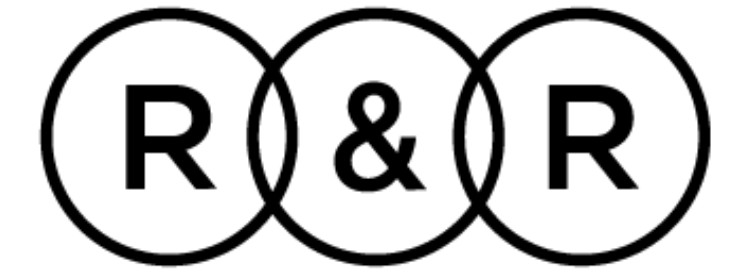


Colorado Wildlife Council



Prepared by:

R&R Partners

Company Representative:

Strategy & Insights

Date Issued:

February 25, 2020

Table of **Contents**

03	Background & Methodology
05	Executive Summary
09	Key Findings
15	Appendix

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

Therefore, R&R conducted the 5th research wave of an ongoing tracking study among n=938 Colorado voters (In the Wind: n=95; Gen Pop: n=843). The online survey was fielded from January 20, 2020 to January 31, 2020.

All participants were screened to ensure they are 18 years or over, and are registered to vote in Colorado. Data were weighted for a census representation on key demographics and congressional districts. Sample size yields a +/- 3.19 percent margin of error at a 95 percent confidence level of 5.69 million Colorado residents.

Data were tested for significant differences at the 95 percent confidence level and noted throughout. When comparing subgroups (e.g., Gen Pop vs. ITW, research waves, etc.), statistically significant differences are indicated with an uppercase letter (e.g., A, B, C, D, etc.). If no indication is made, the data is not statistically different, and is considered to be at parity.

Executive Summary

Executive Summary

Wave 5, which was fielded in late January, should not be viewed in a vacuum – we must first consider the context in which data were obtained. For example, **this survey was fielded during an extremely charged political climate.** This includes the 2020 presidential campaign, a presidential impeachment, and more specific to Colorado, Sen. Gardner’s re-election race and the Gray Wolf Reintroduction Initiative. Further, mass shootings in 2019 consistently placed the issue of firearms front and center – and we know from previous research that hunting is often associated with guns.

We must also consider the new campaign strategy, which is essentially considered a “reset” and the establishment of a new benchmark. Because of this, apple-to-apple comparisons should be taken with a grain of salt. As part of this reset, Wave 5 goes beyond just measuring success, as we have done in previous waves, and additionally provides insight into how to optimize our approach when speaking with our ITW audience.

Executive Summary

Further, **the media for this campaign drastically shifted compared to previous campaign strategies. Specifically, for this media flight, we were hyper-targeted to ITW** – a group of Coloradoans who may already be a bit more negative towards hunting, or the issue of firearms in general, with the potential to negatively impact our numbers. Considering the above, a drop in key metrics is expected, but shouldn't necessarily raise red flags or be taken as a reflection of the broader campaign itself.

Executive Summary

In spite of current events, we have stayed fairly consistent with previous years. **Though our key metrics (e.g., hunting/fishing support) in Wave 5 do experience an expected dip relative to previous waves, the overall data is not astronomically different YOY.** And, importantly, the numbers are shifting to being more neutral rather than negative. It's possible that this issue, in the context of every other important issue going on, is just not ranking high enough on Coloradoan's priority lists – suggesting it may be more a reflection of their priorities rather than a slow slide to opposition.

Moving forward, it will be important to monitor the softening of the intensity of opposition in subsequent waves. Again, **it's possible the issue of hunting/fishing isn't a policy priority for Coloradans right now,** especially in an environment where issues such as health care, cost of living, the economy, and immigration are taking center stage. This dynamic may be causing respondents to be more neutral on the issue, as an expression of prioritization, rather than an expression of moving toward supporting restrictions. **Additionally, there may be other factors at play, such as confusion around the ballot question, a dislike of gun culture or perhaps a result of partisan voting.** Additional research is recommended to further tease apart these underlying factors and better understand any influence they have on ballot support.

Regardless of the rational, we will continue to message to our ITW audience on the benefits of hunting and fishing in Colorado.

Key Findings

Hunting & Fishing Support

About 5 in 10 Coloradoans say they support hunting, and about 2 in 10 say they don't support it. Similar to previous research waves, those “non-supporters” tend to say they're against killing animals in general and believe it's wrong to harm another living thing. Those who do support hunting tend to know more about the benefits, such as how it helps both wildlife management and the state of Colorado.

Importantly, **about 3 in 10 are neutral towards hunting – suggesting there is still a sizeable number still 'sitting on the fence'.**

About 7 in 10 Coloradoans say they support fishing, and fewer than 1 in 10 say they don't support it. Again, similar to hunting, those who don't support fishing cannot condone killing an animal, and tend to say the act itself is inhumane.

Ballot Support

About 4 in 10 say they “know little” about the rules and regulations regarding hunting, and about 4 in 10 tell us they “know nothing at all.”

Yet, when asked how likely they would be to support a ballot initiative in Colorado that seeks to further restrict hunting, about **4 in 10 say they are not likely to support this ballot initiative and about 3 in 10 say they are likely.** And, when asked how likely they would be to support a ballot initiative in Colorado that seeks to further restrict fishing, **about 5 in 10 say they are not likely to support this ballot initiative and about 2 in 10 say they are likely.**

Importantly, for each of these ballot initiatives, **about 3 in 10 are neutral. Again, this suggest many Coloradoans are still sitting in that middle ground,** and are likely more susceptible to messaging compared to those who are more polarized on the topic.

Key Messaging

Gen Pop and ITW may differ in their support of hunting, yet they share many commonalities in terms of messaging. Both subgroups are receptive to messaging which focuses on the economic benefits of hunting and fishing; and, importantly, each needs to understand the direct impact it has on them, personally. This tells us **we have the right message and we're putting it in front of the right people** – and, **key message points, even those hyper-targeted to ITW, will still resonate among the larger Gen Pop audience**. And, the need to demonstrate a direct connection, a personal benefit, should continue to remain a crucial component of the campaign.

Messages which focus on “managing” or “hunting wildlife”, such as for food or to prevent human/animal conflict, do not resonate among voters. **Remember to avoid messages which highlight the act of hunting itself**, as this is a sensitive area for many ITW. These messages don't tie back to a direct benefit, and highlights why some are opposed to it in the first place.

Key Messaging

Therefore, CWC should **continue with the current messaging strategy, both in terms of what you say and how it's targeted.** We know ITW lies in that middle ground and can be persuaded either way, and they remain a key target audience moving forward. But, being in that middle ground, they are susceptible to communications from either side, which stresses the importance for CWC and its message to remain top-of-mind. **The emphasis should be on continuous exposure and building awareness – both of the benefits of hunting and fishing but also of CWC itself.** Building brand rapport will lend additional credibility, and should help elevate the impact of the overall message.

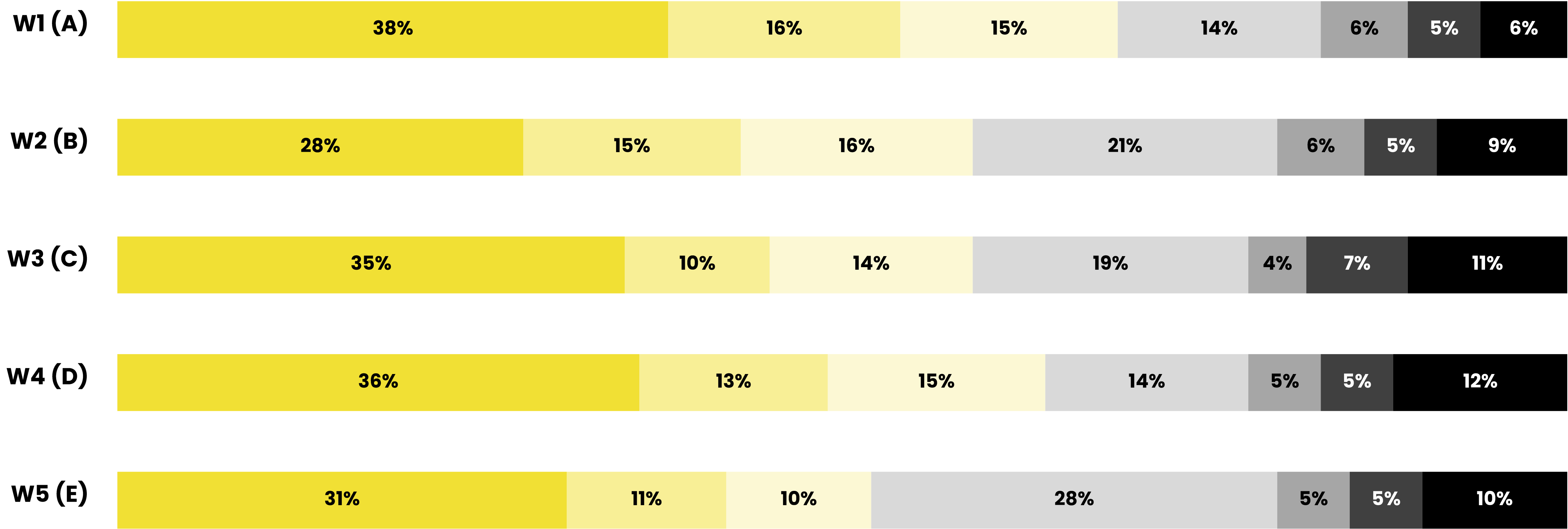
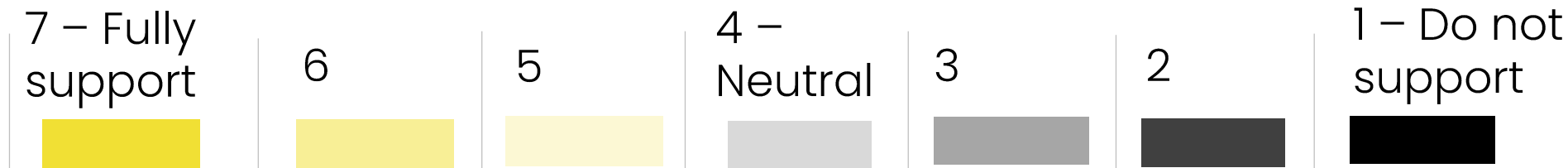
Future Research

Importantly, **those who recall the 'This is the Wild Life' ad(s) generally understand the major themes.** There doesn't appear to be confusion around what the ad(s) say or the message they communicate, but rather **it seems there may be another factor at play that is influencing our data.** For example, if this audience generally understands the message, tends to know license fees help fund wildlife management, and yet still support a ballot initiative to restrict hunting, then **it may be a problem of understanding the ballot initiative itself, a dislike of guns/gun-related activities, or perhaps a result of partisan voting.** It's likely additional research is needed to further tease apart these underlying factors and better understand any influence they have on ballot support.

Appendix

Hunting Support
2020 | W5

To what extent do you support **hunting** in Colorado? Use a scale of 1 to 7, where 1 means you do not support hunting in Colorado at all and 7 means you fully support hunting in Colorado.



Top-3 Box:
W1: 69%BCE | W2: 59%E | W3: 59%E | W4: 64%E | W5: 52%

Bottom-3 Box:
W1: 17% | W2: 20% | W3: 22% | W4: 22% | W5: 20%

Hunting Support
2020 | W5

To what extent do you support **hunting** in Colorado? Use a scale of 1 to 7, where 1 means you do not support hunting in Colorado at all and 7 means you fully support hunting in Colorado.



