



*Key findings from a Pennsylvania survey of voters
segmented by sportsmen status
August 2018*

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#18351

#18586

Methodology

- A survey of 700 registered voters throughout Pennsylvania: N=400 among “non-sportsmen” voters, sometimes just referenced as “voters” in this report, and N=300 among those who identify as a hunter or angler, referred to here as “sportsmen.”
- Sample was drawn proportionately throughout the state and is representative of each audience. The margin of error for a sample size of N=400 voters is $\pm 4.9\%$ and $\pm 5.66\%$ for N=300 sportsmen at the 95% confidence interval.
- Interviews conducted July 18-24, 2018 on both cell phones, landlines, and online interviews.

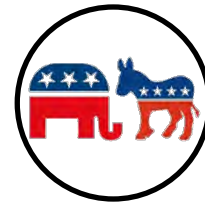
Key Demographics



Gender

Male
Female

Voters	Sportsmen
47%	69%
53%	31%



Party

Republicans
Independents
Democrats

Voters	Sportsmen
38%	47%
19%	17%
43%	36%



Age

18-34
35-44
45-54
55-64
65+

Voters	Sportsmen
22%	21%
19%	24%
16%	15%
20%	20%
23%	19%



2016 Vote

Trump
Clinton

Voters	Sportsmen
38%	51%
43%	33%



Geography

City
Suburban
Small Town
Rural

Voters	Sportsmen
18%	13%
44%	33%
20%	24%
18%	30%

Participation in Outdoor Recreation among Non-Sportsmen Voters

	Voters	
	Total Participated	Total Did NOT Participate
Visited an area lake or river at least two or three times for something other than swimming or boating	58%	42%
Visited a natural area to view or photograph wildlife at least two or three times	52%	48%
Gone swimming or boating at a lake or river at least two or three times	35%	65%
Gone camping at least two or three times	29%	71%

Have you and/or someone else in your household participated in the following activities in the past year, that is since July 2017?

Profile of the Segments

Voters with the most outdoor activities

3-4 Activities

Men Ages 18-44	32%
Ages 35-44	30%
Small Town/ Rural men	30%
Republican Men	28%
Independents	26%

Voters with moderate outdoor activities

1-2 Activities

Women Ages 18-44	60%
Liberals	56%
White Women	55%
Democrat Women	55%
Small Town/ Rural Women	53%
Women	52%
West Region	52%
Republican Women	52%
City/ Suburban Women	51%
Ages 35-44	50%
Identify as a Conservationist	50%

Voters with NO outdoor activities

None

Do Not Identify as a Conservationist	52%
Non-Whites	49%
Ages 65+	46%
Democrat Men	43%
Men Ages 45+	42%
City Region	42%
City/ Suburban Men	42%
Men	40%
2016 Trump Voters	39%
Moderates	39%

Three-quarters of sportsmen and nearly two-thirds of non-sportsmen voters identify as a “conservationist.”

% Identify as a Conservationist

Voters

64%

Sportsmen

75%

Do you consider yourself to be a conservationist or not?

The proportion of Pennsylvania sportsmen who identify as a “conservationist” is on par with sportsmen nationally.

% Identify as a Conservationist

National*

80%

PA Sportsmen

75%

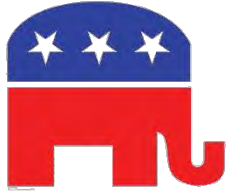
**Data from a 2017 National Survey of Sportsmen*

Do you consider yourself to be a conservationist or not?

It is also true across party lines.

% Identify as a Conservationist – By Party

National*



84%

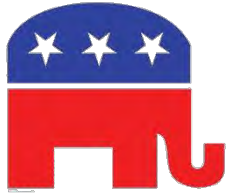


77%



79%

PA Sportsmen



77%



61%



80%

**Data from a 2017 National Survey of Sportsmen*



Importance of Conservation Issues

Sportsmen are more likely to say that conservation issues will be a primary factor in their support for an elected official, although the vast majority of both say it is at least somewhat important.

Importance of Conservation Issues When Voting

		Sportsmen
<i>Very important</i> , they are a primary factor in deciding whether to support an elected public official	27%	37%
<i>Somewhat important</i> ; they are one of several issues you consider	51%	53%
Total Important	78%	90%
Total Not Important	21%	10%
<i>Not too important</i> ; they are not a significant consideration in deciding whether to support an elected public official	16%	8%
<i>Not at all important</i> for you in deciding whether to support an elected official	5%	2%

Compared to other issues like the economy, health care, and education, how important are issues involving protecting fish and wildlife habitat, public lands and water quality of lakes, rivers and streams for you when deciding whether to support an elected public official?
Are they...

National hunters and anglers have a stronger focus on conservation compared to their counterparts in Pennsylvania.

Importance of Conservation Issues When Voting

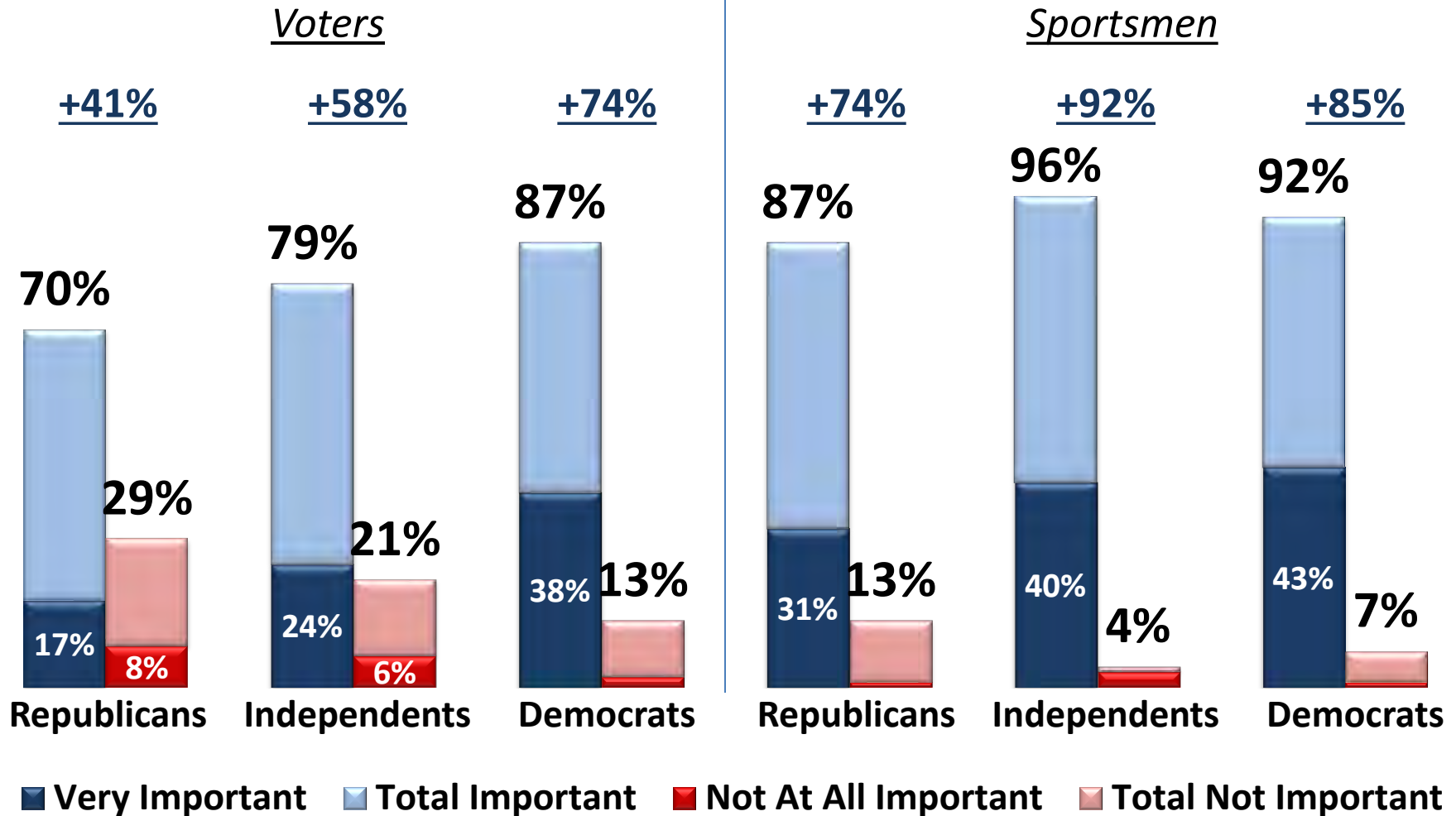
		Pennsylvania Sportsmen
Very important , they are a primary factor in deciding whether to support an elected public official	44%	37%
Somewhat important ; they are one of several issues you consider	51%	53%
Total Important	95%	90%
Total Not Important	5%	10%
Not too important ; they are not a significant consideration in deciding whether to support an elected public official	4%	8%
Not at all important for you in deciding whether to support an elected official	1%	2%

*Data from a 2018 National Survey of Sportsmen

Compared to other issues like the economy, health care, and education, how important are issues involving protecting fish and wildlife habitat, public lands and water quality of lakes, rivers and streams for you when deciding whether to support an elected public official?
Are they...

Majorities across the political spectrum say conservation issues are important, although intensity is greatest among Democrats.

Importance of Conservation Issues When Voting



Compared to other issues like the economy, health care, and education, how important are issues involving protecting fish and wildlife habitat, public lands and water quality of lakes, rivers and streams for you when deciding whether to support an elected public official?

Sportsmen focus on protecting water quality and wildlife habitat in their advice to elected officials.

Protect Water

Fight Pollution Think Long-Term
Less Regulation

Defend Wildlife/Habitat Stock More fish

Bring Back Past Hunting Laws

Less Hunting/Fishing

Look for Renewable Energy Sources

Stop Dumping in Water

Protect Sportsmen's Rights

Protect our Natural Resources

Conserve the Environment

Stop Drilling/Fracking

If you were giving advice to elected officials here in Pennsylvania on how they should address issues that are important to sportsmen like you regarding fish and wildlife habitat, and the health of rivers, streams and lakes, what would you tell him or her?

Examples of Advice for Elected Officials:

"Make sure all habitats are protected. That includes streams, rivers, creeks, lakes, woods, forests, open fields, and all other habitats needed by wild animals and the habitat they need to survive."

Republican Male from Monroe

"Our water systems are very important."

Democrat Female from Allegheny

"Clean up the environment please."
Republican Female from Washington

"Let's figure out the cause of the pollution in the waters and put a stop to it, to improve the health of fish and other wildlife that depend on the water sources."

Republican Female from Perry

"Our natural resources are a valuable asset that we need to protect for future generations."

Independent Male from Allegheny

"The health of the environment is one of the most important issues that we need to work on, not only for the animals and fish, but for people too."

Independent Female from Tioga

If you were giving advice to elected officials here in Pennsylvania on how they should address issues that are important to sportsmen like you regarding fish and wildlife habitat, and the health of rivers, streams and lakes, what would you tell him or her?

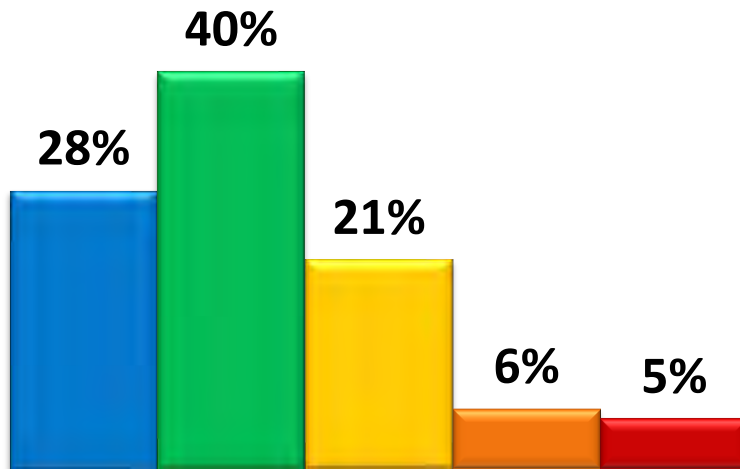


Core Perceptions of Rivers & Streams

Pennsylvanians generally regard the condition of their drinking water fairly positively.

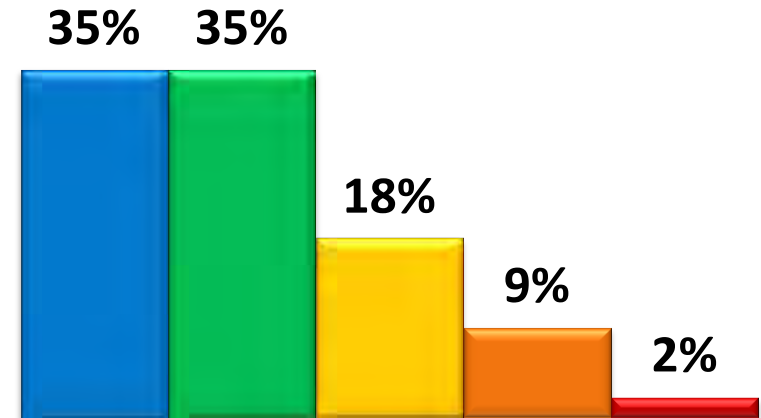
"The overall condition of your drinking water"

GPA: 2.8



Voters

GPA: 2.9



Sportsmen

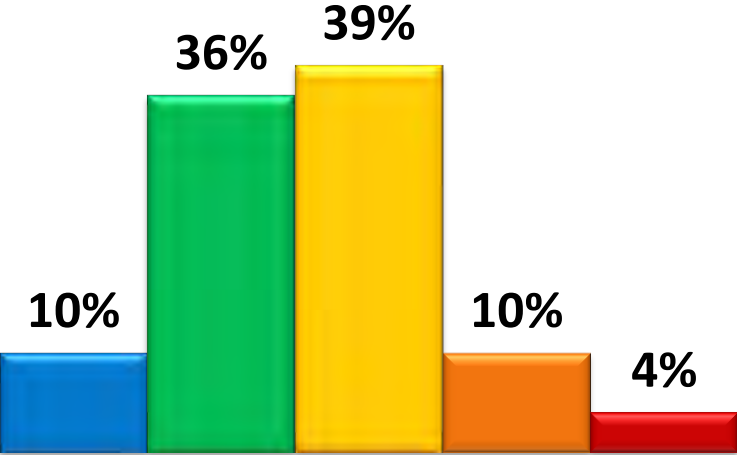
■ A ■ B ■ C ■ D ■ F

For each of the following, please indicate how you would grade the overall condition of that type of water or body of water. Would you give it a grade of A, for excellent; B, for pretty good; C, for only fair; D, for poor; or F, for failing?

