



HILL
RESEARCH CONSULTANTS

Texas parks & conservation issues

February 22—24, 2009

Background

- **Methodology**

- Statewide sample of 601 voters
- Interviews conducted February 22–24, 2009
- Margin of error of $\pm 4.0\%$ for 601 cases
- Survey funded and conducted on behalf of the Texas Coalition for Conservation, a non-partisan organization that advocates on behalf of state parks, outdoor-recreation, and wildlife conservation issues (www.texascoa.org)

- **Contributors**

- Dr. David B. Hill, Director, Hill Research Consultants
- Dr. Stephen H. White, Assistant Director
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Key findings

part 1 of 2

- The public is discouraged & anxious about the political and economic environments. Advocacy in this context must be solidly “pro-change,” promising to move away from the status quo, yet not so bold as to suggest “risky” or “dangerous” change. Change back to the “good ole days,” before current setbacks, is the ideal.
- There is broad & intense sentiment—transcending all partisan & geographic lines—that conservation is a core Texas value
- You can’t go wrong with any issue related to “water”—even those most hostile to your agenda concede it is an absolutely vital priority
- Beyond your core base of support, general public gives strong backing to maintaining a high quality park system... but diminishes in certainty on whether such should involve additional expenditures to create new parks

Key findings

part 2 of 2

- **Funding parks & conservation via a sales tax on outdoor sporting goods makes intuitive sense to the public; wide support exists for devoting all such revenues to that purpose; there is strong opposition to diversion to other government programs**
- **Support for higher hunting/fishing fees, while limited at first, quickly gains momentum once voters are informed of how long it has been since rates have been increased, and especially that what is being considered falls under \$5 per licensee.**

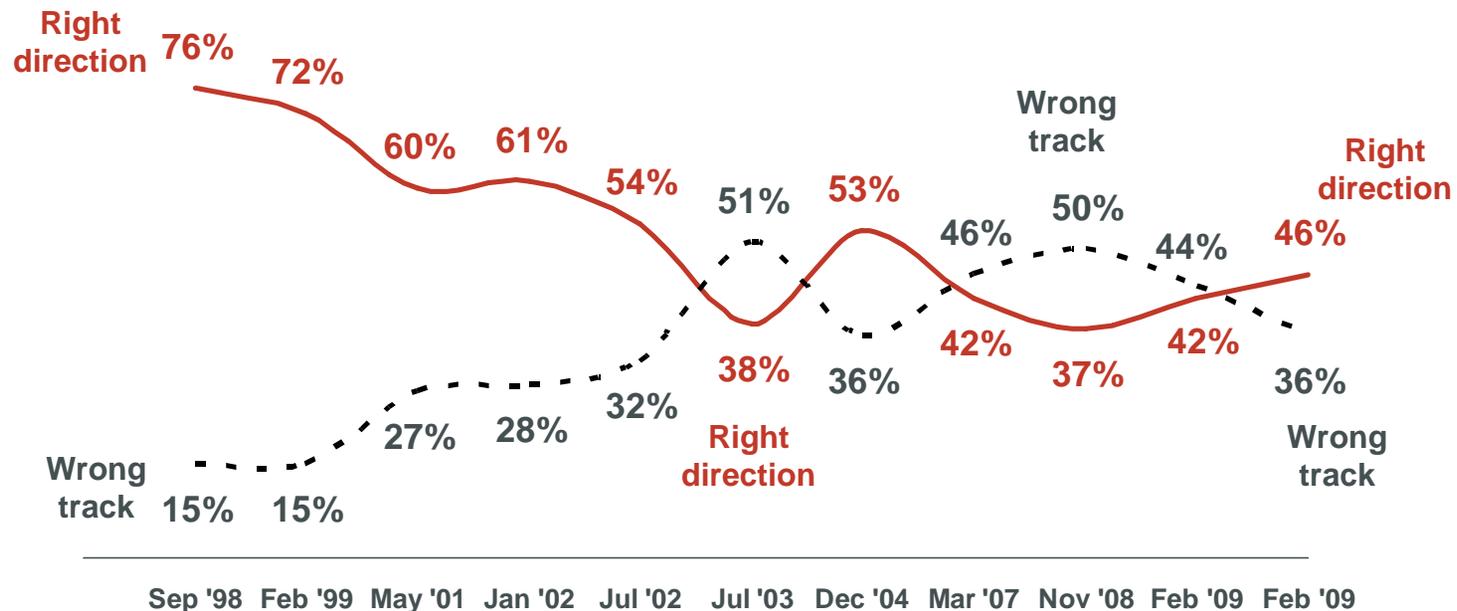
State of the state

time series

- In contrast to historically optimistic assessments, the Texas electorate remains relatively muddled and anxious in mood

State of the state

"Do you feel things in your part of Texas are going in the right direction these days, or do you feel things have pretty seriously gotten off on the wrong track?"

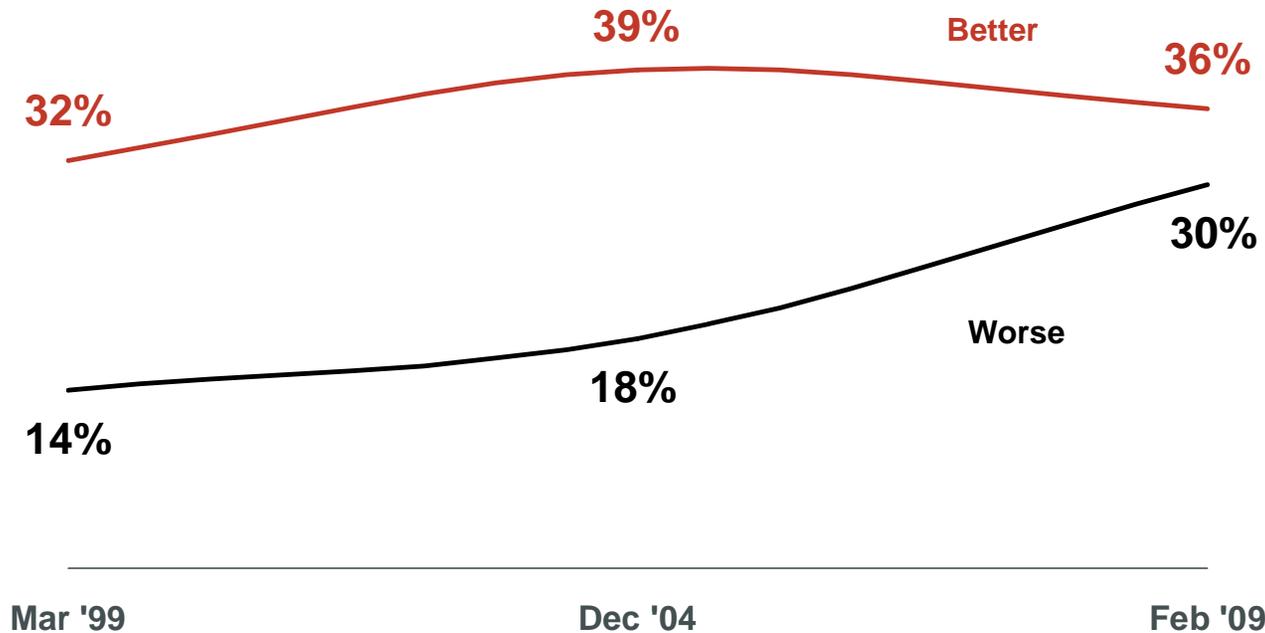


Economic expectations

time series

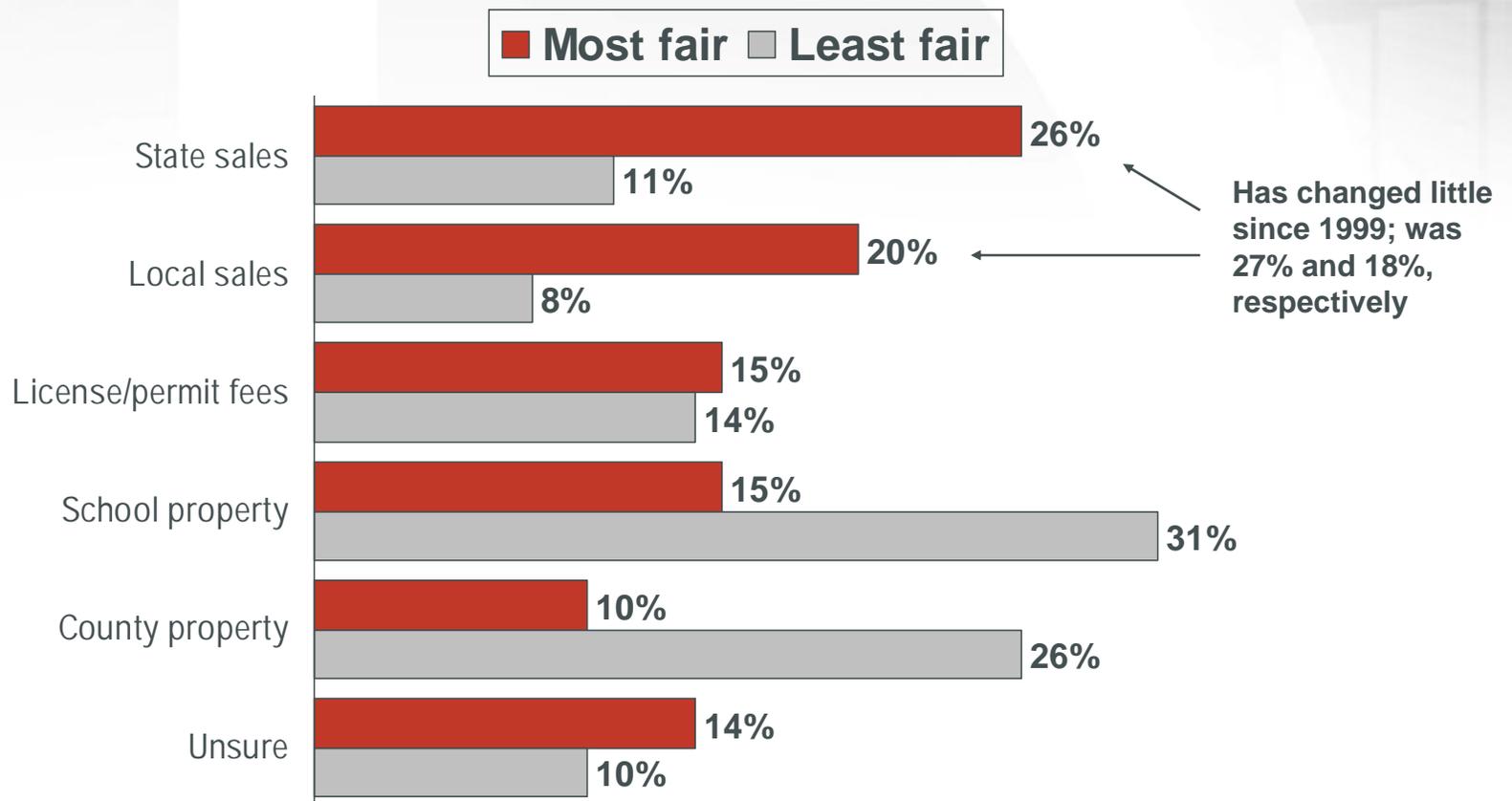
- Fraction of the public concerned they will be “worse off” economically next year compared to today stands at a decade-long high of 30%