Recall: All ITWs start out between 3-5 on hunting support.

In as much detail as possible, please explain your answer.

*"Hunting helps keep certain populations of wildlife within reasonable limits."
(Support hunting)*

"I think hunting is fine as long as the rules are being followed." (Support hunting)

"I believe that hunting is a good recreational activity that creates revenue and supports conservation." (Support hunting)

I'm vegan. I am absolutely opposed to killing animals. (Don't support hunting)

"Hunting promotes violence and gun use." (Don't support hunting)

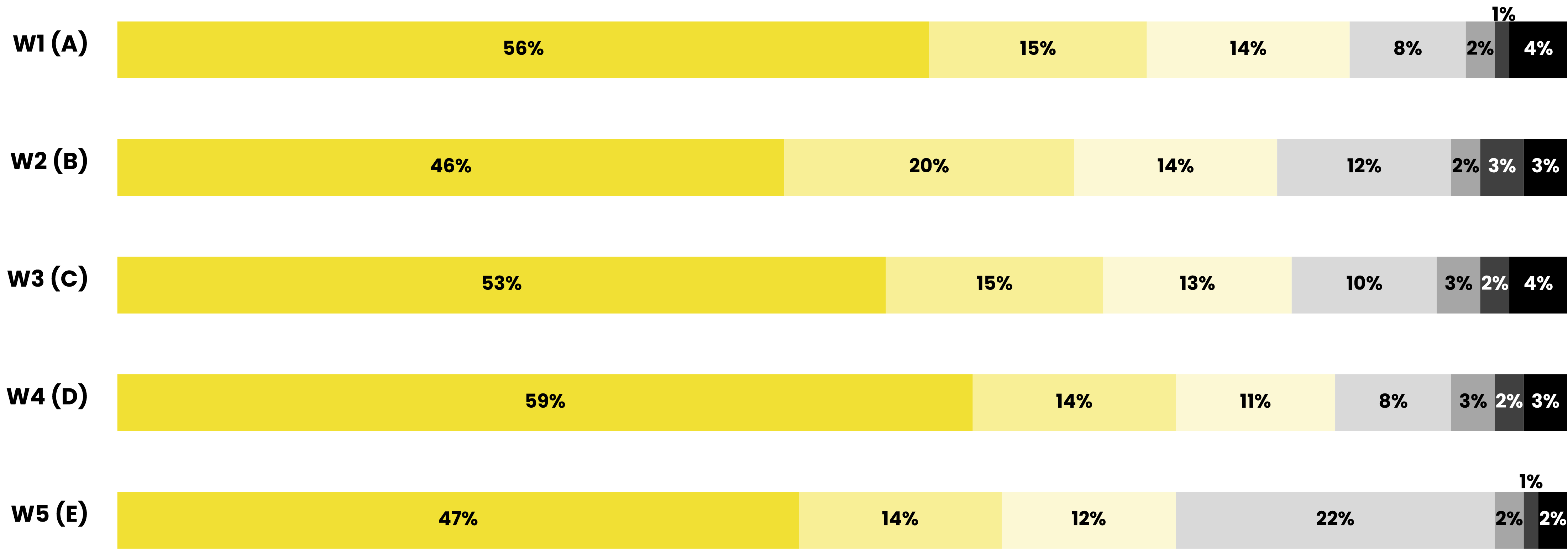
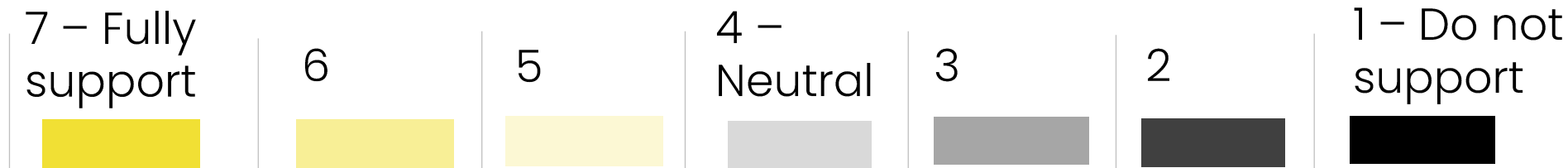
*"Hunting is not necessary to manage the wildlife, re-introduction of the predators is. Humans should not interfere with nature and should allow the natural process."
(Don't support hunting)*

"I think it's a form of animal cruelty." (Don't support hunting)

Reasons for Supporting/Not Supporting Hunting <i>*Table excerpt</i>	
Positive Mentions	62%
Necessary for population control/wildlife management	17%
Not letting the animal go to waste	14%
Support it if it's regulated/done humanely	13%
Gets people outdoors	13%
Provides funding for parks and conservation efforts	6%
Neutral Mentions	16%
Don't care either way	15%
Safety concerns	1%
Negative Mentions	32%
Don't hunt/no interest	12%
Against killing animals for sport/trophy hunting	8%
Hunting is violent	4%
Hunting upsets the ecosystem	3%
It's cruel/animal abuse	2%

Fishing Support
2020 | W5

To what extent do you support **fishing** in Colorado? Use a scale of 1 to 7, where 1 means you do not support fishing in Colorado at all and 7 means you fully support fishing in Colorado.



Top-3 Box:
W1: 85%E | W2: 80%E | W3: 81%E | W4: 84%E | W5: 73%

Bottom-3 Box:
W1: 7% | W2: 8% | W3: 9%E | W4: 8%E | W5: 5%

Fishing Support
2020 | W5

To what extent do you support **fishing** in Colorado? Use a scale of 1 to 7, where 1 means you do not support hunting in Colorado at all and 7 means you fully support hunting in Colorado.



Recall: All ITWs start out between 3-7 on fishing support.

In as much detail as possible, please explain your answer.

“it is an innocent outdoor activity.” (Support fishing)

*“Fly fishing is an important outdoor sport to the culture of Colorado.”
(Support fishing)*

*“Fishing in Colorado is an opportunity for another revenue stream,
drawing both locals and tourists.” (Support fishing)*

*“Over fishing is becoming a problem and killing our lakes and streams.
Plus people are doing it for sport instead of necessity.” (Don’t support
fishing)*

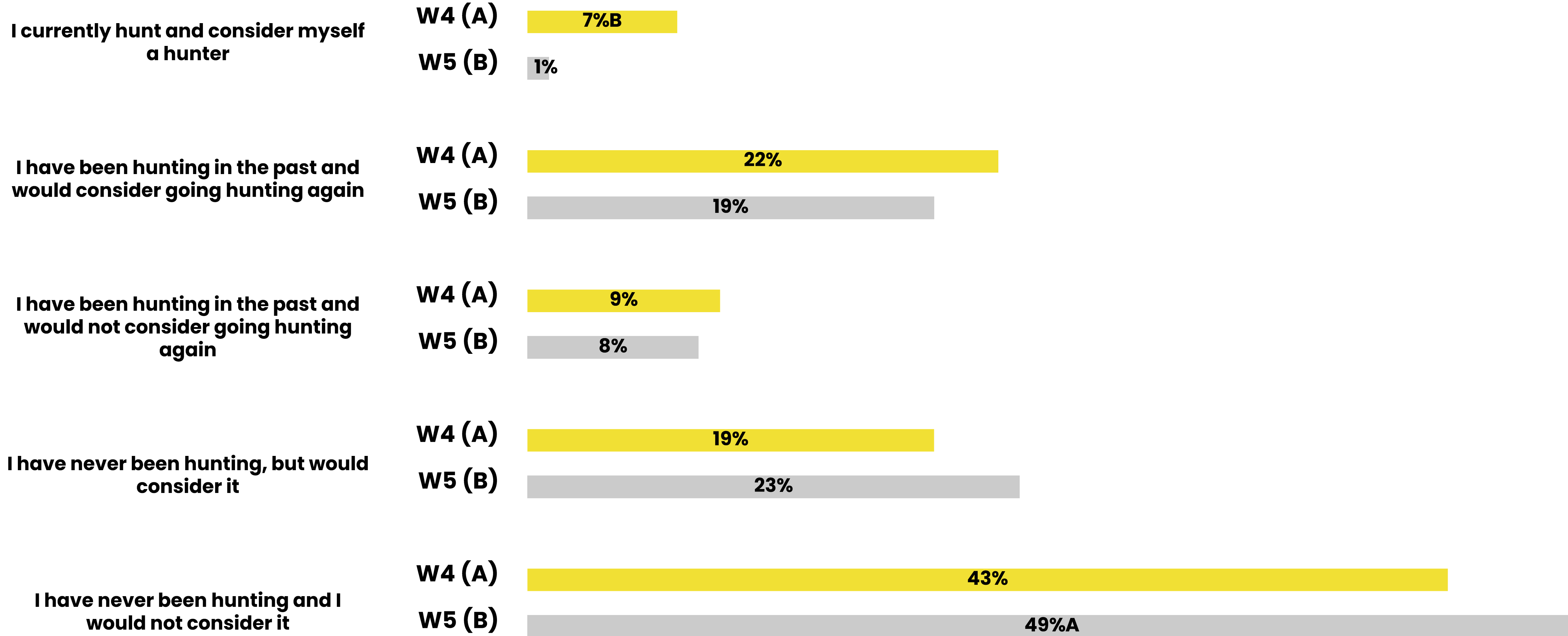
*“I am a vegetarian I don’t find it very human to do it to the animals.”
(Don’t support fishing)*

*“My family did not fish when I was younger so I never had the chance to
get interested.” (Don’t support fishing)*

Reasons for Supporting/Not Supporting Fishing <i>*Table excerpt</i>	
Positive Mentions	73%
Gets people outdoors	42%
Source of food	10%
Support it if it’s regulated	8%
Good for the economy	6%
Fishing is part of Colorado	5%
Neutral Mentions	13%
Don’t care either way	13%
Negative Mentions	14%
No interest in fishing	9%
Dislike killing animals	1%
Against fishing for sport/trophy fishing	1%
Depletes natural resources	1%