They are far more divided on the condition of rivers or streams in their area, although sportsmen are more positive than voters.

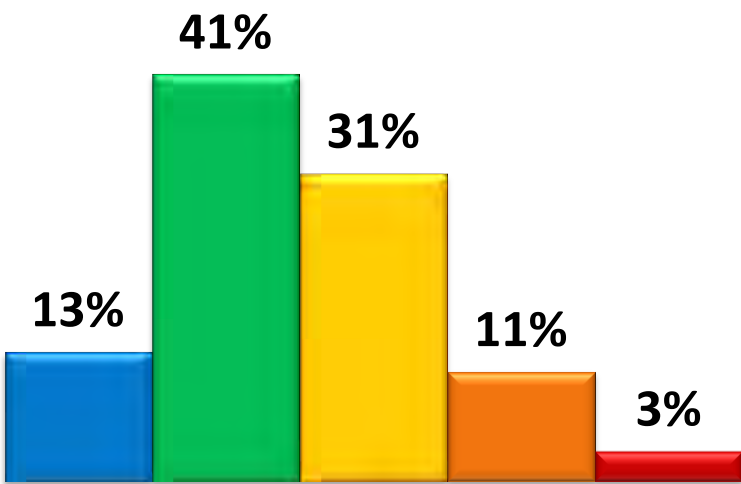
“The river or stream closest to you”

GPA: 2.4



Voters

GPA: 2.5



Sportsmen

■ **A** ■ **B** ■ **C** ■ **D** ■ **F**

For each of the following, please indicate how you would grade the overall condition of that type of water or body of water. Would you give it a grade of A, for excellent; B, for pretty good; C, for only fair; D, for poor; or F, for failing?

This is largely due to a significant gender distinction – women are more pessimistic about the condition of rivers and streams than are men.

“The river or stream closest to you”

Voters

Sportsmen

GPA: 2.4

GPA: 2.3

GPA: 2.6

GPA: 2.3



Men

Women

Men

Women

■ A/B

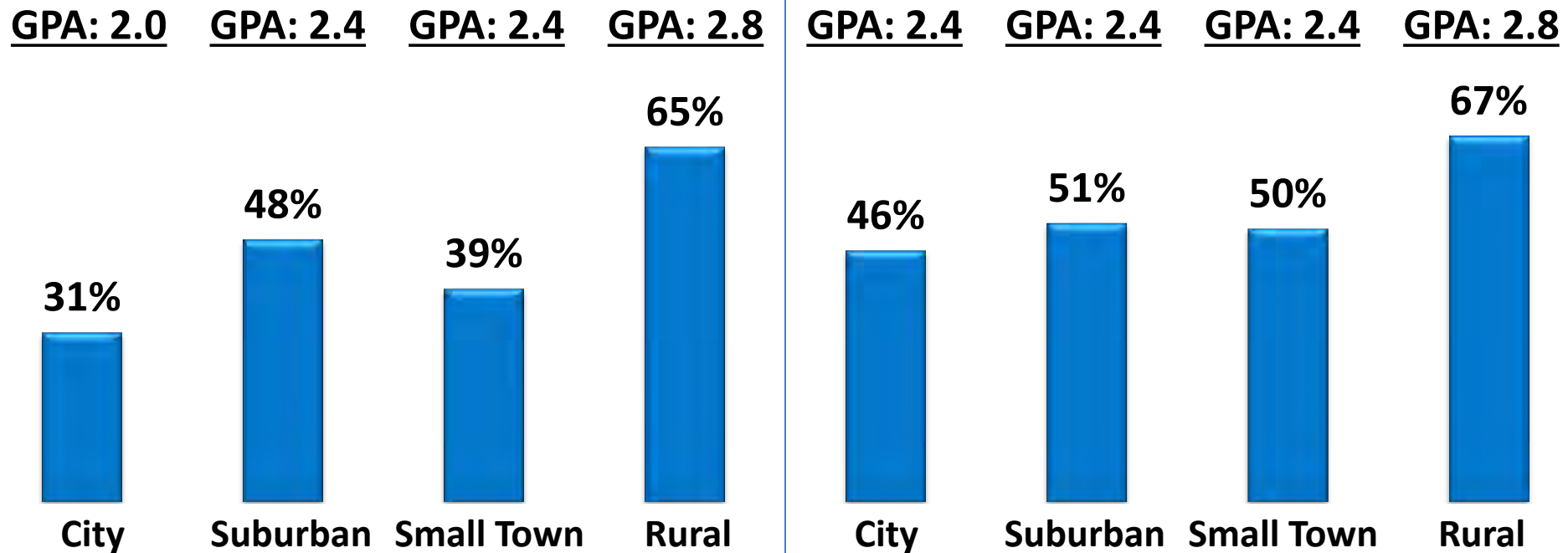
For each of the following, please indicate how you would grade the overall condition of that type of water or body of water. Would you give it a grade of A, for excellent; B, for pretty good; C, for only fair; D, for poor; or F, for failing?

Rural residents tend to be the most positive about the condition of rivers and streams.

"The river or stream closest to you"

Voters

Sportsmen

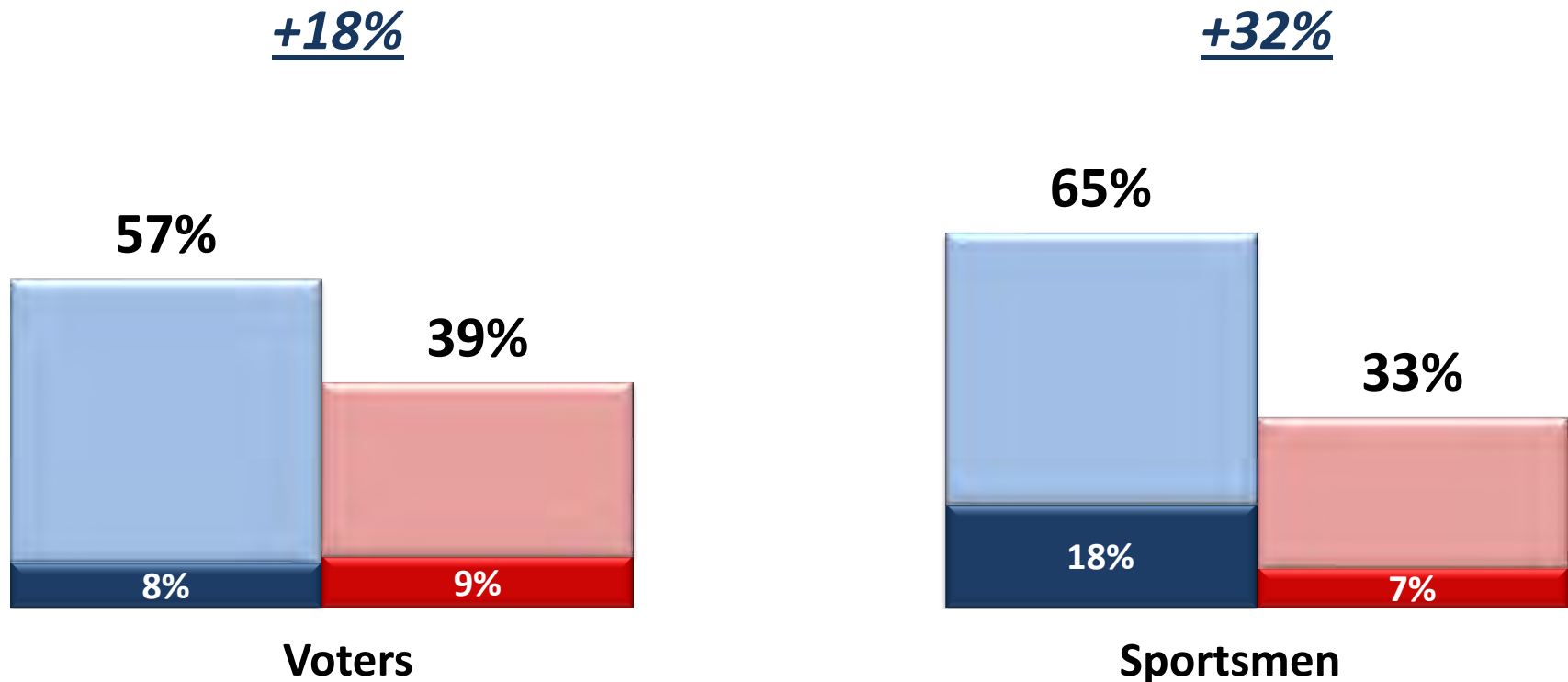


■ A/B

For each of the following, please indicate how you would grade the overall condition of that type of water or body of water. Would you give it a grade of A, for excellent; B, for pretty good; C, for only fair; D, for poor; or F, for failing?

Moreover, Pennsylvanians tend to view conditions as improving over the last decade.

Health of Local Rivers and Streams

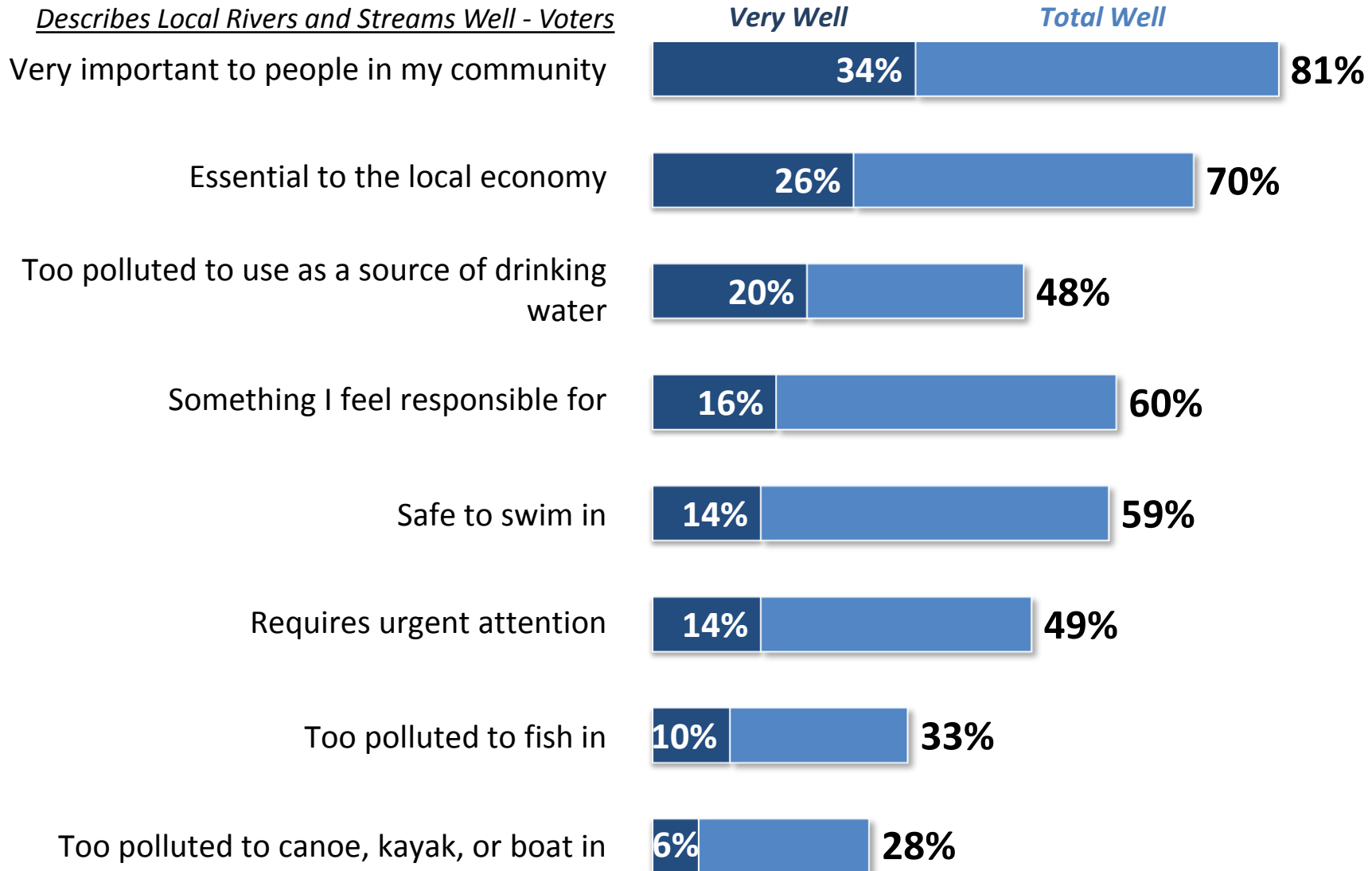


■ Much Better ■ Somewhat Better ■ Much Worse ■ Somewhat Worse

And do you think the overall health of local rivers and streams has gotten better or gotten worse over the last ten years?

Most non-sportsmen still view rivers and streams as important, but don't tend to think of them as polluted or requiring attention.