Economic expectations
“Thinking about the economic situation in your part of Texas one year from now, do you think your local economy will get better, get worse, or stay the same one year from now?”



Most & least fair taxes

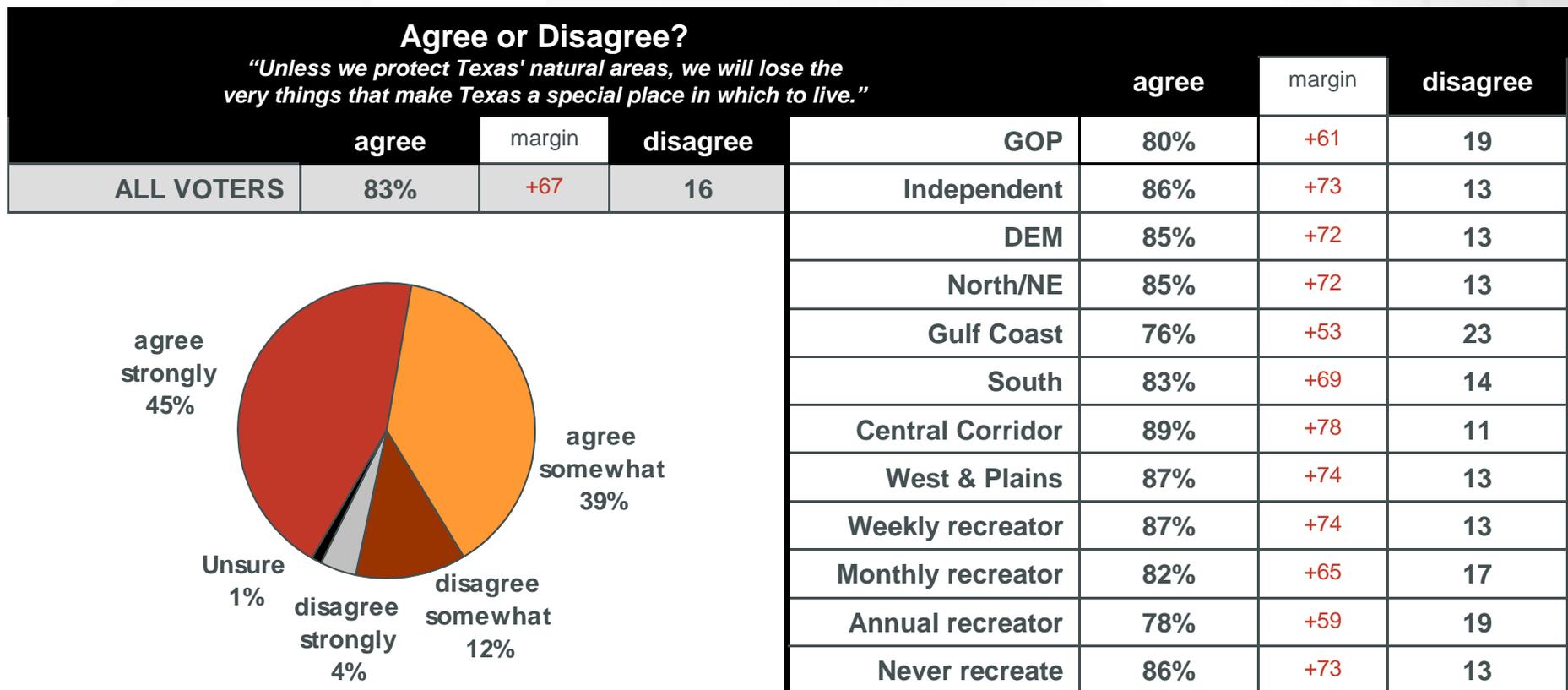
- The public continues to see the sales tax as the “most fair” source of revenue.



Valuing Conservation

part 1 of 3

- Broad and strong agreement that conservation of Texas' natural areas is a core Lone Star value

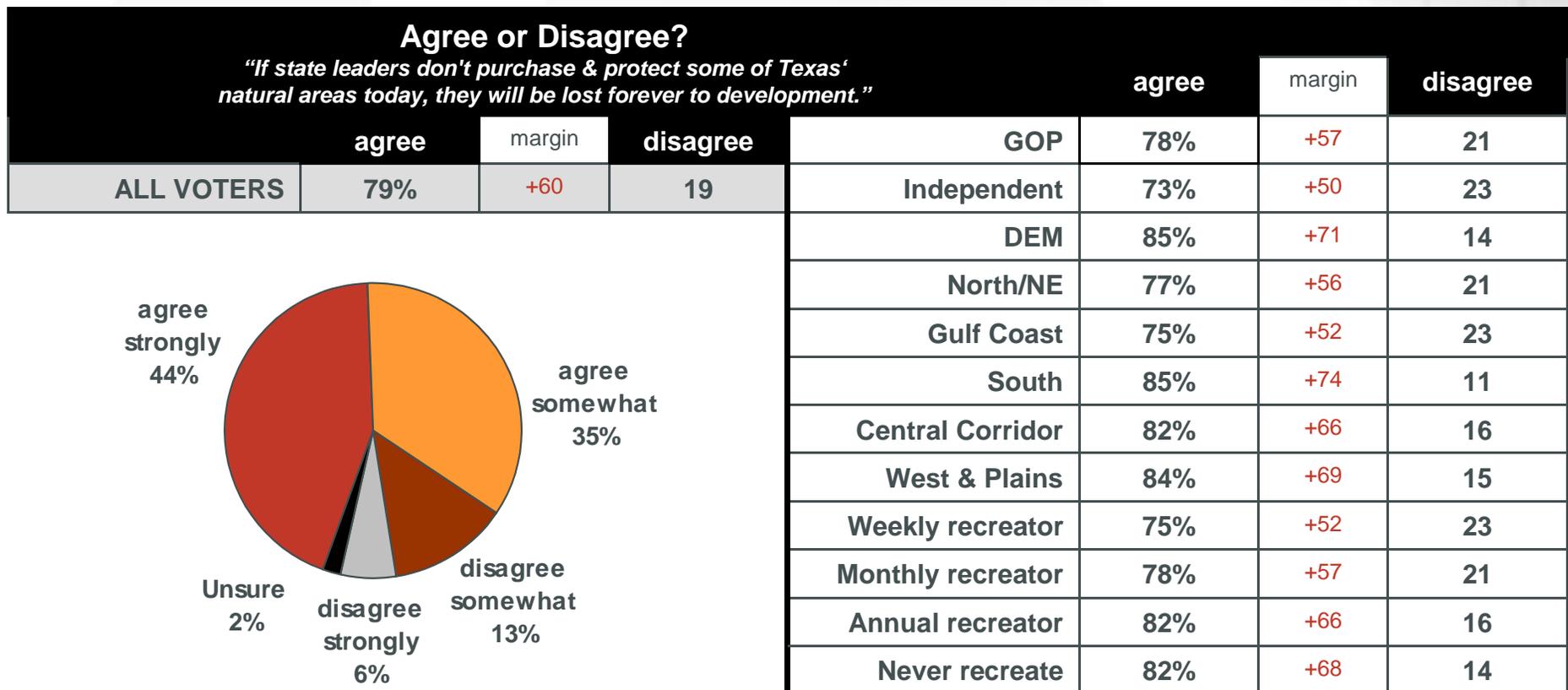


Numbers may not add up to 100% due to rounding and/or respondents answering "unsure."