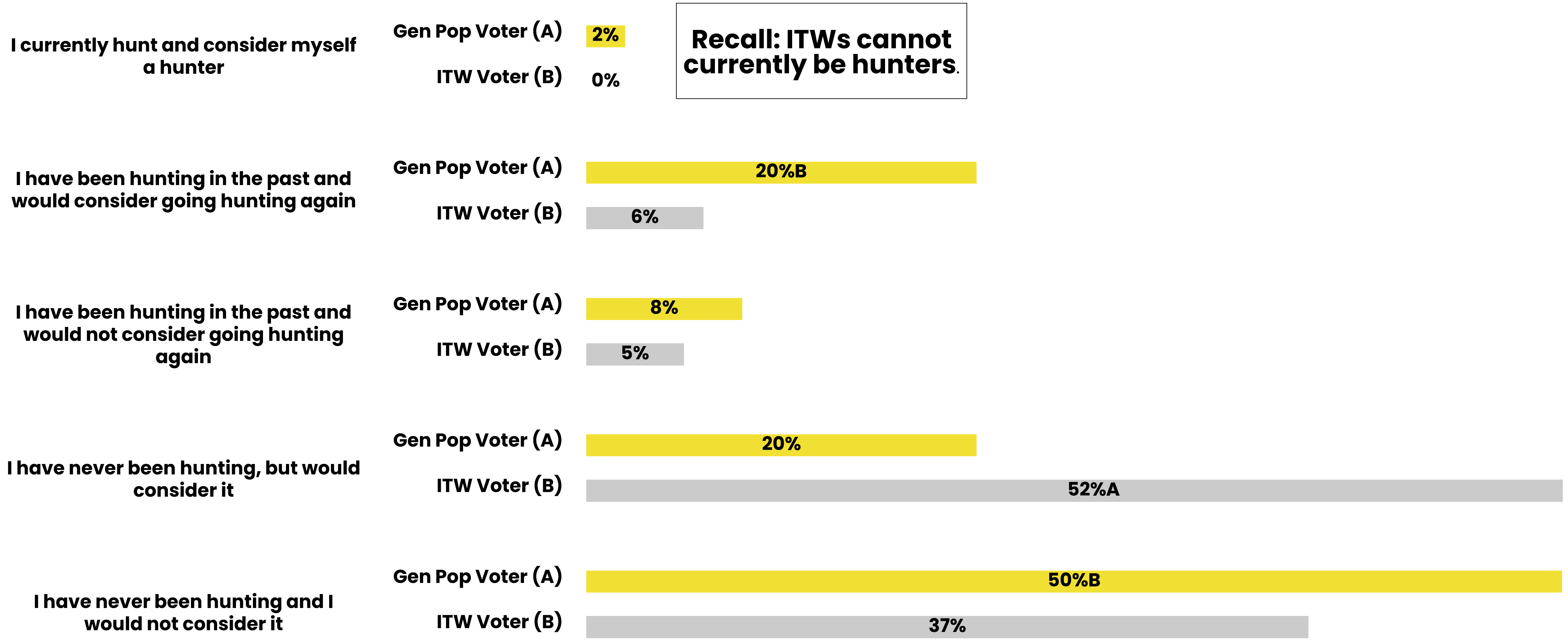
Hunting Experience
2020 | W5

Which of the following best describes your relationship to hunting?



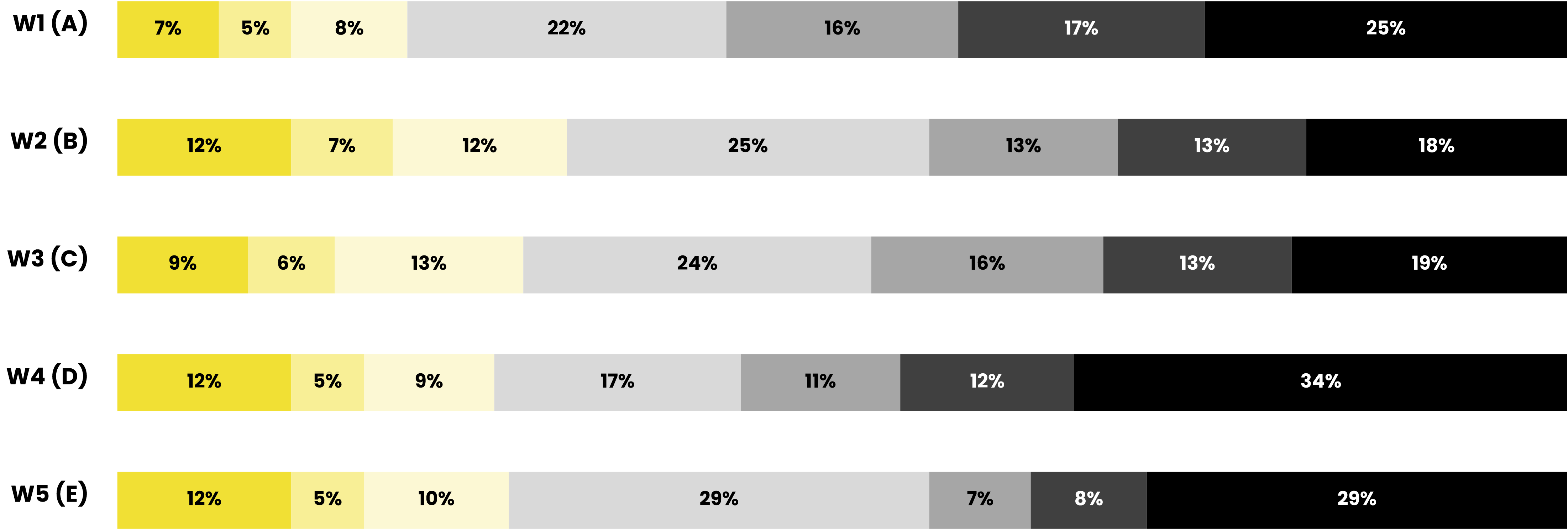
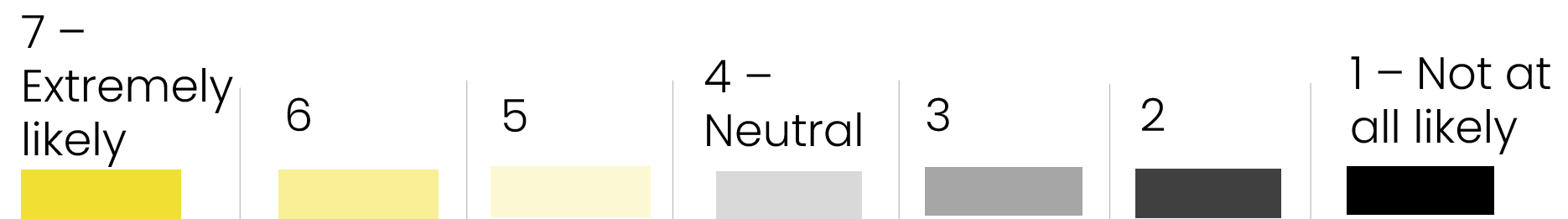
Hunting Experience
2020 | W5

Which of the following best describes your relationship to hunting?



ITW are generally more neutral towards hunting, and have less experience with it as well. Yet, they're open to the idea – 5 in 10 say they would consider hunting in the future.

In general, how likely are you to support a ballot initiative in Colorado that seeks to further restrict hunting?



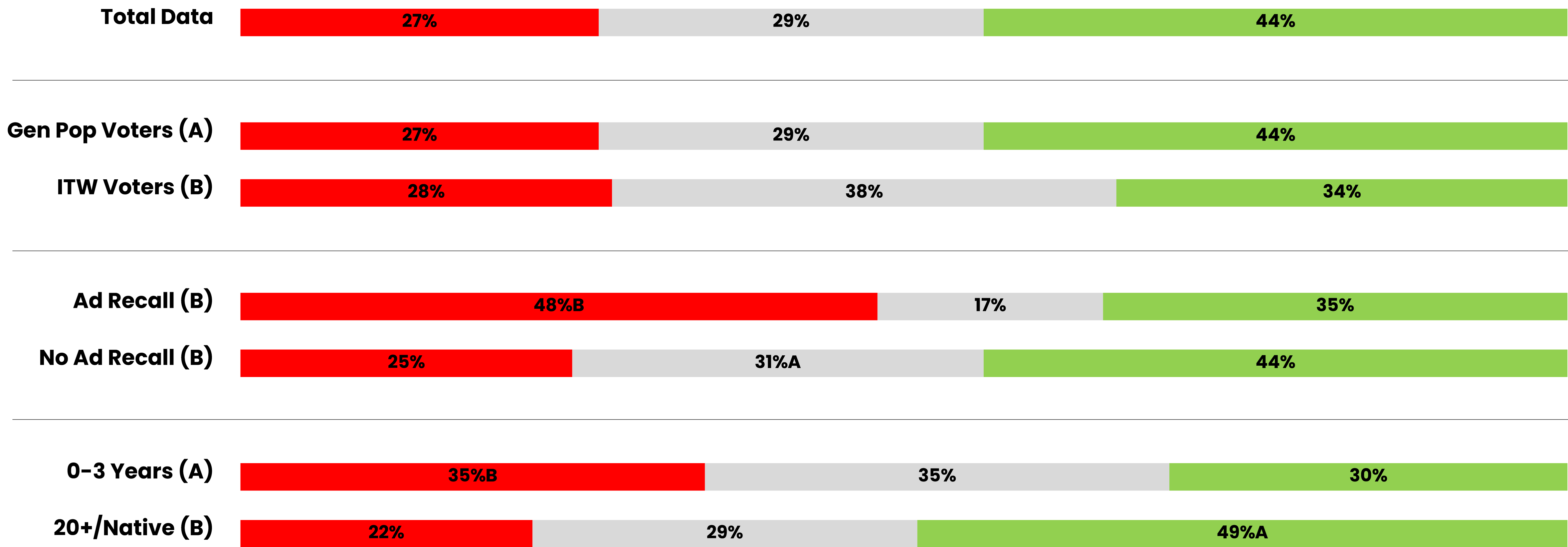
Top-3 Box:

W1: 20% | W2: 31%A | W3: 28%A | W4: 26% | W5: 27%A

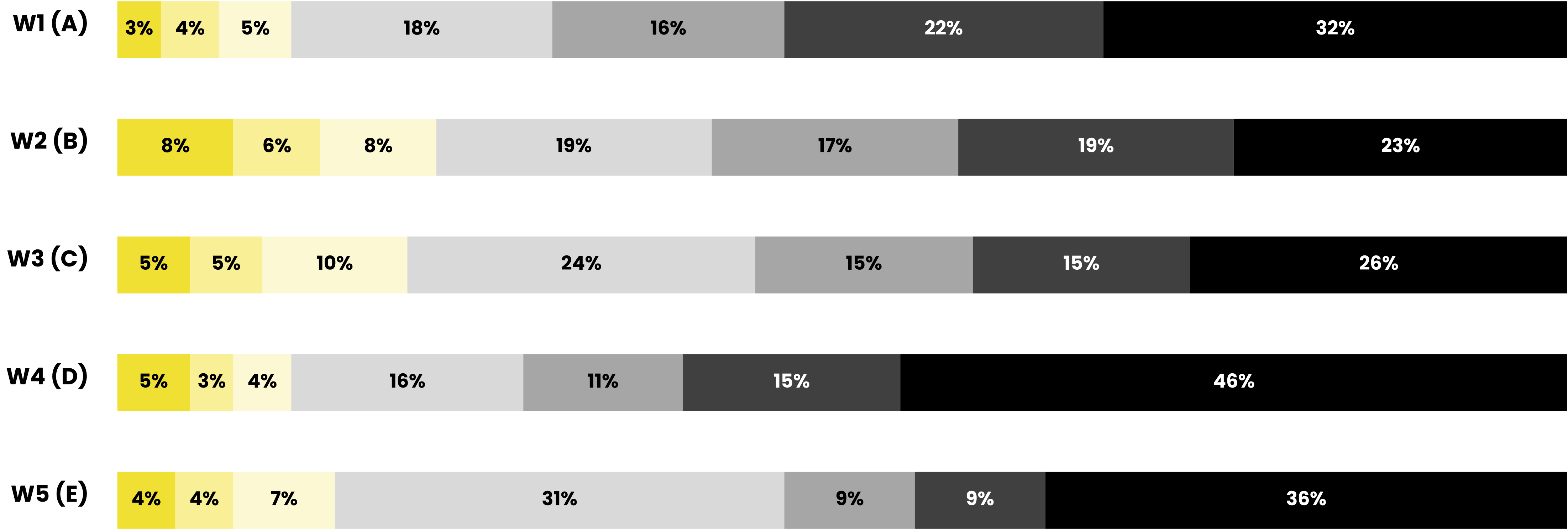
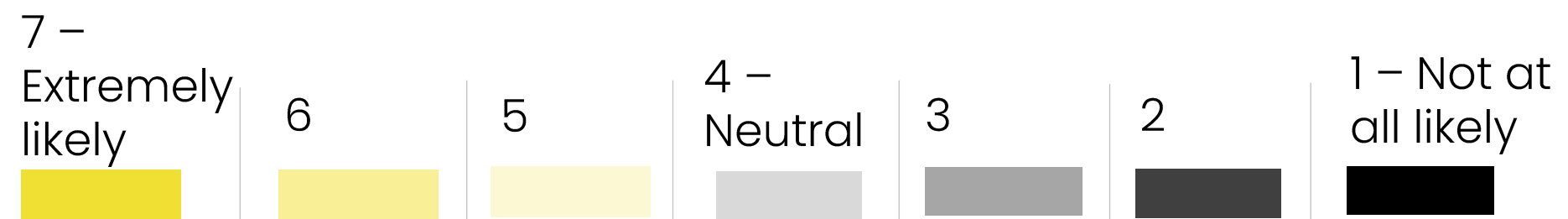
Bottom-3 Box:

W1: 58%BCE | W2: 44% | W3: 48% | W4: 57%BCE | W5: 44%

In general, how likely are you to support a ballot initiative in Colorado that seeks to further restrict **hunting**?



