



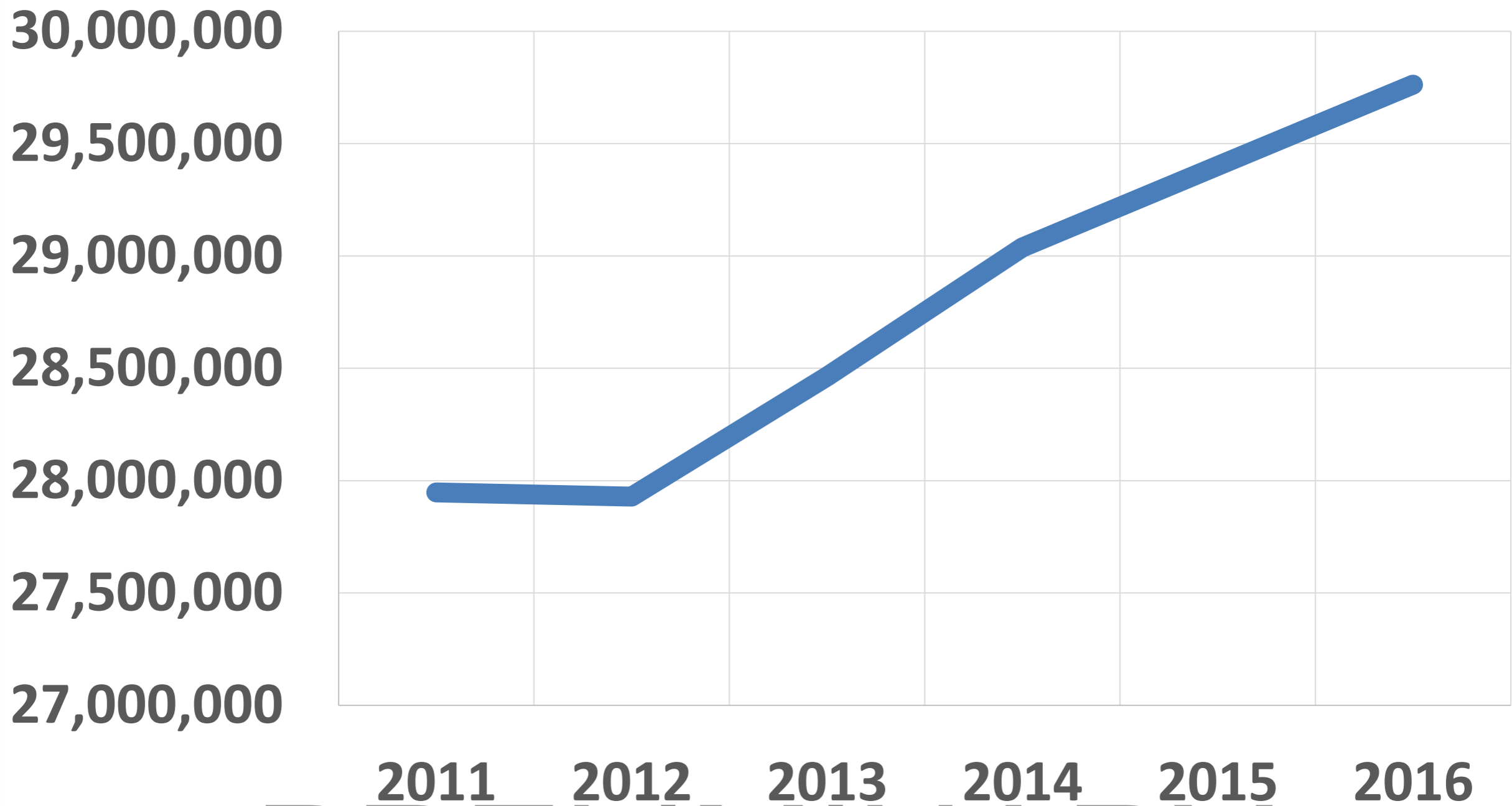
**SOUTHWICK**  
ASSOCIATES

# State Fishing Licenses and Factors Affecting Growth/Decline

December, 2018

**PRELIMINARY**

# Sportfishing Participation is UP



USFWS Certified License Buyers

PRELIMINARY

**But Not Everywhere...**



**PRELIMINARY**

**Fishery Improvements**

**Employment**

**Regulations & Licensing**

**Population Growth**

**Demographics**

**Marketing**

**Economy**

**Weather**

**PRELIMINARY**

**Fishery Improvements**

**Employment**

**Regulations & Licensing**

**Population Growth**

**Demographics**