Valuing Conservation

part 2 of 3

- Concern over the threat development poses to natural areas is widespread as well



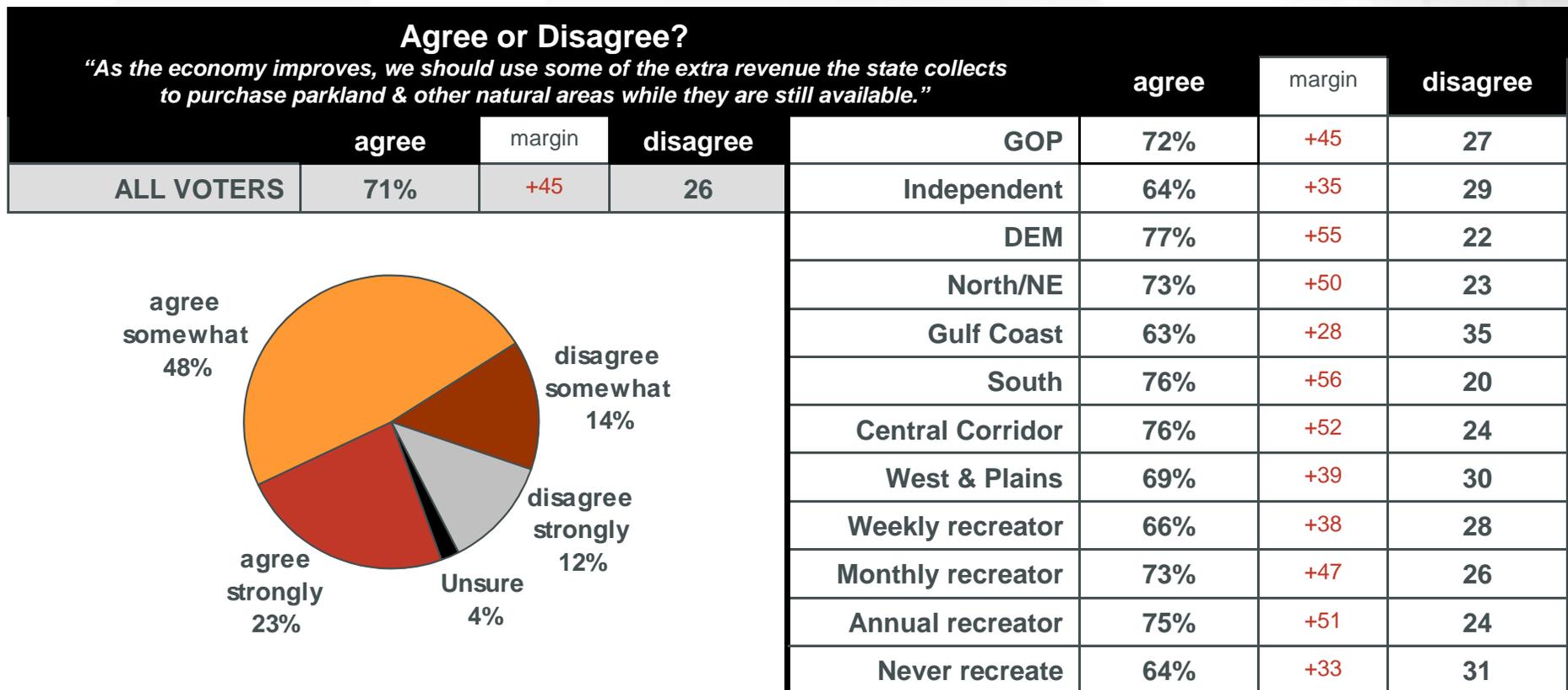
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Valuing Conservation

part 3 of 3

- These larger sentiments translate into general—but not as intense—support for potential conservation purchases once the economy improves



Numbers may not add up to 100% due to rounding and/or respondents answering “unsure.”



Up-Close: Economy & parks funding

- Support for additional parks funding as economy improves is found regardless of current or expected financial position

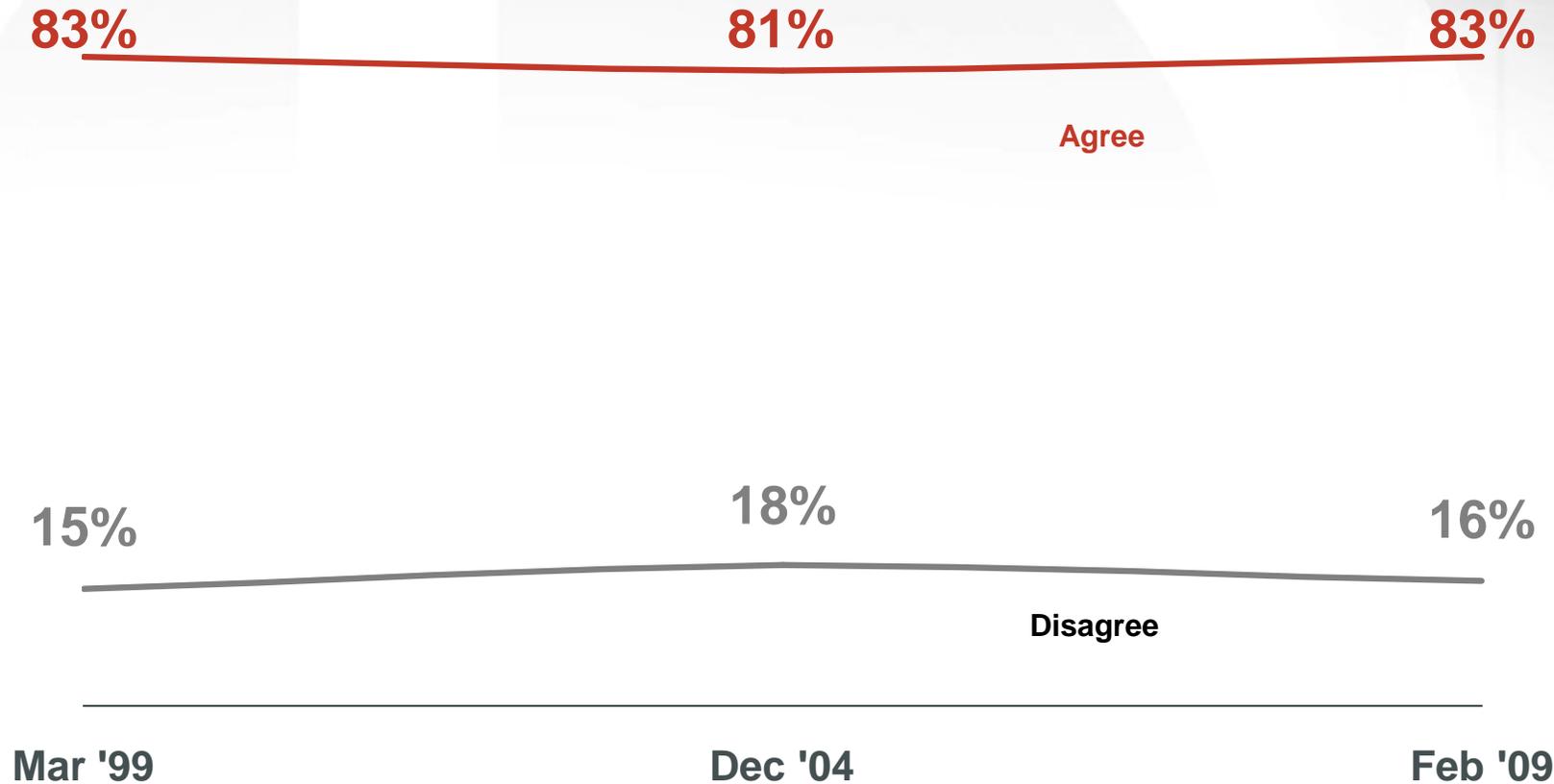
Agree or Disagree?			
<i>“As the economy improves, we should use some of the extra revenue the state collects to purchase parkland & other natural areas while they are still available.”</i>			
	agree	margin	disagree
Currently doing better than ever economically	69%	+42	27
Living comfortably right now	80%	+62	18
Barely getting by in current economy	82%	+65	17
Expect economy year from now to get <u>better</u>	74%	+50	24
Expect economy year from now to <u>stay same</u>	72%	+47	25
Expect economy year from now to get <u>worse</u>	67%	+32	32

Numbers may not add up to 100% due to rounding and/or respondents answering “unsure.”

Valuing conservation

time series

“Unless we protect Texas' natural areas, we will lose the very things that make Texas a special place in which to live”



Valuing conservation

time series

“If state leaders don’t purchase & protect some of Texas’ natural areas today, they will be lost forever to development”