In general, how likely are you to support a ballot initiative in Colorado that seeks to further restrict **fishing**?



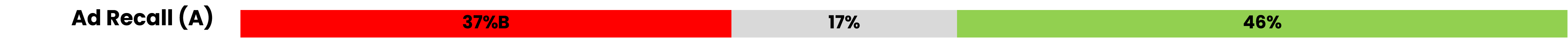
Top-3 Box:

W1: 12% | W2: 22%ADE | W3: 20%AD | W4: 12% | W5: 15%

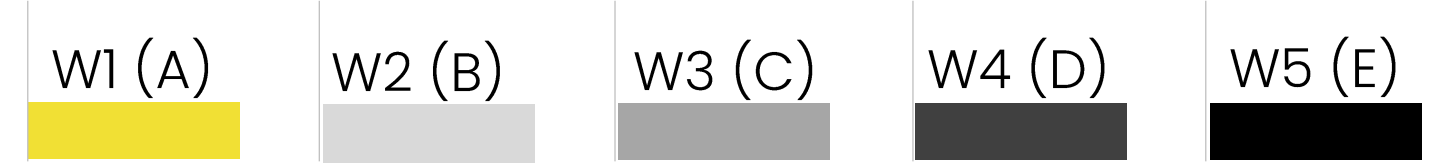
Bottom-3 Box:

W1: 70%BCE | W2: 59% | W3: 56% | W4: 72%BCE | W5: 54%

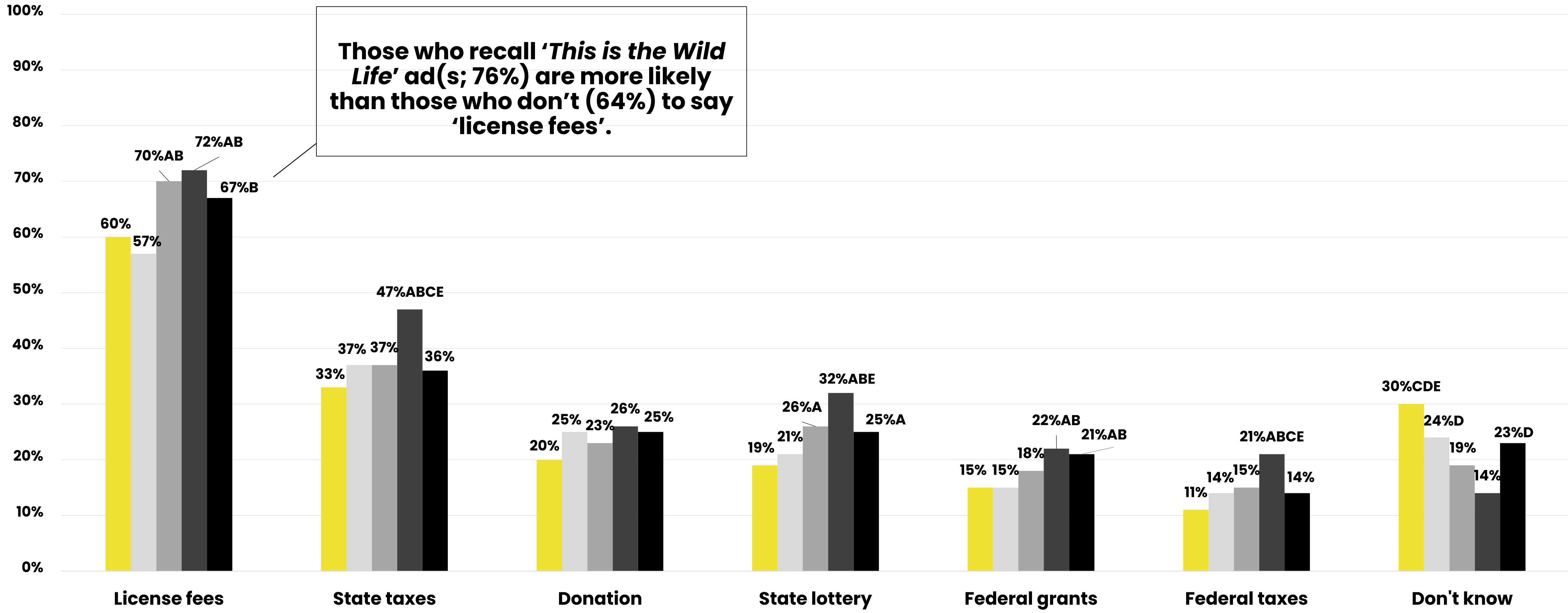
In general, how likely are you to support a ballot initiative in Colorado that seeks to further restrict **fishing**?



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



Those who recall 'This is the Wild Life' ad(s; 76%) are more likely than those who don't (64%) to say 'license fees'.

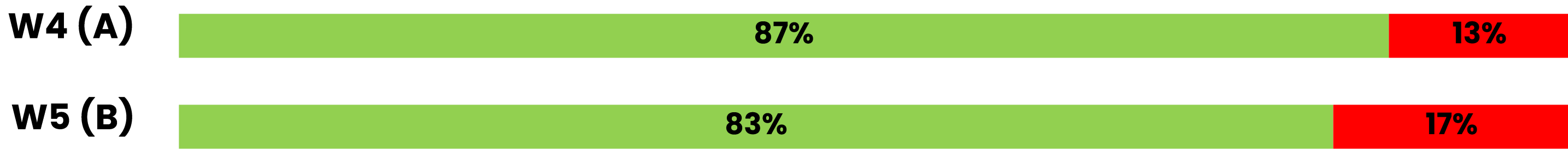


Hunting Perceptions
2020 | W5

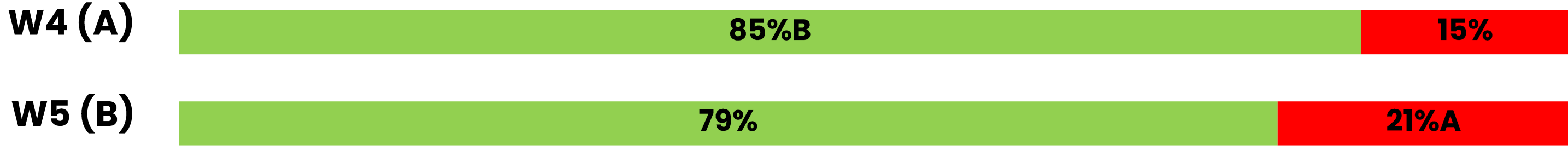
How much do you agree or disagree with the following statements about hunting?

Strongly/some what agree █ Strongly/some what disagree █

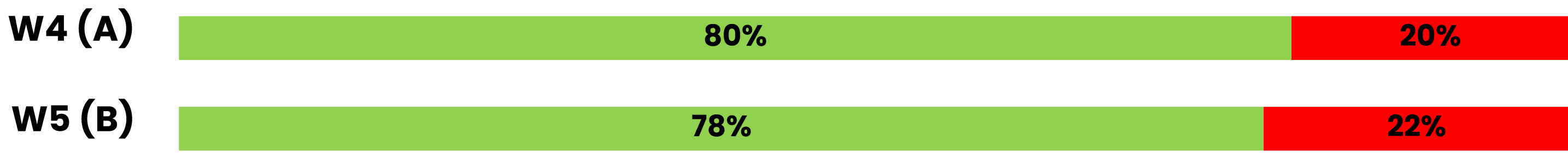
License fees from hunting and fishing are a major source of funding for public lands*



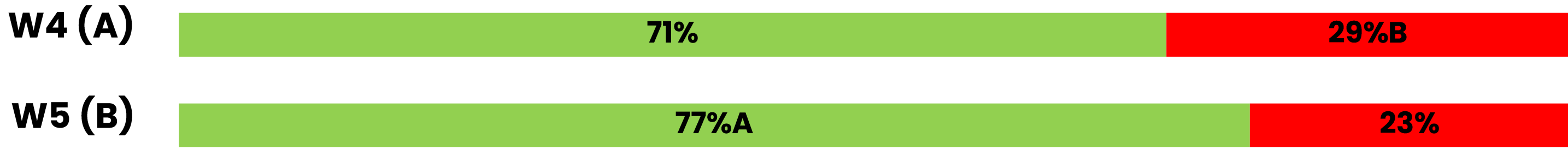
Hunting plays an important role in wildlife management*



Hunting plays an important role in stabilizing ecosystems here in Colorado



Hunting plays an important role in keeping Colorado's environment and public lands healthy*



Continuing to demonstrate the benefits of hunting for both wildlife and the environment will remain critical messaging points among Coloradoans.

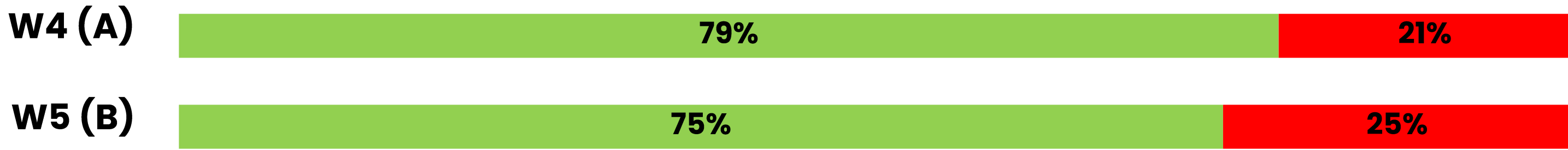
Base: *Statements are slightly reworded in W5; Total Answering (n=938)

Hunting Perceptions
2020 | W5

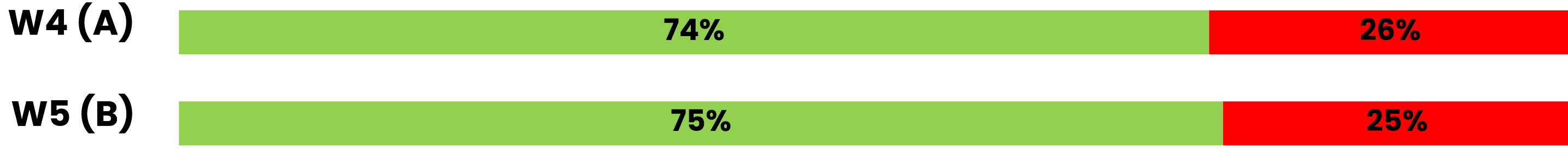
How much do you agree or disagree with the following statements about hunting?

