State Fishing Licenses and Factors Affecting Growth/Decline

December, 2018
Sportfishing Participation is UP

USFWS Certified License Buyers

PRELIMINARY
But Not Everywhere...
Fishery Improvements
Regulations & Licensing
Population Growth
Economy
Marketing
Demographics
Weather
Employment
PRELIMINARY
1) Which factors or characteristics beyond our control increase participation or cause declines?

2) For states experiencing long-term angler growth, do they share any common characteristics?

3) Of those factors we can control, which ones provide the greatest growth opportunities?

Increase growth in fishing participation
WHAT WE DID

PRELIMINARY
Models

Sunday
Sunny
Warm
Rural

Monday
Stormy
Cold
Urban

PRELIMINARY
Information Used Includes:

- Participation
- Environmental
- Economic
- Demographic
Information Used Includes:

State agency actions:
1) Which factors or characteristics beyond our control increase participation or cause declines?

2) For states experiencing long-term angler growth, do they share any common characteristics?

3) Of those factors we can control, which ones provide the greatest growth opportunities?
1) Which factors or characteristics beyond our control impact fishing participation?
2) For states experiencing long-term angler growth, do they share any common characteristics?
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4 of 6 growth states vs. 1 of 6 declining states
3) Of those factors we can control, which ones provide the greatest growth opportunities?

- **R3**
  - Email campaigns: Georgia (2016) & Connecticut (2013)
  - Arizona’s Fish Arizona (2005)
  - Kansas’ non-profit volunteer partnership (2012)
3) Of those factors we can control, which ones provide the greatest growth opportunities?

- **Licensing Changes:**
  - 365-day licenses: Mississippi & Arizona
  - Simplified licenses: Arizona
  - Multi-year licenses: PA, ID, MS, WY
Highlight: Kansas

- Licensed Anglers $\uparrow$ 10%
  - License restructuring (2016)
    - Multi-year and lifetime licenses (2016)
- Urban Fishing
  - Urban fishing initiative in 2016
- R3: Partnered with a non-profit to engage volunteer force (2012)
Highlight: Arizona

- Licensed Anglers ↑ 12%
  - Integrated R3 approaches (2005)
    - Utilized volunteers
    - Large marketing effort
  - License restructuring (2014)
    - Condensed suite of licenses
    - Valid for 365 days from date of purchase
What We Don’t Know

• Nationally, which factors have the greatest or least impacts collectively

• Insights from the other 38 states

• Which specific R3 efforts have the best financial return
  – This must be evaluated in each state

• Potential benefits of new, untested R3 methods
Takeaways

• Integrated marketing is key!

• Ramping up large scale R3 efforts:
  – Email campaigns: low cost! RBFF toolkit available
  – Marketing to urban-based audiences
    ... and more!

• Simplifying license structures

• Offering multi-year licenses
Takeaways

• Don’t be discouraged if your overall participation rate is decreasing
  – The factors described here can positively affect your bottom line.

• As AFWA Angler R3 Taskforce recognized: No “one-size-fits-all” solutions exist:
  – Test
  – Evaluate
  – Improve
  – Grow
Takeaways

“We need to wake up every day and think about R3 related strategies if we are going to succeed with the objective of increasing participation in angling and boating”.

- Carter Smith, Executive Director, Texas Parks and Wildlife
QUESTIONS?