

# Insights into First-Time Fishing License Buyers:

## A Survey Analysis

For:

Recreational Boating & Fishing Foundation (RBFF)

By:

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## Executive Summary

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Targeted marketing efforts to increase participation in recreational fishing require in-depth knowledge of anglers' characteristics, motivations and expectations. To learn what motivates first-time license buyers to purchase a fishing license, the Recreational Fishing & Boating Foundation (RBFF) implemented a multi-stage research effort. This survey analysis is the third stage and involved an online survey of fishing license buyers identified as first-time purchasers in their state of residence based upon their license purchase history. The goal of the survey was to explore and confirm findings from the first two stages regarding their motivations for fishing, level of participation, whom they turn to for information, and their expectations and preferences regarding their fishing experiences.

### *Key findings and recommendations*

- More than 90% of first-time license buyers had fished as a child, indicating that the recent purchase is a re-entry into the sport of recreational fishing as an adult.
  - This validates the importance of youth angler recruitment efforts and taking the time to introduce kids to the sport of fishing.
- The majority of first-time license buyers looked forward to having a chance to spend some time with family and friends and the opportunity to relax and unwind. And roughly half of first-time license buyers wanted the opportunity to spend some time in the great outdoors.
  - Campaign efforts and messaging should take these motivations into consideration, recognizing that the benefits of fishing are numerous and complex.
- Three out of four, or 78%, of first-time fishing license buyers say that their first fishing trip either met or exceeded their expectations. And, when asked about factors they liked least, one out of three reported that there were no problems and they liked everything about fishing.
  - This shows that these new anglers are enjoying the sport, and it is important to keep fishing top of mind as an activity choice in their busy lives.
- If a first-time license buyer goes fishing more than once in their first year, their likelihood to renew more than doubles. Results show that 70% of first-time license buyers who fished just two or three times in their first year renewed their licenses versus a 30% renewal rate among the group who only fished once.
  - This highlights the importance of engaging with these new anglers to remind them of fishing opportunities and local information to encourage them to go fishing again.
- The majority of 2012 first-time license buyers purchased a fishing license again in 2013 and 66% plan to go fishing again in 2014, however nearly one third of first-time license buyers indicate they might fish in 2014. And over half of the first-time license buyers who did not renew indicate they are still interested in fishing.
  - These first-time license buyers are potential targets for retention-based marketing efforts as they have shown interest in the sport and are open to the possibility of trying the sport again.

- Social characteristics of fishing attracted many of the first-time license buyers, having been invited by family and friends or being asked by a child to take them fishing. And evidence shows that this social factor will continue to influence their future purchase decisions.
  - Marketing messages targeting this characteristic of the sport can positively influence that decision to renew their licenses.
- Results indicate that first-time license buyers are not widely aware of the reliance on fishing license sales revenue by state fish and wildlife agencies as a critical funding source.
  - This can be a secondary message when encouraging anglers to renew their license.
- While first-time license buyers most frequently turn to friends and family as reliable sources of knowledge related to fishing, they do seek out information through state agency websites and small bait and tackle retailers.
  - This highlights the importance of online information and retail partnerships to engage with people fishing, and to explore opportunities for partnering to offer incentives and local fishing information and instruction.
- First-time license buyers are looking for information about local places to fish and the right equipment to utilize. And the majority of first-time license buyers are making the purchase through an online portal.
  - This presents an opportunity to encourage license buyers at the time of purchase to explore other information available online, and to collect email addresses as a cost-effective means for following up and communicating with anglers.

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## Introduction

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Targeted marketing efforts to increase participation in recreational fishing require in-depth knowledge of anglers' characteristics, motivations and expectations. To learn what motivates first-time license buyers to purchase a fishing license, the Recreational Fishing & Boating Foundation (RBFF) implemented a multi-stage research effort. The first stage involved an in-depth investigation of state-level fishing license sales records to explore the key characteristics—age, gender, license purchased, etc.—associated with anglers taking up the sport relative to repeat or more avid anglers (Southwick Associates 2013). The second stage involved focus group discussions in two states with those first-time anglers to determine factors that motivated them to take up or return to the sport, that they enjoyed most about their experience, and that influenced their future purchase potential (Responsive Management 2013).<sup>1</sup> This survey analysis is the third stage and involved an online survey of fishing license buyers identified as first-time purchasers in their state of residence based upon license purchase history. The goal of the survey was to reach a wider geographical target audience to explore and confirm findings from the focus groups as to their motivations for fishing or reasons for lapsing, level of participation, whom they turn to for information, as well as their expectations and preferences.

## Methodology

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This analysis was conducted across 27 states based on license records made available by each state's fish and wildlife agency (Table 1). Resident license sales records from 2008 to 2012 were analyzed to construct a license purchase history for each license buyer.

Table 1. States participating in survey

States		
Alabama	Maine	Oregon
Alaska	Minnesota	Pennsylvania
Arkansas	Nebraska	South Carolina
Colorado	New Hampshire	Tennessee
Florida	New Jersey	Texas
Georgia	New York	Utah
Iowa	North Carolina	Vermont
Kansas	Ohio	Virginia
Kentucky	Oklahoma	Wyoming

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<sup>1</sup> The Executive Summary of *Understanding First-Time Fishing License Buyers: Focus Group Report* authored by Responsive Management in 2013 is provided in the Appendix. Additional in-depth analysis is provided in the full report.

Target audience license buyers were then defined as individuals with a recorded purchase of a fishing license in 2012 and no record of a fishing license purchase in any other year between 2008 and 2011. Also included among the target audience mailing list were anglers on record as purchasing for the first time in 2011 and then lapsing in 2012. Given that the implementation of this survey was through an online platform, license holders who had not provided their email addresses to their state fish and wildlife agencies were omitted during the generation of the target mailing list. Anglers who obtained senior citizen, youth, or lifetime licenses over the period were omitted from the analysis. Also, people who were not required to purchase a license to fish were omitted from the analysis.

- A stratified random sample was drawn with no more than 4,000 first-time anglers from each state invited to participate in the survey. In states with fewer than 4,000 first-time anglers with an email address, all potential respondents were invited to participate.
- More than 86,000 email invitations were sent to individuals in the participating states (Table 2a).
- Sixteen percent of emails were bounced back as undeliverable.
- The final target audience mailing list count was 72,959 individuals.

The online survey was opened on January 23, 2014. Individuals received an initial email invitation, including the survey link, asking for them to share their experiences about their past fishing license purchase. The first follow-up reminder was sent five days following the opening day and a second reminder was emailed one week after the survey opened. On February 3, 2014 the survey was closed.

- Messaging in the second reminder email was modified to emphasize interest in the outdoors rather than their license purchase to encourage those who might not regard themselves as an angler to complete the survey.
- In the end, 5,144 individuals responded to the survey, reaching a response rate of 7.1% (Table 2a). Target audience size and response rates by state are reported in the Appendix (Table A1).

One of the key findings was that, unlike other anglers, first-time or re-engaged anglers are not as likely to respond to online surveys. Whether they would respond to other more-costly forms of surveys is not known. Online surveys of anglers achieve response rates typically between 30-50%. The low response rate within this study may impact results. First, the results are likely not very reliable for use in projecting the total number of anglers who fit the various definitions of first-time and re-engaged anglers used in this report. The results are regarded as reliable in describing the motivations, interests and opinions of the specific angler segments as done in this report. The low response rate can be attributed to multiple reasons, including limited interest in fishing among the target audience resulting in less interest in responding, survey invites targeting “anglers” and “license buyers”, and state license databases being unable to reliably identify first-time anglers.

At the beginning of the survey, each respondent answered several screening questions. They included:

- Have you fished in your state of residence in any of the past six years (respondents were asked to check the appropriate boxes that indicated the years they fished in their state of residence between 2008 through 2013)?
- Have you fished anywhere else as an adult?

The goal was to identify the true first-time anglers who had not fished in their state of residence during any of the years from 2008 through 2011 and had not fished anywhere else as an adult.

- A total of 1,407 fishing license buyers reported that they had fished for the first time in their state of residence in 2012 and had not fished there in any of the prior years listed (Table 2b).
- More than half (63.0% or 887) of these 1,407 license buyers reported that they had fished in an area outside of their current state of residence as an adult (Table 2b).
- The remaining 520 license buyers are identified as true 2012 first-time anglers, not having previously fished out of state or in their state of residence.

Table 2a. First-time fishing license buyer survey response rate

<b>Target audience based on license sales records</b>	<b>Total</b>	<b>First-Time Angler<sup>a</sup></b>	<b>Lapsed First-Time Angler<sup>a</sup></b>
Target audience license buyer list	86,859	64,596	22,263
Undeliverable emails	13,900	10,140	3,760
Adjusted target audience license buyer list	72,959	54,456	18,503
Response (count)	5,144	4,755	389
Overall response rate (percent)	7.10%	8.70%	2.10%

<sup>a</sup> Identified as First-Time Angler (first fishing license purchase in 2012) and Lapsed First-Time Angler (first fishing license purchase in 2011 but lapsed in 2012) using state-level sales record databases.

Table 2b. First-time fishing license buyer survey, respondent sample based on self-reported activity

<b>Respondents based on self-reported activity</b>	<b>Total</b>	<b>First-Time Angler</b>	<b>Lapsed First-Time Angler</b>
Self-reported first-time license buyers in state of residence in 2012 <sup>b</sup>	1,407	1,327	80
Previously fished outside state of residence	887	838	49
First-time license buyers	520	489	31

<sup>b</sup> First-time license buyers in 2012 group based upon responses to screener questions. Note the re-assignment of a portion of lapsed first-time anglers based upon their self-reported activity.

Note: Unweighted counts.

There are biasing factors inherent in any survey, including this online survey of first-time fishing license buyers.

- First, the practice of collecting email addresses varies from state to state, impacting the size of the potential target audience within a state. Additionally, even in those states that routinely collect emails, the willingness of individuals to share their email addresses influences the size and characteristics of a survey target audience. Demographic characteristics (age and gender)

of first-time anglers and lapsed first-time anglers, as defined by their license purchase history on record, were explored for two groups, those with emails on record and those without emails on record, across a sampling of participating states. The group of respondents to this survey shows no systematic difference across either age or gender, relative to the distribution based upon the selected states.

- Response rates varied from state to state. This factor affects the influence any one particular observation has within the overall analysis. For example, in the case where emails are routinely collected, the potential target audience is larger relative to states where emails are not regularly collected. Similarly, the potential response for each state is skewed by the number of available emails. In an effort to equalize the influence of respondents across each participating state, a proportional weight is applied for each state based upon the number of first-time anglers identified through the sales record history relative to the response rate.
- Lastly, state license databases are not always efficient means of identifying new or first-time fishing license buyers within a state. Screening questions placed at the opening of the survey asking about an individual's recollections of fishing between 2008 and 2012 were used to filter respondents in an effort to identify those respondents who are truly first-time anglers. Responses to screening questions identify 1,407 individuals who report fishing only in 2012. The balance of the responding anglers report that they fished in their state of residence during one or more of the years between 2008 and 2011, did not fish in 2012, or have never fished. These findings suggest the possibility that an angler's purchase history is not entirely reflective of their actual fishing activity, and reinforces similar insights gained in the earlier focus groups.