Strongly/some what agree █ Strongly/some what disagree █

If hunting were banned, it would significantly change Colorado's culture and way of life



Hunting plays an important role in Colorado's economy



Hunting is an important source of food for many people in Colorado



If hunting were banned or restricted in Colorado, it would have a negative impact on me personally



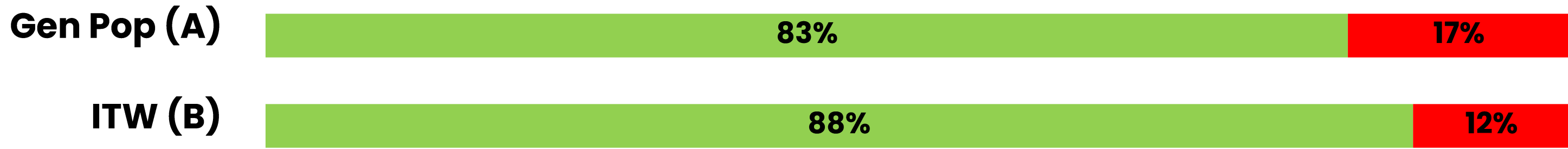
Careful:
Many Coloradoans still lack a deep connection to hunting – feeling a ban would not impact them personally.

Hunting Perceptions
2020 | W5

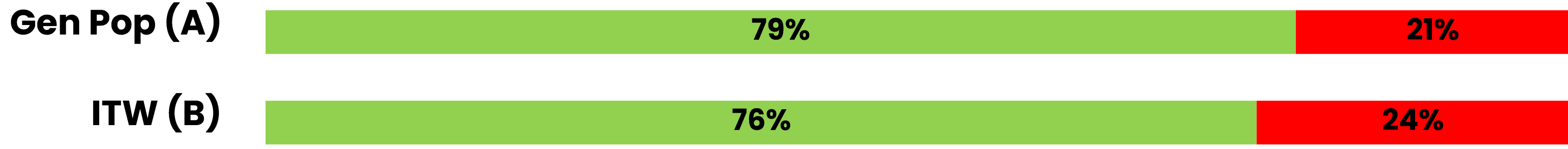
How much do you agree or disagree with the following statements about hunting?

Strongly/some what agree  Strongly/some what disagree 

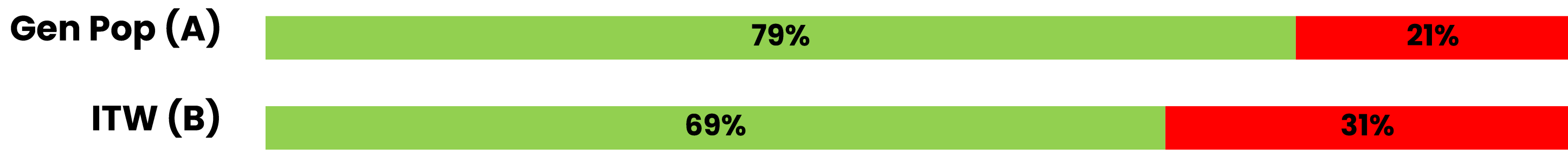
License fees from hunting and fishing are a major source of funding for public lands*



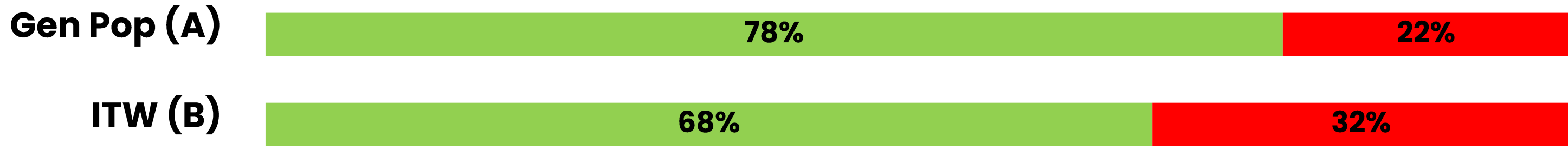
Hunting plays an important role in wildlife management*



Hunting plays an important role in stabilizing ecosystems here in Colorado



Hunting plays an important role in keeping Colorado's environment and public lands healthy*



Though Gen Pop and ITW may differ in their support of hunting, both groups share similar views on the role of hunting in Colorado.

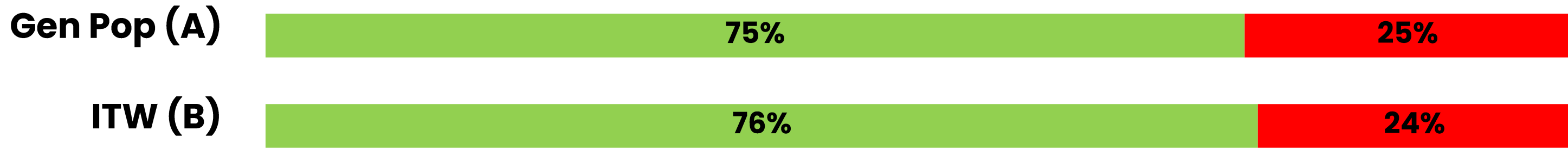
Base: *Statements are slightly reworded in W5; Total Answering (n=938)

Hunting Perceptions
2020 | W5

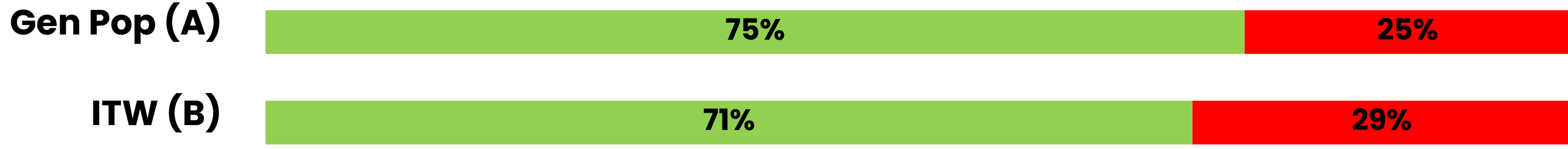
How much do you agree or disagree with the following statements about hunting?

Strongly/some what agree  Strongly/some what disagree 

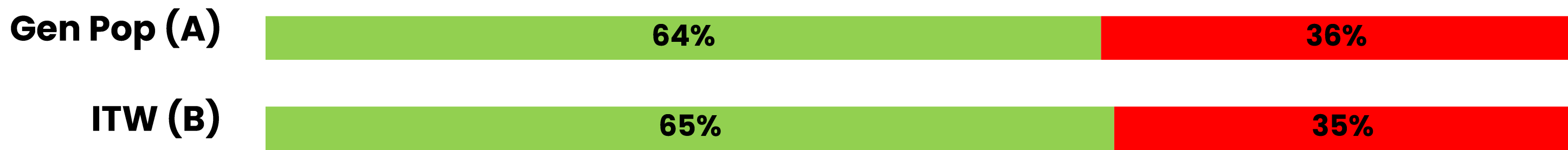
If hunting were banned, it would significantly change Colorado's culture and way of life



Hunting plays an important role in Colorado's economy



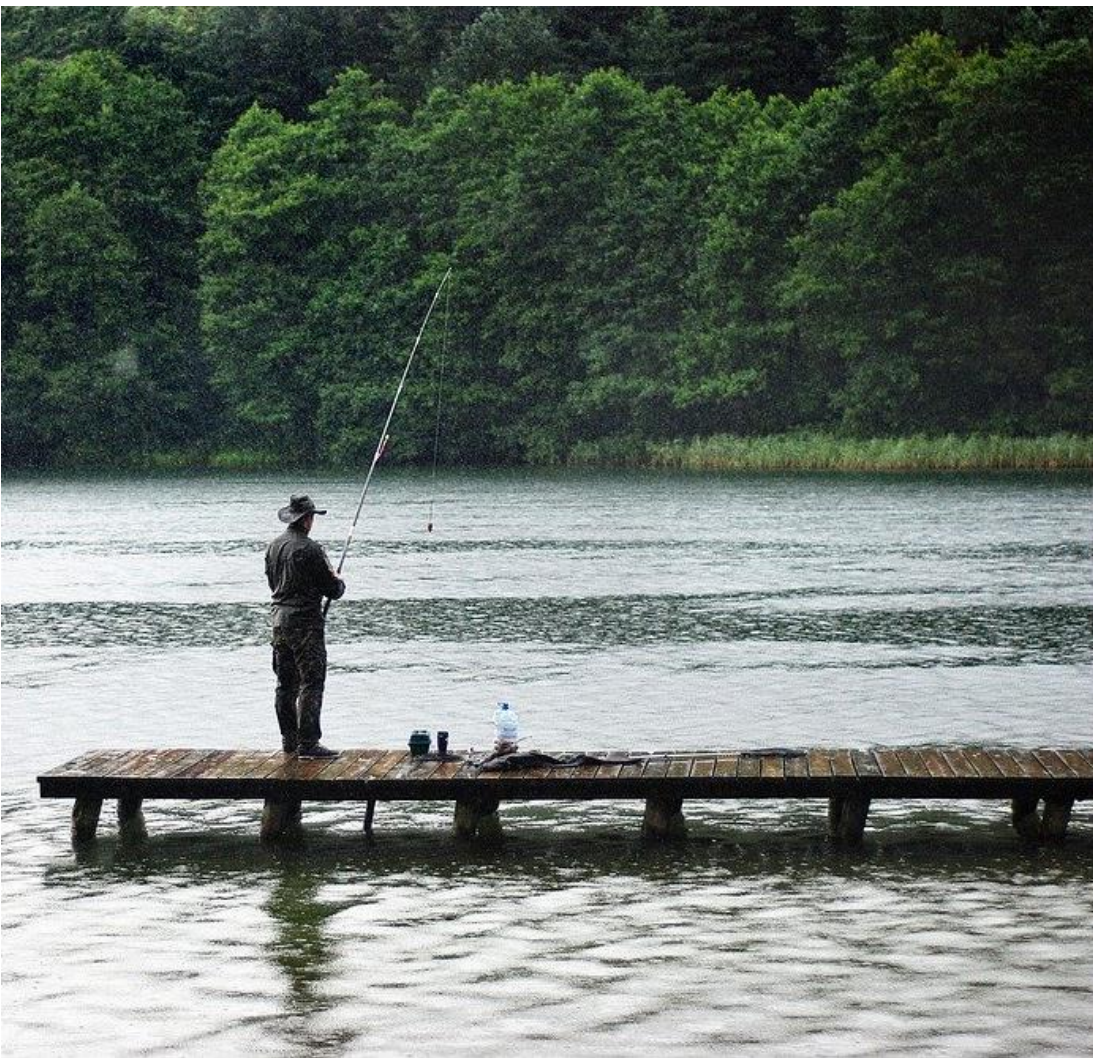
Hunting is an important source of food for many people in Colorado



If hunting were banned or restricted in Colorado, it would have a negative impact on me personally



We continued to test eight pro-hunting arguments to see which was most convincing:



Animal Welfare

Willful Destruction of Wildlife: Due to the “Willful Destruction of Wildlife” statute, hunters are required by state law to harvest and process all of the big game they kill and it is illegal to just take the “trophy” parts of the animals, like antlers. The intentional wasting of a carcass is met with heavy fines and a felony charge.

Managing big game population: Recreational hunting is the state-mandated method for managing Colorado’s big game populations.

