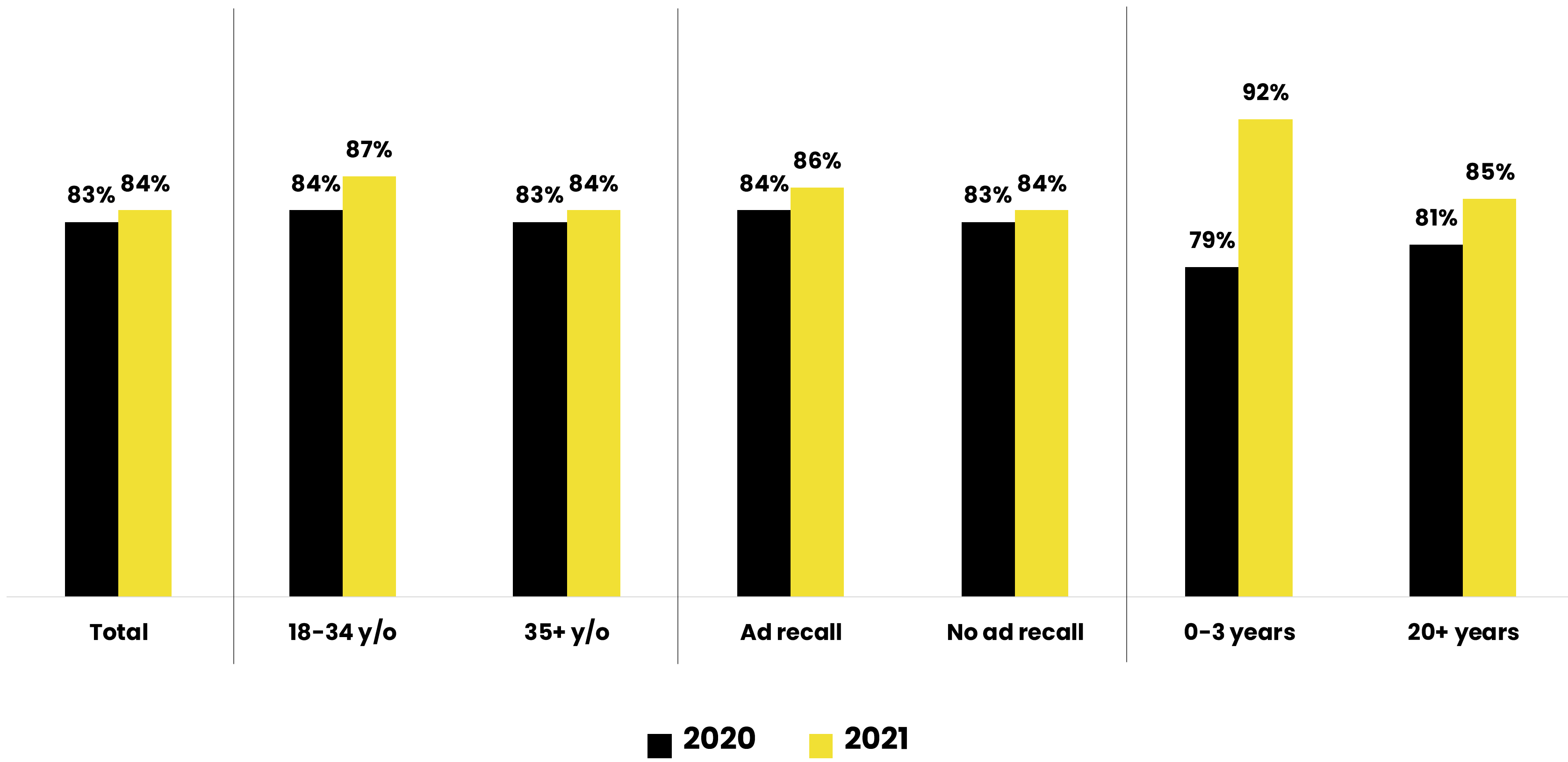


Base: Total answering (2020: n=931; 2021: n=680)

In general, to what extent do you approve or disapprove of legal, regulated fishing? Please select one.

When comparing 2020 to 2021, support for legal, regulated fishing has increased across the key subgroups (e.g., age groups, recall of ads, length of residency).