76%

77%

79%

Agree

22%

20%

19%

Disagree

Mar '99

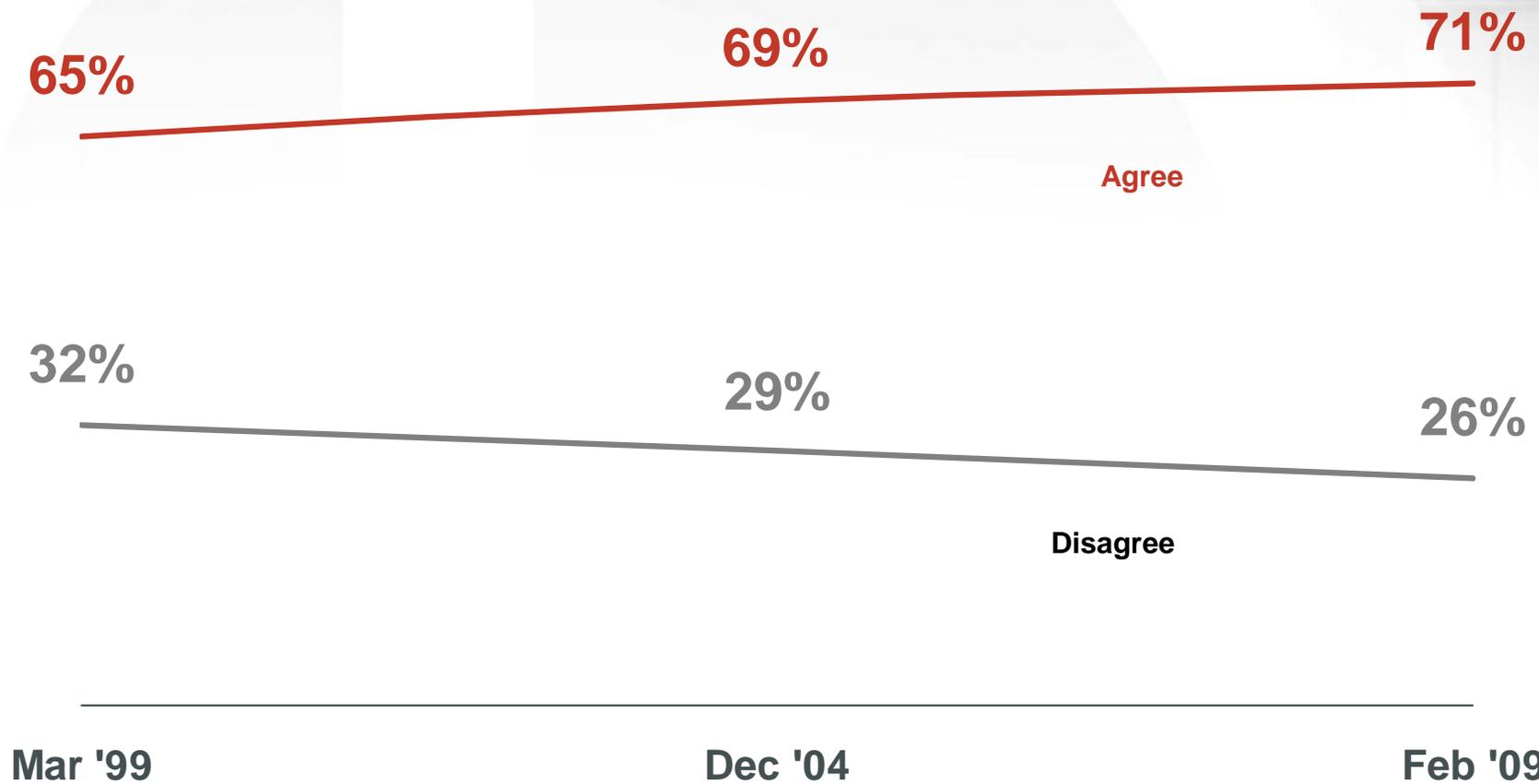
Dec '04

Feb '09

Valuing conservation

time series

“As the economy improves, we should use some of the extra revenue the state collects to purchase parkland & other natural areas while they are still available”



Priority of issues

- Since first measured in March '99, hierarchy of priorities has remained consistent
 - After public education, you can't beat "water"—safeguarding, conserving and protecting it
 - Additional parks creation is a relatively modest priority

Priority of issues					
	extremely	very	margin	somewhat	not very
Improving public schools	36%	52	+78	7	3
Safeguarding drinking water	35%	54	+78	9	2
Conserving land & water	25%	54	+58	17	4
Protecting Texas' creeks, rivers & lakes	19%	52	+43	24	4
Reducing traffic & highway congestion	16%	45	+23	32	6
Protecting the habitat of native Texas wildlife	13%	40	+6	35	12
Increasing the number of neighborhood parks	5%	17	-54	43	33
Creating new state parks	5%	17	-55	46	31

Priority of issues

time series

Extremely + very high priority of issues			
	March '99	December '04	February '09
Improving public schools	91%	91%	90%
Safeguarding drinking water	85%	96%	89%
Conserving land & water	74%	74%	79%
Protecting Texas' creeks, rivers & lakes	72%	72%	71%
Reducing traffic & highway congestion	67%	73%	71%
Protecting the habitat of native Texas wildlife	52%	55%	53%
Increasing the number of neighborhood parks	30%	22%	22%
Creating new state parks	Not asked	21%	22%

Primary goals & objectives

- Again, water-related concerns rise to the top
- Strong sentiments also expressed for protecting undisturbed areas from development, for the benefit of future generations

Position on parks & conservation goals or objectives

	STRONGLY support	SOMEWHAT support	DON'T support
Protect land over our aquifers & around rivers, lakes, & streams to protect the quality of our drinking water	79%	19	2
Conserve water usage to leave for future generations enough pristine flowing rivers to insure we have healthy bays, estuaries, waterfowl habitat, & coastal economies	71%	24	4
Protect/preserve diversity of our natural areas (vistas, plains, streams, lakes, wildlife habitats, prairies, coastal wetlands) for enjoyment of present & future generations	50%	40	7
Preserve land & other key natural areas near lakes & rivers before they are sold to someone else & developed	48%	36	14

Primary goals & objectives

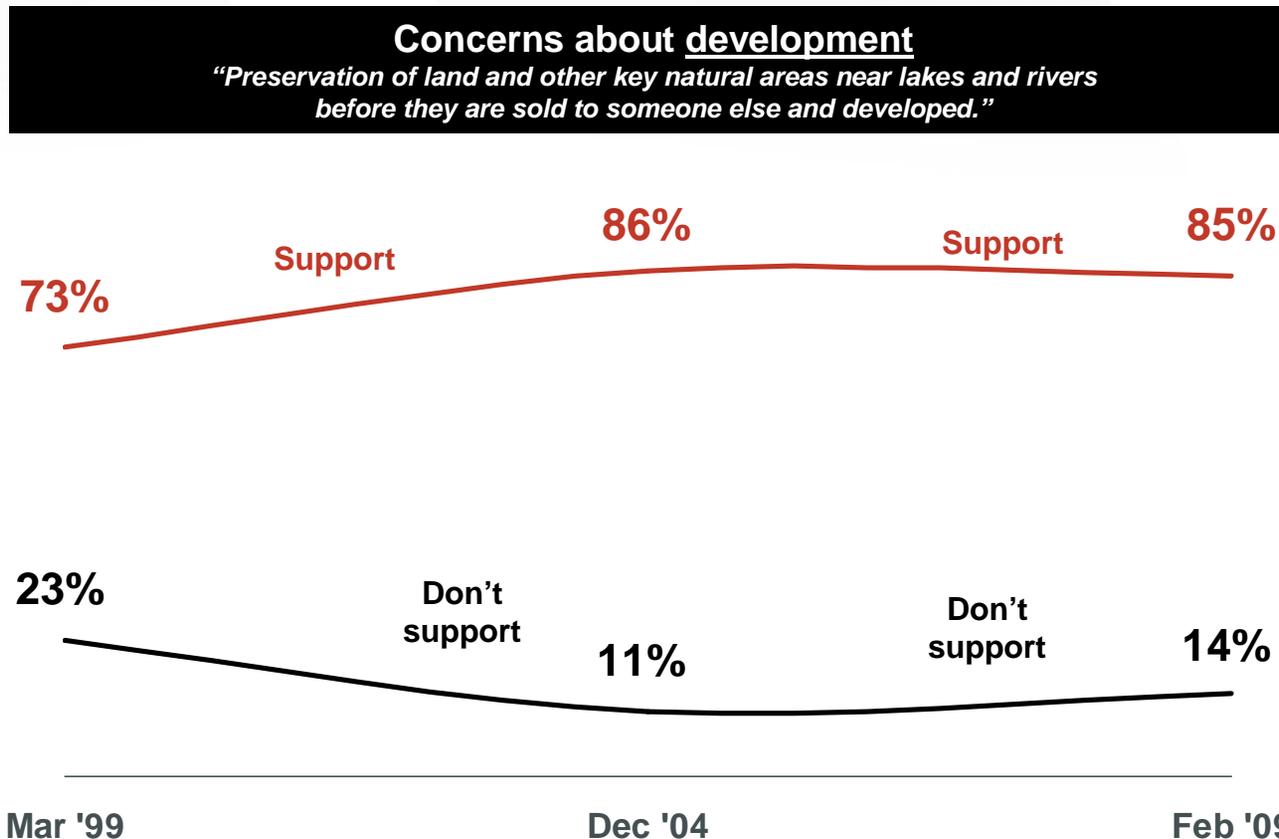
time series

	March '99	December '04	February '09
Protect land over our aquifers & around rivers, lakes, & streams to protect the quality of our drinking water	Not asked	95%	97%
Conserve water usage to leave for future generations enough pristine flowing rivers to insure we have healthy bays, estuaries, waterfowl habitat, & coastal economies	Not asked	95%	95%
Protect/preserve diversity of our natural areas (vistas, plains, streams, lakes, wildlife habitats, prairies, coastal wetlands) for enjoyment of present & future generations	Not asked	89%	90%
Preserve land & other key natural areas near lakes & rivers before they are sold to someone else & developed	73%	86%	85%

Up-Close: Concerns about development

time series

- Since first measured in March '99, support for land preservation--to counter creeping development--has increased and remained a significantly higher priority



Secondary goals & objectives

- One thing to protect & preserve; another entirely to create and build
- While significant support for these projects exists as well, there is an obvious diminishment in intensity—at this point, likely reflecting larger economic anxieties

<u>Position</u> on parks & conservation goals or objectives			
	STRONGLY support	SOMEWHAT support	DON'T support
Develop hiking & walking trails, campgrounds, & other outdoor recreational areas that serve Texans	36%	50	13
Provide natural areas & undeveloped sections of public land throughout our urban & suburban areas, to ease the effects of crowded development	34%	50	14
Create more local neighborhood parks	23%	49	26
Create at least four state parks of five-thousand acres each, or larger, near to Texas' metropolitan areas	22%	48	29

Secondary goals & objectives

time series

	March '99	December '04	February '09
Develop hiking & walking trails, campgrounds & other outdoor recreational areas that serve Texans	87%	81%	86%
Provide natural areas & undeveloped sections of public land throughout our urban & suburban areas, to ease the effects of crowded development	Not asked	81%	84%
Create more neighborhood parks	82%	73%	73%
Create at least four state parks of five thousand acres each, or larger, near to Texas' metropolitan areas	Not asked	70%	69%