Economy

\$3 billion annually to Colorado’s economy: Hunting and fishing directly contributes nearly \$3 billion annually to Colorado’s economy, supporting 25,000 jobs, rivaled only by the ski industry in total revenue generated.

Alleviates taxpayer burden: The revenue generated from the sale of hunting and fishing licenses makes up more than half of the funding for the state’s wildlife management efforts – funds that might otherwise have to come from taxpayers.

Environment

Funds habitat programs: The habitat conservation programs that license fees support help protect and conserve Colorado’s 66 million acres of land – the same land that Coloradans spend their time enjoying with their friends and families while enjoying activities like kayaking, hiking and biking.

960 different species of wildlife: License fees support wildlife programs for about 960 different species in Colorado.

Personal Benefit

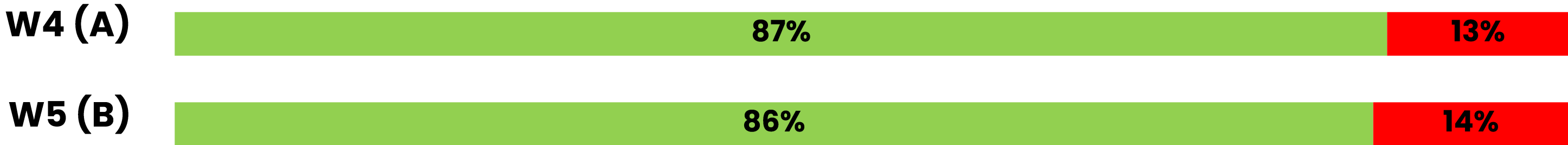
Truly free-range meal: Hunting provides an alternative for people to provide local, free range and sustainable meat options for themselves, as well as family and friends.

Human/animal wildlife conflict: Human and wild animal conflicts, such as wild animals roaming into suburban yards or onto public roads and highways, pose a serious threat to public safety in Colorado. Hunting can help decrease the population of wild animals who wander into areas where humans live.

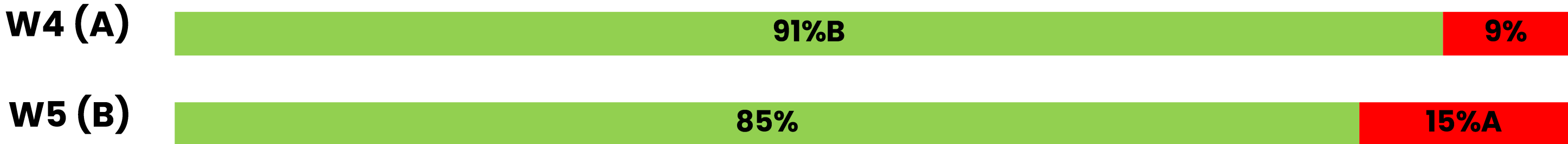
How convincing a reason is this to SUPPORT hunting and fishing in the state of Colorado?



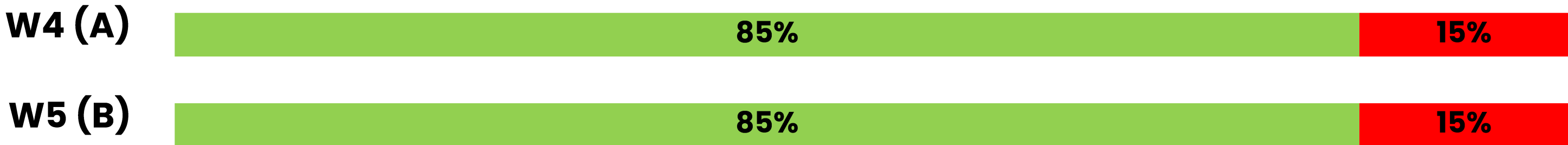
\$3 billion annually to Colorado's economy



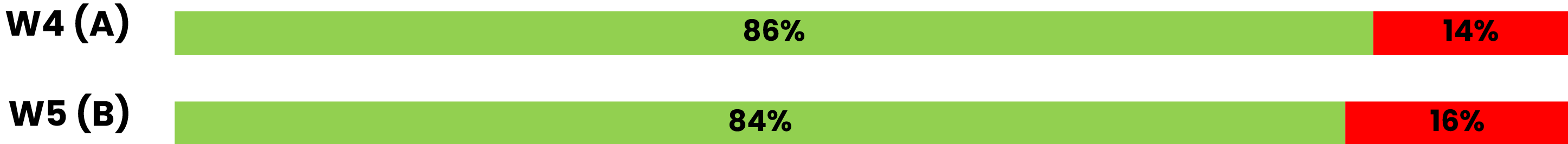
Funds habitat programs*



960 different species of wildlife*



Willful Destruction of Wildlife

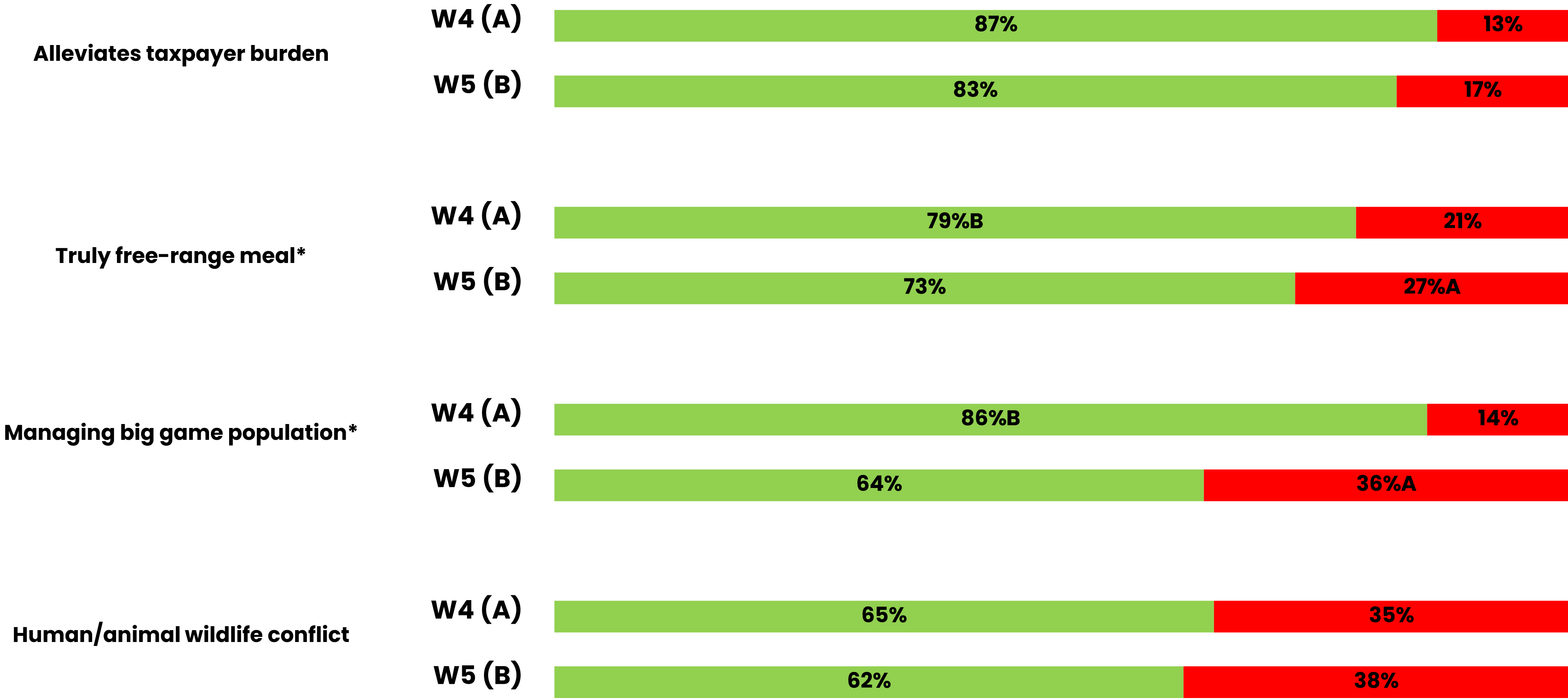


Economic benefits continue to remain strong message points.

Benefits, such as helping habitat programs and wildlife, need to be tied back to the voter to demonstrate a direct value.

Base:
*Statements are slightly reworded in W5; Total Answering (n=938)

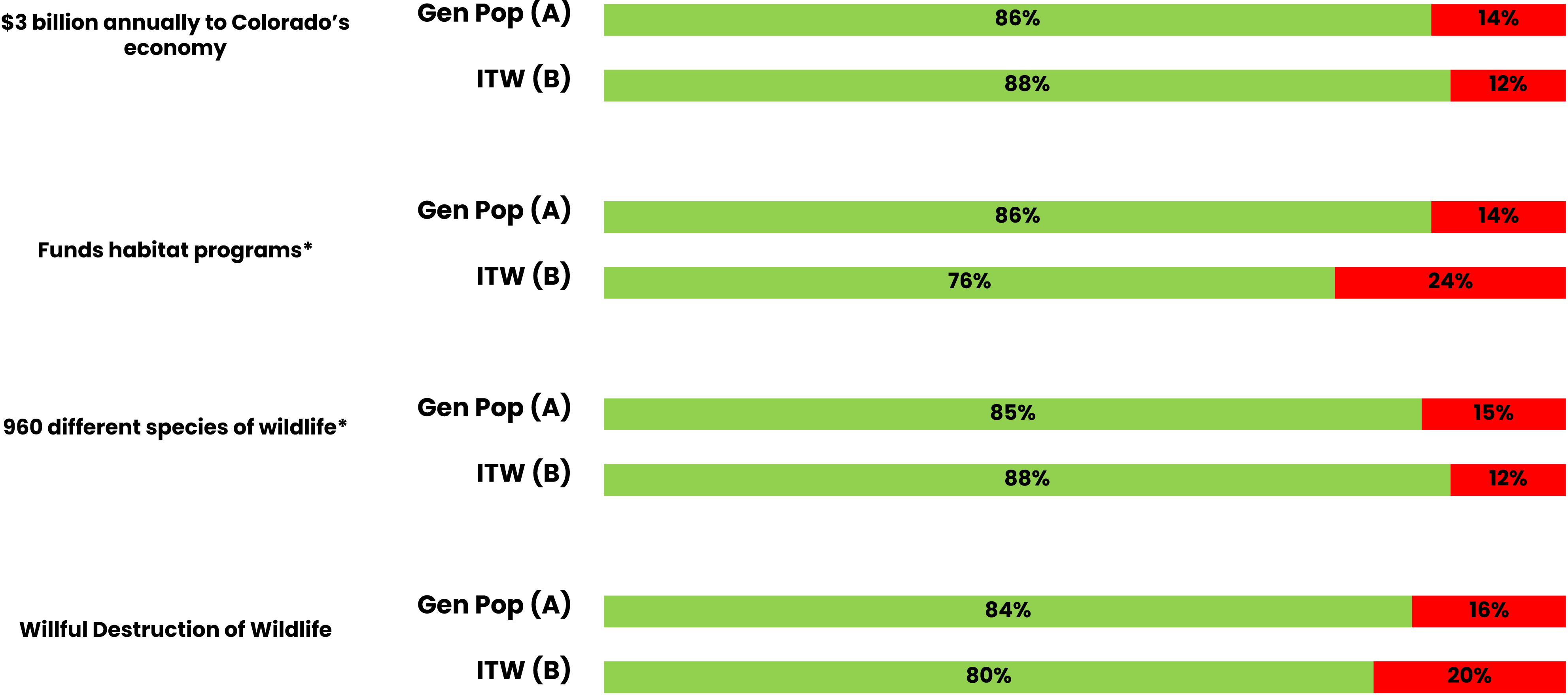
How convincing a reason is this to SUPPORT hunting and fishing in the state of Colorado?