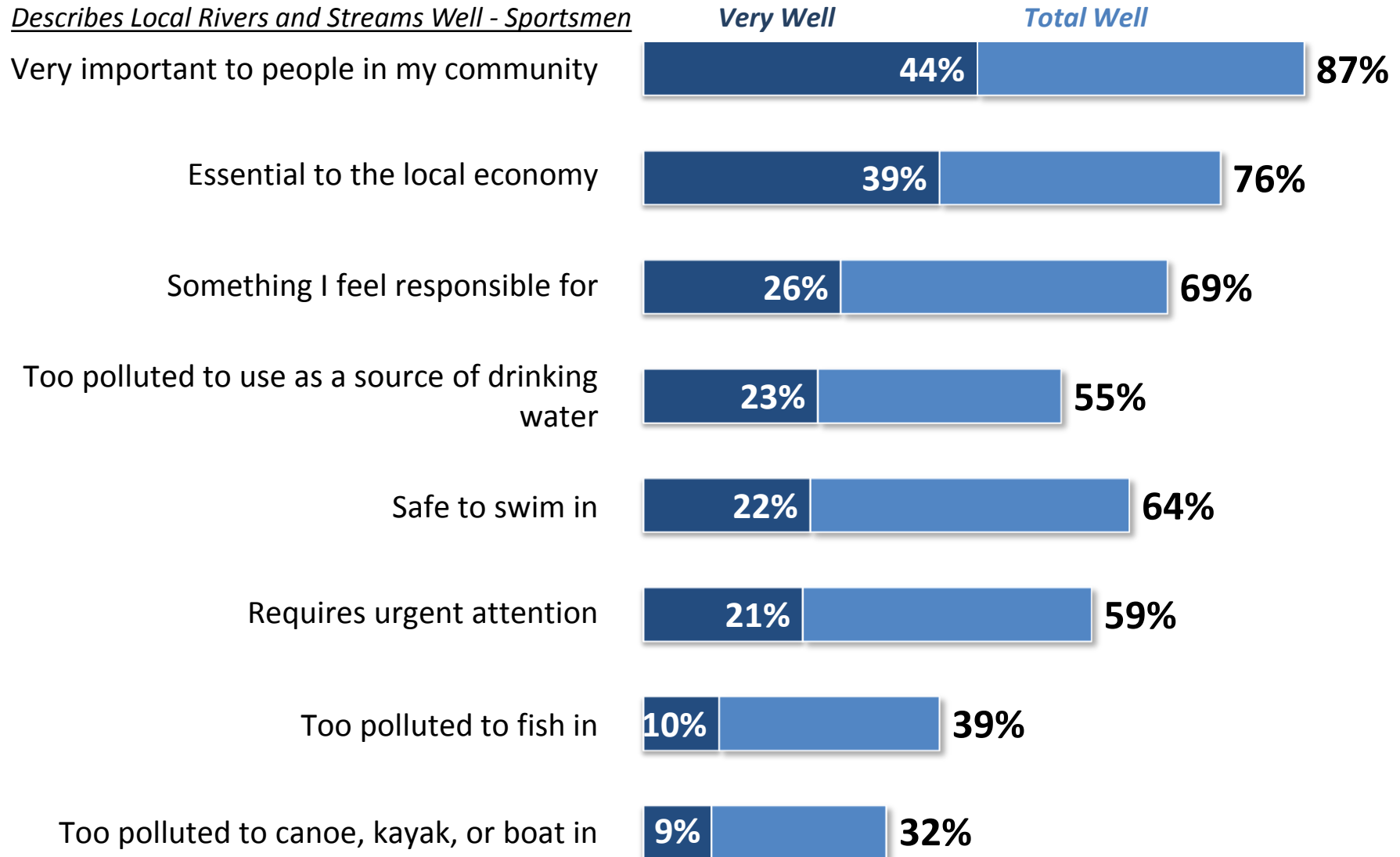
Describes Local Rivers and Streams Well - Voters



The following words and phrases are ones that some people have used to describe local rivers and streams. For each one please indicate whether you think it describes it very well, fairly well, not very well, or not well at all?

Majorities of sportsmen perceive rivers as important, their responsibility, and requiring urgent attention.

Describes Local Rivers and Streams Well - Sportsmen



The following words and phrases are ones that some people have used to describe local rivers and streams. For each one please indicate whether you think it describes it very well, fairly well, not very well, or not well at all?

Sportsmen are more likely to think each phrase describes local waterways well compared voters.

*Describes Local Rivers and Streams Well
- Ranked by Difference Score*

	% Total Well Difference Score (Voters- Sportsmen)
Requires urgent attention	+10%
Something I feel responsible for	+9%
Too polluted to use as a source of drinking water	+7%
Essential to the local economy	+6%
Too polluted to fish in	+6%
Very important to people in my community	+6%
Safe to swim in	+5%
Too polluted to canoe, kayak, or boat in	+4%

The following words and phrases are ones that some people have used to describe local rivers and streams. For each one please indicate whether you think it describes it very well, fairly well, not very well, or not well at all?

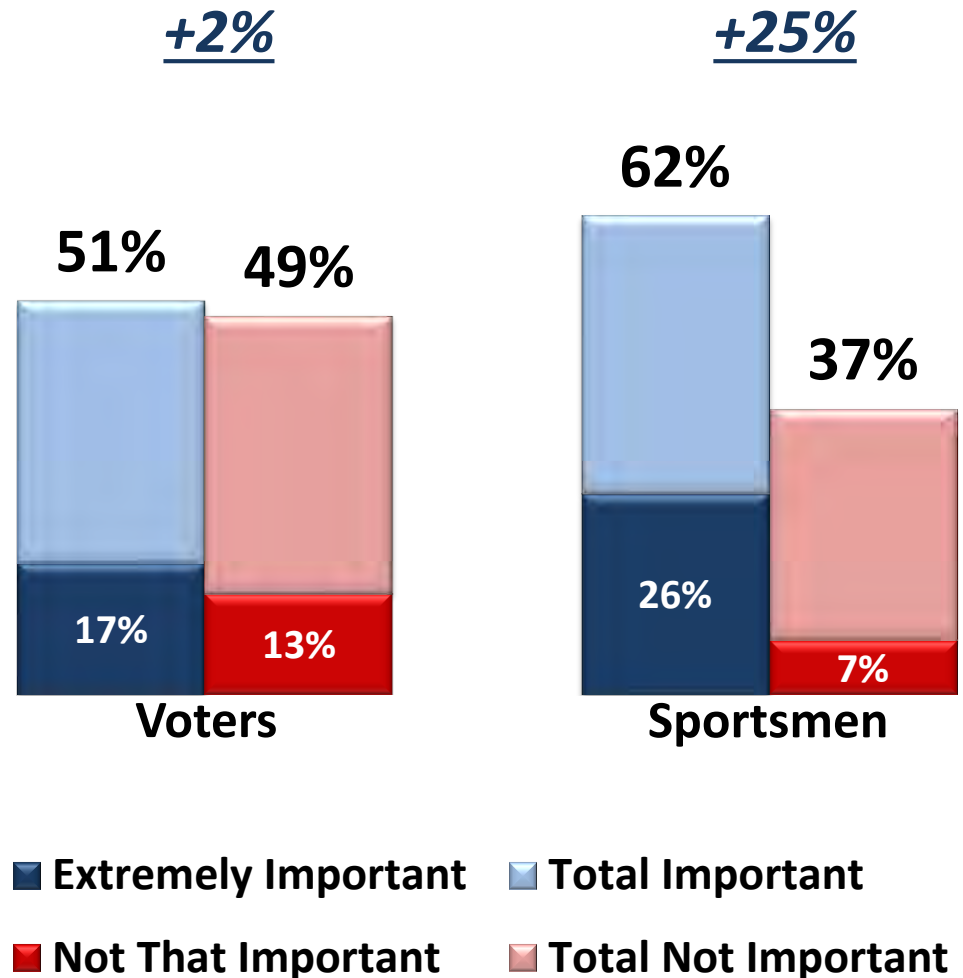
For non-sportsmen voters, the amount of outdoor recreation activities does have an impact on connections to and the perceived importance of local rivers and streams.

<i>Describes Local Rivers and Streams Well</i> <i>- Ranked by Most Outdoor Activities % Total Well</i>	Most Outdoor Activities	Moderate Outdoor Activities	None
	Total Well	Total Well	Total Well
Very important to people in my community	88%	81%	78%
Essential to the local economy	81%	69%	64%
Something I feel responsible for	72%	66%	45%
Requires urgent attention	57%	51%	44%

There are various actions that would affect rivers, lakes, streams and wetlands here in Pennsylvania that could be taken either by Congress or by state decision-makers. For each one, please indicate whether you would support or oppose that action

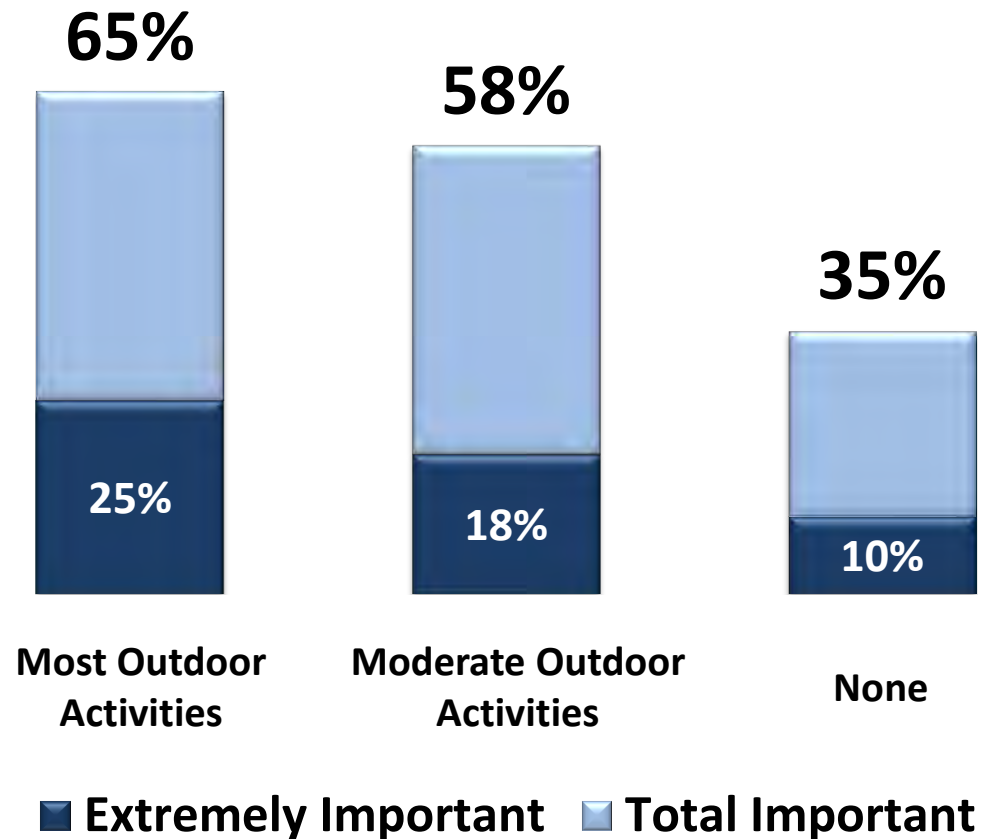
A goal of every river and stream in the state being safe for recreation is more important to sportsmen than their non-hunting or angling counterparts.

“Some people have said that Pennsylvania should have a goal that every river and stream in the state should eventually be safe for swimming, boating and other outdoor recreation. How important would that be to you personally? Would it be...”



Not surprisingly the amount of outdoor recreation is also an important predictor of the importance of this goal for non-sportsmen voters as well.

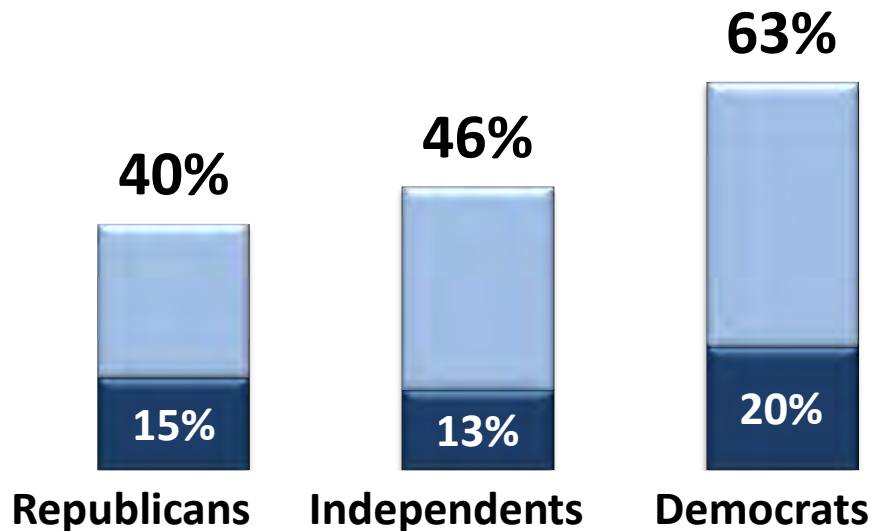
“Some people have said that Pennsylvania should have a goal that every river and stream in the state should eventually be safe for swimming, boating and other outdoor recreation. How important would that be to you personally? Would it be...”



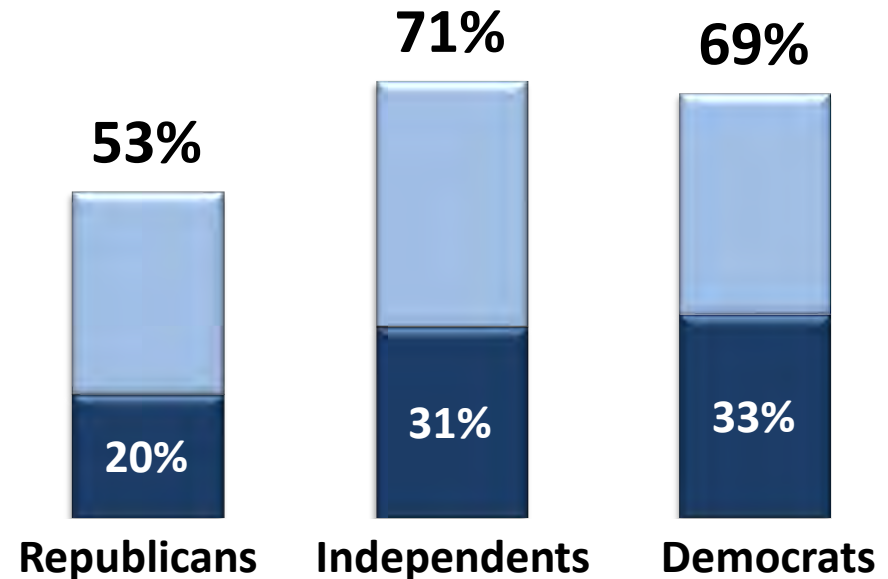
There is a partisan distinction among both voters and sportsmen in the importance of this goal.