% Approve, Top-2 Box Summary

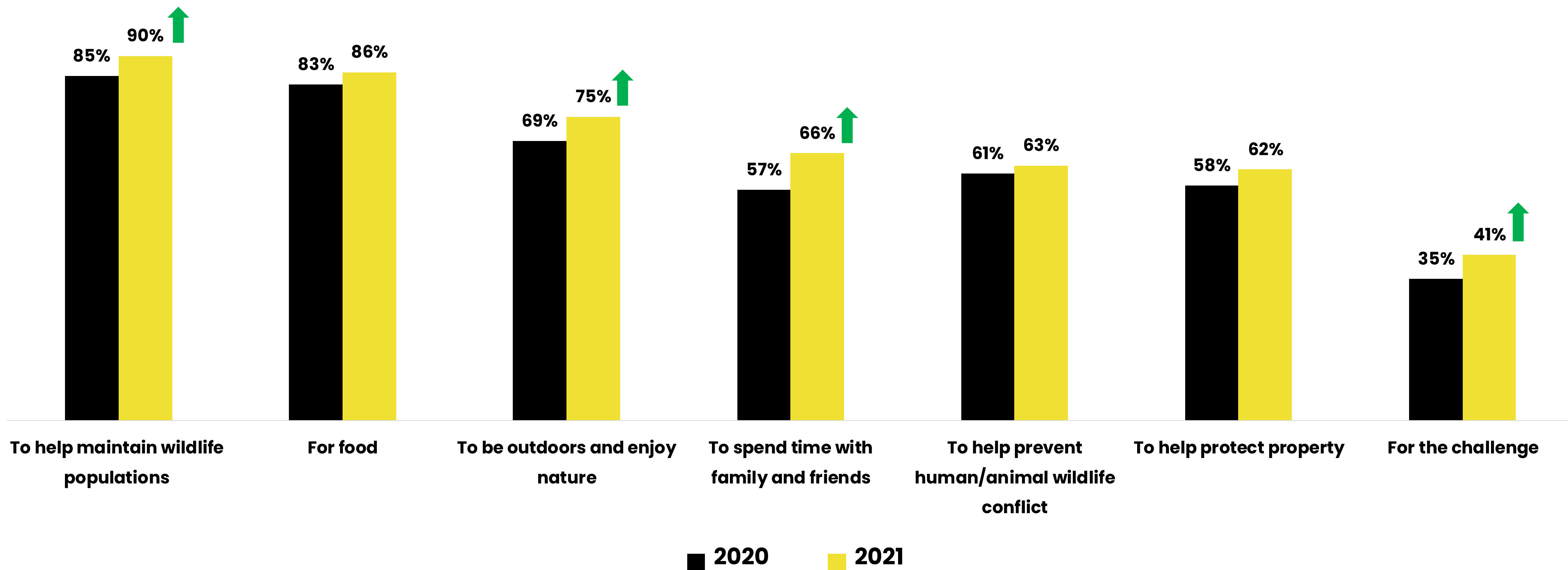


Base: Total answering (2020: n=931; 2021: n=680)

In general, to what extent do you approve or disapprove of legal, regulated fishing? Please select one.

To contextualize Coloradoans' support levels, we explored their approval/disapproval of several motivations for hunting. Overall, Colorado voters believe "helping to maintain wildlife populations" is the most acceptable motivation to hunt, followed by "for food." Interestingly, "to be outdoors" and "to spend time with family/friends" both significantly increased since 2020. Knowing the events of the past year resulted in many people visiting national parks, camping and spending more time in nature, it's possible that these types of activities garnered appreciation for the outdoors and contributed to this increase in approval.

Approval of Motivations for Legal, Regulated Hunting
% Approve, Top-2 Box Summary

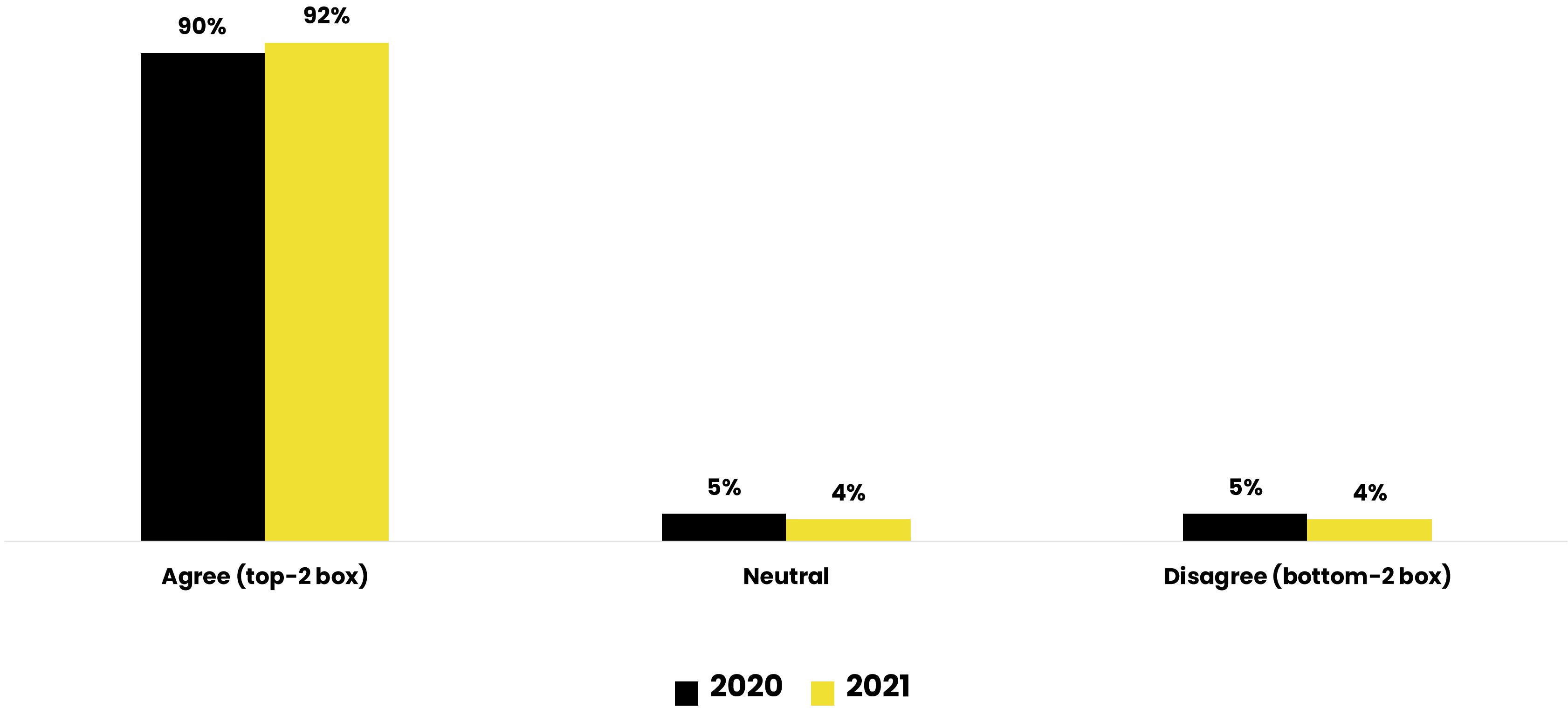


Base: Total answering (2020: n=931; 2021: n=680)

To what extent do you approve or disapprove of the following motivations for legal, regulated hunting? Please indicate your response for each motivation below.

About 9 in 10 (92%) Colorado voters agree that it's OK for others to hunt if they do so legally and in accordance with Colorado's hunting laws and regulations – consistent with national levels.