### *Key definitions for license buyers*

Responses among three respondent groupings are discussed in this report: first-time fishing license buyers, lapsed first-time fishing license buyers, and all other target audience fishing license buyers. Based on the limitations of state license databases to reliably identify a customer as first-time anglers, the grouping assignments are made based upon customer responses to the screener questions, not based upon their license purchasing history.

**First-time license buyers** are the focus of the majority of this report and defined as:

- An angler who reported they fished in their state of residence only in 2012, and not before. Anglers who fished as an adult outside of their state of residence were **excluded** from this grouping.
  - Two separate sub-groups comprise this group, individuals who purchased in 2012 and did not renew in 2013 (lapsing first-time license buyers) and individuals who purchased in 2012 and renewed in 2013 (renewing first-time license buyers). Several tables throughout the report show findings for each of these subgroups alongside the collective first-time license buyer group.

At the end of the report, the analysis examines the influence of several factors and messaging on the fishing license purchase potential in 2014. The focus is broadened to include first-time license buyers as well as lapsed first-time license buyers and all other target audience license buyers. For this topic only, respondents were not screened based on previous fishing activity in other states. **As a result, either of these groupings may include anglers who fished elsewhere as an adult.**

**Lapsed first-time license buyers** are defined as either:<sup>2</sup>

- Anglers who reported they first fished in their state in 2011, did not indicate they fished in their state between the years of 2008 and 2010, lapsed in 2012 and may or may not have re-engaged in the sport in 2013.

**All other target audience license buyers** are defined as:

- Anglers who do not fit the two definitions above and reported having fished in at least one or all of the years between 2008 and 2013.

Table 3 provides a graphical definition of each of these groups as well as the count of respondents within each group.

Table 3. First-time license buyer, lapsed first-time license buyer, and all other target audience license buyer definitions

	License years fished in state of residence				Count
	2008-2010	2011	2012	2013	
First-time license buyers	No purchase		X	X	361
			X		159
Lapsed first-time license buyers		X			87
		X		X	23
All other target audience license buyers	Purchased in at least one of these years but excludes those buyers fitting into first-time or lapsed first-time license buyer categories.				4,514

Note: Counts reflect unweighted counts.

<sup>2</sup> This set largely represents anglers defined as “Tier 8” anglers as part of RBF’s Fishing License Marketing Program, including 2011 Tier 8 anglers who renewed in 2013.

## Results

### *Motivations to take up or return to the sport*

Why did these first-time license buyers return to the sport or take up the sport of fishing for the first time in 2012? Roughly one third of all first-time license buyers tell us that the most influential factors in motivating their purchase decision were:

- Having a friend or relative invite them fishing, wanting to spend some time outdoors, and wanting to get away from stress and relax for a while (Table 4).
- One fifth of all first-time license buyers report that they wanted to take their children fishing and another 13% of respondents report that their children asked to go fishing.
- Renewing first-time anglers were roughly twice as likely to cite spending time outdoors and getting away from stress as a motivating factor to go fishing, relative to lapsing first-time license buyers.
- Lapsing first-time license buyers were at least three times more likely to cite a one-time event such as a larger group outing or vacation as a motivating factor to go fishing.

Table 4. Factors that prompted first-time license buyers in 2012 to begin or return to fishing (*respondents selected all that applied*)

Factor	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
A friend or relative invited me to go fishing	38%	44%	36%
I was looking for a way to spend some time outdoors	35%	22%	41%
I just wanted to get away from stress and relax for a while	31%	15%	39%
I wanted to take my children fishing	21%	19%	22%
I wanted to try out a new hobby	16%	10%	19%
My children asked me to take them fishing	13%	9%	15%
I wanted to try catching my own food	10%	6%	12%
It was something I tried as part of a vacation trip	7%	12%	5%
I recently moved to the state and wanted to try fishing here	4%	2%	5%
It was part of a larger group outing	10%	21%	5%
Other:	13%	11%	14%
<i>Took child or grandchild fishing</i>			
<i>Adult friend, relative, spouse wanted to go fishing with me</i>			
<i>Moved to or near a body of water</i>			
<i>Purchased a boat, camp, etc.</i>			
<i>Took the time or found more time</i>			
	N=421	N=124	N=297

- Ninety-one percent of first-time license buyers fished as a child (Table 5).

Table 5. Proportion of first-time license buyers who fished when they were a child

	Percent
Fished as a child	91%
Did not fish as a child	10%

N=412

*Number of fishing trips and factors affecting participation*

- The largest proportion (37%) of first-time license buyers went fishing two to three times in 2012 (Table 6).
- A similarly sizable proportion (36%) of lapsing first-time license buyers fished only once in 2012.
- In contrast, 19% of renewing first-time license buyers fished more than 10 times in 2012.

Table 6. Total number of times first-time license buyers went fishing in 2012

	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
1 time	15%	36%	7%
2-3 times	37%	39%	37%
4-6 times	20%	12%	24%
7-10 times	10%	5%	12%
More than 10 times	16%	7%	19%
None	1%	1%	1%
	N=418	N=122	N=296

- Among the group of anglers who fished only once in 2012, 69% wanted to fish more often over the course of the year (Table 7).

Table 7. Desire among first-time license buyers who fished only one time to have fished more during 2012

	Percent
I would have liked to fish more than once	69%
I did not want to fish more than once	31%

N=64

First-time license buyers who fished only once but wanted to fish more often were then asked to identify reasons why they were not able to spend more time recreational fishing (Table 8).

- Being too busy with other things tops the list as the primary factor preventing them from getting out to fish more in 2012. In most cases, this indicates that other activities are preferred.
- Other limitations identified include feeling like they didn't know enough to go fishing by themselves (21%) and purchasing a license which didn't allow them to fish more often (18%).

Table 8. Factors preventing first-time license buyers who fished only once in 2012 from fishing more often (*respondents selected all that applied*) (*Please note the limited sample size*)

Factor	Percent
I was too busy with other things	83%
I didn't feel like I knew enough about fishing to go by myself	21%
I only had a short-term fishing license (1-day, 2-day, etc.)	18%
I didn't have anyone to go fishing with me	17%
I didn't have my own fishing equipment	14%
It was late in the season and I didn't have time to go fishing again	13%
I didn't have a boat	10%
I didn't know where to go fishing	6%
My family or friends weren't interested in going fishing with me	3%
Other	3%
I couldn't find any beginner fishing information that I thought was helpful	2%

N=44

The reasons cited most often among the small proportion of first-time license buyers who fished only once in 2012 and didn't want to fish more often are (Table 9):

- The fishing trip(s) they took were part of a one-time opportunity that involved more than just fishing (59%) and
- They prefer to partake in other outdoor activities that they enjoy more than fishing (47%).

Table 9. Factors influencing the desire of first-time license buyers to fish more than just once in 2012 (*respondents selected all that applied*)

Factor	Percent
It was just a one-time opportunity that involved more than fishing	59%
There are other outdoor activities that I enjoy more than fishing	47%
I really didn't enjoy fishing when I went	14%
Other	10%
Fishing was too expensive	9%
I was too busy	4%

N=20

*Note: Readers are cautioned against drawing broad inferences from Table 9 due to the small sample size.*

### *First-time license buyers returning in 2013*

The vast majority (69%) of first-time license buyers responding to the survey also purchased a license in 2013 (Table 10).<sup>3</sup>

Table 10. Proportion of first-time license buyers renewing in 2013

	Percent
Renewed in 2013	69%
Did not renew in 2013	31%

Unweighted N=520

Under the assumption that the frequency of fishing trips might be correlated with the avidity for the sport, one might expect that those first-time license buyers who fished more often in 2012 might be more likely to renew their license in 2013, relative to those who fished less frequently.

- Consistent with that assumption, more than 85% of first-time license buyers who fished more than seven times renewed their license in 2013 (Table 11).
- Additionally, if a first-time license buyer goes fishing more than once in their first year, their likelihood to renew more than doubles. Results show that 70% of first-time license buyers who fished just two or three times in 2012 opted to renew their license in 2013 relative to a 30% renewal rate among the group who only fished once in 2012.

Table 11. Percent of first-time license buyers renewing a license in 2013 by number of days fishing in 2012 groupings

	Percent renewing in 2013
Fished 1 time in 2012	30%
Fished 2-3 times in 2012	70%
Fished 4-6 times in 2012	82%
Fished 7-10 times in 2012	86%
Fished more than 10 times in 2012	87%

N=296

<sup>3</sup> Evidence from an investigation of anglers in 2011 and the lapse rate between two groups of anglers, first-time and repeat anglers, found that only 31% purchased a license the following year (Southwick Associates 2013). The findings here indicate that 69% of respondents identified as first-time license buyers in 2012 also fished in 2013. One of the two factors potentially driving what appears to be incongruous findings is the influence of non-response bias. For the earlier report, an in-depth investigation of state license databases was undertaken to investigate the likelihood of anglers renewing their license. For this analysis, an online survey was employed which is potentially influenced by non-response bias. In other words, it may be the case that individuals who fished for the first time in 2012 and did not renew in 2013 chose to not respond to the survey. Also, in the case of the earlier analysis, it was not possible to identify and filter out those first-time anglers who had fished outside of their state of residence as an adult. As a result, the first-time angler population for any state is significantly larger than the first-time angler population examined here because of the slightly broader definition of a first-time angler (which includes those who fished out of state or fished without a license). It is not possible, however, to know with certainty the degree to which this factor would impact the earlier findings of license renewal rates.

Among first-time license buyers who renewed their license for 2013, the largest percentage of anglers is balanced between those who were able to fish two to three times in 2013 and those who were able to fish more than ten times in 2013 (Table 12).

- Compared to 2012, a larger percentage of anglers went fishing more than ten times in 2013.
- On the other hand, more anglers report no fishing trips after renewing their license in 2013 suggesting that, while they had hoped to get out fishing again, they were not able to or chose not to make a trip during the year.

Table 12. Number of times first-time license buyers who renewed their licenses went fishing in 2013

	Percent
1 time	11%
2-3 times	27%
4-6 times	20%
7-10 times	9%
More than 10 times	27%
None	6%

N=290

Table 13 shows a cross-tabulation of the numbers of days spent fishing in 2012 and in 2013 for those first-time license buyers who renewed their license.