*“Some people have said that Pennsylvania should have a goal that every river and stream in the state should eventually be safe for swimming, boating and other outdoor recreation. How important would that be to you personally?
Would it be...”*

Voters



Sportsmen



■ Extremely Important

■ Total Important

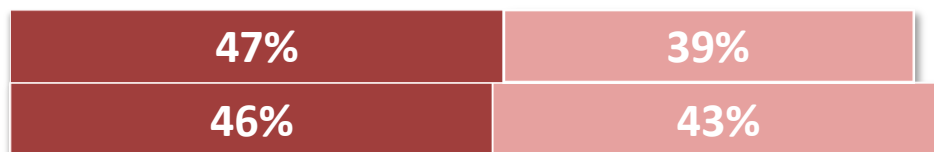
State voters focus on ag run-off as a major threat to water.

Possible Source for Pollution

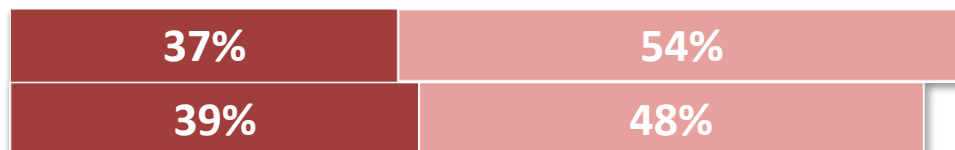
Pesticides and fertilizers that runs off farms and agricultural operations into rivers and streams



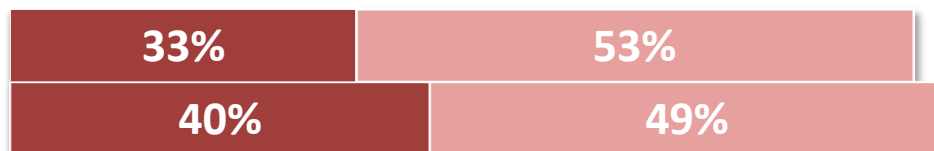
Poorly planned growth and development



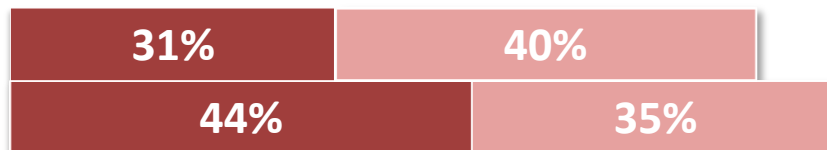
Polluted runoff from streets and rooftops



Soil and waste that runs off farms and agricultural operations into rivers and streams



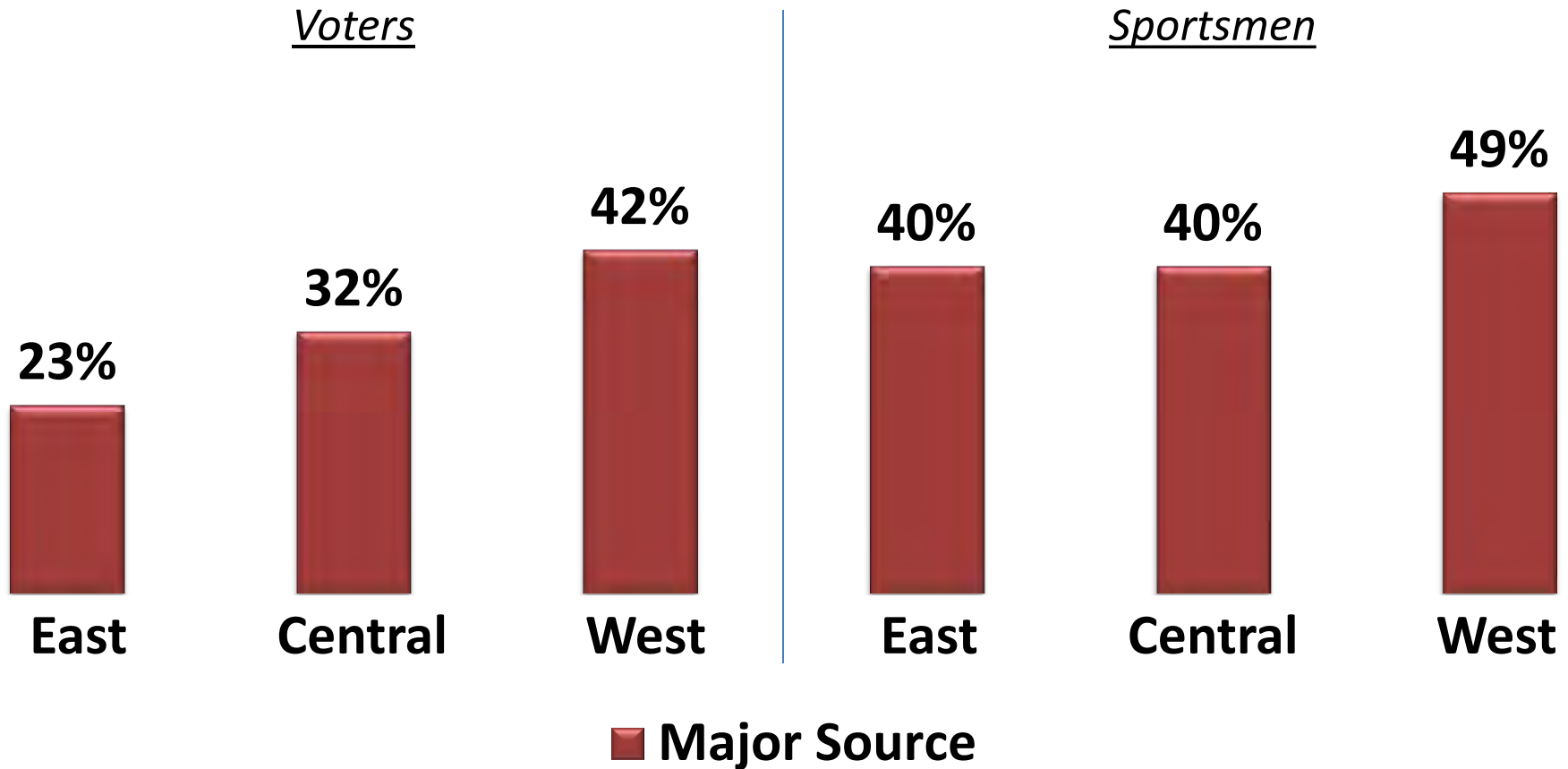
Polluted runoff from abandoned mines



The following is a list of possible sources of pollution in the rivers and streams here in Pennsylvania. For each one, please indicate how big a source of pollution you think that is. Some may seem similar, but please respond to each one.

Recognition of mine run-off is predictably greater in western Pennsylvania

“Polluted runoff from abandoned mines”

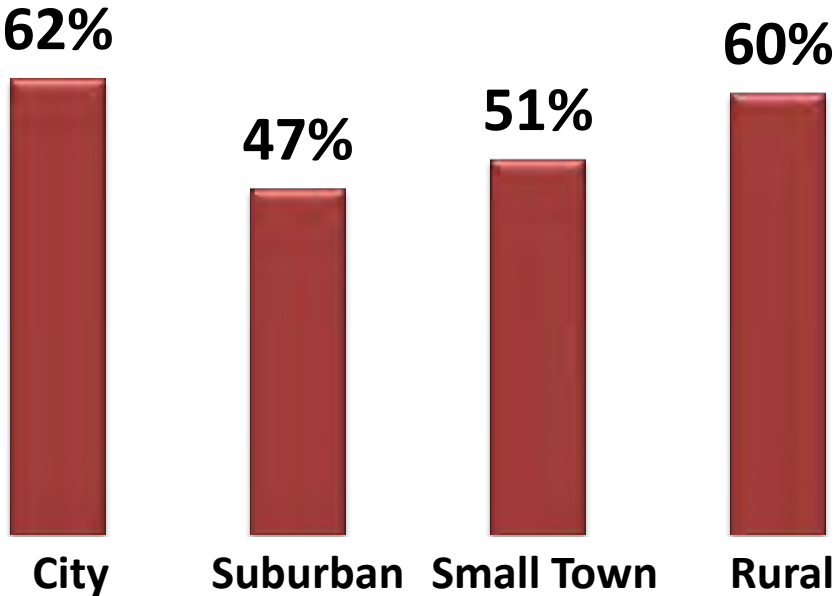


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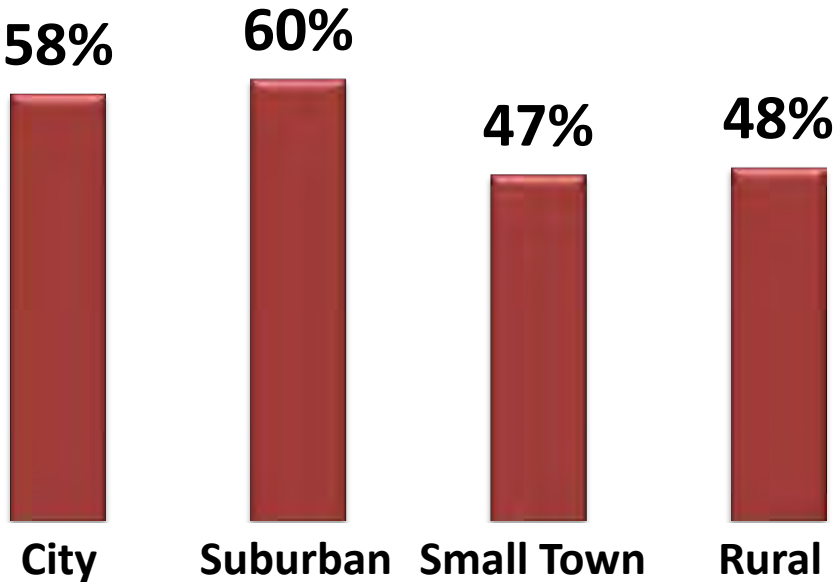
Urban residents are more inclined to say pesticide/fertilizer is a major source of water pollution.

“Polluted runoff from pesticides and fertilizers”

Voters



Sportsmen



■ Major Source

The following is a list of possible sources of pollution in the rivers and streams here in Pennsylvania. For each one, please indicate how big a source of pollution you think that is. Some may seem similar, but please respond to each one.



Policies to Protect and Restore Rivers and Streams

A majority of sportsmen and non-sportsmen voters say laws and standards related to waters should be strengthened.

All Voters

Sportsmen

***Strengthen* those standards** **56%** **51%**

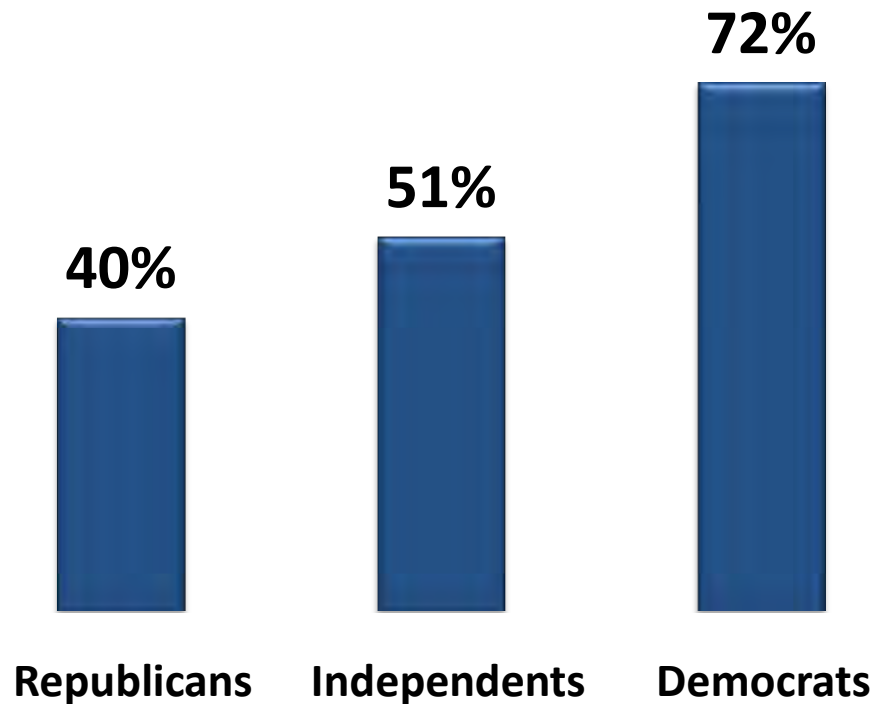
***Maintain* those standards** **41%** **41%**

***Relax* those standards** **3%** **7%**

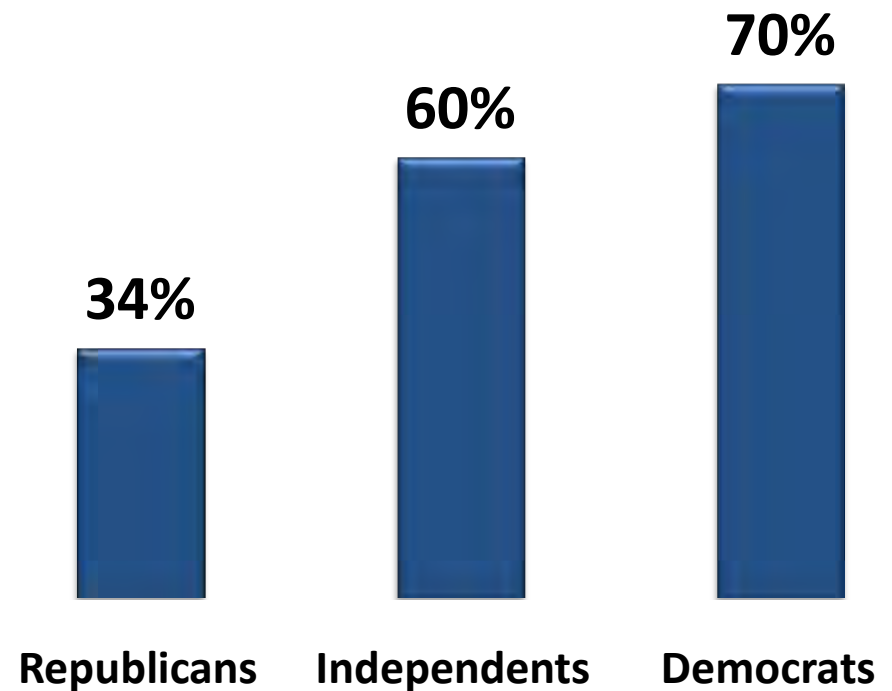
When you think about the laws and standards currently in place that are intended to protect the health of lakes, rivers, streams and wetlands, would you prefer that decision-makers in Pennsylvania?