Agreement that it is OK for Others to Hunt

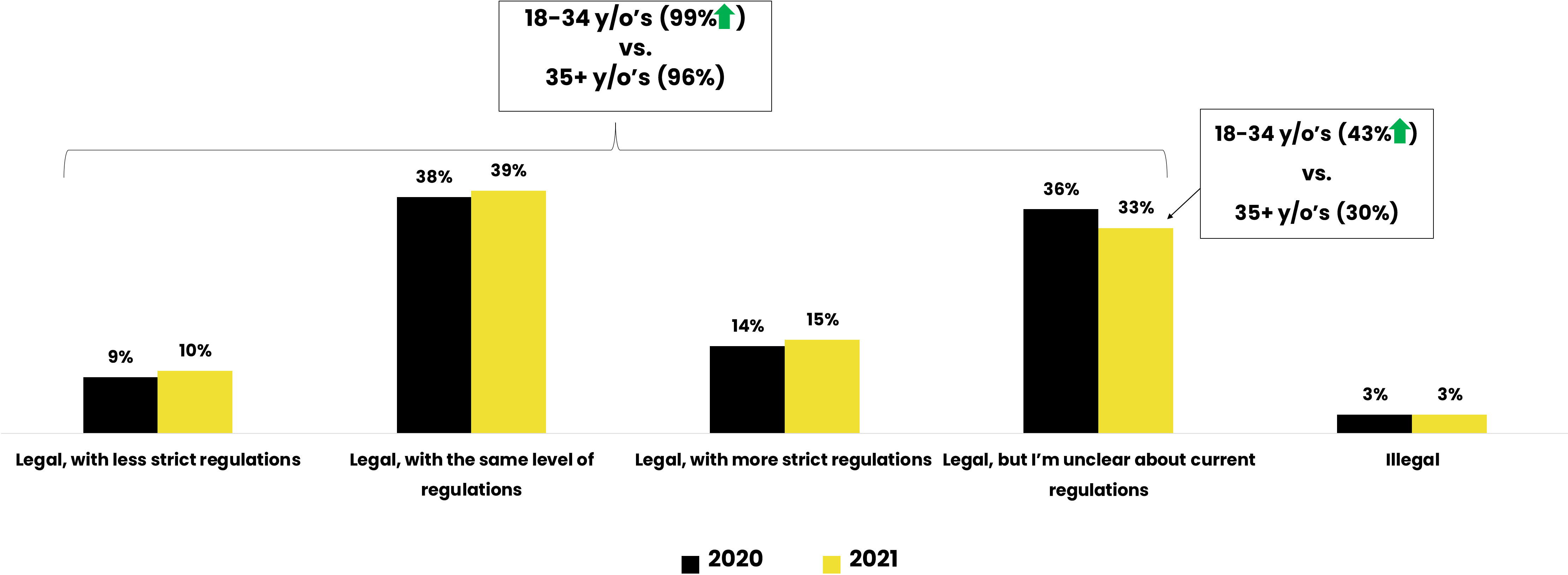


Base: Total answering (2020: n=931; 2021: n=680)

Regardless of your personal opinion on hunting, do you agree or disagree that it is OK for other people to hunt if they do so legally and in accordance with Colorado's hunting laws and regulations? Please select one.

Very few Coloradoans believe hunting should be completely illegal or that stricter regulations should be implemented. Many want this activity to be legal; however, it's clear that there is confusion around current regulations – especially among 18- to 34-year-olds. Interestingly, when looking at the net category, younger voters are more likely than older voters to believe hunting should be legal.

Perceptions of Hunting Regulations




Base: Total answering (2020: n=931; 2021: n=680)

Thinking about hunting, would you say hunting in Colorado should be ...? Please select one. Please note, "regulations" refer to general guidelines for hunting seasons, permitted locations, species allowed, etc.

Hunting
Regulations

In general, about a quarter of those who believe hunting should be “legal” say they have little knowledge of current regulations; regardless, they still feel it should be legal and regulated. Some also mention that current regulations are working, and hunting helps wildlife management.

Conversely, those who feel hunting should be “illegal” tend to believe hunting is cruel and that wildlife should be protected. A few say hunting is not necessary as people can shop for food at local markets.

Believes hunting should be “legal” <i>*Table excerpt</i>		
Theme	2020 (n=901)	2021 (n=657)
Don't know enough about current regulations	28%	25%
Current regulations are working/no change is needed	26%	19% 
Helps wildlife management/maintains wildlife populations	10%	8%
Hunting should be legal	6%	8%
Hunting has too many regulations already	6%	8%
Regulations are needed	7%	6%

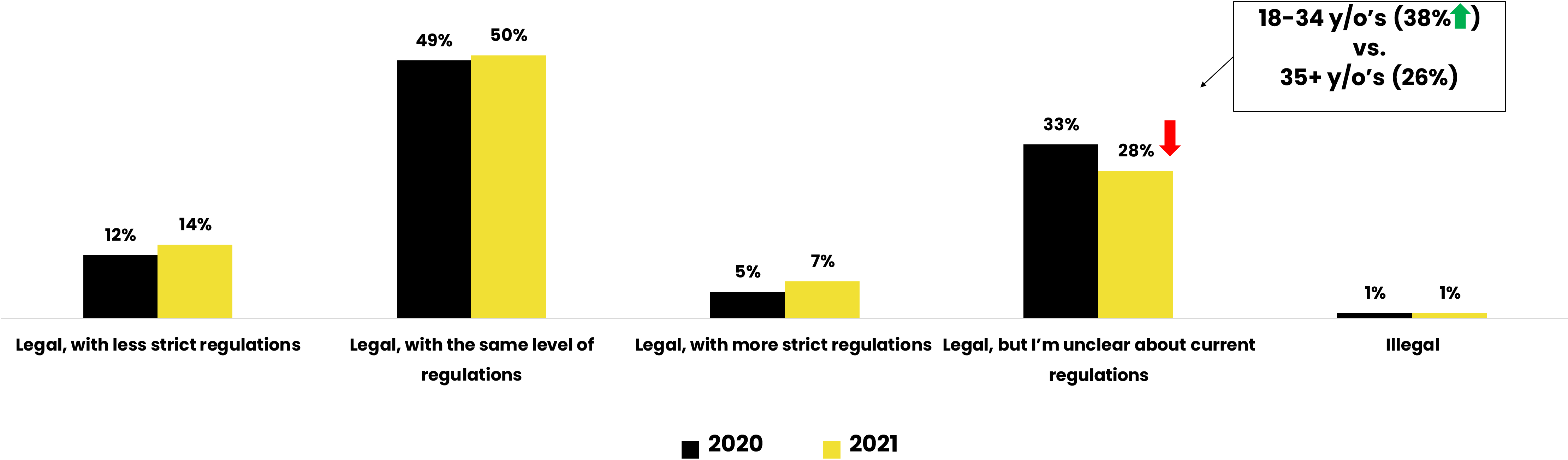
Believes hunting should be “illegal” <i>*Small sample size; table excerpt</i>		
Theme	2020 (n=30)	2021 (n=23)
Don't believe in killing mammals/hunting is cruel	29%	30%
Protect wildlife	19%	16%
Protect the environment/ecosystem	5%	12%
Hunting is not necessary/shop for food	12%	10%
Hunting should just be illegal	9%	4%
More regulations/better enforcement is needed	4%	5%

Base: Total answering (2020: n=931; 2021: n=680)

What makes you say that about hunting in Colorado? Please explain in as much detail as possible.