- With the exception of anglers who didn't fish at all in 2012 and those who fished 7-10 times, anglers were more likely to fish the same numbers of days in 2013 as they did in 2012.
- For the majority of groups, the proportion of anglers who spent more days fishing in 2013 was greater than those who spent fewer days fishing in 2013. This suggests that some first-time license buyers have taken significant interest in fishing.

Table 13. Number of times fishing in 2012 and 2013 among first-time license buyers

		How many times did you fish in 2012?					
		None	Once	2-3 times	4-6 times	7-10 times	More than 10 times
How many times did you fish in 2013	None	0%	10%	10%	2%	0%	7%
	Once	19%	54%	14%	5%	0%	4%
	2-3 times	0%	23%	49%	28%	8%	1%
	4-6 times	44%	13%	15%	40%	22%	4%
	7-10 times	0%	0%	5%	7%	30%	11%
	More than 10 times	37%	0%	7%	17%	40%	73%
	Total	100%	100%	100%	100%	100%	100%

N=290

Additional cross tabulations were conducted seeking differences by age, gender and marital status (Tables A2 and A3), but no differences were found.

### Expectations, likes and dislikes

The majority of first-time license buyers looked forward to having a chance to spend some time with family and friends and the opportunity to relax and unwind (Table 14).

- Roughly half of first-time license buyers wanted the opportunity to spend some time in the great outdoors.
- Renewing first-time license buyers are again more likely to cite the opportunity to spend time outdoors relaxing and unwinding as expectations for their time spent fishing than lapsing first-time license buyers.

Table 14. Expectations of first-time license buyers for first fishing trip in 2012 (*respondents selected all that applied*)

Expectation	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
A chance to spend some time with family and friends	53%	56%	53%
Relaxing and unwinding	52%	46%	55%
An opportunity to spend some time in the great outdoors	49%	44%	51%
A chance to try something new; maybe catch a few fish	22%	21%	23%
An opportunity to teach my children about fishing and nature	18%	14%	20%
An exciting time catching a lot of fish	13%	13%	14%
I didn't know what to expect. Just thought I'd give it a try	13%	11%	14%
Competing to see who could catch the biggest or most fish	5%	5%	5%
Other	3%	6%	2%
	N=421	N=124	N=297

- Three out of four of first-time license buyers (78%) say that their first fishing trip either met or exceeded their expectations (Table 15).
- Twelve percent of first-time license buyers had some but not all of their expectations met.
- Less than 10% of this group indicates that their trip did not meet any of their expectations.

Table 15. Meeting the expectations of first-time license buyers' first fishing trip

Response	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Yes, it was about what I expected	58%	59%	58%
It exceeded my expectations	20%	23%	19%
It partially met my expectations	12%	7%	15%
No, it did not meet my expectations	8%	11%	7%
It turned out to be different than anything I expected	2%	0.7%	2%
	N=411	N=121	N=290

First-time license buyers were then asked to reflect on their fishing trips in 2012 and identify what factors they liked the best and the least.

- Roughly half of anglers say that they liked the time with family and friends and the chance to be outdoors the best (Table 16). This is consistent when explored within the two first-time license buyer sub-groups.
  - Lapsing first-time license buyers are more likely to report spending time with family and friends (65%) as something they liked best about fishing, relative to renewing first-time license buyers.
- Approximately one quarter of anglers say that they enjoyed the quiet and solitude (28%), catching fish (28%), and the opportunity to truly relax and get away from stress (24%).
  - A larger proportion of renewing first-time license buyers report that these are factors they enjoyed relative to lapsing first-time license buyers.

Table 16. Factors first-time license buyers liked best about fishing in 2012 (*respondents selected up to three that applied*)

Factor	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Spending time with family and friends	53%	65%	48%
Being outdoors	51%	52%	50%
The quiet and solitude	28%	21%	31%
Catching fish	28%	19%	31%
The chance to truly relax and get away from stress	24%	19%	26%
Sharing the enjoyment of fishing with a child	19%	16%	21%
Reliving my childhood memories of going fishing	16%	15%	16%
The "chase"--the strategy of finding the right spot and the right tackle	10%	9%	10%
The affordability--fishing is low-cost entertainment	10%	10%	10%
Catching my own food	6%	6%	6%
Nothing--I didn't like fishing	0.4%	1%	0%
Other	2%	5%	1%
	N=411	N=123	N=288

Exploring those factors that first-time license buyers liked best about their trip relative to their expectations, results suggest that (Table 17):

- For those whose expectations included the sport of fishing (excitement and competition of catching fish), the social aspect of fishing (spending time with others) as well as having a chance to get outdoors, were all factors they enjoyed.
- Anglers whose expectations included the social aspect of fishing (spending time with others) say that those were the aspects of fishing they liked best. Many among this group also like the opportunity to recreate outdoors.

Table 17. Cross-tabulation of fishing trip expectations and most enjoyable features of fishing trip for first-time license buyers (*respondents selected multiple options for each individual question*)

		What did you like best about fishing when you went in 2012?										
		Catching fish	Spending time with family and friends	Sharing the enjoyment of fishing with a child	Being outdoors	The quiet and solitude	The chance to truly relax and get away from stress	The "chase" -- the strategy of finding the right spot and the right tackle	Catching my own food	Reliving my childhood memories of going fishing	The affordability--fishing is low-cost entertainment	Total
What were your expectations for your first fishing trip in 2012?	An exciting time catching a lot of fish	16%	18%	6%	19%	9%	9%	7%	6%	9%	2%	100%
	Competing to see who could catch the biggest or most fish	14%	18%	12%	9%	10%	6%	15%	2%	10%	4%	100%
	Relaxing and unwinding	11%	19%	6%	21%	12%	12%	5%	3%	7%	4%	100%
	A chance to spend some time with family and friends	10%	27%	9%	18%	11%	9%	4%	3%	6%	3%	100%
	An opportunity to teach my children about fishing and nature	9%	20%	27%	15%	8%	5%	4%	1%	9%	2%	100%
	An opportunity to spend some time in the great outdoors	10%	19%	7%	24%	12%	10%	5%	3%	8%	3%	100%
	A chance to try something new maybe catch a few fish	11%	18%	7%	23%	11%	10%	9%	2%	5%	4%	100%
	I didn't know what to expect Just thought I'd give it a try	11%	19%	6%	20%	5%	13%	7%	3%	6%	11%	100%

N=411

- Anglers whose expectations included being able to relax and unwind say that they liked the opportunity to spend time outdoors as well as spending time with others.
- This suggests that anglers who enjoy the sport of fishing also enjoy the social aspect of fishing. On the other hand, anglers who enjoy the social aspects are not as likely to be motivated by the sporting aspect of fishing.

Factors first-time license buyers liked least about fishing in 2012 include (Table 18):

- One third of first-time license buyers report that they felt there was no problem and liked everything about their fishing experience in 2012.
  - Renewing first-time license buyers were slightly more likely to report no problems, relative to lapsing first-time license buyers.
- Not catching any fish (38%) is reported most often. This is consistent when explored within the two first-time license buyer sub-groups.
- Twelve percent of anglers report that they did not like the hassle of dealing with equipment, finding a place to fish, and driving long distances to get to a spot. And a similar proportion felt that the spots they selected were too crowded.
  - Lapsing first-time license buyers are slightly more likely to report the hassle factors as something they liked least about their trip, relative to renewing first-time license buyers.

Table 18. Factors first-time license buyers liked least about fishing in 2012 (*respondents selected up to three that applied*)

Factor	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Not catching any fish	38%	38%	38%
There were no problems--I like everything about fishing	37%	33%	38%
The hassle factors--loading the equipment, finding a place to fish, driving some distance to get there	12%	17%	11%
The fishing spots were crowded	12%	11%	12%
The expenses--equipment, bait, supplies, etc.	9%	9%	9%
Baiting the hooks, or taking the fish off the hook	8%	9%	8%
The lakes and rivers weren't very clean	6%	5%	6%
Not having the right equipment: rod, reel, line, tackle, etc.	6%	4%	6%
It was boring	3%	3%	2%
Being outdoors--flies, mosquitoes, heat, cold, weather, etc.	2%	1%	2%
Other	4%	3%	4%
	N=411	N=123	N=288

## 2012 License purchase and process

Eighty-five percent of all first-time license buyers report that they purchased a license that provided annual privileges either through an annual fishing license or a combination hunting and fishing license (Table 19). Only 8% of anglers purchased a short-term fishing license.

Table 19. Fishing license types purchased by first-time license buyers in 2012

License type	Percent
Annual fishing license	72%
Combination annual hunting and fishing license	13%
Short-term fishing license (1-day, 2-day, 5-day, 1-week, etc.)	8%
I don't remember	7%
Other	0.5%

N=407

- Not unexpectedly, those first-time license buyers who purchased an annual license did so because they planned to go fishing several times over the course of the year (Table 20).
- Twenty percent of anglers elected to purchase an annual license after comparing prices between the available short-term and annual options.

Table 20. Factors influencing the first-time license buyer's purchase of an annual license

Factor	Percent
I planned to go fishing several times that year	65%
The price difference between a short-term and annual license	20%
I didn't notice short-term licenses were available	9%
I don't remember	5%
Other	3%

N=342

Online purchasing options provide easy and convenient access for anglers allowing them to purchase a license at a time that best fits their schedule (Table 21).

- The majority of first-time fishing license buyers (62%) bought their licenses online.
- Thirty-seven percent purchase their license in-person
  - The majority of in-person sales occur at a retailer or sporting goods store, such as Walmart, Dick's or Cabela's.

Table 21. Where first-time license buyers purchased their license

Location	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Online from the fish and wildlife agency website*	62%	64%	61%
In-person at a retailer/sporting goods store	30%	31%	30%
In-person at a small bait and tackle shop	4%	2%	4%
In-person at a state agency office	3%	2%	3%
Other	2%	2%	2%
	N=403	N=120	N=283

\*The results are based on a survey of first-time anglers with an email address on file at their state fish and wildlife agency. As a result, the percent of respondents who purchase online may be upwardly biased to an unknown extent.

- The license purchase experience was easy (Table 22).

Table 22. License purchase experience for first-time license buyers

Experience	Percent
Very easy	77%
Somewhat easy	21%
Somewhat difficult	1%
Very difficult	0.2%
I don't remember	1%
N=406	

Exploring the perceived ease of license purchase relative to the location of purchase for first-time license buyers (Table 23), results indicate that:

- Purchases made in-person at state offices received the most 'very easy' responses.
- Three quarters of those buying a license online found the process very easy while one fifth found it somewhat easy.