Messages that focus on managing or hunting wildlife, such as for food or to prevent human/animal conflict, don't resonate among voters. These messages don't tie back to a direct benefit, and highlights why some dislike it in the first place.

Base:
*Statements are slightly reworded in W5; Total Answering (n=938)

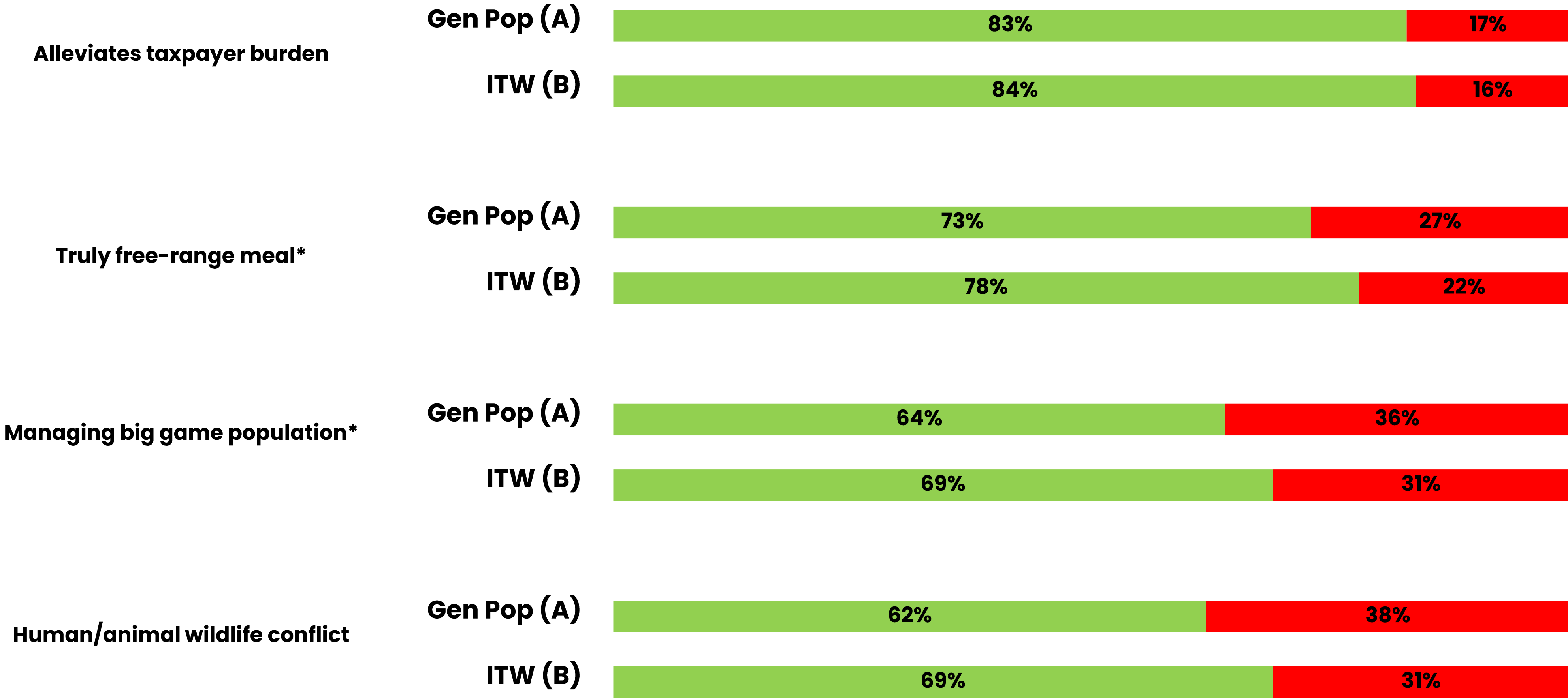
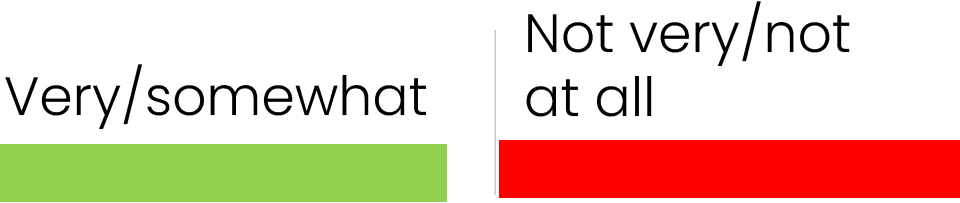
How convincing a reason is this to SUPPORT hunting and fishing in the state of Colorado?



There are no major differences between Gen Pop and ITW voters – suggesting key message points, even those targeted to ITW, will still resonate among the larger Gen Pop audience.

Base:
*Statements are slightly reworded in W5; Total Answering (n=938)

How convincing a reason is this to SUPPORT hunting and fishing in the state of Colorado?

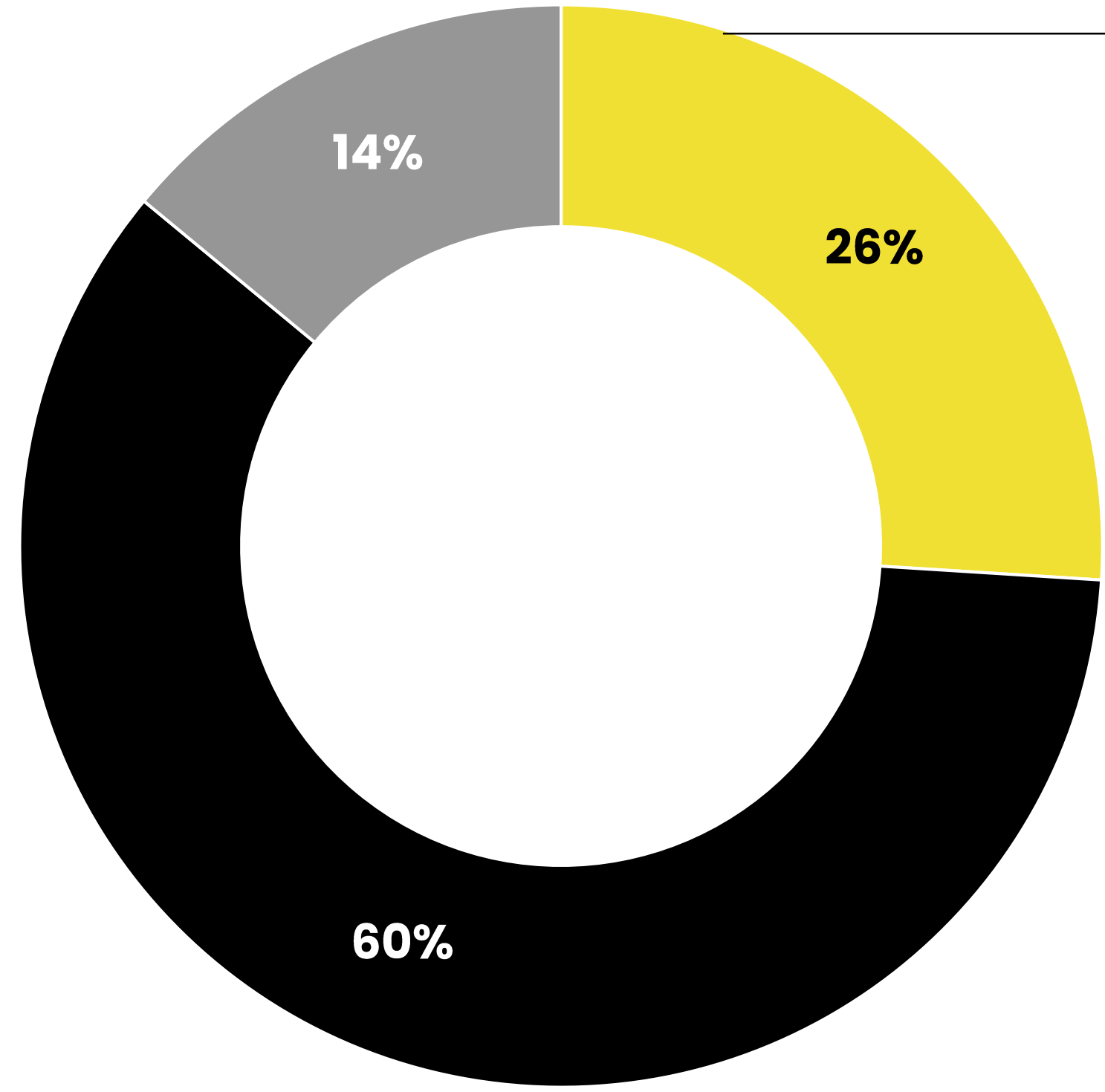


Base:
*Statements are slightly reworded in W5; Total Answering (n=938)

Have you seen or heard any advertising about hunting and/or fishing in Colorado?



Recall Any Ad



What do you remember about these advertisements? Please be as specific as possible.

Those who recall any hunting/fishing advertisement tend to mention the various benefits to Colorado, such how it funds state programs or promotes tourism to the state – with a few even recalling the previous “Hug-a-Hunter” campaign. Only a few recall negative ads, and a couple even indirectly mention the Grey Wolf Reintroduction Initiative – though these responses tend to be in the minority.

“A couple of commercials about Colorado anglers and hunters and the role they play in managing wildlife.”

“Ads how license fees support lands and actually help animals.”

“Mostly the fishing in Colorado ads. How money they spend goes back into the rivers.”

“A man hugged a hunter and thanked him for helping the environment.”

“Where top go for training and licensing.”

“I heard that Colorado is considering adding grey wolves to balance out the elk count.”