Very few Coloradoans believe fishing should be completely illegal or experience more strict regulations. As seen with hunting, many want this activity to be legal; however, some are not clear on current regulations – especially 18- to 34-year-olds.

Perceptions of Fishing Regulations



Base: Total answering (2020:n=931; 2021:n=680)

Thinking about fishing, would you say fishing in Colorado should be ...? Please select one. Please note, "regulations" refer to general guidelines for fishing seasons, permitted waters, species allowed, etc.

Fishing
Regulations

Those who feel fishing should be “legal” tend to say current regulations are working and no change is needed. While some are unclear on current regulations, they still believe it should be legal and regulated. A few also mention the benefits of fishing, such as maintaining fish populations and preventing overfishing.

Very few think fishing should be completely “illegal” and tend to say fishing is not necessary or that better enforcement is needed.

Believes fishing should be “legal” <i>*Table excerpt</i>		
Theme	2020 (n=924)	2021 (n=675)
Current regulations are working/no change is needed	28%	30%
Don't know enough about current regulations	26%	20%
Helps maintain fish populations	6%	7%
Fishing has too many regulations already	5%	7%
Prevents overfishing	5%	5%
Fishing should just be legal	6%	4% ↓
Enjoy fishing/spend time with family and friends	4%	4%
Don't fish/don't care	6%	3% ↓

Believes fishing should be “illegal” <i>*Small sample size; table excerpt</i>		
Theme	2020 (n=7)	2021 (n=5)
Should not have to pay to fish/should not require a license	30%	-
Protect the environment/ecosystem	19%	-
Fishing is not necessary	19%	30%
Better enforcement needed	18%	24%

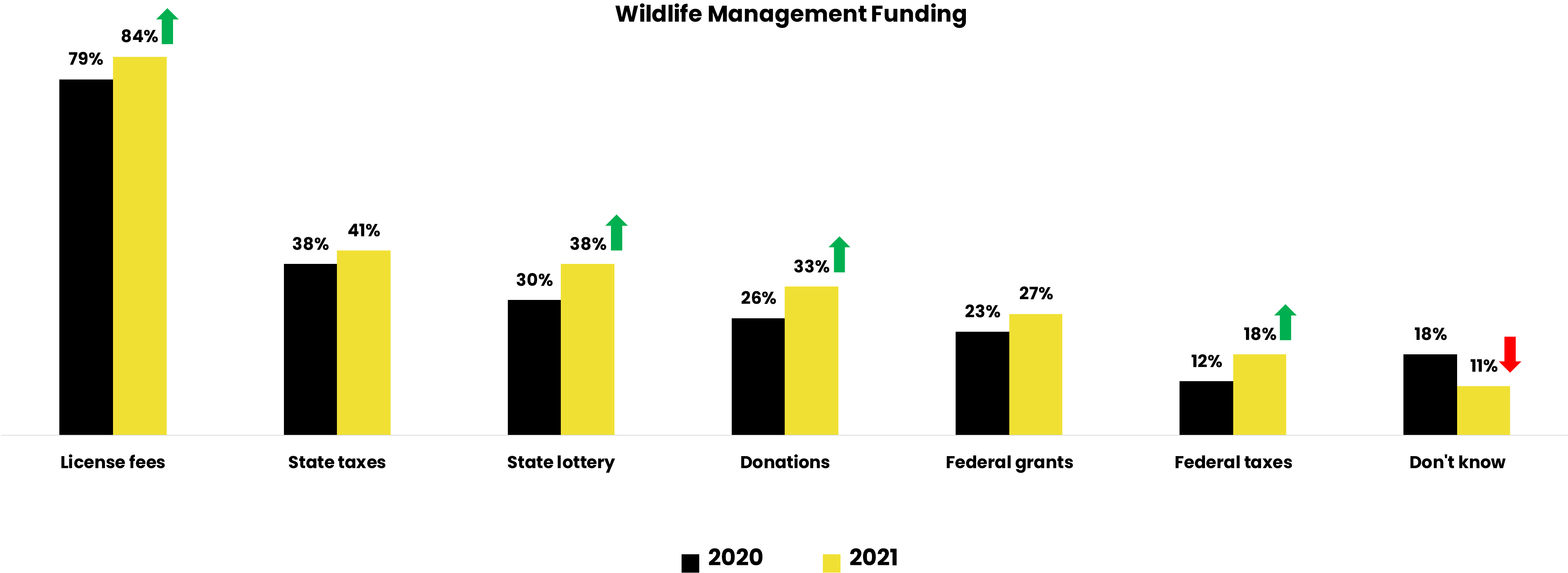
Base: Total answering (2020: n=931; 2021: n=680)

What makes you say that about fishing in Colorado? Please explain in as much detail as possible.

Benefits of License Fees

Funding

About 8 in 10 (84%) Colorado voters know wildlife management is funded by hunting and fishing license fees. Similar to 2020, many in 2021 select more than one answer – suggesting that they believe wildlife management benefits from diverse funding sources.