Table 23. Cross-tabulation: Perceived ease of purchase and location of fishing license purchase by first-time license buyers

Location of license purchase	Perceived ease of purchase					Total
	Very Easy	Somewhat easy	Somewhat difficult	Very difficult	I don't remember	
Online from the fish and wildlife agency website	76%	21%	1%	0%	1%	100%
In-person at a sporting goods store	77%	20%	1%	1%	1%	100%
In-person at a small bait & tackle shop	87%	13%	0%	0%	0%	100%
In-person at a state agency office	100%	0%	0%	0%	0%	100%
Other	57%	29%	0%	0%	14%	100%

N=403

#### Information providers for first-time license buyers

- The majority (57%) of first-time license buyers look to friends and family who are experienced anglers as reliable and helpful sources of information related to fishing (Table 24).
- Fifty-five percent of anglers also turn to online sources for information, either through their state fish and wildlife agency’s website (29%), TakeMeFishing.org (4%), or other websites (22%).
- Approximately one third (31%) of first-time license buyers ask for information about fishing from retail stores, with small bait and tackle shops being the more popular option (24%).
- Lapsing first-time license buyers are twice as likely to report they don’t need fishing information, relative to renewing first-time license buyers (22% versus 11%). As a result, they are less likely to seek out helpful information about fishing.

Table 24. First-time license buyer sources for reliable and helpful fishing information (*respondents selected all that applied*)

Information source	Total	First-time license buyers	
		Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Friends and family who are experienced anglers	57%	53%	59%
State fish and wildlife agency website	29%	17%	35%
People at small bait and tackle shops	24%	11%	29%
Other online websites	22%	16%	24%
I don't need fishing information	15%	22%	11%
Printed brochures, fishing maps, pamphlets, etc.	10%	6%	11%
Sales clerks at large sporting goods stores	7%	5%	8%
Newspapers or magazines	5%	3%	6%
Radio and outdoor television shows	4%	2%	5%
TakeMeFishing.org website	4%	3%	4%
Other	3%	4%	2%
	N=402	N=123	N=279

While not their primary source for reliable and helpful fishing information, 66% of first-time license buyers have visited their state fish and wildlife agency website to look for information about fishing in their state of residence (Table 25).

- Twenty-nine percent of anglers did not know to look to their state agency’s website for information. Lapsing first-time license buyers are almost twice as likely to not know to turn to their state agency website for information about fishing.

Table 25. Visitation to state fish and wildlife agency website by first-time license buyers to look for fishing related information

	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Yes, I have visited the website	66%	52%	72%
No, I didn't know they provided fishing information online	29%	42%	24%
No, I prefer to get fishing information elsewhere	5%	6%	5%
	N=400	N=123	N=277

- The percentage of first-time license buyers who are aware that license sales are the primary source of agency revenue is evenly balanced with those who are unaware of sales as a primary revenue source (Table 26).

Table 26. Knowledge of fishing license revenue as the primary funding source for state fish and wildlife agencies among first-time license buyers

	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Yes, I knew license sales is the primary source of revenue	52%	51%	52%
No, I did not know license sales is the primary source of revenue	48%	49%	48%
	N=401	N=123	N=278

Among first-time license buyers who fished in 2012 and then chose not to fish in 2013, the most common reason is not having enough time or too busy to go fishing (Table 27). One fifth of these anglers report that they did not go again because they didn’t have anyone to accompany them. As a whole, this group of anglers who did not return to the sport is rather small.

Table 27. Factors influencing a first-time license buyer’s decision to not fish in 2013 after having fished in 2012 (*respondents selected all that applied*)

	Percent
I was too busy	48%
Other*	38%
I didn't have anyone to go fishing with me	20%
I didn't have a boat	15%
There are no places nearby for me to fish	9%
I couldn't find any beginner fishing information that I thought was helpful	2%
I didn't know where to go fishing	2%
I didn't enjoy fishing in 2012	0%
Fishing is too expensive	0%
I didn't have any fishing equipment	0%
I forgot to buy a license	0%

N=18

\*Other reasons were not provided

*Note: Readers are cautioned against drawing broad inferences based on these results due to the small sample size.*

Among first-time license buyers who fished in both 2012 and 2013:

- The most common motivation to return to the sport was because they enjoyed fishing and wanted to go again (Table 28).
- Approximately 40% of returning anglers wanted to continue to find ways to spend time outdoors as well as to relax and get away from stress. Note that these reasons are very similar to those factors motivating first-time license buyers to purchase a license in the first place (Table 4).
- Thirty-eight percent of anglers either wanted to take their children fishing or had their children ask them to go fishing. And, 33% say that they had someone invite them to go fishing again in 2013.

Table 28. Factors influencing a first-time license buyer’s decision to fish in both 2012 and 2013 (*respondents selected all that applied*)

	Percent
I enjoyed fishing and wanted to go again	66%
I was looking for a way to spend some time outdoors	42%
I just wanted to get away from stress and relax for a while	40%
A friend or relative invited me to go again	33%
I wanted to take my children fishing	22%
My children asked me to take them fishing	16%
I wanted to catch my own food	10%
The fishing was really good and I did not want to miss out	8%
Other	6%

N=259

Sixty-six percent of first-time license buyers plan to go fishing again in 2014 and another 29% say that they might fish in 2014 (Table 29).

- Renewing first-time license buyers are more than twice as likely to plan to purchase a license again in 2014.
- More than half of lapsing first-time license buyers says they might fish again in 2014.
  - This group of anglers who are not committed to fish again but feel that there is a possibility is a potential target group for marketing efforts. They have shown interest in the sport having purchased a license in the past and are open to the possibility of trying the sport again.

Table 29. Percent of first-time license buyers planning to go fishing in 2014

	First-time license buyers		
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)
Yes, I plan to go fishing	66%	30%	82%
Maybe, I might fish in 2014	29%	56%	17%
No, I do not plan to go fishing in 2014	5%	14%	2%
	N=381	N=118	N=263

*Factors and messaging having an influence on anglers returning in 2014*

Several factors and marketing messages were tested for their potential to impact future purchasing decisions (Tables 30 and 31). Respondents were asked whether a factor or message was not likely, somewhat likely, or very likely to influence their decision to purchase a license in 2014. Included in these tables are the findings relating to the percentage of individuals indicating a very likely response among the first-time license buyers group, including both sub-groups, as well as the lapsed first-time license buyer group. Detailed tables for all groups across all potential response options are included in the Appendix (Tables A4 through A13).

- Receiving an invitation or having a child ask them to go are the top two factors having a positive influence on the fishing license purchase decision of first-time license buyers in 2014 (Table 30).

Table 30. Factors influencing a first-time and lapsed first-time license buyer’s likelihood to purchase another license in 2014 (*reflects only the percentage of respondents selecting ‘very likely to influence’*)

	First-time license buyers			Lapsed first-time license buyers
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)	
If someone invited me to go fishing	52%	57%	50%	53%
If a child asked me to take them fishing	47%	41%	50%	60%
Knowing that 100% of my license dollars go towards conserving fish and their habitat	34%	26%	37%	38%
If I received some information about places to fish close to where I live	31%	22%	36%	32%
If I received a discount coupon on the purchase of fishing equipment	28%	22%	31%	24%
If I received easy-to-understand information about how to fish (types of equipment, what lures to use, etc.)	25%	12%	31%	23%
A smartphone app with fishing information that was specific to my state	24%	15%	28%	16%
If I received an email reminder to buy a fishing license	18%	15%	19%	14%
If buying a license was easier	17%	15%	18%	24%
If I better understood the fishing regulations and rules/ If regulations were less confusing	15%	13%	16%	24%
Educational "how to" videos	9%	4%	11%	15%
An educational event or class hosted by your state fish and wildlife agency	3%	6%	10%	5%
Other	3%	5%	3%	3%
	N=363	N=114	N=249	N=94

- Sharing information regarding local places to fish and how license dollars are spent also have a positive impact in future license purchase decisions, particularly among renewing first-time license buyers.
- Similarly, providing information about how to fish and the right equipment to use, as well as offering a discount coupon on the purchase of equipment, have a positive impact on future license purchases, particularly among renewing first-time license buyers.
- Among lapsed first-time license buyers:
  - These findings are consistent across the lapsed first-time license buyer group. It is notable that almost one quarter of this group shares that they might be more likely to purchase again in 2014 if buying a license was easier and if they better understood the fishing regulations.
- Among all other target audience license buyers (Table A8):
  - Having someone extend an invitation or having a child ask them to go are also the top two factors positively influencing the fishing license purchase decision of more than 50% of all other target audience anglers in 2014. Requests from children statistically have the greater impact.
  - Sharing information about how license dollars are spent as well as providing information about local places to fish have a strong positive impact on future license purchase decisions for 52% and 44% of all other target audience anglers, respectively.

Seven marketing messages were tested for their likelihood to impact future license purchasing potential (Table 31).

- The “fishing is a great way to spend time with family and friends” message is identified by 56% of the first-time license buyer group as very likely to influence their future purchase decision and is statistically the top reason among those rating very likely (Tables A9 through A11).
- Among the group of first-time license buyers, all of the messages were either somewhat likely or very likely to positively impact the purchase decision of 69% or more of first-time license buyers.

Table 31. Communication messaging influencing a first-time and lapsed first-time license buyer’s likelihood to purchase another license in 2014 (reflects only the percentage of respondents selecting ‘very likely to influence’)

	First-time license buyers			Lapsed first-time license buyers
	Total	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)	
Fishing is a great way to spend time with family and friends	56%	45%	60%	45%
100% of your fishing license fees are invested back into conservation, ensure healthy fish populations and public access to fishing opportunities	44%	33%	49%	42%
Fishing is a great way to teach young people to appreciate nature	43%	38%	46%	39%
Fishing is a stress reliever--a chance to relax and disconnect from everyday hassles	43%	30%	47%	41%
Fishing is a way to connect with nature	41%	20%	53%	45%
Fishing license fees support fish and wildlife conservation	37%	26%	42%	32%
Fishing is exciting	28%	18%	32%	25%
Other	2%	1%	2%	0.3%
	N=374	N=115	N=259	N=97

- Among the lapsed first-time license buyer group:
  - The “fishing is a great way to spend time with family and friends” message is also identified by 45% of this group as very likely to influence their purchase decision (Table 31). Given the size of this particular group, it is difficult to determine the strength of one message over another.
  - And, all of the messages were either somewhat likely or very likely to positively impact the purchase decision by 63% or more of the group (Table A12).
- Among all other target audience license buyers (Table A13):
  - The “fishing is a great way to spend time with family and friends” and “100% of your fishing license fees are invested back into conservation, ensure healthy fish populations and public access to fishing opportunities” messages are identified by 62% of the group as very likely to influence their purchase decision.
  - And across all target audience anglers, all of the messages were either somewhat likely or very likely to positively impact the purchase decision by 78% or more of this group.

