

Bellwether Research & Consulting

To: The National Wildlife Federation

From: Christine L. Matthews, President
Bellwether Research & Consulting

Date: July 12, 2004

Subject: National Hunter-Angler Survey Results

I am pleased to report the key findings from a national survey of hunters and anglers conducted by Bellwether Research between June 8th and June 20th, 2004. The study has a Sampling Error of $\pm 3.6\%$ at a 95% confidence level.

Survey Methodology

- A total of 752 telephone interviews were completed: Two-thirds (500) with respondents randomly selected from a national list of current fishing license holders and one-third (252) with respondents randomly selected from a national list of current hunting license holders.

The proportion of anglers to hunters corresponds to the 2001 U.S. Fish & Wildlife Service National Survey of Fishing, Hunting, and Wildlife-Associated Recreation. The U.S. Fish & Wildlife Service data, collected every five years by the Census Bureau, is the definitive source of hunting and angling participation.

- All respondents in this study are self-identified registered voters.
- All said hunting or fishing is an “important” part of their lifestyle.

Sample Profile

The sample of hunters and anglers is almost exclusively male, quite conservative, and more Republican than voters at large. One-third of the respondents live in the Midwest, another third are from the South, while 20% are Westerners and 14% are from the Northeast. Their average age is 50, with the majority between the ages of 40 and 59.

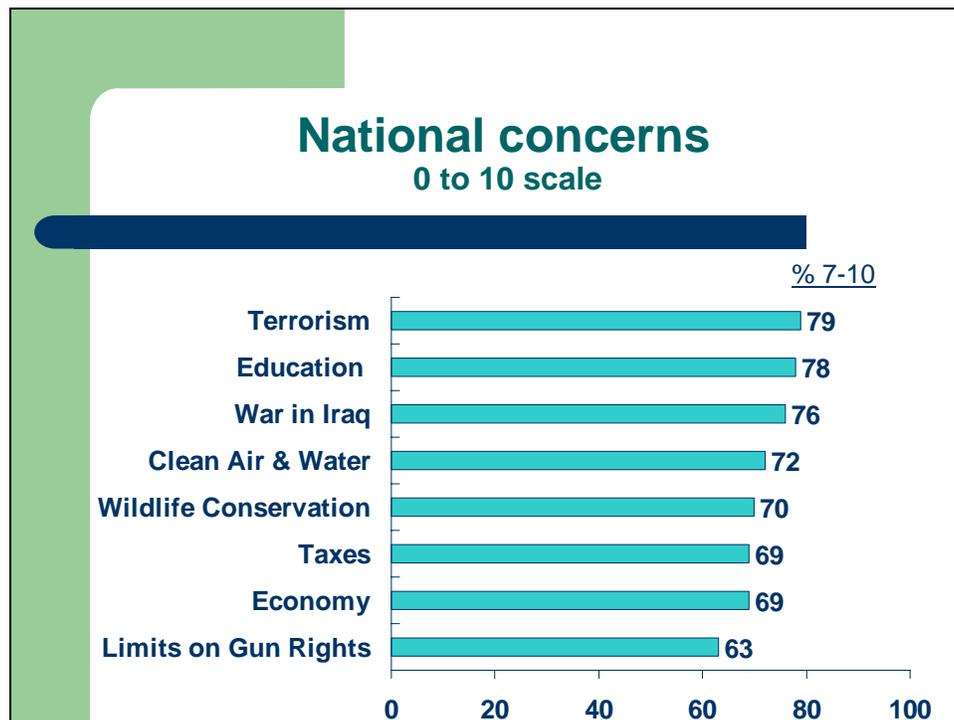
- 91% Male
- 66% Conservative
- 42% Republican
- 35% Independent
- 21% Democrat
- 68% voted for George W. Bush in 2000

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Nearly all (86%) say wildlife and conservation issues will be an important factor in deciding their vote for president in 2004. More than one-third of sportsmen say conservation and wildlife issues will be “very” important to their decision.

Issue Concerns

Terrorism tops the list of *national* concerns for sportsmen, followed closely by education, and then the war in Iraq. Wildlife conservation and clean air and water edge economic issues, followed by limits on gun rights.



Sportsmen rate loss of wildlife habitat across the country, loss of streams and wetlands, and pollution as top *concerns impacting hunting and fishing conditions*. These issues are followed closely by limits on gun rights.