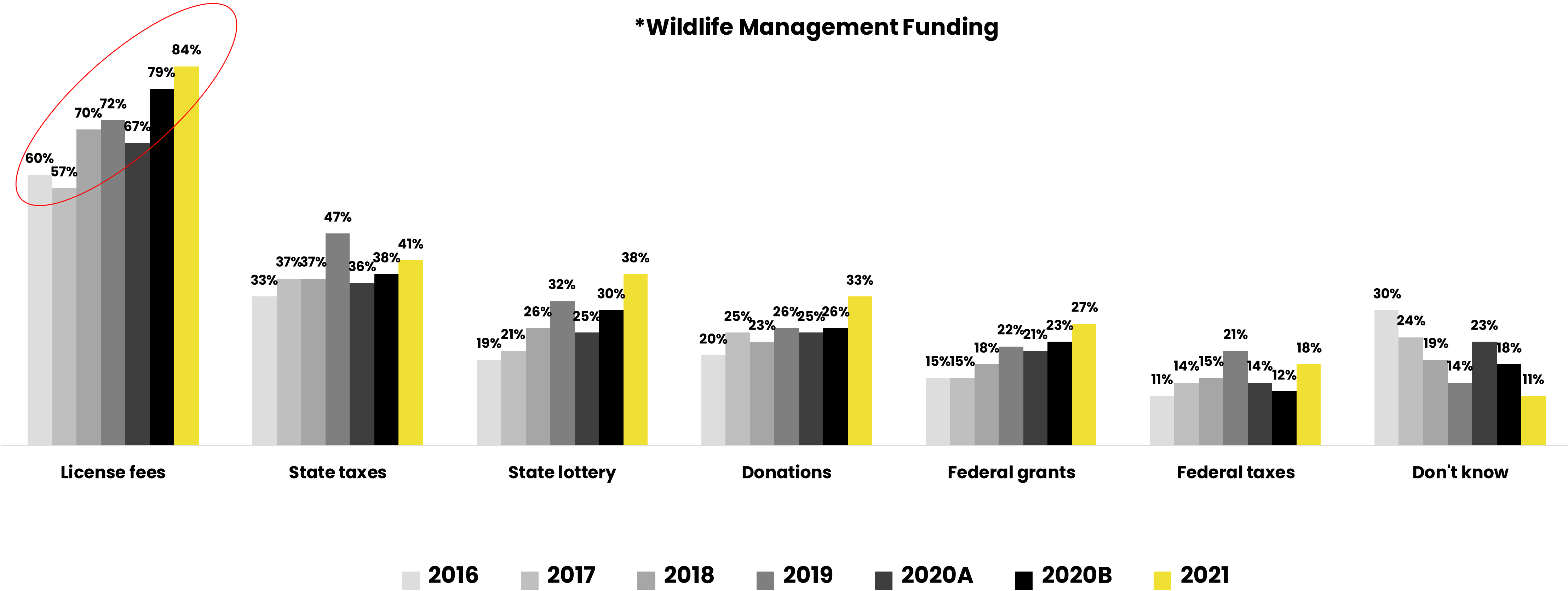
Base: Total answering (2020: n=931; 2021: n=680)

To the best of your knowledge, how is wildlife management in Colorado funded? Please select all that apply.

Funding

When looking at previous waves, a greater number of Colorado voters in 2021 indicate wildlife management is funded by license fees.

***Wildlife Management Funding**







*Data not tested for significant differences.
 Base: Total answering (n=varies by year)
 To the best of your knowledge, how is wildlife management in Colorado funded? Please select all that apply.

Benefits to Colorado

Many Colorado voters know that the fees from hunting and fishing licenses help fund wildlife management, contribute to outdoor/public spaces, aid in conservation, and help to stimulate Colorado’s economy.

Based on these major themes, however, it appears many voters do not make a direct connection to any type of personal benefit – suggesting a need to continue highlighting the positive impact license fees have on the individual.

How License Fees Benefit Colorado <i>*Table excerpt</i>		
Theme	2020	2021
Wildlife management	20%	17%
Contributes to parks & recreation	10%	9%
Pays salaries (e.g., rangers, mgmt.)	10%	8%
Conservation	4%	7% 
Protect land / land management	5%	6%
Revenue / stimulates economy	5%	5%
Fish hatcheries / restock fish	3%	5% 
Contributes to outdoor spaces	4%	4%
Protect environment / ecosystem	2%	4% 
Not sure / Don't know	25%	16% 

Base: Total answering (2020: n=931; 2021: n=680)

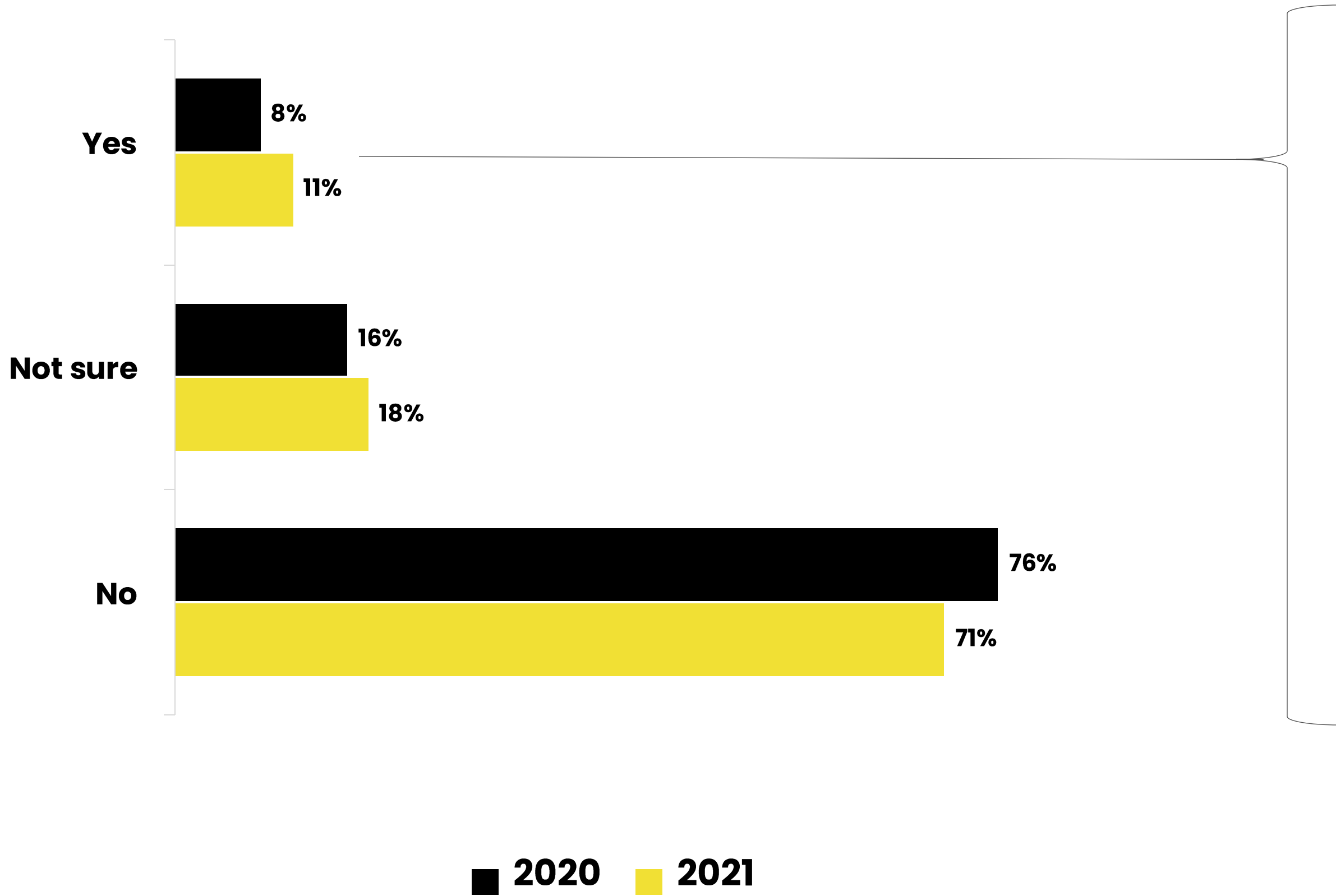
How, if at all, do hunting and fishing license fees benefit Colorado? Please answer to the best of your knowledge. Please write your response in the dialogue box below.