Sporting goods tax

ballot tests

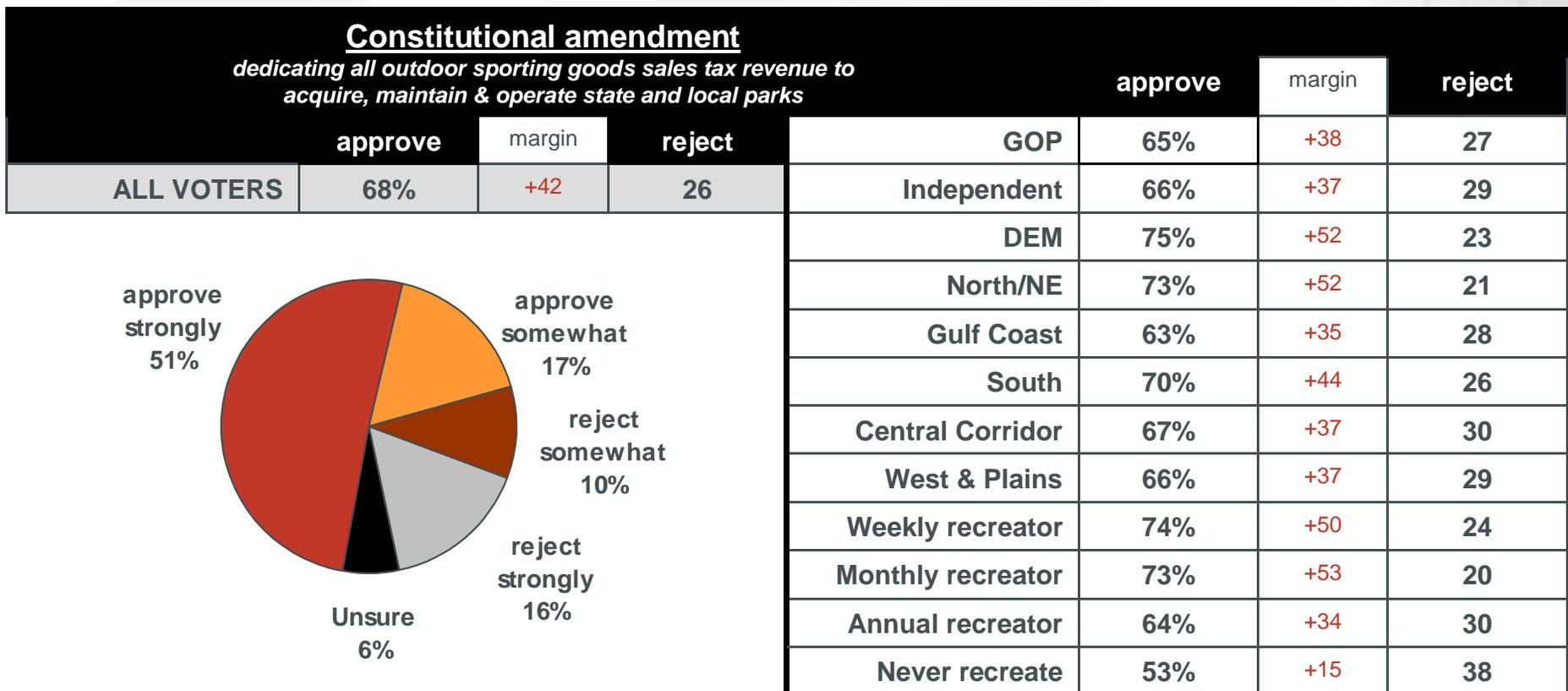
- It strikes the public as intuitive & reasonable to fund parks with sales tax on outdoor sporting goods
- Strong support for dedicating all “SGT” revenue for parks funding; intense pushback against diverting revenue to other purposes

Sporting goods tax <u>ballot tests</u>					
<i>approve or disapprove</i>					
	strongly	Yes, approve	margin	No, disapprove	strongly
<u>GENERAL USE</u> of tax revenue generated by sale of outdoor sporting goods to acquire, maintain & operate state and local parks	35	74%	+51	23	14
<u>DEDICATE ALL</u> tax revenue generated by sale of outdoor sporting goods to acquire, maintain & operate state and local parks	54	75%	+55	20	11
Use sporting goods tax revenue to <u>ACQUIRE ADDITIONAL</u> land for public hunting, fishing, birding, camping, hiking, kayaking, canoeing	46	76%	+55	21	13
Use sporting goods tax revenue to pay for other government programs with <u>LITTLE OR NO CONNECTION</u> to parks or wildlife programs	8	23%	-50	73	55
<u>CONSTITUTIONAL AMENDMENT</u> dedicating all outdoor sporting goods sales tax revenue to acquire, maintain & operate state and local parks	51	68%	+42	26	16

Up-Close: Sporting goods tax amendment

ballot test

- Support for an actual constitutional amendment locking in SGT revenue for parks is broadly-held across partisan & geographic lines; even “non-recreators” back slightly

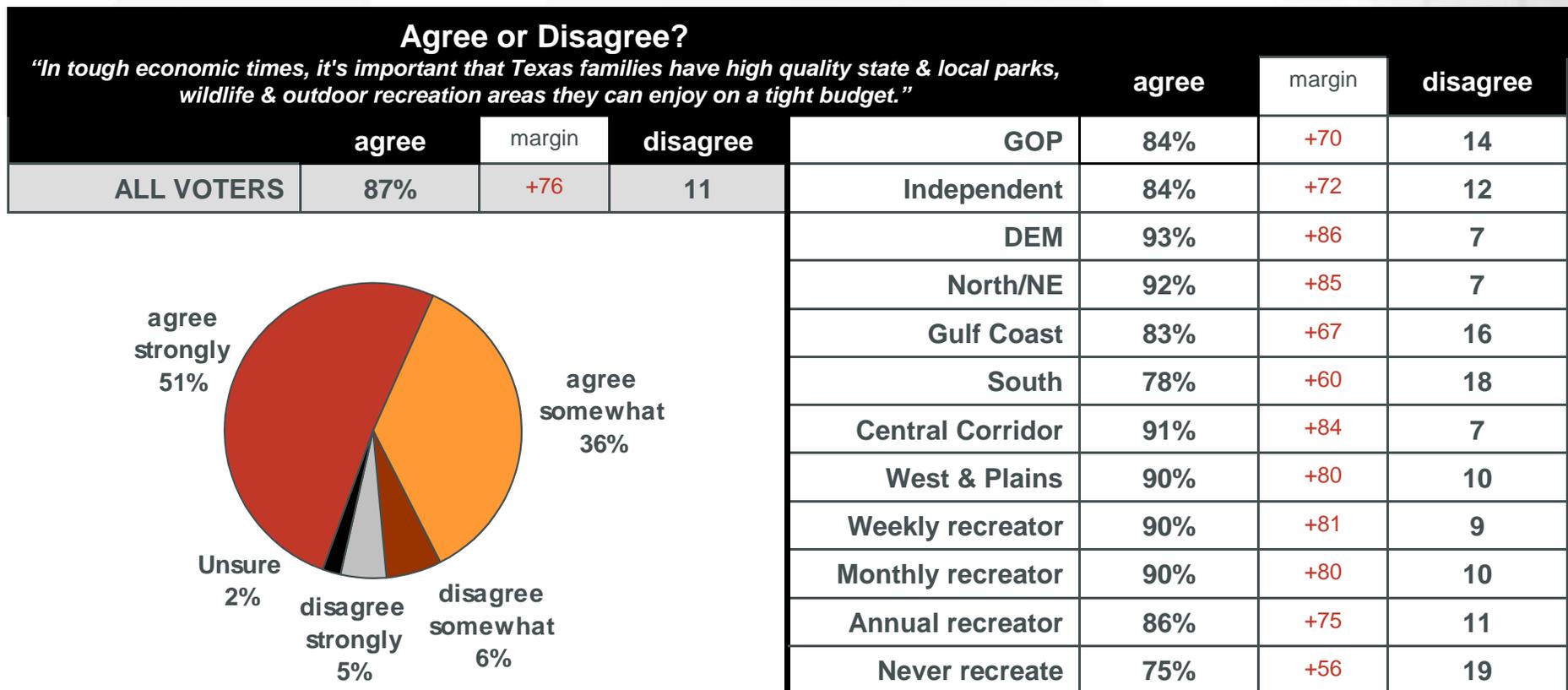


Numbers may not add up to 100% due to rounding and/or respondents answering “unsure.”