## Conclusions & Recommendations

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- It is often the case that the fishing license purchase made in 2012 by first-time license buyers is a re-entry into the sport of recreational fishing as an adult, as an overwhelming majority had fished as a child; thereby validating the importance of taking the time to introduce kids to the sport of fishing.
- The majority of first-time license buyers looked forward to having a chance to spend some time with family and friends and the opportunity to relax and unwind, as well as the opportunity to spend some time in the great outdoors. Campaign efforts and messaging should take these motivations into consideration, recognizing that the benefits of fishing are numerous and complex.
- First-time license buyers are indicating their first fishing trip either met or exceeded their expectations, and that there were no problems and they liked everything about fishing. This shows that these new anglers are enjoying the sport, and it is important to keep fishing top of mind as an activity choice in their busy lives.
- Results show that if a first-time license buyer goes fishing more than once in their first year, their likelihood to renew more than doubles. This highlights the importance of engaging with these new anglers to remind them of fishing opportunities and local information to encourage them to go fishing again.
- The majority of 2012 first-time license buyers purchased a fishing license again in 2013 and many plan to purchase in 2014. However, nearly one third of first-time license buyers are not committed to purchasing in 2014 and are potential targets for retention-based marketing efforts as they have shown interest in the sport and are open to the possibility of trying the sport again.
- It is the social aspect that drew many of the first-time license buyers into the sport, having been invited by family and friends or being asked by a child to take them fishing. Evidence shows that this social factor will continue to influence their future purchase decisions and that marketing messaging targeting this characteristic of the sport can positively influence that decision.
- Evidence also suggests that first-time license buyers are not widely aware of the reliance on fishing license sales revenue by state fish and wildlife agencies as a critical funding source. This can be a secondary message when encouraging anglers to renew their license.
- While first-time license buyers most frequently turn to friends and family as reliable sources of knowledge related to fishing, they do seek out information through state agency websites and small bait and tackle retailers. This highlights the importance of online information and retail partnerships to engage with people fishing, and to explore opportunities for partnering to offer incentives and local fishing information and instruction.
- First-time license buyers are looking for information about local places to fish and the right equipment to utilize. Given that the majority of first-time license buyers are making the purchase through an online portal, this presents an opportunity to encourage license buyers at the time of purchase to explore the information available online, and to collect email addresses as a cost-effective means for following up and communicating with anglers.

## References

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Responsive Management (2013) *Understanding First-Time Fishing License Buyers: Focus Group Report*. Prepared for the Recreational Boating & Fishing Foundation.

Southwick Associates (2013) *First-Time and Repeat Angler Analysis: National Summary Report*. Prepared for the Recreational Boating & Fishing Foundation.

## Appendix

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### *Target audience size and response rate by participating state*

Table A1. First-time angler survey response rate by state

	<b>Initial Email List</b>	<b>Undeliverable</b>	<b>Net Mail out</b>	<b>Response</b>	<b>Response Rate</b>
Alabama	29	3	26	3	11.5%
Alaska	4,000	643	3,357	149	4.4%
Arkansas	1,497	231	1,266	80	6.3%
Colorado	3,000	560	2,440	238	9.8%
Florida	4,000	942	3,058	111	3.6%
Georgia	4,000	624	3,376	80	2.4%
Iowa	1,982	366	1,616	141	8.7%
Kansas	4,000	591	3,409	372	10.9%
Kentucky	1,087	152	935	72	7.7%
Maine	4,000	603	3,397	167	4.9%
Minnesota	4,000	406	3,594	271	7.5%
Nebraska	4,000	542	3,458	222	6.4%
New Hampshire	4,000	695	3,305	343	10.4%
New Jersey	4,000	887	3,113	309	9.9%
New York	4,000	593	3,407	315	9.2%
North Carolina	4,000	499	3,501	225	6.4%
Ohio	4,000	709	3,291	192	5.8%
Oklahoma	4,000	489	3,511	217	6.2%
Oregon	2,069	236	1,833	170	9.3%
Pennsylvania	4,000	728	3,272	197	6.0%
South Carolina	4,000	664	3,336	167	5.0%
Tennessee	4,000	768	3,232	204	6.3%
Texas	4,000	541	3,459	296	8.6%
Utah	4,000	528	3,472	304	8.8%
Vermont	1,146	161	985	42	4.3%
Virginia	4,000	728	3,272	257	7.9%
Wyoming	49	11	38	-	0.0%
<b>Total</b>	<b>86,859</b>	<b>13,900</b>	<b>72,959</b>	<b>5,144</b>	<b>7.1%</b>

*Demographic and household characteristics of anglers*

Table A2. Demographic characteristics of anglers

	First-time license buyers			Lapsed first-time license buyers	All other target audience license buyers
	All	Purchased in 2012 only (lapsing)	Purchased in 2012 and 2013 (renewing)		
Age category					
18 to 24	5%	1%	6%	4%	3%
25 to 34	18%	23%	16%	13%	10%
35 to 44	21%	23%	20%	17%	16%
45 to 54	17%	20%	16%	26%	20%
55 to 64	18%	17%	18%	11%	20%
65 and over	8%	7%	9%	5%	11%
No answer	13%	9%	15%	25%	18%
Gender					
Male	68%	66%	69%	77%	83%
Female	32%	34%	31%	23%	17%
Marital status					
Single	25%	23%	25%	18%	18%
Married	69%	71%	68%	76%	77%
Unmarried partner	6%	6%	6%	6%	5%
Ethnicity					
Caucasian	88%	84%	90%	82%	89%
Hispanic	5%	7%	4%	11%	4%
Black/African-American	3%	4%	3%	4%	2%
Other/Multi-racial	2%	4%	1%	1%	3%
Asian/Pacific	1%	2%	1%	1%	1%
Native American/Alaska Native	1%	1%	1%	1%	1%
	N=429	N=126	N=303	N=98	N=4,386

Table A3. Percent of anglers with children under 18 living in household

	First-time license buyers	Lapsed first-time license buyers	All other target audience license buyers
Yes, there are children under 18 living in our household	34%	47%	36%
No, there are not children under 18 living in our household	66%	53%	64%
	N=390	N=98	N=4,386

*Factors and messaging influencing the purchase potential of anglers*

Table A4. Factors influencing a first-time license buyer's likelihood to purchase another license in 2014

	Not likely	Somewhat likely	Very likely
If someone invited me to go fishing	12%	36%	52% (±5%)
If a child asked me to take them fishing	24%	29%	47% (±5%)
Knowing that 100% of my license dollars go towards conserving fish and their habitat	30%	37%	34% (±5%)
If I received some information about places to fish close to where I live	30%	39%	31% (±4%)
If I received a discount coupon on the purchase of fishing equipment	41%	31%	28% (±4%)
If I received easy-to-understand information about how to fish (types of equipment, what lures to use, etc.)	40%	35%	25% (±4%)
A smartphone app with fishing information that was specific to my state	45%	31%	24% (±4%)
If I received an email reminder to buy a fishing license	49%	34%	18% (±4%)
If buying a license was easier	59%	24%	17% (±4%)
If I better understood the fishing regulations and rules/ If regulations were less confusing	54%	32%	15% (±3%)
Educational "how to" videos	59%	32%	9% (±3%)
An educational event or class hosted by your state fish and wildlife agency	0%	3%	3% (±2%)
Other	0%	3%	3%

N=363

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A5. Factors influencing a first-time license buyer's likelihood to purchase another license in 2014 (Purchased in 2012 only)

	First-time license buyers Purchased in 2012 only (lapsing)		
	Not likely	Somewhat likely	Very likely
If someone invited me to go fishing	8%	34%	57% (±9%)
If a child asked me to take them fishing	29%	30%	41% (±9%)
Knowing that 100% of my license dollars go towards conserving fish and their habitat	45%	29%	26% (±8%)
If I received some information about places to fish close to where I live	43%	35%	22% (±8%)
If I received a discount coupon on the purchase of fishing equipment	54%	24%	22% (±8%)
If I received easy-to-understand information about how to fish (types of equipment, what lures to use, etc.)	66%	22%	12% (±6%)
A smartphone app with fishing information that was specific to my state	60%	25%	15% (±6%)
If I received an email reminder to buy a fishing license	57%	28%	15% (±6%)
If buying a license was easier	68%	17%	15% (±6%)
If I better understood the fishing regulations and rules/ If regulations were less confusing	65%	22%	13% (±6%)
Educational "how to" videos	72%	24%	4% (±4%)
An educational event or class hosted by your state fish and wildlife agency	70%	24%	6% (±4%)
Other	0%	6%	5% (4%)

N=114

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A6. Factors influencing a first-time license buyer's likelihood to purchase another license in 2014 (Purchased in 2012 and 2013)

	First-time license buyers Purchased in 2012 and 2013 (renewing)		
	Not likely	Somewhat likely	Very likely
If someone invited me to go fishing	13%	37%	50% (±6%)
If a child asked me to take them fishing	22%	29%	50% (±6%)
Knowing that 100% of my license dollars go towards conserving fish and their habitat	23%	40%	37% (±6%)
If I received some information about places to fish close to where I live	24%	41%	36% (±6%)
If I received a discount coupon on the purchase of fishing equipment	34%	35%	31% (±6%)
If I received easy-to-understand information about how to fish (types of equipment, what lures to use, etc.)	28%	41%	31% (±6%)
A smartphone app with fishing information that was specific to my state	38%	34%	28% (±6%)
If I received an email reminder to buy a fishing license	45%	36%	19% (±5%)
If buying a license was easier	54%	27%	18% (±5%)
If I better understood the fishing regulations and rules/ If regulations were less confusing	49%	36%	16% (±4%)
Educational "how to" videos	53%	36%	10% (±4%)
An educational event or class hosted by your state fish and wildlife agency	54%	36%	10% (±4%)
Other	0%	2%	3%

N=249

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A7. Factors influencing a lapsed first-time license buyer's likelihood to purchase another license in 2014

	Not likely	Somewhat likely	Very likely
If a child asked me to take them fishing	11%	29%	60% (±10%)
If someone invited me to go fishing	8%	39%	53% (±10%)
Knowing that 100% of my license dollars go towards conserving fish and their habitat	23%	39%	38% (±10%)
If I received some information about places to fish close to where I live	21%	48%	32% (±9%)
If buying a license was easier	38%	38%	24% (±9%)
If I better understood the fishing regulations and rules/ If regulations were less confusing	38%	38%	24% (±9%)
If I received a discount coupon on the purchase of fishing equipment	35%	41%	24% (±9%)
If I received easy-to-understand information about how to fish (types of equipment, what lures to use, etc.)	31%	46%	23% (±8%)
A smartphone app with fishing information that was specific to my state	41%	43%	16% (±7%)
Educational "how to" videos	60%	25%	15% (±7%)
If I received an email reminder to buy a fishing license	41%	45%	14% (±7%)
An educational event or class hosted by your state fish and wildlife agency	50%	45%	5% (±4%)
Other	0%	2%	3%