There is a predictable but significant partisan correlation, although almost no one from either party says to relax standards.

Voters



Sportsmen

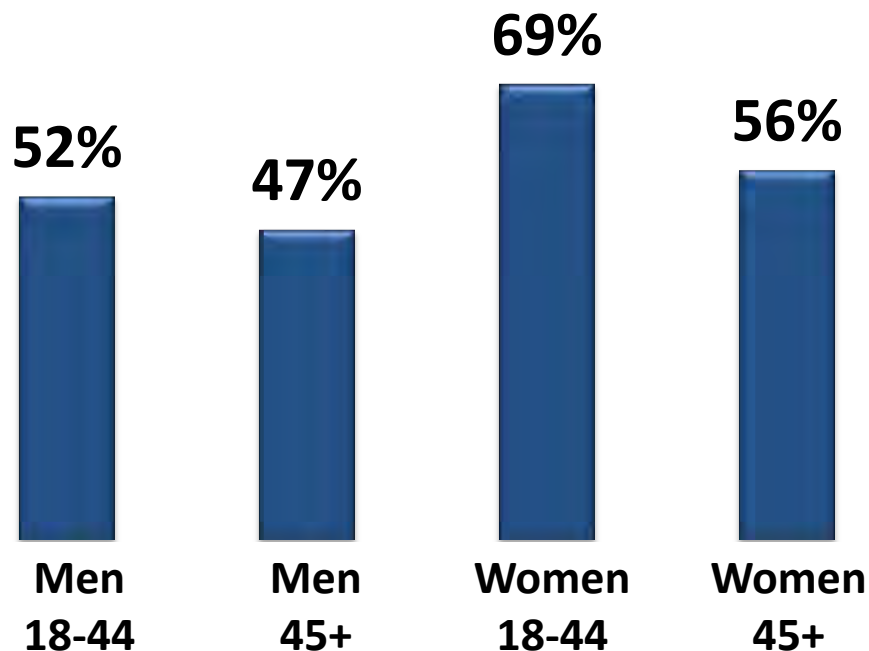


■ **Strengthen Those Standards**

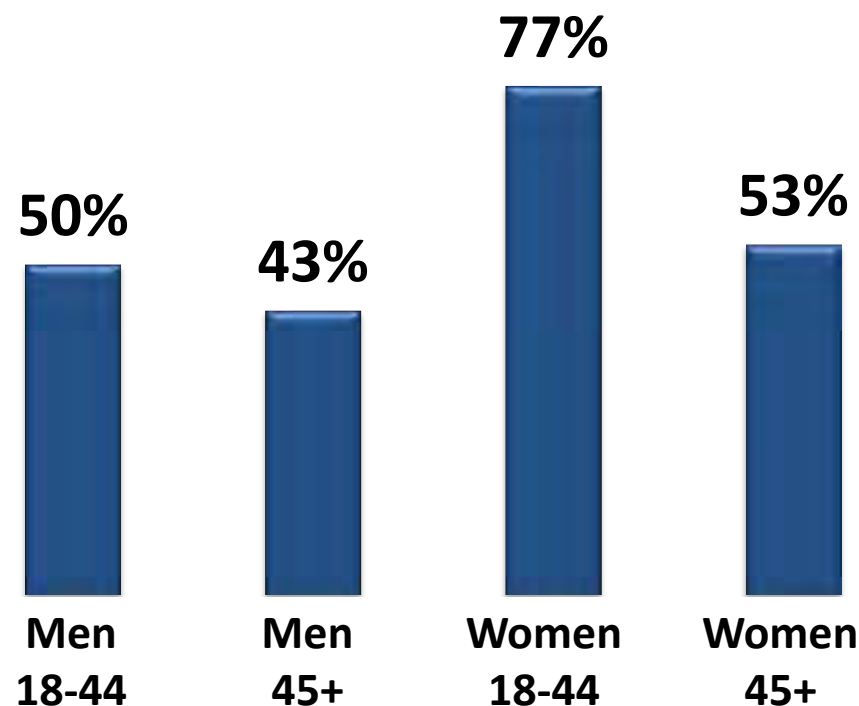
When you think about the laws and standards currently in place that are intended to protect the health of lakes, rivers, streams and wetlands, would you prefer that decision-makers in Pennsylvania?

Younger women are the strongest proponents of strengthening standards to protect water in PA.

Voters



Sportsmen



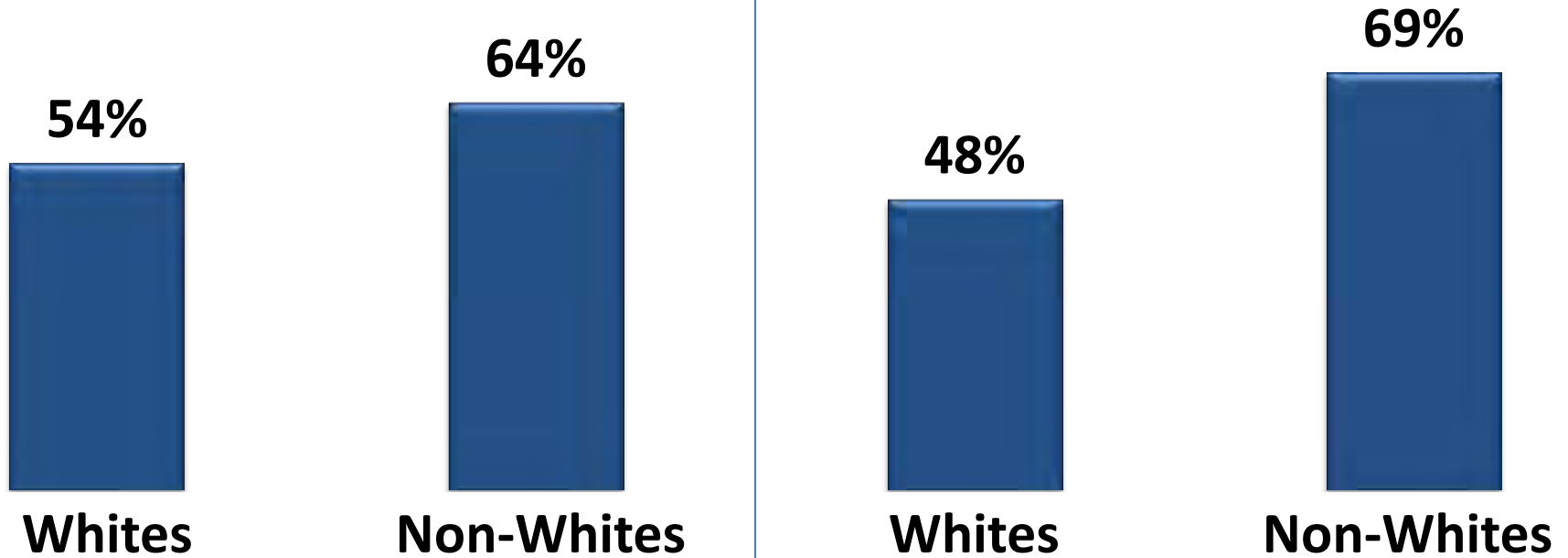
■ Strengthen Those Standards

When you think about the laws and standards currently in place that are intended to protect the health of lakes, rivers, streams and wetlands, would you prefer that decision-makers in Pennsylvania?

There is also a distinction based on ethnic background.

Voters

Sportsmen

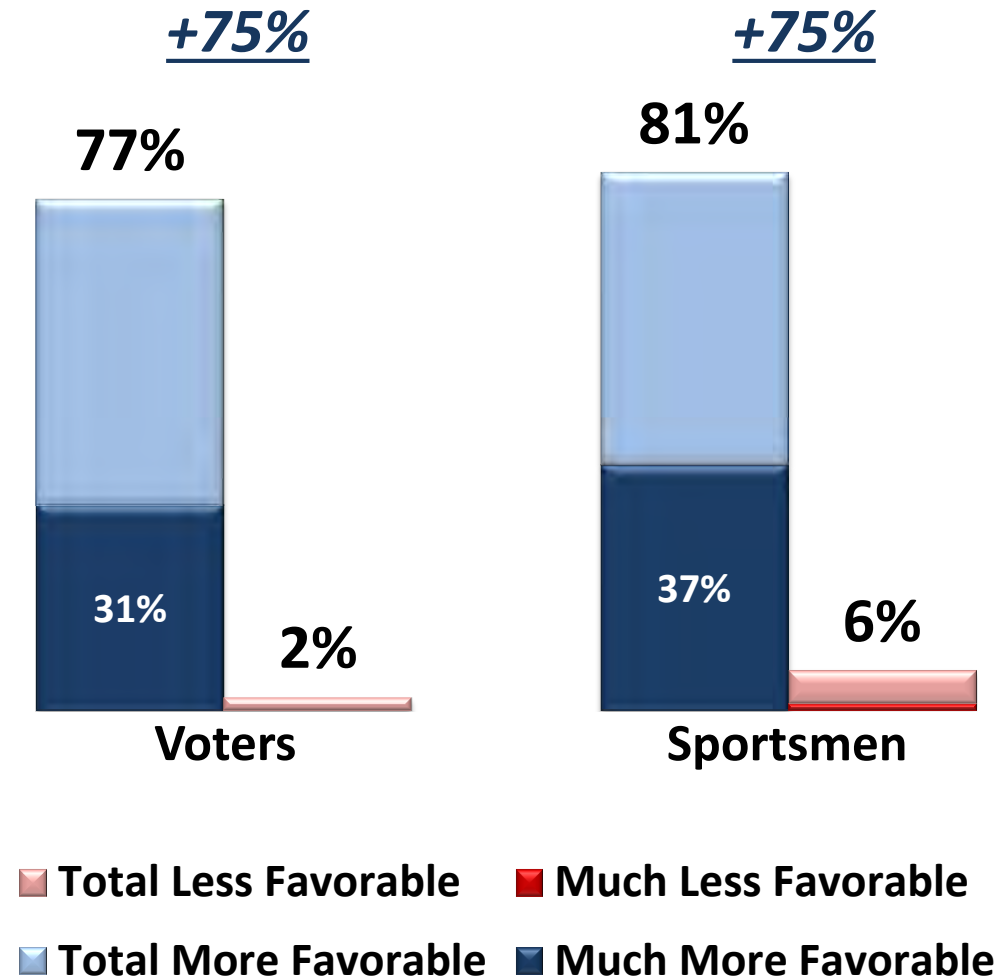


■ Strengthen Those Standards

When you think about the laws and standards currently in place that are intended to protect the health of lakes, rivers, streams and wetlands, would you prefer that decision-makers in Pennsylvania?

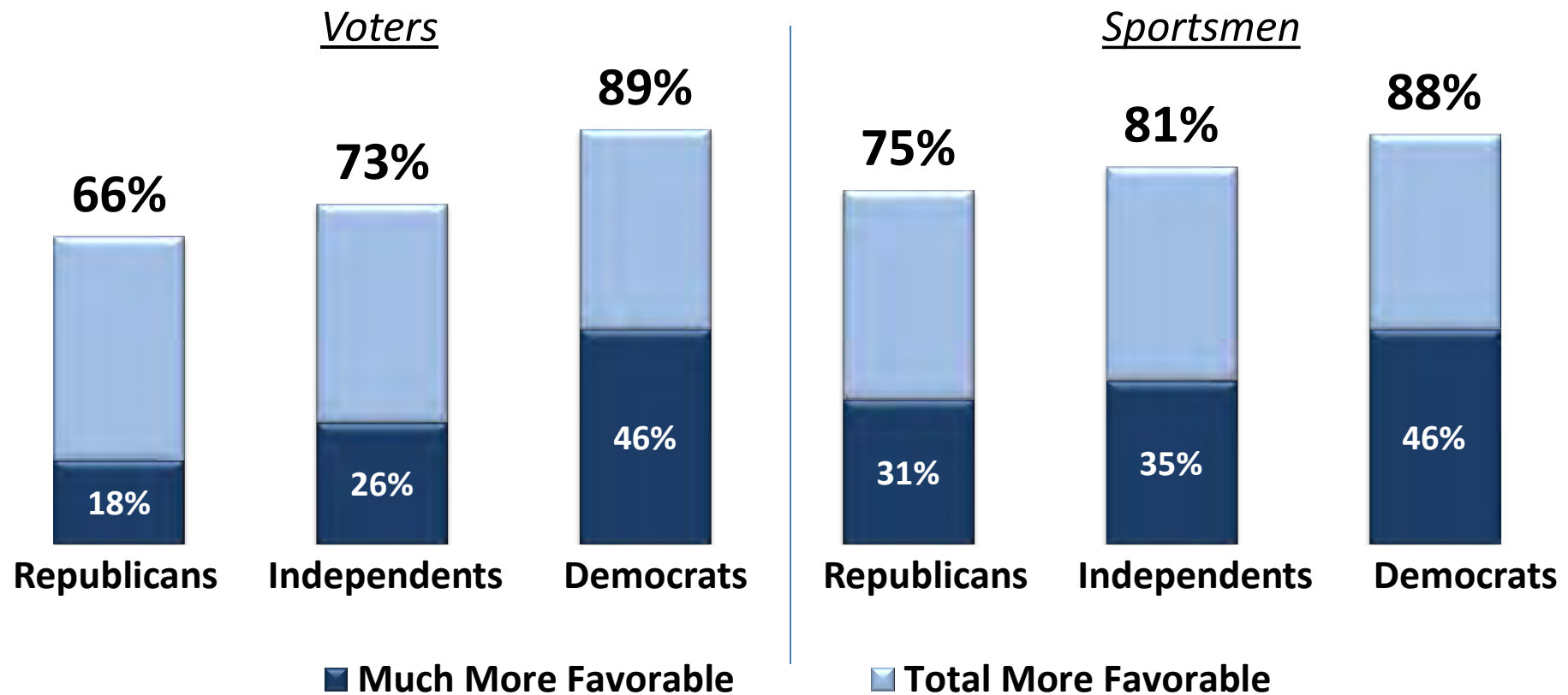
Both voters and sportsmen look far more positively on an elected official who supports protection of state waters.