Ad Recall

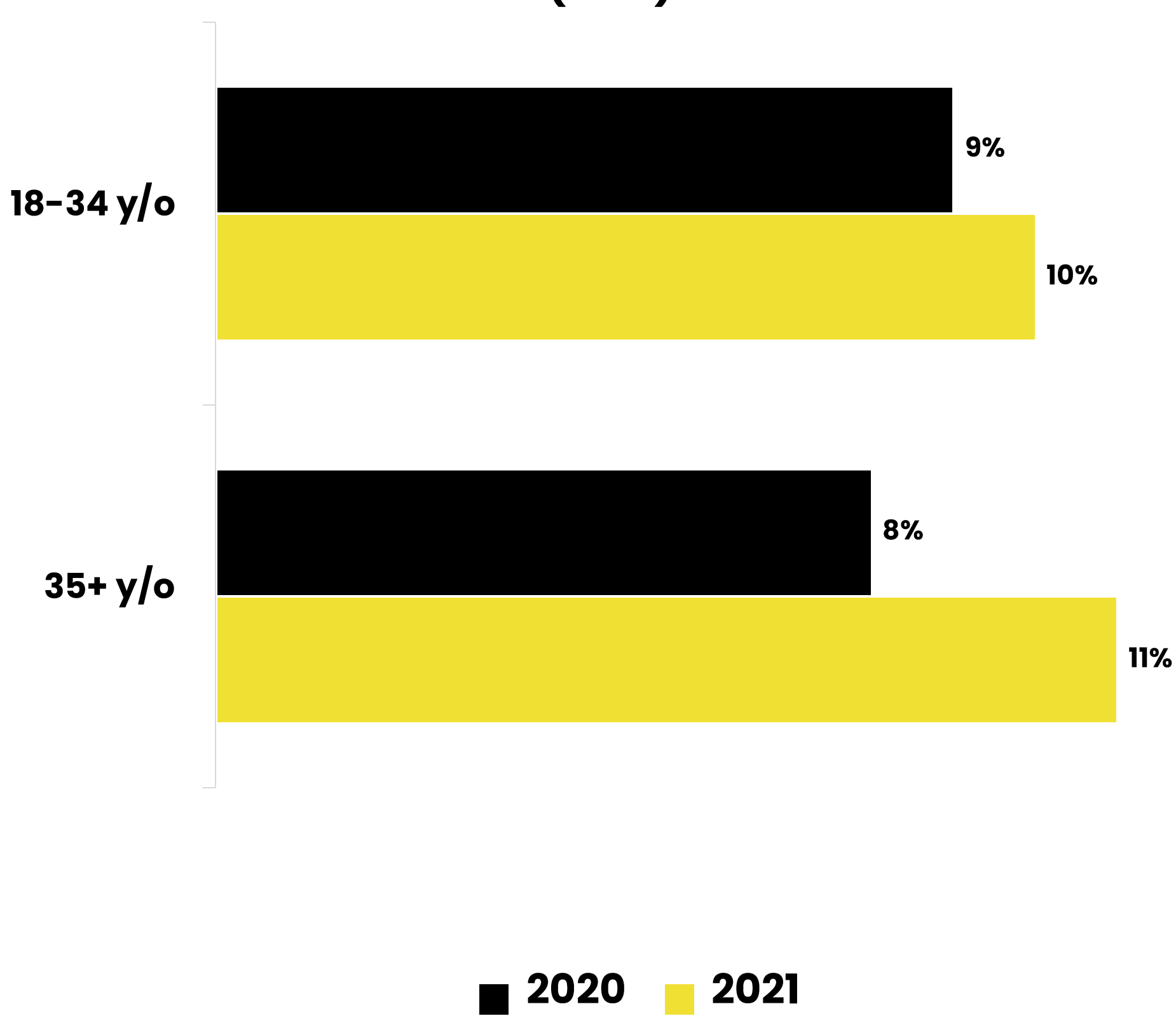
Ad Recall

Compared to 2020, 2021 experienced an incremental increase in aided recall. Additionally, key age groups remain on a par with total data.

Recall of CWC Advertisements



Recalls CWC Advertisements (2021)



Base: Total answering (2020: n=931; 2021: n=680)

Have you ever seen or heard any advertising using the phrase "This is the Wild Life?" Please select one.

Ad Recall

Overall, 2021 saw an incremental increase in many of the key themes recalled from This is the Wild Life advertisements. Those who recall the messaging tend to understand the general theme of the advertisement(s), such as how license fees help wildlife, parks and small businesses. Some also mention specifics from the advertisement(s), including the spokesman, coffee mug, or where they saw it (e.g., billboard, YouTube).