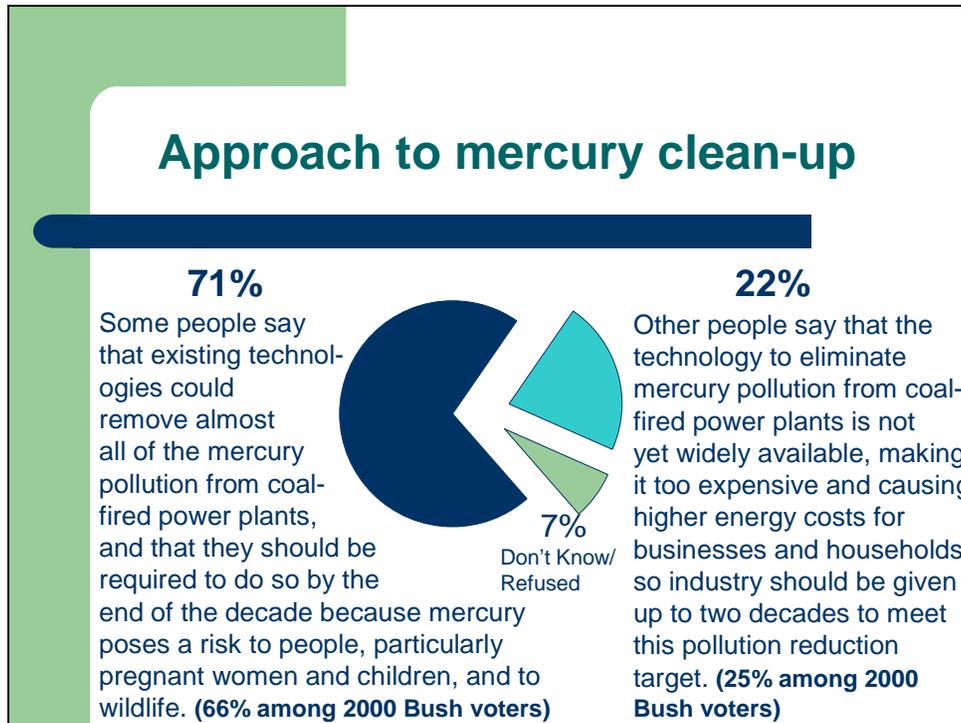
% 7-10 (on a ten point concern scale)

- 71% Loss of wildlife habitat
- 70% Loss of streams and wetlands
- 69% Pollution
- 67% Limits on gun rights

Preferences on Policy Issues

Sportsmen express a consistently strong preference for conservation on a series of more detailed issue questions relating to mercury pollution, energy production, and wetlands.

On mercury clean up, a nearly three-to-one majority say coal fired power plants should clean up mercury within the decade rather than be given two decades, even given cost considerations.

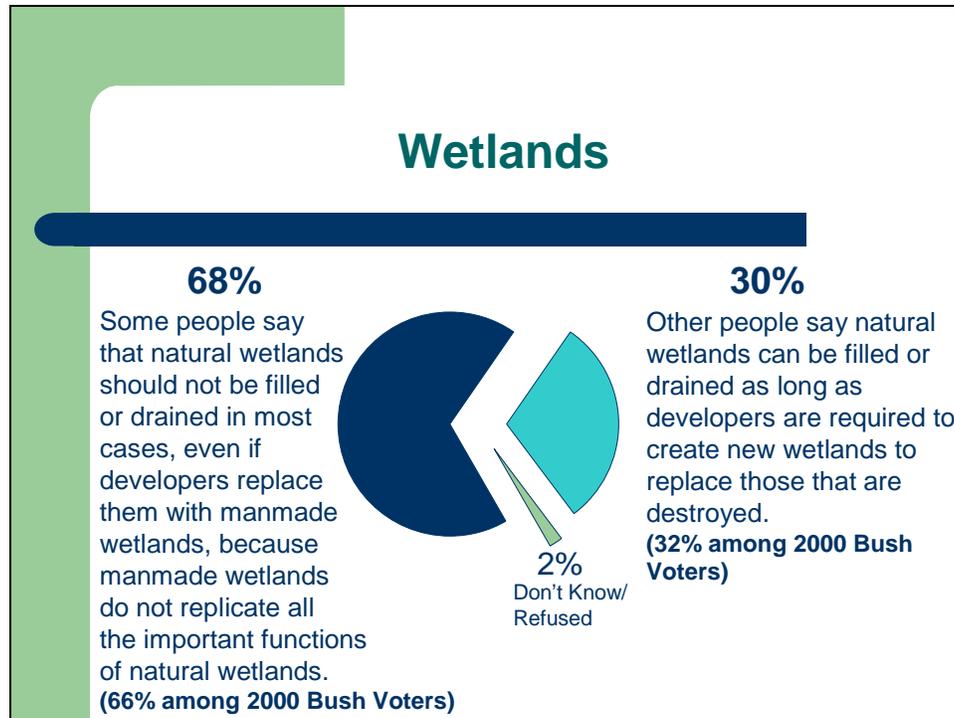


Nearly three-fourths of hunters and anglers prefer alternatives to oil and gas drilling as solutions to America's energy needs. Specifically,

- 42% Rely less on oil and gas and expand development of renewable forms of energy like wind, solar and ethanol.
- 31% Conserve more, waste less, and develop more fuel efficient cars so we use less oil and gas
- 20% Drill for more oil and gas in the U.S., including areas within wildlife refuges and other public lands, to increase our domestic energy supply.