“Let's say that an elected official voiced support of protecting or restoring the health of lakes, rivers, streams and wetlands here in Pennsylvania, would that give you a more favorable or less favorable impression of that person or not make a difference in your views either way?”



Support for protecting waters in Pennsylvania is a plus across the political spectrum.

“Let's say that an elected official voiced support of protecting or restoring the health of lakes, rivers, streams and wetlands here in Pennsylvania, would that give you a more favorable or less favorable impression of that person or not make a difference in your views either way?”



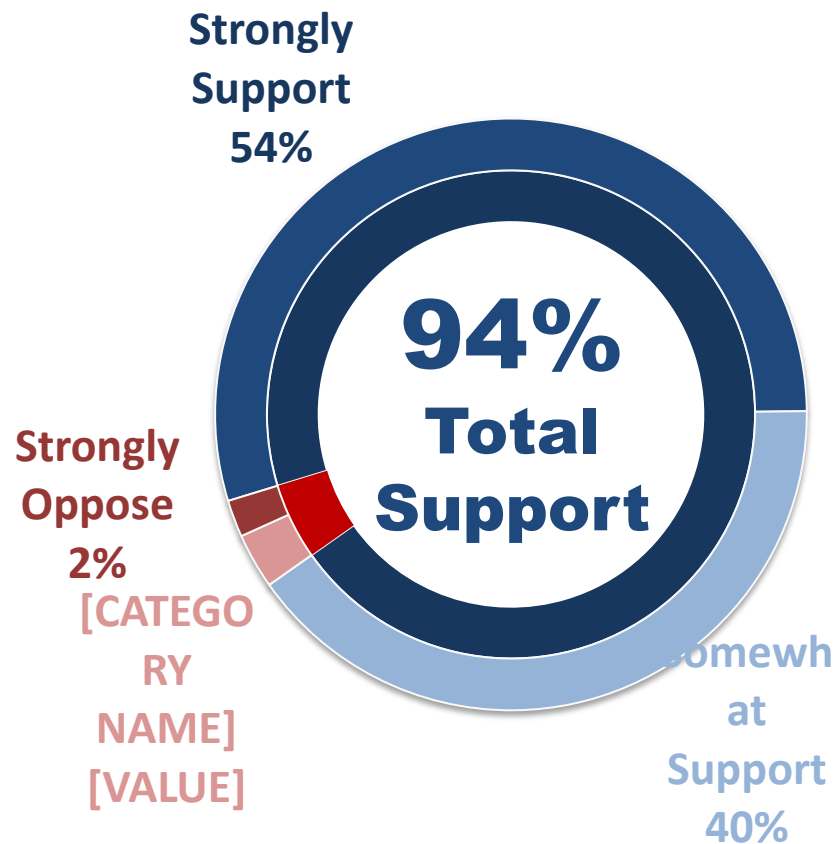
What We Did

Voters Heard the Following:

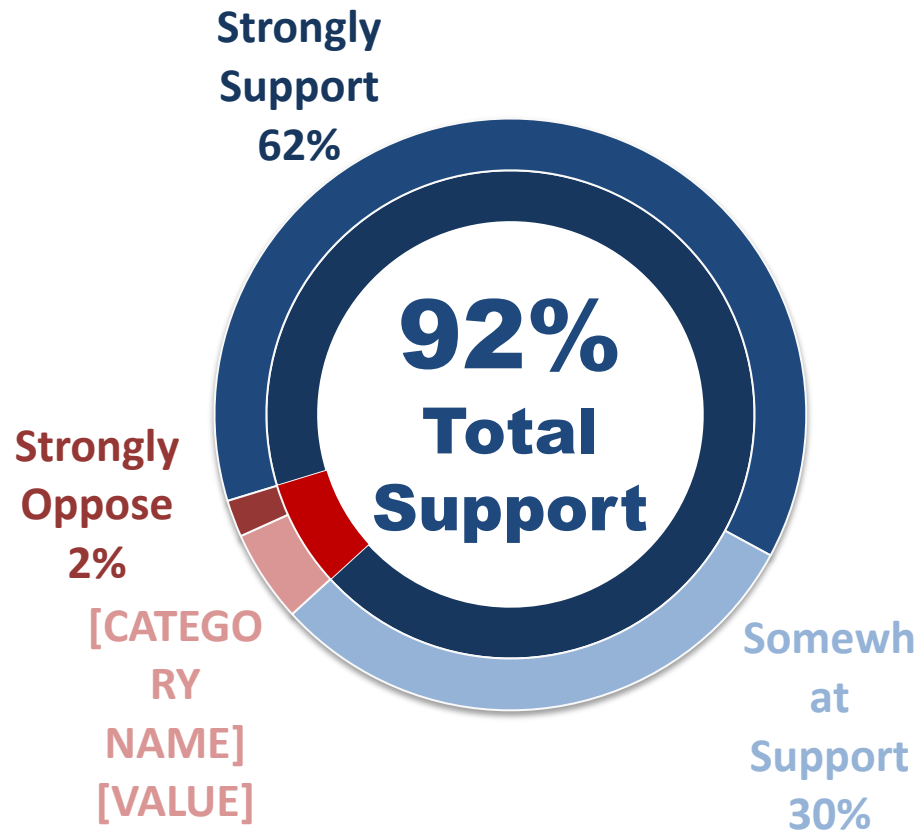
“More specifically, Pennsylvania designates streams with the cleanest water as ‘exceptional value.’ This designation, which applies to less than four percent of the streams in the state, increases protections of those waters. Fishing, hiking, and other recreational activities are still allowed, but any development in these areas must not hurt water quality in the streams.”

There is nearly universal support for protecting more streams in the state as “exceptional value” streams.

Voters



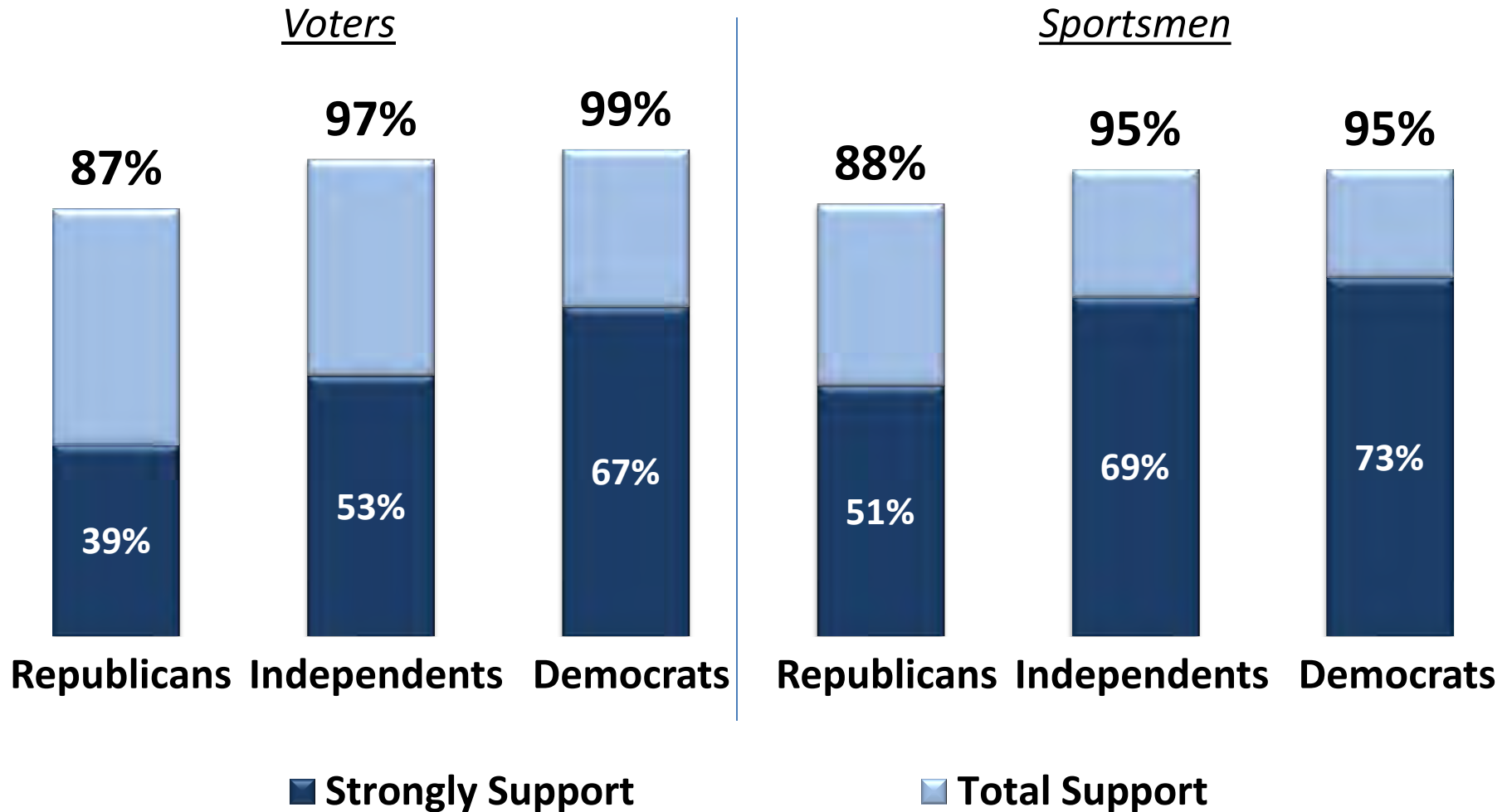
Sportsmen



Thinking about this, would you support or oppose the state of Pennsylvania protecting more streams if they meet the standard to be designated as an “exceptional value” stream?

Support is overwhelming across party lines.

Support for Protecting “Exceptional Value” Streams – By Party



Thinking about this, would you support or oppose the state of Pennsylvania protecting more streams if they meet the standard to be designated as an “exceptional value” stream?

Moreover, voters side squarely behind supporters of increasing designations after hearing both viewpoints.

Voters

Sportsmen

Supporters of Pennsylvania designating more streams as "exceptional value" say that by designating our healthiest streams as "exceptional value," we are protecting clean drinking water for millions of Pennsylvanians, ensuring pristine habitat for Pennsylvania's fish and wildlife, and boosting a nearly \$30 billion outdoor recreational economy in our state

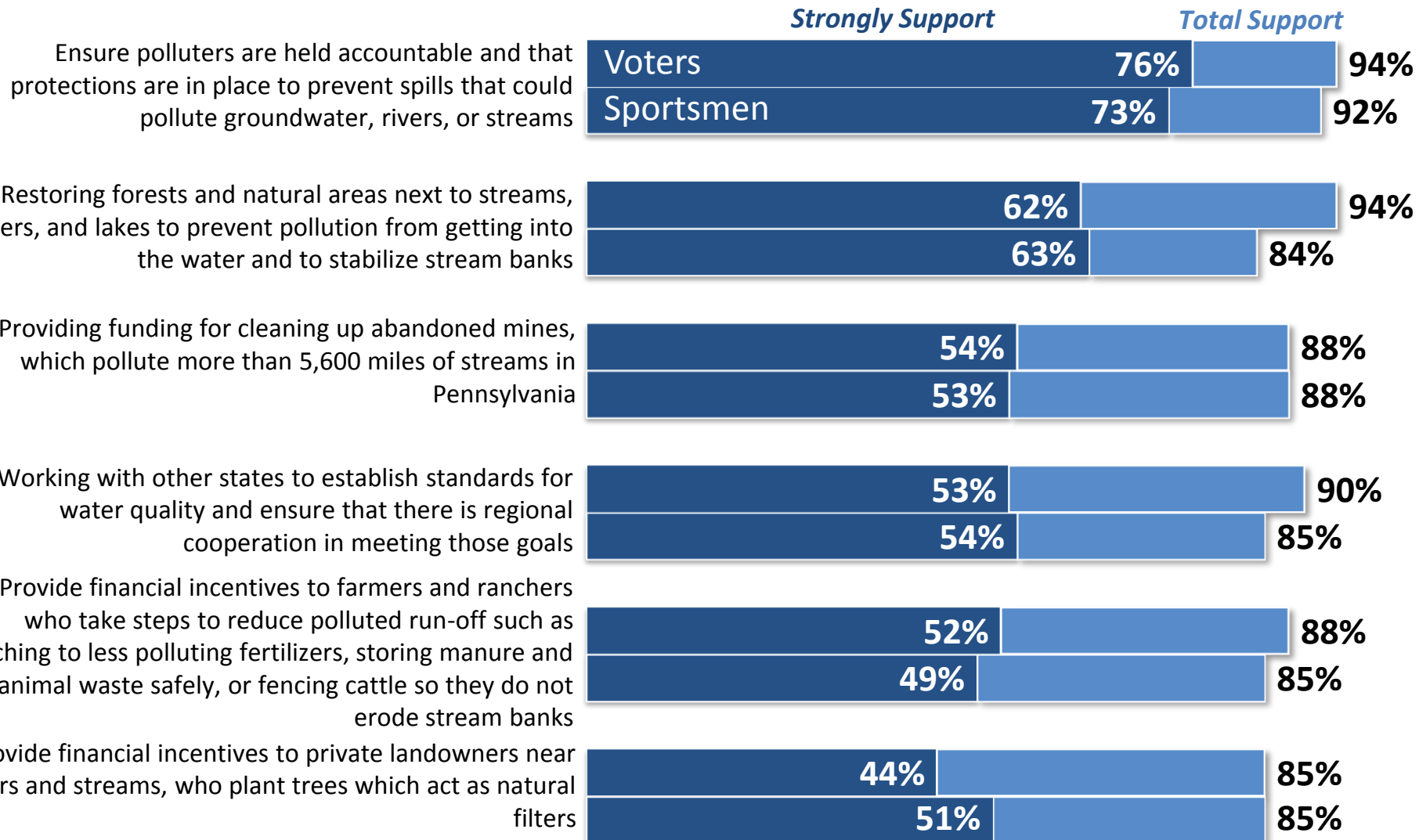
80% 78%

Opponents of Pennsylvania designating more streams as "exceptional value" say that special protection designations hurts local economic development and job creation by imposing costly and unnecessary design, engineering, and construction costs on developers who seek to work in rural areas of the state which so desperately need an economic boost.