N=94

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A8. Factors influencing all other target audience license buyer's likelihood to purchase another license in 2014

	Not likely	Somewhat likely	Very likely
If a child asked me to take them fishing	17%	23%	60% (±2%)
If someone invited me to go fishing	17%	30%	53% (±2%)
Knowing that 100% of my license dollars go towards conserving fish and their habitat	17%	31%	52% (±2%)
If I received some information about places to fish close to where I live	25%	31%	44% (±2%)
If I received a discount coupon on the purchase of fishing equipment	33%	31%	36% (±1%)
A smartphone app with fishing information that was specific to my state	42%	26%	32% (±1%)
If I received easy-to-understand information about how to fish (types of equipment, what lures to use, etc.)	37%	34%	29% (±1%)
If I received an email reminder to buy a fishing license	43%	31%	27% (±1%)
If buying a license was easier	46%	28%	26% (±1%)
If I better understood the fishing regulations and rules/ If regulations were less confusing	43%	33%	24% (±1%)
Educational "how to" videos	56%	28%	16% (±1%)
An educational event or class hosted by your state fish and wildlife agency	57%	30%	13% (±1%)
Other	0%	5%	6%

N=4,386

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A9. Communication messaging influencing a first-time license buyer's likelihood to purchase another license in 2014

	Not likely	Somewhat likely	Very likely
Fishing is a great way to spend time with family and friends	11%	33%	56% (±5%)
100% of your fishing license fees are invested back into conservation, ensure healthy fish populations and public access to fishing opportunities	18%	38%	44% (±5%)
Fishing is a great way to teach young people to appreciate nature	22%	35%	43% (±5%)
Fishing is a stress reliever--a chance to relax and disconnect from everyday hassles	15%	42%	43% (±5%)
Fishing is a way to connect with nature	17%	42%	41% (±5%)
Fishing license fees support fish and wildlife conservation	18%	46%	37% (±5%)
Fishing is exciting	31%	42%	28% (±4%)
Other	0%	3%	2%

N=374

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A10. Communication messaging influencing a first-time license buyer's likelihood to purchase another license in 2014 (Purchased in 2012 only)

	First-time license buyers Purchased in 2012 only (lapsing)		
	Not likely	Somewhat likely	Very likely
Fishing is a great way to spend time with family and friends	11%	44%	45% (±9%)
100% of your fishing license fees are invested back into conservation, ensure healthy fish populations and public access to fishing opportunities	27%	40%	33% (±8%)
Fishing is a great way to teach young people to appreciate nature	33%	30%	38% (±9%)
Fishing is a stress reliever--a chance to relax and disconnect from everyday hassles	27%	54%	20% (±7%)
Fishing is a way to connect with nature	25%	46%	30% (±8%)
Fishing license fees support fish and wildlife conservation	30%	44%	26% (±8%)
Fishing is exciting	45%	37%	18% (±7%)
Other	0%	4%	1%

N=115

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A11. Communication messaging influencing a first-time license buyer's likelihood to purchase another license in 2014 (Purchased in 2012 and 2013)

	First-time license buyers Purchased in 2012 and 2013 (renewing)		
	Not likely	Somewhat likely	Very likely
Fishing is a great way to spend time with family and friends	11%	28%	60% (±6%)
100% of your fishing license fees are invested back into conservation, ensure healthy fish populations and public access to fishing opportunities	14%	37%	49% (±6%)
Fishing is a great way to teach young people to appreciate nature	17%	37%	46% (±6%)
Fishing is a stress reliever--a chance to relax and disconnect from everyday hassles	10%	37%	53% (±6%)
Fishing is a way to connect with nature	13%	40%	47% (±6%)
Fishing license fees support fish and wildlife conservation	12%	46%	42% (±6%)
Fishing is exciting	24%	44%	32% (±6%)
Other	0%	2%	2%

N=259

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A12. Communication messaging influencing a lapsed first-time license buyer's likelihood to purchase another license in 2014

	Not likely	Somewhat likely	Very likely
Fishing is a way to connect with nature	15%	41%	45% (±10%)
Fishing is a great way to spend time with family and friends	8%	49%	44% (±10%)
100% of your fishing license fees are invested back into conservation, ensure healthy fish populations and public access to fishing opportunities	15%	43%	42% (±10%)
Fishing is a stress reliever--a chance to relax and disconnect from everyday hassles	18%	41%	41% (±10%)
Fishing is a great way to teach young people to appreciate nature	16%	45%	39% (±10%)
Fishing license fees support fish and wildlife conservation	12%	57%	32% (±9%)
Fishing is exciting	37%	38%	25% (±9%)
Other	0%	0.2%	0.3%

N=97

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the 'very likely' response percentages.

Table A13. Communication messaging influencing all other target audience license buyer’s likelihood to purchase another license in 2014

	Not likely	Somewhat likely	Very likely
Fishing is a great way to spend time with family and friends	10%	28%	62% (±1%)
100% of your fishing license fees are invested back into conservation, ensure healthy fish populations and public access to fishing opportunities	11%	28%	62% (±1%)
Fishing is a stress reliever--a chance to relax and disconnect from everyday hassles	14%	28%	59% (±1%)
Fishing is a great way to teach young people to appreciate nature	13%	29%	58% (±1%)
Fishing license fees support fish and wildlife conservation	11%	32%	57% (±1%)
Fishing is a way to connect with nature	13%	31%	56% (±1%)
Fishing is exciting	21%	33%	46% (±1%)
Other	0%	2%	3%

N=4,386

\*Value provided in parenthesis in the last column is the calculated confidence interval at a confidence level of 95% around the ‘very likely’ response percentages.

# **Understanding First-Time Fishing License Buyers: Focus Group Report**

## **Responsive Management (2013)**

### **EXECUTIVE SUMMARY**

#### **INTRODUCTION AND METHODOLOGY**

This study was conducted for the Recreational Boating and Fishing Foundation (RBFF) to better understand the motivations, interests, and expectations of first-time fishing license buyers. Specifically, the research examined first-time buyers' expectations regarding fishing when they bought a license, opinions on their subsequent fishing experiences, and their attitudes toward the license buying process. The qualitative findings discussed in this report are part of a broader market research study to understand why individuals who try fishing either lapse or continue with the activity. This phase of the study consisted of two focus groups with first-time fishing license buyers in Richmond, Virginia, and Denver, Colorado.

Each group consisted of 10-12 people and lasted approximately two hours. The focus group recruiting criteria called for individuals who had purchased a fishing license in 2012 but not during the previous 4 years. The focus groups were conducted using a discussion guide that allowed for consistency in the data collection, and were recorded for later analysis and transcription. Each group was led by one of Responsive Management's trained moderators.

To recruit participants for the focus groups, Responsive Management used databases of fishing license holders from each state that were queried to identify individuals who had purchased a fishing license only once in the past 5 years. Potential participants were contacted by Responsive Management recruiters by telephone. Those interested in participating in the focus groups were given a brief summary of the focus group topic, screened using a screener questionnaire, and, if qualified, confirmed for attendance. The screener ensured that potential participants met the license purchasing criteria established for the groups. Additionally, the screener eliminated individuals who had been fishing at all in the previous 5 years (with or without a license) or who were exempt from needing to purchase a license. To encourage participation, Responsive Management provided a monetary incentive to focus group attendees.

#### **SUMMARY OF FINDINGS**

Fishing holds different appeals for different anglers, and motivations frequently shift with age (younger anglers may be particularly interested in catching fish, while older anglers may be more open to social and nature-based aspects of fishing). In terms of dissatisfactions with the sport, first-time license buyers named environmental factors such as litter and mosquitoes as constraints, and overcrowding in certain areas also impacts satisfaction. Invitations to go fishing are extremely important: very few individuals purchase a license and go fishing on their own initiative; rather, the overwhelming majority obtains a license because of an invitation from a friend or family member. Most first-time license buyers do not report problems or confusion with the license purchasing process, although the lack of expertise among sales associates at stores like Walmart may frustrate newer or novice anglers. Many first-time license

buyers have only a vague understanding that license fees are used for conservation management and very few are aware that states receive matching Federal Aid funds for fishing licenses sold. In terms of messaging, fishing as a way to relax and as a connection to nature (or as a way to temporarily disconnect from busy, technologically-driven modern life) tend to be more appealing to first-time license buyers than reminders that fishing is important for fish and wildlife conservation.

### **Appeals of Fishing**

*I like being on the water, just the quiet, and the competition.* —Richmond first-time license buyer

*It can be just as exciting as it is relaxing, the more fish you catch. If there's a group of people, you want to catch just as many as they are.* —Richmond first-time license buyer

*When you're with people, the time you spend reminiscing and catching up with everyone. I enjoy that part the most.* —Denver first-time license buyer

*I do a lot of catch and release but it's about the joy of catching something. Catching your own food. Fish are a good source of protein, if it's big enough.* —Denver first-time license buyer

*For me, it's the solitude; hearing the water, the wildlife. The relaxation.* —Denver first-time license buyer

Comments from participants in both locations illustrated the variety of different reasons anglers take part in fishing. While prior research has indicated that novice anglers tend to be more often motivated by the social aspects of fishing than by the sport/recreation and utilitarian aspects (e.g., catching fish to eat), the focus groups suggest that first-time license buyers are a heterogeneous group, rather diverse in their opinions on the various appeals of the sport.

Unlike many other activities, fishing has numerous dimensions of enjoyment and can be appreciated from different perspectives. It has a strong social appeal: for many individuals, fishing is simply the backdrop or setting in which people can reminisce and socialize. Fishing has a sporting aspect that appeals strongly to individuals who are interested in developing the skills needed to hook and land a fish, or becoming proficient at different types of fishing. Fishing has a strong nature-based appeal: for many people, it is simply an activity that provides a reason to experience the outdoors. Similarly, there is also the appeal of relaxing in solitude by water, a concept mentioned by numerous participants in the groups. In general, the focus groups reinforce the fact that onetime, casual, and less avid anglers choose to participate in the activity for different reasons.

Interactions during the group discussions often helped participants to consider the appeals of fishing in different ways, and an effective marketing approach may be to point out some of the various ways of enjoying fishing, rather than singling out one specific aspect. As many participants in the groups suggested, fishing can be as relaxed or as exciting as the angler desires, depending on the person's goals and expectations.