Support for funding parks

part 1 of 2

- A high quality park system is deeply valued among nearly all Texans—even those that don't regularly recreate outdoors



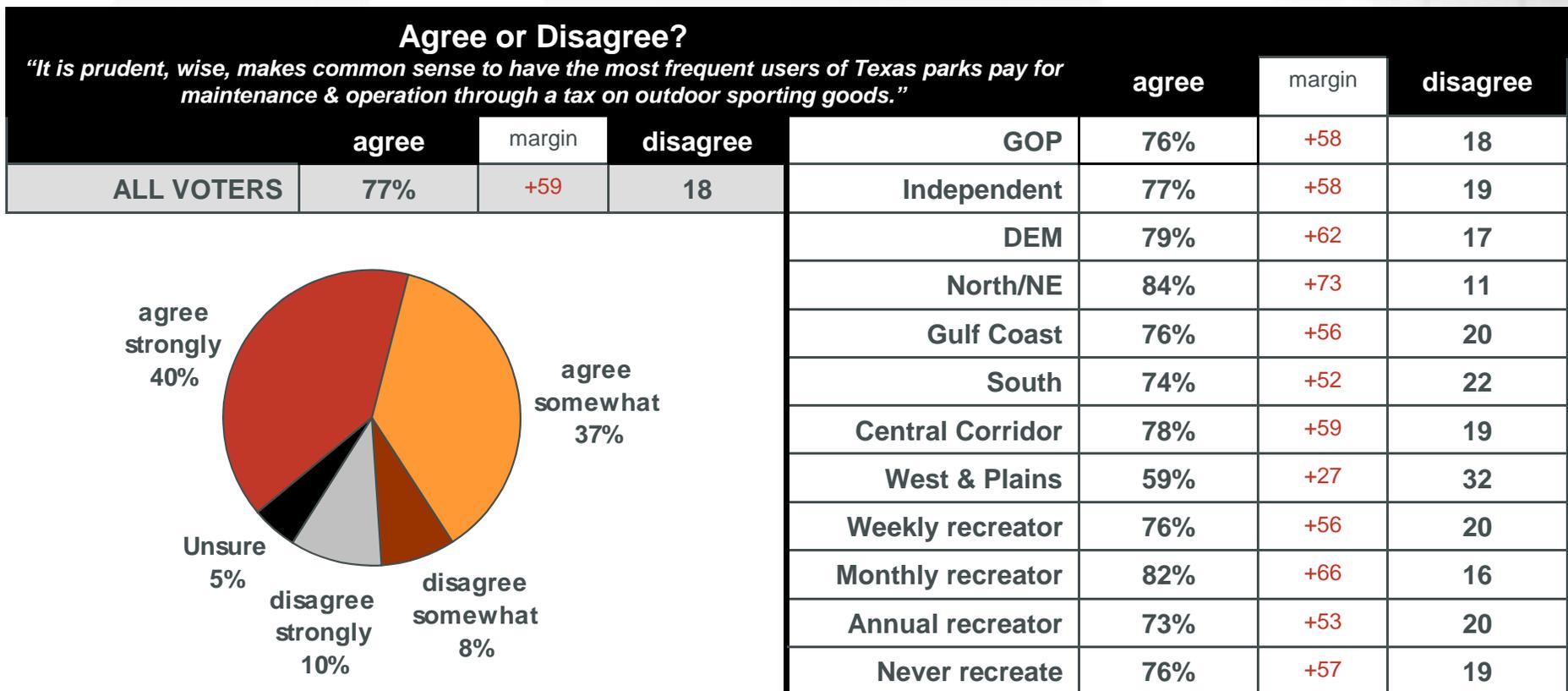
Numbers may not add up to 100% due to rounding and/or respondents answering "unsure."



Support for funding parks

part 2 of 2

- Asked explicitly, the logic of tying parks funding to an outdoor sporting goods tax is endorsed almost universally



Numbers may not add up to 100% due to rounding and/or respondents answering "unsure."



Increasing licenses & fees

ballot tests

- Despite larger economic anxieties, general support for an increase in hunting & fishing fees out-paces opposition almost 2:1
- Backing increases as the public is informed of the lack of any such increase in last half-decade, as well as relatively minor amount of hike being contemplated

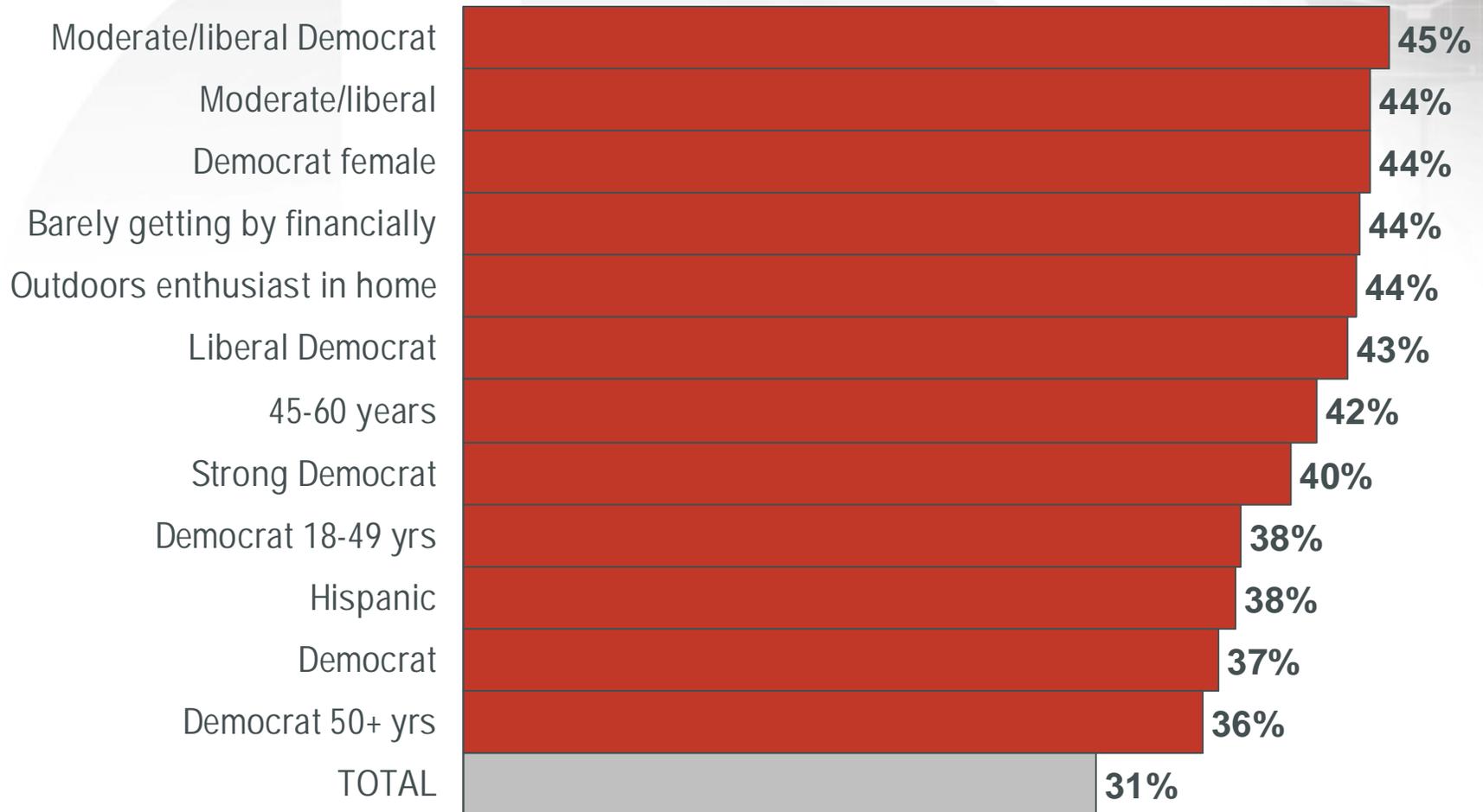
Approve or disapprove...?					
	strongly	Yes, approve	margin	No, disapprove	strongly
<u>GENERAL</u> increase of hunting & fishing fees to fund fish & wildlife conservation programs	35	59%	+25	34	22
Support for higher hunting & fishing fees for fish & wildlife conservation programs after being told there has been <u>NO INCREASE IN 5 YEARS</u>	39	63%	+31	32	23
Support for higher hunting & fishing fees for fish & wildlife conservation programs after being told any increase would be <u>UNDER \$5</u>	52	72%	+47	25	18

Segmenting the electorate

- **Using attitudinal scale, voters divided into four segments**
 - **“Hard Base”**
 - 31% of overall electorate
 - Your most consistent and intense supporters
 - Skews Democratic, female, older, liberal or moderate in ideology
 - **“Soft Supporters”**
 - 36% of overall electorate
 - Still broadly supportive of conservation/parks agenda, but not nearly as intensely
 - Skews Democratic, younger; GOP women make notable appearance
 - **“Friendly Middle”**
 - 18% of overall electorate
 - Favorably disposed, but not yet significantly on-board
 - Skews Republican or Independent male;
 - **“Hostile Opponents”**
 - 16% of overall electorate
 - Should be written-off as unreachable
 - Consists of intensely conservative, older Republican men