18% 21%

The following are two different viewpoints about designating more Pennsylvania streams as an "exceptional value" stream. Please indicate which one comes closer to what you think, even if neither matches your thoughts exactly.

A host of other specific policies are also widely embraced.



There are various actions that would affect rivers, lakes, streams and wetlands here in Pennsylvania that could be taken either by Congress or by state decision-makers. For each one, please indicate whether you would support or oppose that action.

Virtually everyone is willing to pay more in taxes or fees in order to implement these policies.

Voters

Sportsmen

Less Than
\$50

24%

24%

\$50-\$100

46%

44%

More than
\$100

9%

9%

Many of these policies require some funds to be spent to achieve those goals. How much more - if anything - would you be willing to pay in taxes or fees per year to fund efforts like these to restore and maintain water quality and quantity in lakes, rivers, streams, and wetlands?

Majorities of sportsmen are willing to pay increased license fees or dedicate the sales tax on equipment to water.

Dedicating a portion of existing state sales-tax revenue generated from sales of hunting, fishing, wildlife-watching, and outdoor recreational equipment

Sportsmen

87% **Total Acceptable**

Anglers

Increasing annual fishing license fees by seven dollars

60% **Total Acceptable**

Hunters

Increasing hunting fees by seven dollars

57% **Total Acceptable**

There are many ways that Pennsylvania could generate additional funding to help affect rivers, lakes, streams, wetlands and the fish and wildlife which rely upon them. I am going to read you a list of several potential sources of additional funding. For each one, please indicate if that particular way of generating funding would be acceptable or unacceptable.

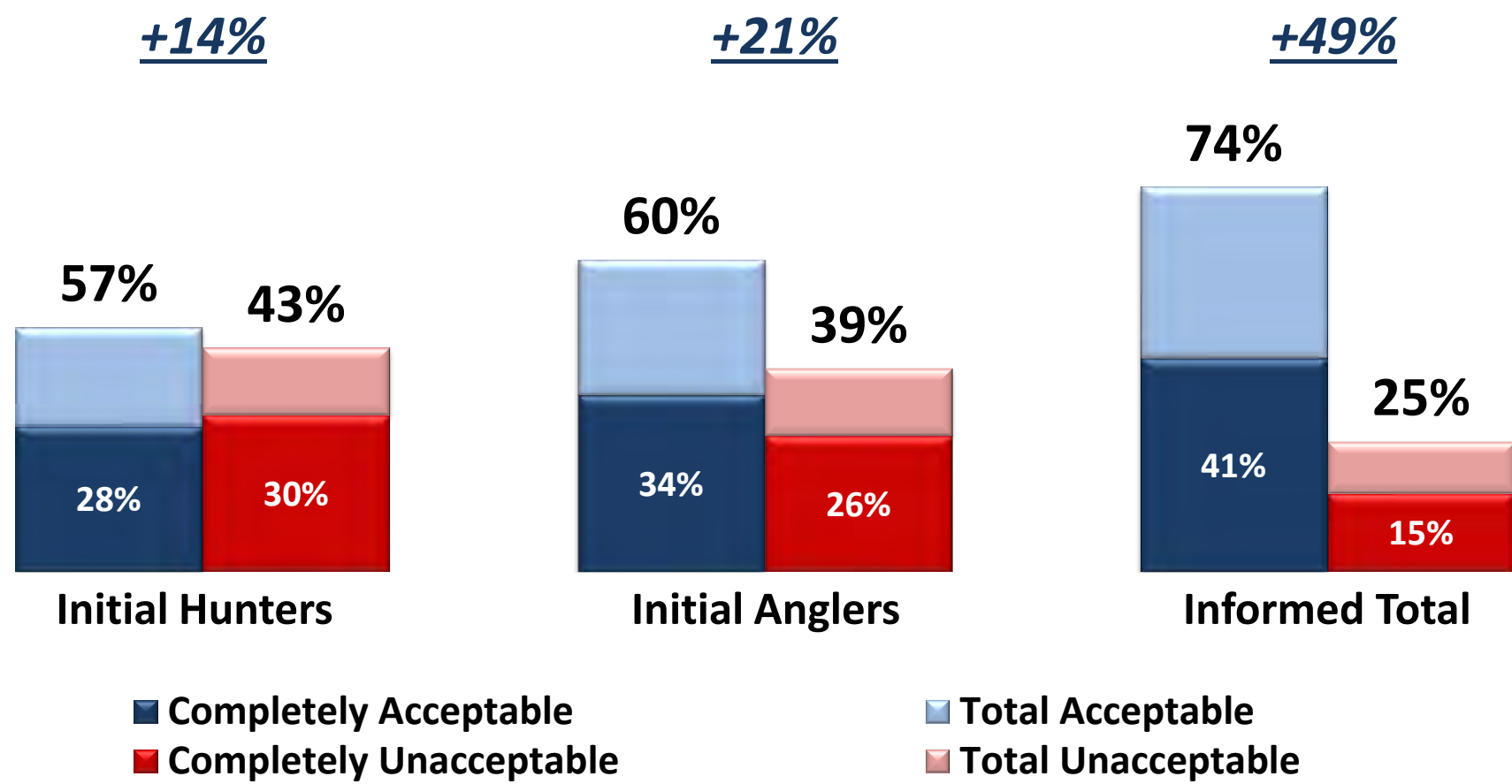
What We Did

Voters Heard the Following:

“Thinking about increasing fees on hunting and fishing licenses - the cost for a fishing license has not increased since 1999 and the cost for a hunting license has not increased in 13 years. As the Pennsylvania Fish and Boat Commission and Pennsylvania Game Commission receive the majority of their funding from license fees and no funding from taxpayers, this has meant cuts to vital services.”

Three-quarters of sportsmen view the hunting and fishing license fee increase as acceptable after hearing this information.

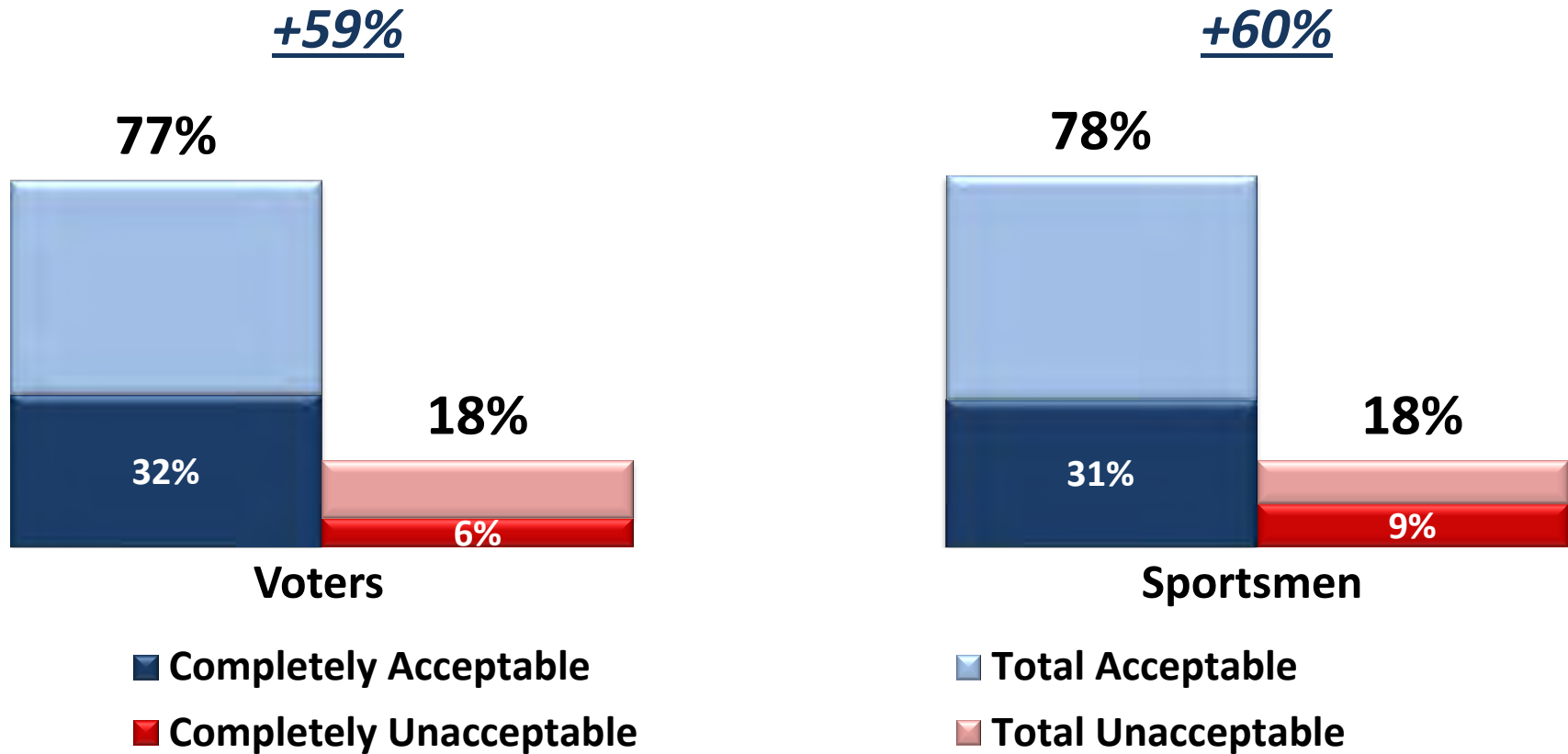
Informed Acceptance of a \$7 Increase – Among Sportsmen



There are many ways that Pennsylvania could generate additional funding to help affect rivers, lakes, streams, wetlands and the fish and wildlife which rely upon them. I am going to read you a list of several potential sources of additional funding. For each one, please indicate if that particular way of generating funding would be acceptable or unacceptable

These two audiences also hold very similar and positive views of issuing bonds through Growing Greener.

“Restoring funding to the Growing Greener program and issuing bonds to be paid through existing tax revenue dedications annually”

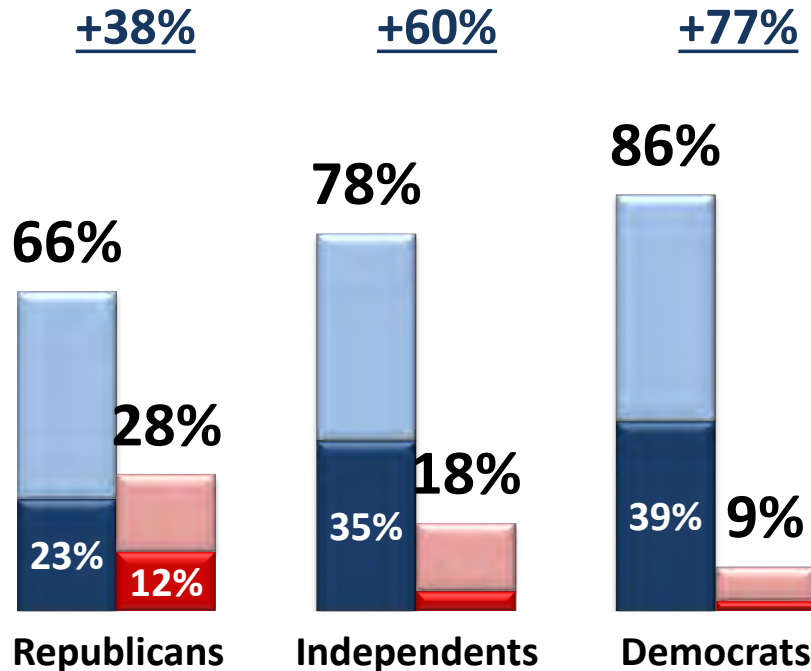


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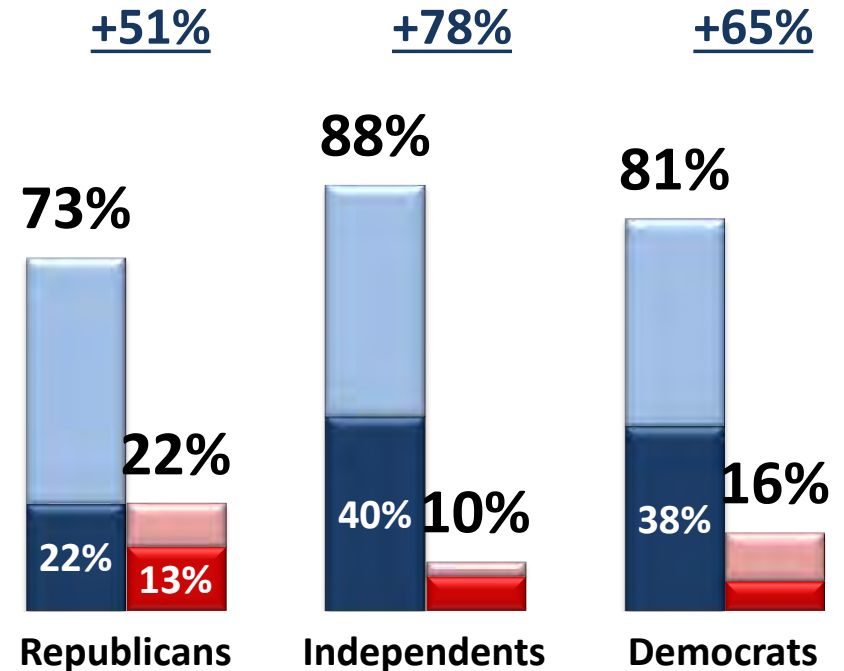
Issuing bonds for Growing Greener is also widely accepted.