Similar to 2020, few Colorado voters say they cannot recall specifics, suggesting that the majority of people who see This is the Wild Life messaging tend to generally understand and retain the information it's trying to convey.

Themes Recalled from 'This is the Wild Life' Ads <i>*Table excerpt</i>		
Theme	2020	2021
How licensee fees help wildlife	2%	8%
Colorado fish & game	7%	8%
Remember the phrase/slogan	5%	7%
Remember the billboards	-	5%
Hunting protects wildlife	5%	3%
YouTube video	-	2%
Colorado parks	1%	2%
Remember the man	1%	2%
Helps small businesses	1%	2%
Remember the coffee/coffee mug	2%	2%
Saw ad(s) but cannot recall	19%	19%

Base: Recall 'This is the Wildlife' ads (2020:n=75; 2021:n=71)

You said you recall seeing or hearing advertising using the phrase "This is the Wild Life." What do you remember about the advertisement(s)? Please be as specific as possible. Please write your response in the dialogue box below.

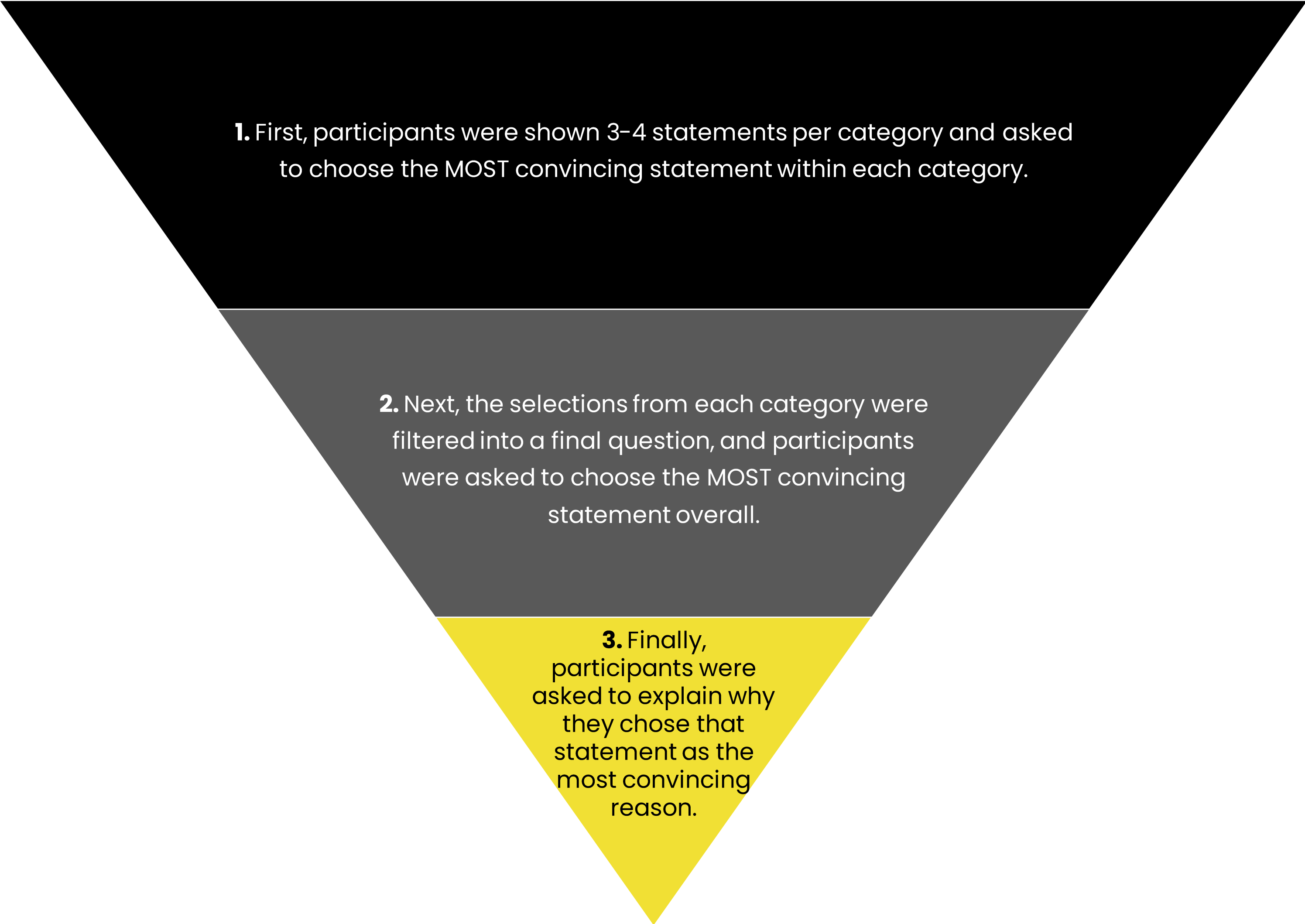
Message Testing

Three-phased approach to message testing:

We tested 13 messaging statements across four categories to uncover the most convincing reason to support legal, regulated hunting and fishing among Colorado voters.

The four categories tested were:

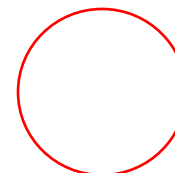
- 1. Hunting/Fishing Behaviors
- 2. Wildlife Management
- 3. Conservation
- 4. Funding



Statement Summary

**Summary of Message Statements
Total Data**

 Denotes top statement per category.

 Denotes top-5 statements overall.

	Message Statement	Selected as most convincing per category	Selected as most convincing overall
Hunting/Fishing Behaviors	Hunting and fishing provide local, free range and sustainable meat options.	32%	3%
	Hunting and fishing are a way of life for some people.	28%	5%
	Hunters and anglers are required to take all usable portions from the animal they harvest.	24%	2%
	It is illegal to just take the "trophy" parts of the animals, such as antlers.	16%	4%
Wildlife Management	The revenue generated from the sale of hunting and fishing licenses supports wildlife programs, including threatened and endangered species.	48%	14%
	Hunters and anglers play a critical role in maintaining wildlife population size for optimal health and sustainability.	41%	14%
	Hunting and fishing fees help support the reintroduction of species to the state, such as lynx and moose.	11%	3%
Funding	Hunting and fishing are the primary funding source for wildlife management efforts in the state, not tax dollars.	55%	10%
	Hunting and fishing contribute \$3.25 billion annually to Colorado's economy.	26%	8%
	Hunting and fishing support over 25,000 jobs in Colorado.	19%	4%
Conservation	Hunting and fishing fees support conservation programs that help protect and conserve wildlife habitat on both public and private lands.	54%	22%
	Hunting and fishing fees support programs and policies that help protect and conserve wildlife.	33%	10%
	Hunting and fishing can help decrease the population of wild animals that are overabundant.	13%	2%

Base: Total answering (2021: n=680)

For you, personally, what do you feel is the MOST convincing reason to support legal, regulated hunting and fishing in Colorado? Please select one.