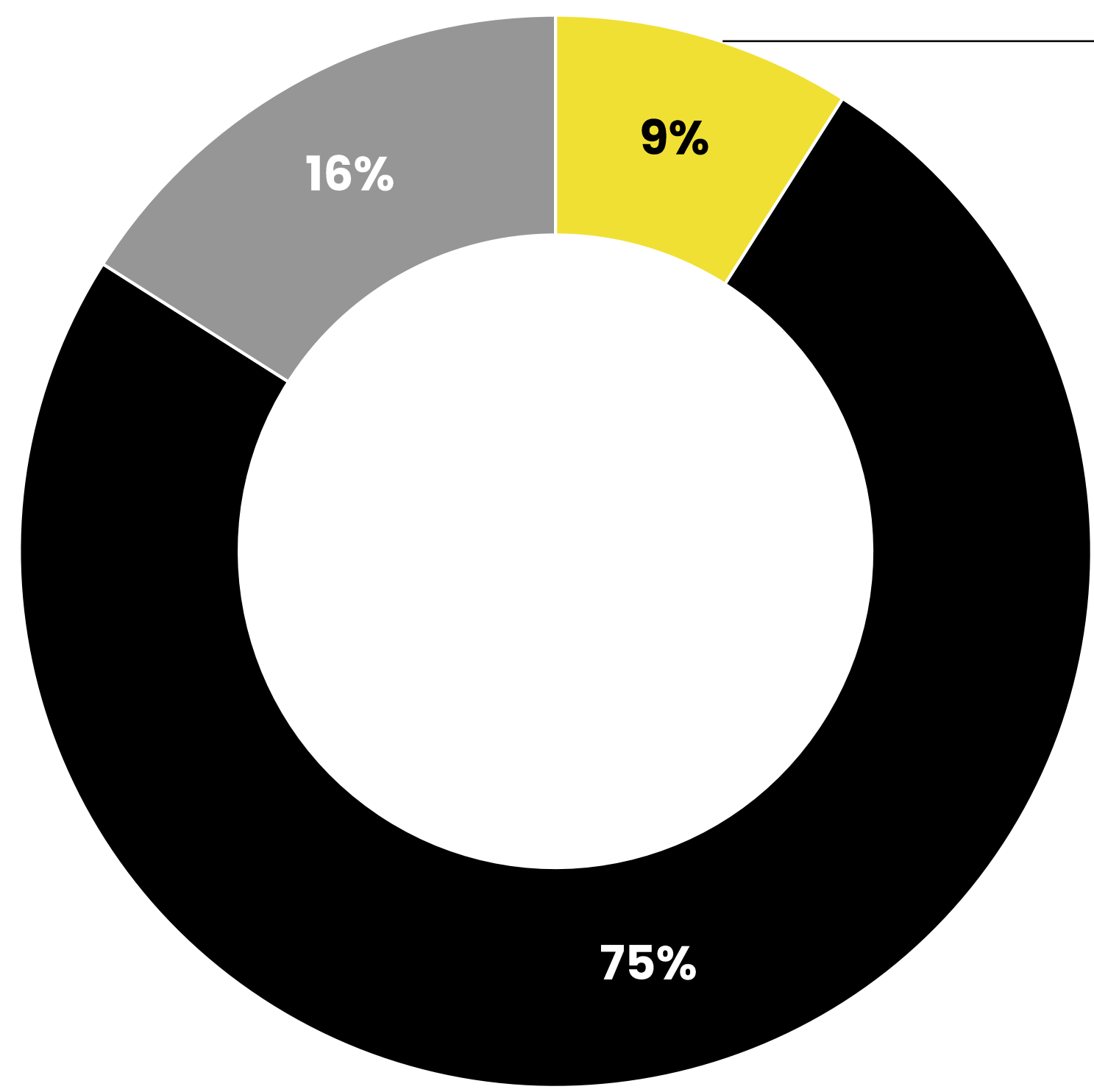
“It was going against hunting, naming that the animals need to be conserved, and the advantages that would come along.”

Hunting/Fishing Ad Recall <i>*Table excerpt</i>	
License fees fund state programs	16%
Encouraged hunting/talked about benefits	13%
Hug-A-Hunter/Hug-An-Angler	13%
Information about regulations	6%
Promoting Colorado/tourism	6%
Where/when/how to purchase a license	2%
Wolves/wolf population	2%
Ads against hunting/fishing	2%
Ads against hunting/fishing restrictions	1%

Have you ever seen or heard any advertising using the phrase ***"This is the Wild Life,"*** even if you mentioned it previously?

Yes Not sure No

Recall CWC Ad



**Gen Pop
Voter**



**ITW
Voter**



What do you remember about these advertisements? Please be as specific as possible.

While some appear to recall specifics regarding the message, others seem to remember vague details about the tagline or relation to the outdoors/wildlife in Colorado. This is important to note, as even though some may not recall messaging specifics, it appears the tagline has made a long-lasting impression. Importantly, there doesn't appear to be much confusion over what the message says or the themes being communicated. Even those with vague memories of the ad(s) can recall the general idea it was communicating.

'This is the Wild Life' Ad Recall	
<i>*Table excerpt</i>	
Wildlife/respect wildlife	19%
Just recall the phrase	10%
Love phrase/caught my attention	8%
Involved hunters/anglers	7%
Promoting Colorado outdoors	5%
Benefits Colorado's parks	3%
Population control	2%

"How wildlife is funded."

"About the hunters and fishers."

"The phrase was used in connection with supporting wildlife hunting in Colorado."

"People entering establishments that provide the equipment for hunting and fishing and explaining who benefits and what the benefits do."

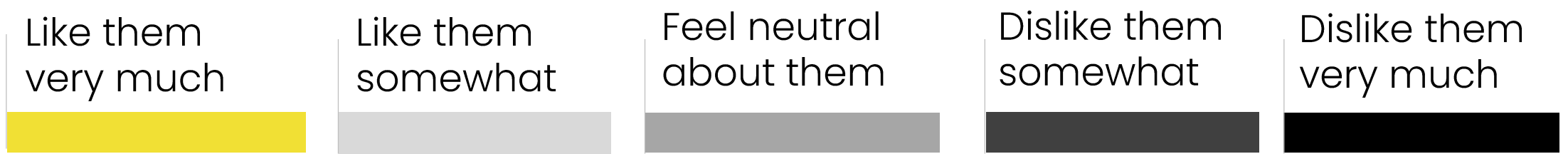
"Outdoor activities are part of Colorado wildlife, refers to the sense of lifestyle."

"I just recall the phrase."

"Not much but the phrase sounds really familiar."

"It was with a commercial about Colorado outdoors."

In general, what are your overall impressions of the advertisements using the phrase *"This is the Wild Life?"*



About 5 in 10 have positive perceptions of the ad(s) – great news considering this is a brand new campaign with a refocused message.

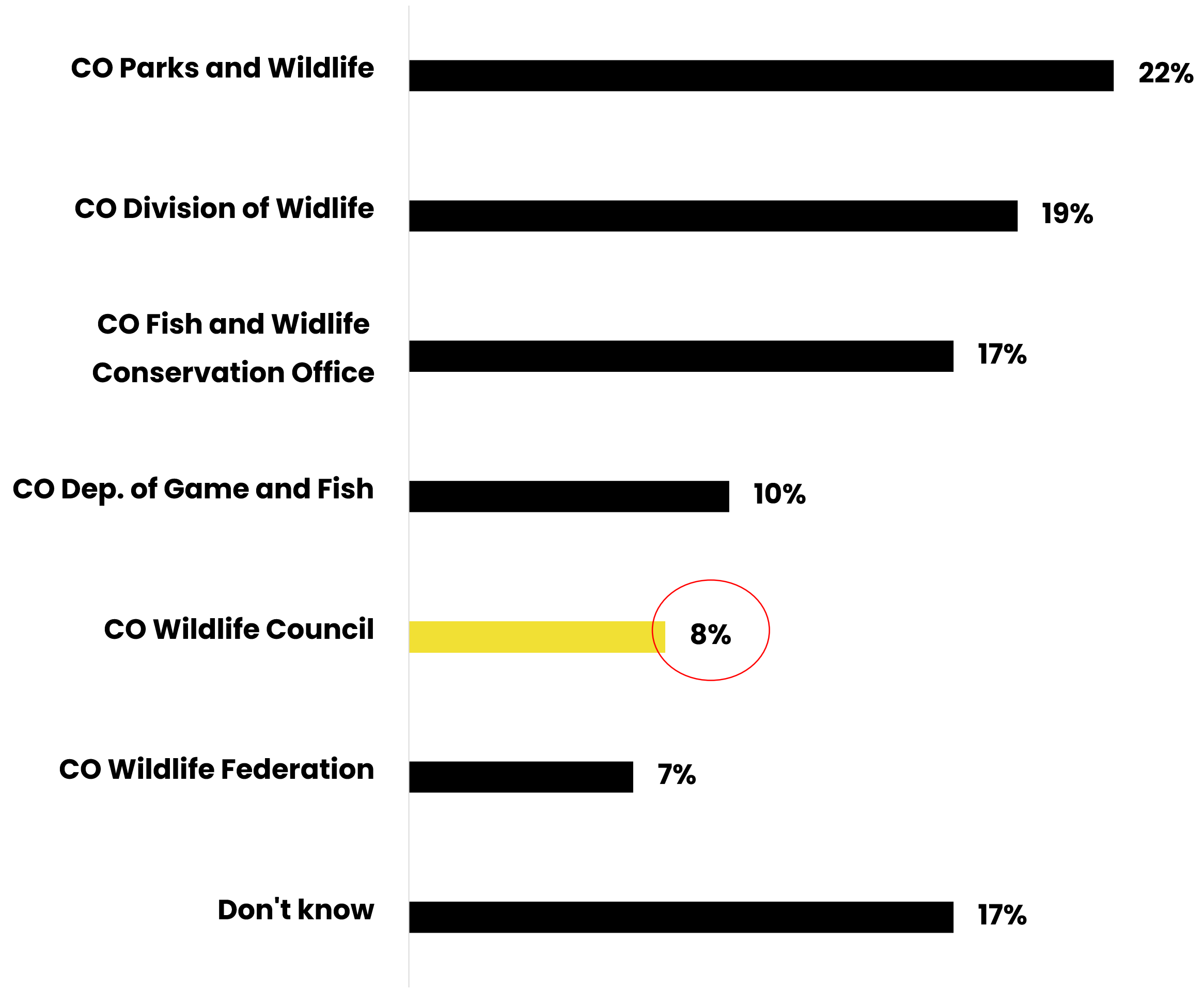


CWC Awareness
2020 | W5

To the best of your knowledge, what group or organization is behind the advertisements using the phrase ***"This is the Wild Life"***?

In general, how familiar are you with the Colorado Wildlife Council?*

**Caution: small sample size.*



Those aware of the tagline seem to be mixed on who they believe is behind it. Yet, it's important to note this is the first campaign where CWC is explicitly shown in the ad.

Additionally, the ad cites "COWildlifecouncil.org in partnership with Colorado Parks & Wildlife." Thus, it's possible some are confused and believe CPW is the driving force behind the campaign.

Further, of those who know CWC is behind "This is the Wild Life," only 2 in 10 say they're familiar with the organization.

Now, please indicate your level of agreement with the following statement:
I believe the Colorado Wildlife Council is a credible source of information on the benefits of hunting and fishing.

**Caution: small sample size.*



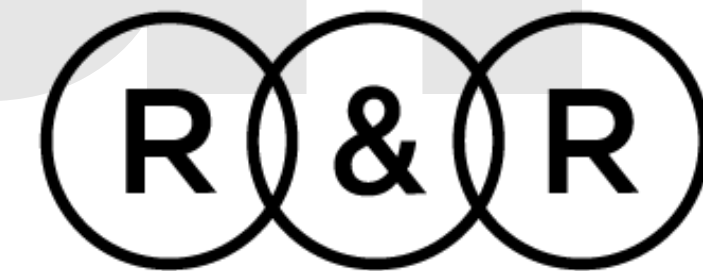
Because awareness of CWC is relatively low, it isn't surprising the views on credibility are split. Though this sample size is very small, it suggests an opportunity to build rapport among Coloradoans and, in turn, establish itself as the trustworthy, 'go-to' source for information on the benefits of hunting and fishing.



Demographics			
18-24	13%	White	69%
25-35	21%	Hispanic	21%
36-44	16%	Black	4%
45-54	17%	Asian	3%
55-64	16%	Other	3%
65+	17%	CD1	15%
0-3 years in CO	9%	CD2	14%
4-10 years in CO	12%	CD3	13%
11-20 years in CO	17%	CD4	15%
20+ years in CO	38%	CD5	14%
Native CO	24%	CD6	15%
Male	50%	CD7	14%
Female	50%	<\$75k	58%
		\$75k+	38%

Thank

You



Thank

Thank

Thank