“Restoring funding to the Growing Greener program and issuing bonds to be paid through existing tax revenue dedications annually”

Voters



Sportsmen



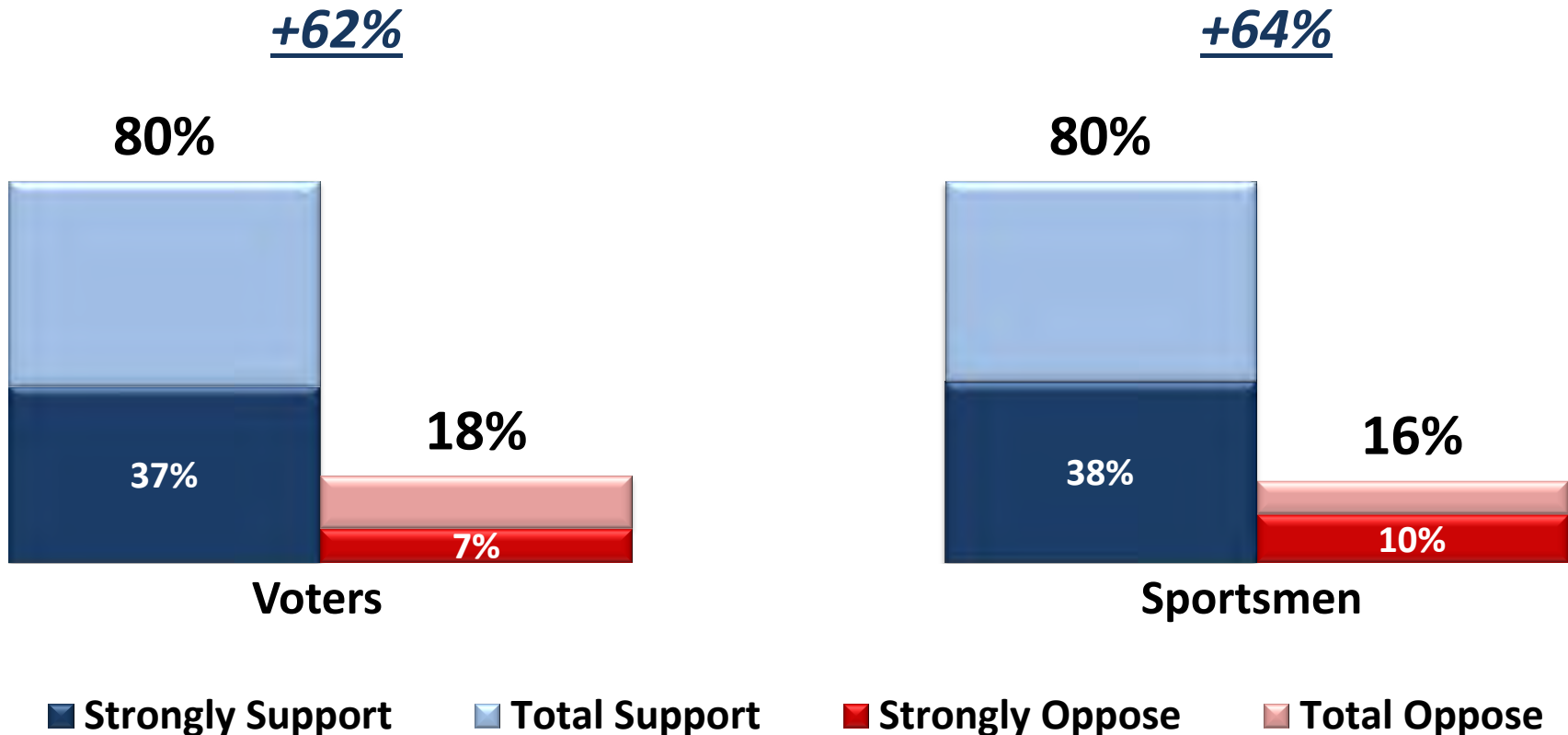
■ Completely Acceptable
■ Completely Unacceptable

■ Total Acceptable
■ Total Unacceptable

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A proposal to restore funding to the \$200 million annual level for Growing Greener has widespread support.

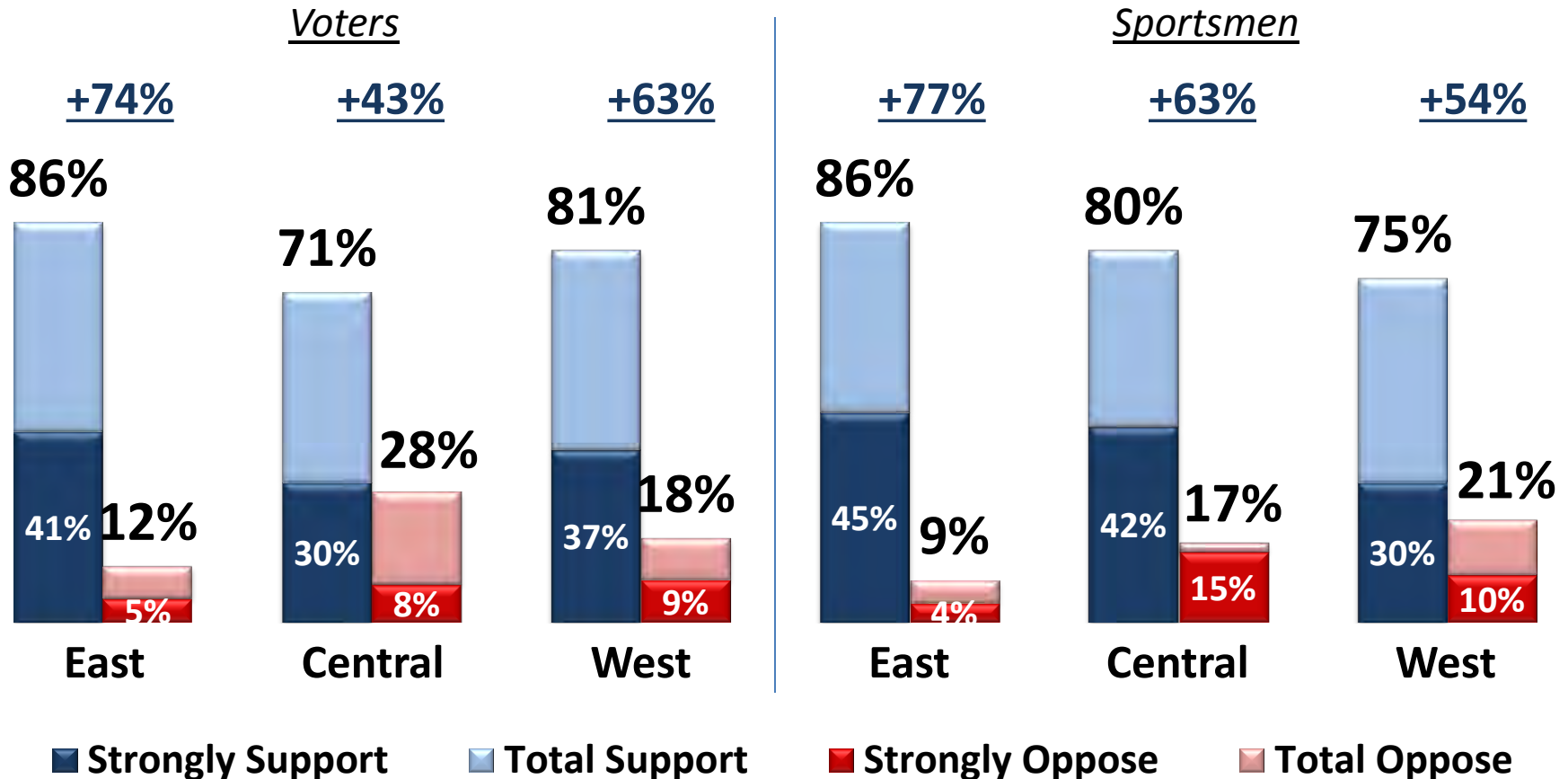
Support for Restoring Funding to the Growing Greener Program



Do you support or oppose restoring funding for the Growing Greener Program to previous levels of 200 million dollars annually in order to protect natural areas, water, and wildlife habitat

Support for restoring Growing Green funding is evident across the state.

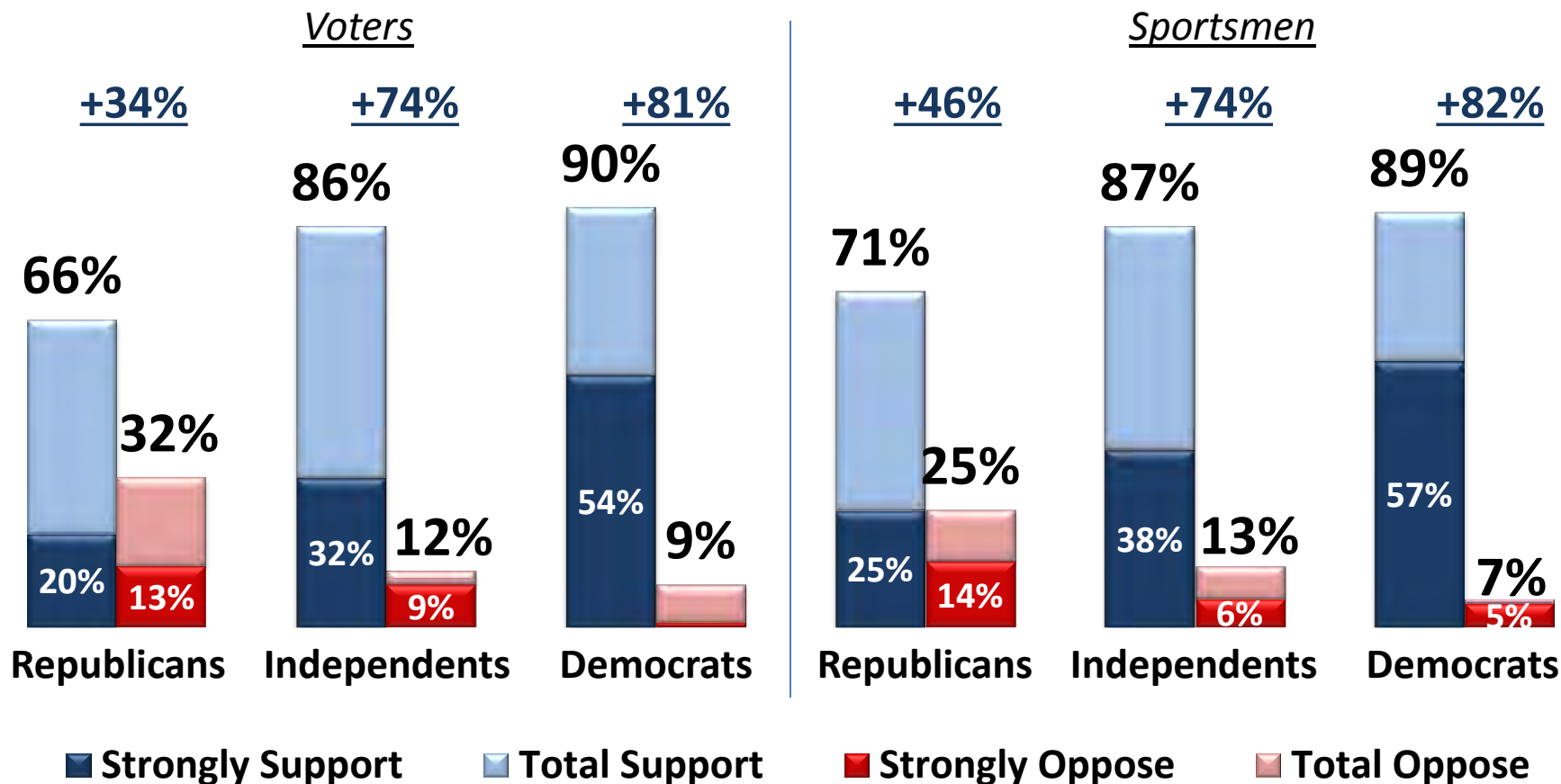
Support for Restoring Funding to the Growing Greener Program – By Region



Do you support or oppose restoring funding for the Growing Greener Program to previous levels of 200 million dollars annually in order to protect natural areas, water, and wildlife habitat

The vast majority of voters across the political spectrum support restoring funding to Growing Greener.

Support for Restoring Funding to the Growing Greener Program – By Party



Do you support or oppose restoring funding for the Growing Greener Program to previous levels of 200 million dollars annually in order to protect natural areas, water, and wildlife habitat

Reasons to SUPPORT Restoring Funding – Voters

Must Protect Environment
Better Quality of Life
Recreation
Conservation is Just Important
We Only have One Planet
Clean Water is Vital
Tourism/Revenue
Needs to Be a Top Priority
Too Much Pollution
Protect Wildlife
For future Generations

Reasons to **OPPOSE** Restoring Funding – Voters

Last Attempt Failed
Too Much Money
Funds are Mishandled
Everyone Should Contribute
Not Needed

What are the one or two reasons why you (SUPPORT/OPPOSE) restoring funding for conservation efforts in Pennsylvania?

Reasons to SUPPORT Restoring Funding – Sportsmen

Conservation is Important
Clean Water is Vital Better Quality of Life
Must Protect the Environment
Save Wildlife Too Much Pollution Act Now Before it is Too Late
For future Generations
Resources are finite
Tourism/Revenue

Reasons to **OPPOSE** Restoring Funding – Sportsmen

Restricts Private Land Owner's Rights
Funds are Mishandled
Other Issues are More Important
Too Much Money

What are the one or two reasons why you (SUPPORT/OPPOSE) restoring funding for conservation efforts in Pennsylvania?