Top Reasons Why Statement Was Selected as the Most Convincing



Hunting and fishing fees support conservation programs that help protect and conserve wildlife habitat on both public and private lands.

- It's important to maintain natural habitat.
- In general, conservation is important.
- Helps protect wildlife and maintain a healthy ecosystem.
- Has the public's interest in mind.
- Conservation leads to healthier environment and wildlife.



The revenue generated from the sale of hunting and fishing licenses support wildlife programs, including threatened and endangered species.

- We need to protect threatened and endangered species.
- Helps protect wildlife and maintain a healthy ecosystem.
- If we stop hunting, taxpayers might be forced to pay for this.
- Helps with the reintroduction of species.



Hunters and anglers play a critical role in maintaining wildlife population size for optimal health and sustainability.

- Prevents overpopulation and helps the sustainability of the species.
- Overpopulation is a problem and puts the ecosystem out of balance.
- Can help control specific animal populations.
- Managed wildlife is better for animals and people.
- It has the public's interest in mind.



Hunting and fishing fees support programs and policies that help protect and conserve wildlife.

- Conservation leads to healthier environment and wildlife.
- A healthy population means healthy ecosystem.
- Preserving the environment benefits everyone.
- Hunting/fishing are the primary funding sources for wildlife management.



Hunting and fishing are the primary funding source for wildlife management efforts in the state, not tax dollars.

- This benefits everyone, not just hunters.
- Helps support conservation efforts.
- Money doesn't lie.
- If we stop hunting, taxpayers will be forced to pay for conservation efforts.
- Helps to prevent overpopulation and protects animals.

Statement Summary

**Summary of Message Statements
18– to 34-year-olds**

 Denotes top statement per category.

 Denotes top-5 statements overall.

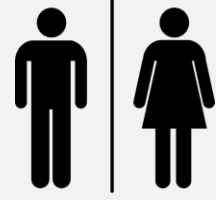
	Message Statement	Selected as most convincing per category	Selected as most convincing overall
Hunting/Fishing Behaviors	Hunting and fishing provide local, free range and sustainable meat options.	36%	4%
	Hunters and anglers are required to take all usable portions from the animal they harvest.	28%	2%
	Hunting and fishing are a way of life for some people.	22%	4%
	It is illegal to just take the “trophy” parts of the animals, such as antlers.	14%	2%
Wildlife Management	The revenue generated from the sale of hunting and fishing licenses supports wildlife programs, including threatened and endangered species.	55%	16%
	Hunters and anglers play a critical role in maintaining wildlife population size for optimal health and sustainability.	32%	11%
	Hunting and fishing fees help support the reintroduction of species to the state like the lynx and moose.	13%	3%
Funding	Hunting and fishing are the primary funding source for wildlife management efforts in the state, not tax dollars.	56%	14%
	Hunting and fishing contribute \$3.25 billion annually to Colorado’s economy.	29%	11%
	Hunting and fishing support over 25,000 jobs in Colorado.	15%	6%
Conservation	Hunting and fishing fees support conservation programs that help protect and conserve wildlife habitat on both public and private lands.	56%	19%
	Hunting and fishing fees support programs and policies that help protect and conserve wildlife.	27%	7%
	Hunting and fishing can help decrease the population of wild animals that are overabundant.	17%	1%

Base: 18-34-year-olds (2021: n=121)

For you, personally, what do you feel is the MOST convincing reason to support legal, regulated hunting and fishing in Colorado? Please select one.

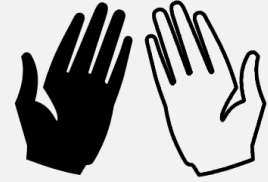
Demographics

GENDER



Male	53%
Female	47%

ETHNICITY



Native American	3%
Asian/Pacific Islander	1%
Black/African American	3%
White (not of Hisp. desc.)	76%
Latino/Hispanic	10%
Other	7%

LOR



Native Coloradan	28%
0-3 years	2%
4-10 years	10%
11-20 years	14%
20+ years	46%

CONG. DIST.



CD 1	14%
CD 2	16%
CD 3	14%
CD 4	15%
CD 5	14%
CD 6	14%
CD 7	14%

HHI



Under \$75K	32%
\$75K+	62%
Prefer not to answer	6%

AGE



18-29	5%
30-44	34%
45-54	20%
55-64	19%
65+	22%

HUNTING



I currently hunt and consider myself a hunter	6%
I have been hunting in the past and would consider going hunting again	23%
I have been hunting in the past and would not consider going hunting again	11%
I have never been hunting, but I would consider it	24%
I have never been hunting and I would not consider it	36%

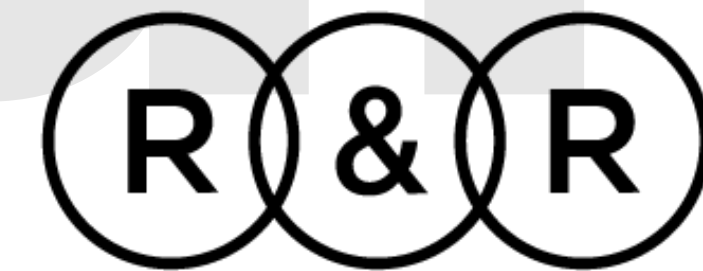
FISHING



I currently fish and consider myself an angler	12%
I have been fishing in the past and would consider going fishing again	66%
I have been fishing in the past and would not consider going fishing again	12%
I have never been fishing, but I would consider it	5%
I have never been fishing and I would not consider it	5%

Thank

You



Thank

Thank

Thank