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By more than two to one, sportsmen say that wetlands should be protected in most cases because manmade wetlands cannot replicate natural ones.



Global Warming Issues

Nearly one in three hunters or anglers think global warming is already having an impact on hunting or fishing conditions, and 63% think global warming *is* having or *will have* an impact on conditions in the future.

- 27% Global warming is already beginning to impact hunting and fishing conditions.
- 36% Global warming will impact hunting and fishing conditions in future generations.
- 34% Global warming will have little or no impact on hunting and fishing conditions and concern about it is overblown.

Three-fourths of sportsmen think the United States should reduce greenhouse gas emissions that threaten fish and wildlife habitat and are in agreement that addressing global warming is a high priority.

Global Warming: Reduce Emissions

“The U.S. should reduce its emissions of greenhouse gases like Carbon Dioxide that contribute to global warming and threaten fish and wildlife habitat.”

**75%
Agree**



**21%
Disagree**

4% Don't Know

Global Warming: Support for Renewable Energy

“Addressing global warming is a high priority. We can improve our environment & strengthen the economy by investing in clean, renewable energy technologies that create jobs while reducing greenhouse gas pollution.”

**74%
Agree**



**23%
Disagree**

3% Don't Know

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Bush Administration Policies

Sportsmen think the oil and gas industry has a great deal of influence with the Bush Administration when it comes to matters of conservation or hunting and fishing. However, few think the industry should have so much influence.

“I’m going to read you a list of people or groups that may have a say on conservation or hunting and fishing issues. Please tell me whose opinion you think counts most with the Bush Administration:”

- 49% The oil and gas industry
- 15% Hunters and Anglers
- 8% Conservation Groups
- 8% Scientists
- 7% Developers
- 11% Don’t Know

Nearly six in ten (57%) westerners think the oil and gas industry has the most say with the Administration.

“And thinking about the list I’ve just read, whose opinion do you think SHOULD count most with the Bush Administration on conservation or hunting and fishing issues?”

- 4% The oil and gas industry
- 38% Hunters and Anglers
- 23% Conservation Groups
- 25% Scientists
- 2% Developers
- 8% Don’t Know

And a near majority (47%) of westerners thinks hunters and anglers should have the most say.

Sportsmen strongly support some of the conservation steps taken by the Bush Administration – such as restoring the Everglades and expanding the Forest Legacy and Partners for Fish and Wildlife programs.

Favor

- 87% Expanded the Partners for Fish and Wildlife program that helps private landowners restore fish and wildlife habitat on their property.
- 78% More than doubled funding for the Forest Legacy Program, a partnership among the Forest Service, states, and land trusts that protects and ensures public access to forest areas threatened by development.
- 75% Provided full funding for Florida Everglades restoration, the largest conservation restoration effort in the nation’s history.

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However, hunters and anglers– including those who supported President Bush in the 2000 election – solidly oppose many of the Administration’s conservation policies.

Oppose

- 69% Proposed giving coal-fired power plants flexibility to meet a national goal to reduce mercury pollution even though that may result in higher mercury pollution in many communities.
- 58% Issued new Clean Water Act guidelines that will, by the government’s own estimates, eliminate protections for up to 20 million acres of wetlands.
- 57% Endorsed exemptions to the Clean Water Act and Safe Drinking Water Act for the oil and gas industry in an effort to expedite oil and gas development on public lands, including prime wildlife, hunting, fishing and outdoor recreation areas.

“Bush 2000 voters”

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Conclusion

The nation’s sportsmen place a high priority on conservation issues, considering them important enough to factor into their decision-making process when selecting political leaders. They view loss of habitat, streams, and wetlands as the most significant threat to the quality of hunting and fishing and oppose policies that threaten these important areas.

They support wetlands protections and aggressive action against mercury pollution; they express dissatisfaction with the Bush Administration’s approach to these issues.

Conservation and renewable energy – more than increased oil drilling – are seen as the best solution to the nation’s energy needs. Sportsmen think the oil and gas industry has a great deal of influence with the Bush Administration but say hunters and anglers and conservationists should have more.