## Motivations for Fishing

*I think when I was a kid it was more about catching the fish and taking the fish home and showing everyone what I caught. But as I got older I started to catch and release everything and now that I'm 45, it's really irrelevant if I catch anything at all. I just like spending time with the person I'm with. That's the key part of it now, the relaxation, more than the catching the fish. Just being outside on the water.* —Richmond first-time license buyer

*I don't know [if I'll buy a license again]. It depends if my kids are interested. They're teenagers now, so they're kind of into catching [fish]—if we're not catching something, they'll want to go home.* —Denver first-time license buyer

In addition to recognizing that fishing can be enjoyed in a number of ways, an important concept to keep in mind when marketing fishing is that motivations for fishing often shift with age. A number of participants in the two groups mentioned how their own preferences or expectations for the sport had changed over the years. One common theme from the groups (supported by much previous research) was for younger anglers to be especially interested in catching fish, particularly as this type of experience provides some action and represents the opposite of quiet, slower-paced outings in which the main appeal is relaxation. By contrast, many older anglers said they were content simply to spend time with others, experience nature, or enjoy solitude. Further evidence of this tendency for motivations to shift with age emerged in the comments addressing reactions to fishing trips during which no fish were caught: parents of younger anglers as well as younger anglers themselves were more likely to communicate frustration, while many older individuals were less likely to indicate that the failure to catch a fish had impacted the trip in a negative way (the quotations above exemplify this tendency).

## Dissatisfactions With Fishing

*Mosquitoes.* —Richmond first-time license buyer

*Coming back empty-handed is a little disappointing.* —Richmond first-time license buyer

*If you're shore pier fishing, you can be in a spot, get a couple of good hits, and everybody on the pier is going to run to that same spot, in a little area like the fish are going to wait there. Then you've got about 10 tangled lines.* —Richmond first-time license buyer

*Finding garbage in the lakes. People that litter make my skin crawl.* —Denver first-time license buyer

*I hate seeing all the extra fishing line everywhere. You have line hanging off every tree around you on the lake.* —Denver first-time license buyer

*It sucks to go somewhere where the banks are full, or like when you get out there in a boat and every time you stop, someone else is set up 15 feet away from you. If you fish in the city, the one thing that's really hard is getting away from everyone else.* —Denver first-time license buyer

*Local lakes are crowded and you can't cast without crossing someone else's line, and then you have to argue with your next-door fisherman.* —Denver first-time license buyer

First-time license buyers in the two groups were asked about dissatisfactions or things they enjoyed least about fishing, and many comments addressed environmental factors that impacted the setting of the fishing trip, such as litter or mosquitoes. A minority of participants specifically mentioned occasions during which they failed to catch any fish (this was more common in the Richmond group). One common theme across the two groups was the issue of overcrowding at popular fishing areas; comments addressing crowding were particularly common in the Denver group, especially when participants mentioned lakes within the city. The issue of tangled fishing line was also repeated fairly often and suggests scenarios in which banks or piers become overly crowded with other anglers, thereby impacting the experience. Related to this is the fact that some people desire to fish but are constrained by time—casual and novice anglers, in particular, are less likely to commit substantial time and planning to longer trips that require them to travel greater distances. Unfortunately, according to some anglers in the groups, local fishing areas sometimes represent the most crowded opportunities.

### **Importance of Invitations**

*Who says no to going fishing?* —Richmond first-time license buyer

*In a world so over-stimulated, it's nice to have that connection with somebody. You know, if my dad said "Hey, let's go," I wouldn't say no. There's that element of excitement in fishing, but it's that moment of space where you connect and bond and create something. And that was the part that really drove the nostalgia reference that I had from a kid, that I wanted to give my kid, and that excitement on his face, that joy. That's a strictly human kind of experience that you don't get from watching TV or going to the movies.* —Richmond first-time license buyer

*My buddy was going fishing and invited me. I got addicted all over again. I fished a lot as a kid but I didn't do it for a while. Mainly it was about being invited.* —Denver first-time license buyer

*No matter who invited me, I would go.* —Denver first-time license buyer

Comments from the two focus groups reinforce the importance of invitations from friends and family members in bolstering participation from novice or casual anglers (i.e., one-time license buyers). Few if any individuals in the groups decided to purchase a license and go fishing completely on their own initiative; rather, the overwhelming majority of participants obtained a license because of an invitation from a friend or family member (another important reason for a license purchase was having a child who asked to be taken fishing or wanting to expose a son or daughter to fishing). Specific reactions to the concept of being invited to go fishing are discussed in a later finding in this section, while some additional research conducted with new anglers provides greater support for the importance of invitations.

A recent Responsive Management study examining the motivations of one-time anglers in Iowa found that this group was highly dependent on going with family and friends—like many of the Richmond and

Denver participants, these people had been invited to go and likely would not have gone without such accompaniment. A survey question measuring the reasons they first bought an Iowa license reinforced the importance of family and invitations: Iowa one-time anglers were more likely to have first purchased a fishing license to take a child or grandchild, because of an invitation from a friend, or because of a request from a family member, thereby mirroring tendencies in the Richmond and Denver focus groups.

### **Experiences Purchasing Fishing Licenses**

*Purchasing online was easy. I know people go to bait shops to buy them and it takes them forever to hand write everything and print the stuff out. I did it right online.* —Richmond first-time license buyer

*It [purchasing a fishing license] was a non-event.* —Richmond first-time license buyer

*Well, my friend just said to go buy it at Sportsman's Warehouse or Walmart.* —Denver first-time license buyer

*It was just horrible at Walmart. The lady just didn't know what was going on. I just know that in the future, I need to prepare myself for that. I need to know it might be a process. My kids and I were waiting there and they were so irritated by the time we got up to the counter, and the salesperson was a little flustered and my kids were agitated and I kept telling them to be calm. At least I know next time the possibility of that happening. I can expect that.* —Denver first-time license buyer

The focus groups suggest that most first-time license buyers were able to navigate the license purchasing process fairly easily and unremarkably, particularly those individuals who purchased their license online (other individuals reported generally positive experiences purchasing a license at a retailer such as Bass Pro Shops or at a local bait and tackle store). The major exceptions were individuals who purchased a fishing license at Walmart, with several participants in the Denver group discussing negative experiences they had at the store. The most common issue appeared to be unknowledgeable or unhelpful sales associates or long wait times at the sporting goods counter; these issues were compounded when the purchaser was unfamiliar with licensing requirements or was seeking information about license or stamp requirements for a specific lake or area.

Despite these negative anecdotes, many individuals (particularly in the Denver group) were able to look past the initial obstacle of a difficult or confusing purchasing process. Indeed, the fourth quotation above illustrates the fact that many novice anglers are willing to put up with some momentary frustration in order to fulfill their end goal of obtaining a license to go fishing. In the quotation above, the purchaser had every reason to leave the store, but instead stayed and ended up purchasing the license because she and her husband were adamant about going fishing. In any case, it is important to keep in mind that not all first-time license buyers will be as patient, and a frustrating license purchasing experience at a big-box retailer like Walmart has the potential to discourage those who wish to try fishing. For this reason, it may be worth recommending the purchase of a license online as often as possible.

## Sources of Information on Fishing and Licenses

*Someone told me [I needed a fishing license]. Just someone that I knew who went fishing. And I had no idea I needed a license until I was told.* —Richmond first-time license buyer

*The wildlife organization for the state [is where I would get information about fishing and licenses]. Because if I'm looking for the purposes of not running afoul of the authorities, I would want to know precisely [what the requirements are].* —Richmond first-time license buyer

*I always go to the DOW: Department of Wildlife.* —Denver first-time license buyer

*Probably any retailer of fishing equipment [would be able to provide information about fishing and licenses].*—Denver first-time license buyer

*My dad told me at a certain age that it was time to buy one [a fishing license].* —Denver first-time license buyer

When asked who they went to for information about fishing and licenses, a small number of people in each group specifically mentioned a state fish and wildlife agency or organization. However, there was a much greater tendency for casual anglers to mention retailers such as Cabela's and Bass Pro Shops, as well as stores like Walmart. As mentioned in the previous finding, one shortcoming of major general-purpose retailers (Walmart in particular) is that employees are ill-equipped to answer questions from new anglers about various types of fishing equipment and licenses or stamps needed for specific lakes and water bodies. Novice anglers desire simple, clear information on these subjects, and they may become intimidated or confused more easily than experienced individuals when they fail to receive clear information at a store.

A recent Responsive Management study that looked at casual and novice anglers in Washington State found that newer anglers' dependence on friends and family as fishing partners tended to influence their sources of information about fishing: newer anglers were less likely to find information from the primary source—the state fish and wildlife agency—and more likely to obtain the information from friends and relatives. Similarly, in addition to acquiring information about fishing and licenses from retailers and sporting goods stores, many first-time license buyers in the Richmond and Denver groups mirrored the tendency of Washington novice anglers to look to friends and family members for guidance or information.

## Attitudes Toward Conservation Funding and Federal Aid

*I think it goes for a good cause, to help keep the programs going. I didn't know it was dollar for dollar matching, for the government. I figured there was something like that, but not all. So at least I'm kind of helping the state maybe get more funding to help our parks. It doesn't make me more likely [to buy a license].* —Richmond first-time license buyer

*I hate to say it, but people are always on the lookout for the government to swallow their money or for their money to go to an organization that's not doing something for them. If I had not done research on*

*the national parks, I would never have known that the cost goes back to the park. I think if they gave that information when people are asking about park licenses and fishing licenses, it might improve people's willingness to buy the pass and go [fishing or hiking in parks] more often.* —Denver first-time license buyer

The focus groups explored whether participants were more likely to purchase a license and go fishing if they knew that license fees were used to manage and conserve wildlife and natural resources in their state. Participants were initially asked whether they knew how fishing license fees were used, and were then read a brief explanation of the Federal Aid process through which states receive matching funds for licenses sold.

In general, less than half of the participants in each group were able to articulate that the fees are used for conservation management, and few if any participants across the two groups were aware that states receive matching Federal Aid funds for fishing licenses sold. In the Richmond group, very few participants suggested that knowing license fees are used to support state conservation efforts made them more likely to buy a license or fish; one exception was a female participant who, in discussing how she always purchased a fishing license for a small and little used Maine lake where she and her husband vacationed, mentioned specifically that she thought of the license fee as a contribution to conservation efforts. By contrast, most other participants in the Richmond group said that, while they were happy to learn that license fees are used for conservation funding, simply knowing this was unlikely to change their future license purchasing behavior (not that these participants would purchase licenses any less frequently).

Denver participants reacted favorably when informed that states receive matching federal funds for licenses sold. A few people specifically approved of the fact that license fees are used to support state resources, while one or two people indicated that someone who was unsure whether to buy a license might decide to do so after learning that the fee would support wildlife in his/her state. Others in the group suggested that a license basically amounts to a user fee (i.e., the purchase is necessary to participate legally); these participants generally did not view the Federal Aid concept as being particularly persuasive or important in terms of their future license purchases.