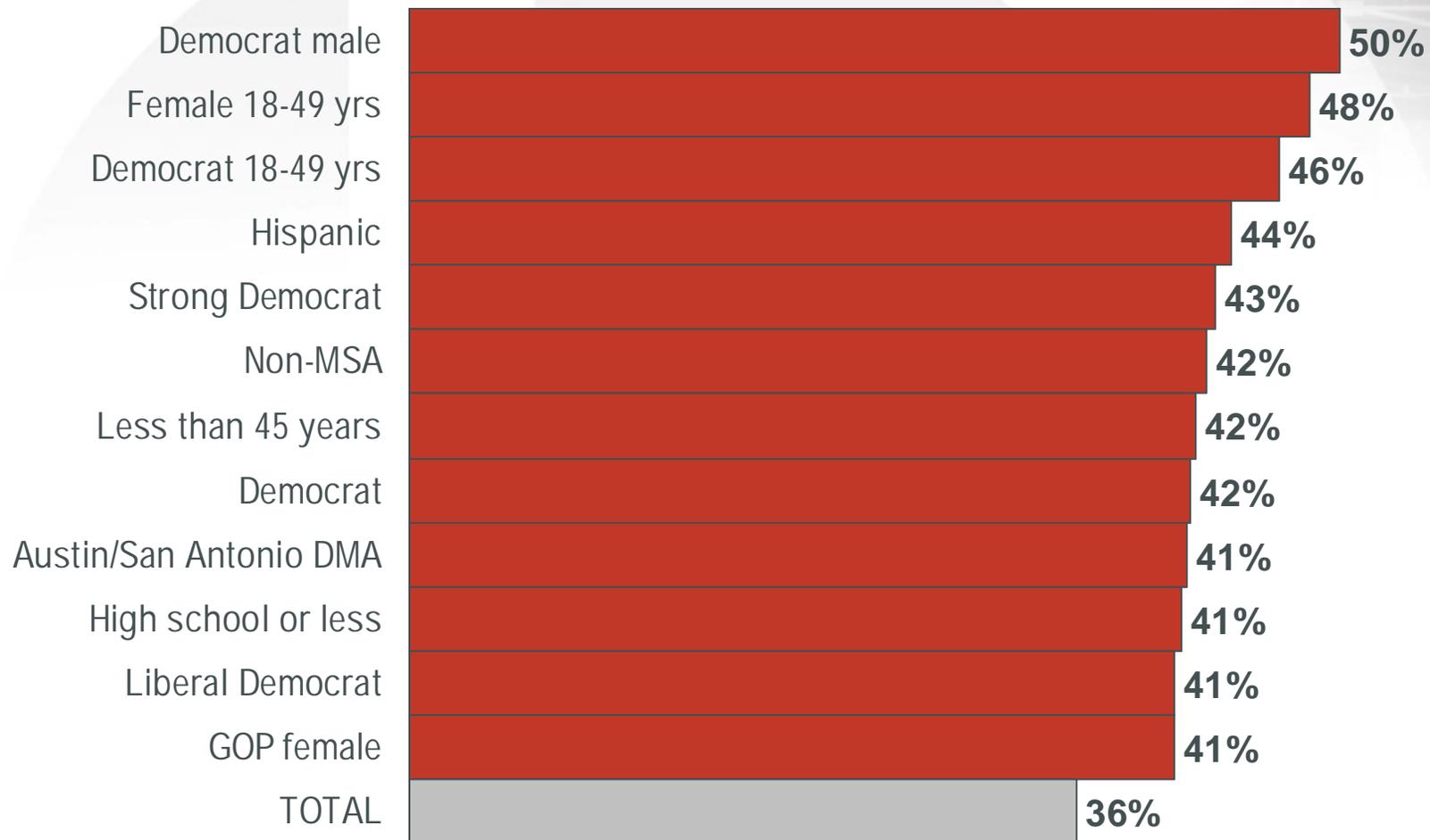
Hard Base profile

select categories w/above-average likelihood of being intensely supportive of conservation/parks agenda



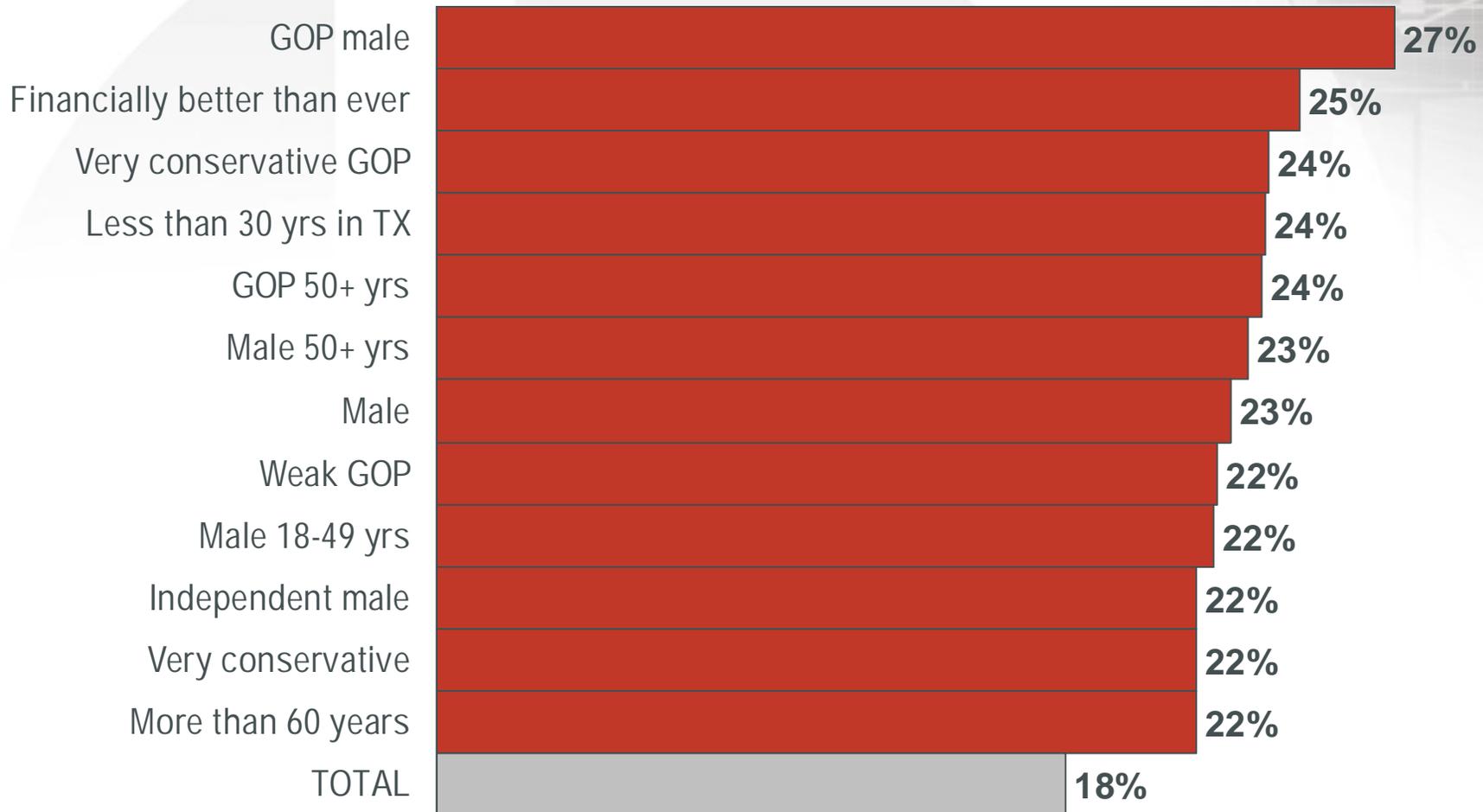
Soft Supporters profile

select categories w/above-average likelihood of being broadly (but less intensely) supportive of agenda



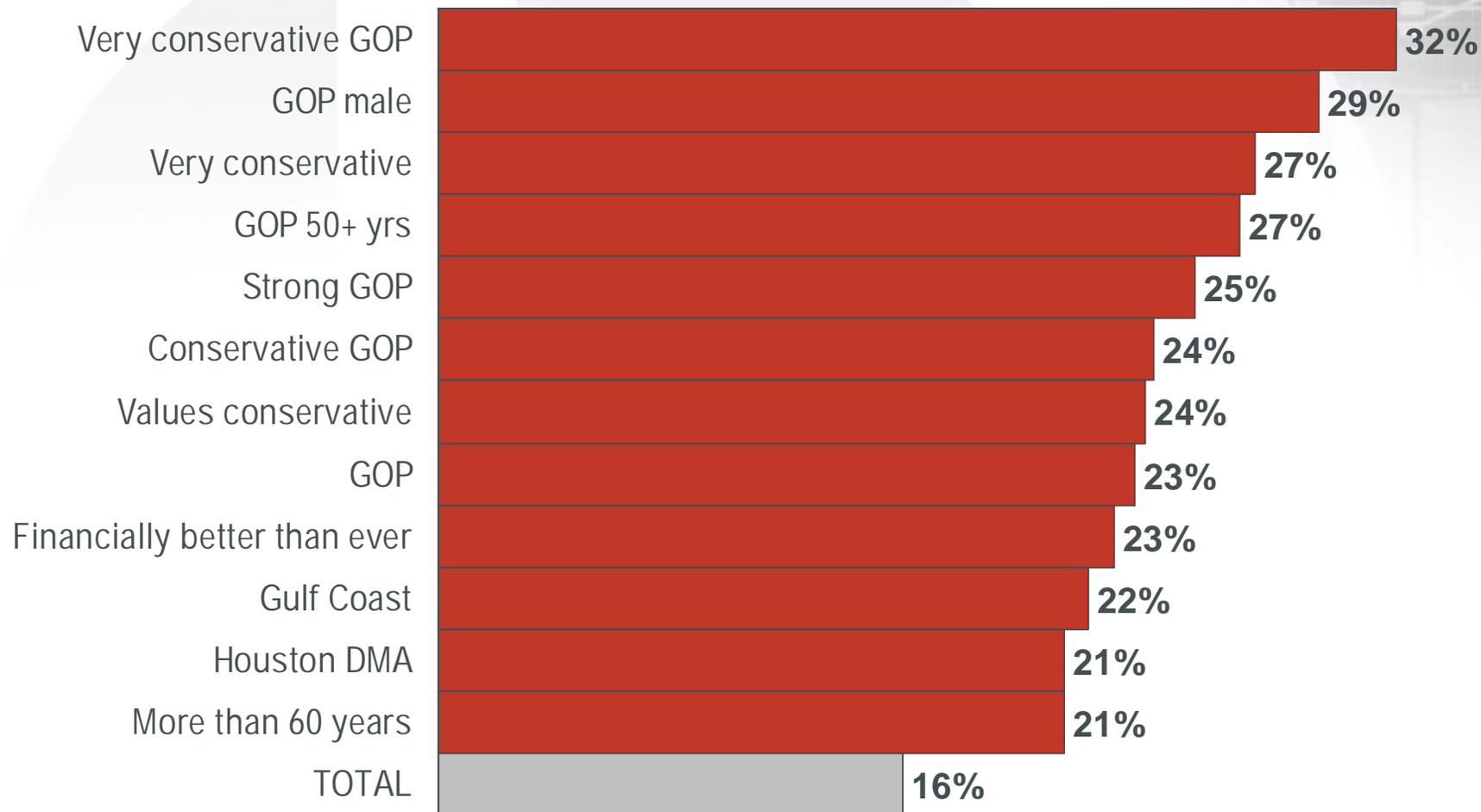
Friendly Middle profile

select categories w/above-average likelihood of being favorably disposed, but not yet fully on-board agenda