### **Reactions to Various Forms of Encouragement**

Focus group participants were asked for their reactions to several specific forms of encouragement or reminders about license purchasing and fishing; their reactions to each item are summarized below:

#### **Having someone to fish with:**

*It's usually more fun to have people to go with.* —Denver first-time license buyer

*Well, it's half and half because sometimes I would prefer to go by myself.* —Denver first-time license buyer

The large majority of the Richmond group considered this an important form of encouragement, and most participants in the Denver group appeared to agree. While a few people in the Denver group

commented that they sometimes preferred to fish alone specifically for the solitude, most in the group viewed fishing companions as a positive concept.

**An invitation from a friend or family member to go fishing:**

*[Being invited] makes it easier for someone like me because I don't have any equipment. So if you invited me, I'd go! I'll pack the food because I don't have any equipment.* —Richmond first-time license buyer

*The fact that someone else initiates it—it wasn't you that came up with the idea—makes it more of a priority. Sometimes peer pressure is a good thing.* —Denver first-time license buyer

As suggested elsewhere, this is one of the most important facilitators in encouraging fishing participation among both casual and novice anglers as well as more avid and committed anglers. Interestingly, participants in the Richmond group saw different benefits to this form of encouragement: some people emphasized that an invitation from a friend or family member would mean being able to go with a more experienced angler who could provide instruction or access to equipment. Others were interested in the social benefits of being able to connect with the person through shared time—these participants generally pointed out that fishing, as an activity, allows for relaxed interaction conducive to conversation (unlike basketball or other, more active activities). In the Denver group, a few people mentioned that they were more likely to go on a fishing trip if invited by someone, due to the excursion being initiated by someone else (in this way, the trip would feel more like a special outing).

**If a child asked to be taken:**

*I would. If you think about it, you know how you feel when you catch a fish, imagine how a three year old feels when they catch a fish. It's exciting when they catch it to see the smile on their face.* — Richmond first-time license buyer

*I'm not going to take a kid who says 30 minutes into it that they're done; no, we're here and we're going to do the half-day or full day or whatever it is. That's why I like all the other things you can do at a lake; if there's no fishing or you're not catching anything, there are other things to do.* —Denver first-time license buyer

In both groups, a few individuals stated that it would “depend on the kid.” At the same time, a substantial number of people across the two groups indicated that they would gladly take a child fishing, if approached for that reason. One person in the Richmond group stated that she would also gladly take older people fishing as well as children. In the Denver group, one or two people said that they would want to make sure the child was interested in fishing for at least several hours or most of a day before committing to an involved trip to a lake.

**More specific tips about how to, where to, and when to fish:**

*It's more about the person who's going to teach you. Most people don't pick up a book like “Fishing for Dummies.” You learn from people.* —Denver first-time license buyer

Reactions in the Richmond group were fairly positive, although participants were not effusive when discussing this form of encouragement. Similarly, participants in the Denver group commented that while such materials certainly could not hurt, they should be free of charge. It was pointed out that individuals generally learn how to fish from other people, not books or instructional manuals.

**Educational “how to” videos:**

*I were going to go fishing and I wanted to learn how to fish for steelhead or whatever, I would much rather go with someone who regularly goes steelhead fishing, and have him show me how to do it, and show me what bait is really effective, than to read an instruction manual or a book or a DVD, because that’s what I’m trying to get away from. I just spent all day researching or writing at work. —Richmond first-time license buyer*

*You can find everything on YouTube. —Denver first-time license buyer*

Similar to the previous item, most people in the Richmond group indicated that they would be fairly unlikely to watch instructional videos of any considerable length, preferring instead to receive advice and guidance from other individuals (including employees or customers at bait shops). In the Denver group, participants pointed out that any number of instructional fishing videos can already be found on YouTube, for those who are interested.

**An educational event or class hosted by your state fish and wildlife agency:**

*It would help me fish, but I don’t have time for that. I don’t have much time off, I wouldn’t want to take a Saturday. —Richmond first-time license buyer*

*Well, the downside to that is the location: where is it, where do you have to go? In today’s age, everything is broadcast or televised or put on YouTube. —Denver first-time license buyer*

Reactions to this were again fairly similar to the previous two items, with participants in both groups pointing out limitations associated with available free time and suitable locations for such classes or events (YouTube was again brought up as a helpful resource for those unwilling or unable to travel considerable distances to a class/event). At the same time, some in the Denver group suggested that they would be open to participating in such events if they happened to encounter them at area parks or lakes at which they were already visiting or planning to visit.

**Receiving information on local fishing opportunities (including preferences related to delivery methods, such as phone calls, letters, e-mails, or free smartphone apps):**

*Depending on where you are, are you going to be able to have a signal to even get the app? I like the brochure best. You can lay in bed in read it, you can take it on a boat, you have access to it. It’s easier, old fashioned. —Richmond first-time license buyer*

*If you're going to go fishing, you could just look to see if this is a good weather day on your app, is this a good lake, are the fish biting, and then you're like, "Okay, it's definitely not coming in the boat, it's going to stay in the car," if you're not into technology on the boat.* —Richmond first-time license buyer

*Maybe if that was included in the purchase of a license. I know stuff is available but just having it handed to you, you're more willing and likely to look at it than if you searched on your own. Just the simple fact that it's handed to you makes you more likely to use it.* —Denver first-time license buyer

One person in the Denver group stated that information on local fishing opportunities would be most valuable if it were distributed in hard copy at the time of a fishing license purchase (this person commented that "the simple fact that it's handed to you makes you more likely to use it"). Regarding preferences in delivery methods, there was little consensus over the best ways to distribute this information: in the Richmond group, different participants preferred mail, e-mail, TV commercials, Twitter messages, and hard copy pamphlets and brochures (such as those provided at rest stops).

Additionally, there was a fairly lengthy digression on the pros and cons of a free fishing app: in short, the group was divided on the merits of an app, with some people emphasizing the convenience of smartphone integration and others pointing out that an app could be confusing, would require constant updates, or would simply lead to little-known fishing spots becoming overcrowded as they were advertised through the app. A few Richmond participants said they would trust local bait and tackle shop employees/customers over an app. Debate in the Denver group over the various delivery methods essentially mirrored the discussions from the Richmond group, albeit on a smaller scale: participants debated the various pros and cons in much the same way but spent less time on the subject as a whole (a few people in the Denver group liked the idea of an app, while others appeared to view it as unnecessary).

#### **Receiving a reminder to renew a license:**

*I may need a reminder, just to embed it in the back of my mind. A reminder might embed it back in your brain like that, like, "I need to go fishing, back out to the water." That's just me.* —Richmond first-time license buyer

*What would really be cool is if you pay with your credit card, you could sign up for auto-renewal, where you would just automatically have your license renewed. An option to auto-renew your license, like Netflix. I think it would probably encourage more people to buy.* —Denver first-time license buyer

Most people in the Richmond group viewed the idea of a reminder favorably. In the Denver group, responses were fairly similar (despite a few people suggesting that a simple reminder would be unlikely to persuade someone to buy a license if they were not already planning on doing so). Additional discussion in the Denver group concerned the convenience and ease of renewing a license, with some people stating their preference for renewal over the Internet (one person suggested an auto-renewal process similar to Netflix). Finally, one Denver participant recommended that short-term fishing licenses be sold on location at lakes, specifically at booths that rent equipment or provide information.

### **If the license purchasing or renewal process was easier:**

*It's not difficult, but again if you dropped the barrier of entry, if you're already renewing your driver's license, why not? —Richmond first-time license buyer*

On this topic, several comments in the Richmond group suggested that the process for purchasing and/or renewing a fishing license is already fairly easy. At the same time, a few participants discussed the possibility of allowing residents to renew a fishing license at the same time a driver's license is renewed (presumably for a longer period similar to the valid term of a driver's license, as opposed to a single-year fishing license period).

### **Reactions to Various Messaging Concepts**

Focus group participants were asked for their reactions to several messaging concepts designed to encourage license purchasing and fishing; their reactions to each concept are summarized below:

#### **Being reminded that fishing is important for fish and wildlife conservation:**

*No, I think it's compassion fatigue. To a certain extent you can get bombarded with the politically correct [messaging]. I would find it more offensive than incentive. —Richmond first-time license buyer*

*From a department's perspective, you drive interest in preserving the environment from a bottom up perspective. Hypothetically, we all love fishing, so we're all going to make sure we don't throw our beer cans over the boat. And bottles in the water, because we're going to know the fish aren't going to be around long if you're doing that. I think we're all tired of like, messages being forced upon us by organizations that all have a message to penetrate; I think people are just worn out by that. People go fishing to get away from that. —Richmond first-time license buyer*

Many participants in the Richmond group appeared openly resistant to messaging that emphasized that fishing is important for fish and wildlife conservation. These individuals appeared to interpret the message as being overly prescriptive or authoritarian; such participants recommended that, rather than attempting to convert anglers or potential anglers into conservationists via messaging, agencies should simply let the fishing experience itself create "stakeholders" of the environment (i.e., individuals are likely to become dedicated to conservation as they become more experienced as anglers, but messaging to this effect will have little value).

#### **Being reminded that fishing helps connect people with nature:**

*I see a slightly different commercial. Not so much connecting with nature, but disconnecting from the rest of it. There's this dome over a boat and my son's sitting there, and there's this white noise bombarding it, so there's this safe zone over it. The picture I get in my head is not plugging in [to nature], but disconnecting from the rest of it [outside of nature]. —Richmond first-time license buyer*

*It's the relaxation, but it's the blocking of that time. It's almost a forceful [way of deciding that] from here to here, the rest of it doesn't exist. It makes space to relax. —Richmond first-time license buyer*

*People sit in their cubicles and get that email [with the fishing and connection to nature message] and say, "Oh—I'd rather be there than here." It's a reminder. —Denver first-time license buyer*

While a handful of Richmond participants found this concept to be obvious, most in the group appeared to view the message itself as valuable. One person in the group suggested that a more powerful message would emphasize that fishing lets people "disconnect from the rest of the world outside of nature," rather than allowing them to connect with nature. Similarly, the message received mixed reactions in the Denver group: a few people felt that it was too obvious, while others viewed it as a useful reminder to disengage and go outside.

**Being reminded that fishing helps people relax:**

*The thing that everyone keeps talking about is the relaxation factor, and I would absolutely agree with that. Very peaceful. I strive toward simplicity in life, and trying to keep it the least complicated, and fishing is the same. Fishing is simplicity. —Richmond first-time license buyer*

*I think people get tired of inching along the highways in their metal coffins, bumper to bumper, with idiots who can't drive—I think it's appealing for people to think about getting away from it. —Denver first-time license buyer*

A number of people in the Richmond group said that they were more likely to be motivated by messaging that emphasized the competitive or exciting aspects of fishing, as opposed to the relaxation aspects. On the other hand, a few others reacted quite positively to this message, saying that it mentioned one of their most preferred aspects of fishing. Participants in the Denver group generally regarded this message quite positively, with comments addressing the value in reminders to relax.