Hostile Opponents profile

select categories w/above-average likelihood of being actively & intensely opposed to conservation/parks agenda



Valuing Conservation by segmentation

	Hard Base 31%	Soft Supporters 36%	Friendly Middle 18%	Hostile Opponents 16%	Key Insights
Unless we protect Texas' natural areas, we will lose the very things that make Texas a special place in which to live	97% agree (73% strongly) vs. 3% disagree	87% agree (45% strongly) vs. 11% disagree	75% agree (20% strongly) vs. 25% disagree	56% agree (43% somewhat) vs. 40% disagree	The one sentiment even Hostile Opponents can, on balance, agree with.
If state leaders don't purchase & protect some of Texas' natural areas today, they will be lost forever to development	95% agree (75% strongly) vs. 5% disagree	87% agree (43% strongly) vs. 12% disagree	65% agree (26% strongly) vs. 30% disagree	47% agree (37% somewhat) vs. 50% disagree	Note familiar pattern—while “Friendly Middle” and “Soft Supporters” often agree with your “Hard Base,” intensity levels (percentage that agree “strongly”) quickly decline.
As economy improves, we should use some of the extra revenue state collects to purchase parkland & other natural areas while still available	93% agree (50% strongly) vs. 4% disagree	81% agree (17% strongly) vs. 18% disagree	53% agree (6% strongly) vs. 42% disagree (9% strongly)	72% DISAGREE (45% strongly)	Hostile Opponents live in an alternate reality to all others when considering additional expenditures.
Key Insights	<p>See particularly how Friendly Middle broadly shares the first two sentiments with Hard Base and Soft Supporters, but only narrowly endorses additional state spending to create new parks.</p> <p>Beyond the Hard Base, general (and real) support for parks/conservation in theory bumps up against the concrete reality of paying for such expenditures.</p>				

Priority by segmentation

	Hard Base 31%	Soft Supporters 36%	Friendly Middle 18%	Hostile Opponents 16%	Key Insights
Safeguard drinking water	50% extremely 42% very	34% extremely 59% very	26% extremely 58% very	16% extremely 59% very	<p>You can never go wrong with “water”—guarding, conserving or protecting it.</p> <p>Note that water is the one issue even Hostile Opponents will acknowledge as a high priority</p> <p><u>Intense</u> support for <u>additional</u> local or state parks only expressed among Hard Base; Soft Supporters & Friendly Middle are more sentimental, less concrete in backing.</p>
Conserve land & water	46% extremely 50% very	22% extremely 65% very	11% extremely 53% very	6% extremely 37% very	
Protect creeks, rivers, lakes	39% extremely 53% very	12% extremely 67% very	9% extremely 49% very	7% extremely 19% very	
Wildlife, native habitat protect	32% extremely 53% very	7% extremely 48% very	20% very 64% somewhat	46% NOT very 34% somewhat	
Create new state parks	10% extremely 33% very	4% extremely 17% very	1% extremely 5% very	74% NOT very 0% extremely	
Increase local parks	7% extremely 31% very	49% somewhat 26% NOT very	43% somewhat 45% NOT very	86% NOT very 0% extremely	
Key Insights	Support for additional local or state parks even drops in intensity even among the Hard Base.				

Goals & objectives by segmentation

	Hard Base 31%	Soft Supporters 36%	Friendly Middle 18%	Hostile Opponents 16%	Key Insights
Protect quality of our drinking water	100% support (97% strongly)	99% support (87% strongly)	98% support (64% strongly)	87% support (39% strongly)	<p>Measured differently, the results come out the same—</p> <p>(a.) Broad support, even among Hostile Opponents, for any issue touching upon “water.”</p> <p>(b.) Support for additional parks retaining intensity only among Hard Base, dispersing into more general backing among the rest of the public.</p>
Conserve water usage for future generations	99% support (94% strongly)	100% support (77% strongly)	95% support (53% strongly)	74% support (31% strongly)	
Protect diversity of natural areas for future generations	100% support (88% strongly)	96% support (55% strongly)	92% support (15% strongly)	56% support (7% strongly)	
Preserve land near lakes & rivers before sold/developed	99% support (80% strongly)	92% support (52% strongly)	74% support (18% strongly)	51% support (11% strongly)	
Develop hiking & walking trails, campgrounds	100% support (63% strongly)	95% support (37% strongly)	87% support (15% strongly)	63% oppose	
Urban & suburban parks to ease effects of development	92% support (63% strongly)	93% support (31% strongly)	82% support (15% strongly)	53% oppose	
Create more local neighborhood parks	93% support (43% strongly)	80% support (22% strongly)	60% support 37% oppose	68% oppose	
Create four 5k-acre parks near to major metro areas	94% support (47% strongly)	80% support (18%) strongly)	50% support (5% strongly)	82% oppose	

Sporting Goods Tax by segmentation

	Hard Base 31%	Soft Supporters 36%	Friendly Middle 18%	Hostile Opponents 16%	Key Insights
<u>GENERAL USE</u> to acquire, maintain & operate state and local parks	91% approve (62% strongly)	74% approve (29% strongly)	71% approve (23% strongly)	45% approve vs. 54% disapprove (39% strongly)	All but the most hostile of opponents approve conceptually of using sporting goods tax revenues to fund parks, even all such revenues. Note again that support for <u>additional</u> parks is uniquely intense among Hard Base, more general elsewhere. All can agree in opposition to diverting SGT revenues to purposes unrelated to parks and conservation. Backing strong among base and supporters, but sale would still need to be closed among critical middle necessary to assure ballot victory.
<u>DEDICATE ALL</u> to acquire, maintain & operate state and local parks	97% approve (79% strongly)	78% approve (55% strongly)	64% approve (45% strongly)	37% approve vs. 56% disapprove (40% strongly)	
Use to <u>ACQUIRE ADDITIONAL</u> land for hunting, fishing, birding, camping, hiking, kayaking, etc.	98% approve (77% strongly)	81% approve (47% strongly)	66% approve (23% strongly)	32% approve vs. 62% disapprove (50% strongly)	
Use for other programs with <u>LITTLE OR NO CONNECTION</u> to parks or wildlife programs	79% disapprove (66% strongly) vs. 18% approve	75% disapprove (58% strongly) vs. 22% approve	71% disapprove (53% strongly) vs. 21% approve	58% disapprove (32% strongly) vs. 38% approve	
<u>CONSTITUTIONAL AMENDMENT</u> dedicating all to acquire, maintain & operate state and local parks	96% approve (82% strongly)	77% approve (56% strongly) vs. 18% disapprove	50% approve (29% strongly) vs. 38% disapprove (18% strongly)	14% approve (4% strongly) vs. 77% disapprove (61% strongly)	

Support for funding parks by segmentation

	Hard Base 31%	Soft Supporters 36%	Friendly Middle 18%	Hostile Opponents 16%	Key Insights
In tough economic times, it's important that Texas families have high quality state & local parks, wildlife & outdoor recreation areas they can enjoy on a tight budget	98% agree (79% strongly)	91% agree (50% strongly) (41% somewhat)	93% agree (36% strongly) (57% somewhat)	51% agree (14% strongly) vs. 45% disagree (22% strongly)	Even a majority of Hostile Opponents (barely) concede cost/enjoyment value of high quality park system, and acknowledge intuitive appreciation for funding via tax on sale of outdoor sporting goods. Drop in intensity beyond Hard Base though indicates need to continually message on the justice and "common sense" benefits of this approach.
It is prudent, wise, and makes common sense to have the most frequent users of Texas parks pay for maintenance & operation through a tax on outdoor sporting goods	90% agree (57% strongly) (33% somewhat)	83% agree (39% strongly) (44% somewhat)	68% agree (29% strongly) 39% somewhat vs. 23% disagree	50% agree (21% strongly) vs. 44% disagree (26% strongly)	

Increasing hunting & fishing fees by segmentation

	Hard Base 31%	Soft Supporters 36%	Friendly Middle 18%	Hostile Opponents 16%	Key Insights
<p><u>GENERAL</u> increase of hunting & fishing fees to fund fish & wildlife conservation programs</p>	83% approve (51% strongly) vs. 14% disapprove	62% approve (40% strongly) vs. 32% disapprove (21% strongly)	40% approve (13% strongly) vs. 49% disapprove (32% strongly)	30% approve (18% strongly) vs. 60% disapprove (46% strongly)	<p>Note that Friendly Middle (to ignore completely Hostile Opponents) doesn't approve of higher fees until explicitly told increases would be under \$5.</p> <p>Soft Supporters respond very well to the supporting arguments made to advance increases—they simply need to be informed to get fully on board.</p>
<p>Support for higher hunting & fishing fees for fish & wildlife conservation programs after being told there has been <u>NO INCREASE IN 5 YEARS</u></p>	86% approve (63% strongly) vs. 10% disapprove	68% approve (39% strongly) vs. 27% disapprove (21% strongly)	41% approve (16% strongly) vs. 51% disapprove (30% strongly)	30% approve (21% strongly) vs. 64% disapprove (49% strongly)	
<p>Support for higher hunting & fishing fees for fish & wildlife conservation programs after being told any increase would be <u>UNDER \$5</u></p>	95% approve (77% strongly) vs. 4% disapprove	77% approve (50% strongly) vs. 21% disapprove (14% strongly)	55% approve (35% strongly) vs. 36% disapprove (26% strongly)	34% approve (24% strongly) vs. 62% disapprove (49% strongly)	