**Marketing**

**Economy**

**Weather**

**PRELIMINARY**

## PURPOSE

- 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**

PRELIMINARY

PARTNERS



RECREATIONAL  
BOATING & FISHING  
FOUNDATION



**American Sportfishing Association**

*Leading the Way for Sportfishing's Future*



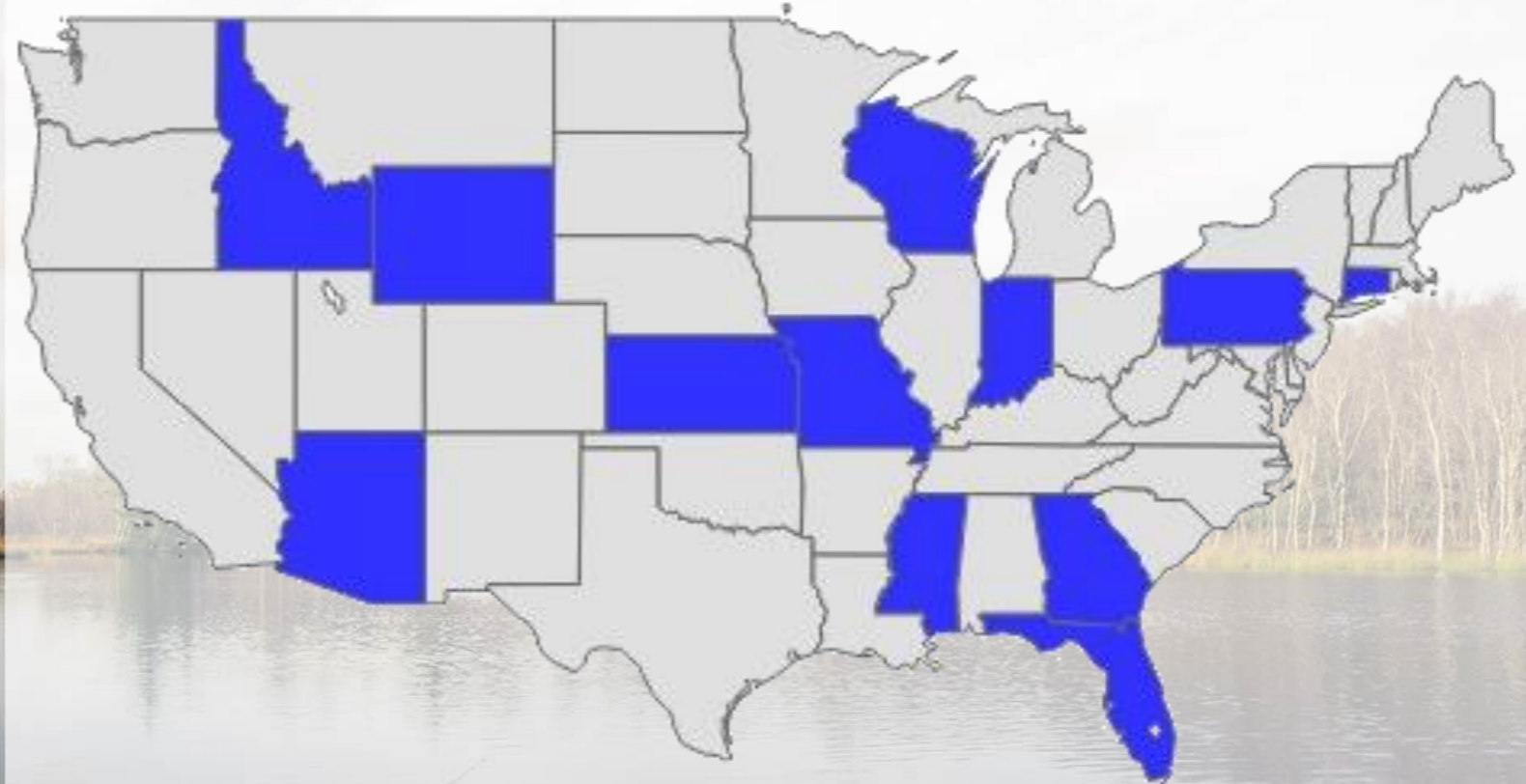
National Marine  
Manufacturers Association®



**SOUTHWICK  
ASSOCIATES**

PRELIMINARY

WHAT WE DID



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# Models

**Sunday  
Sunny  
Warm  
Rural**



**Monday  
Stormy  
Cold  
Urban**



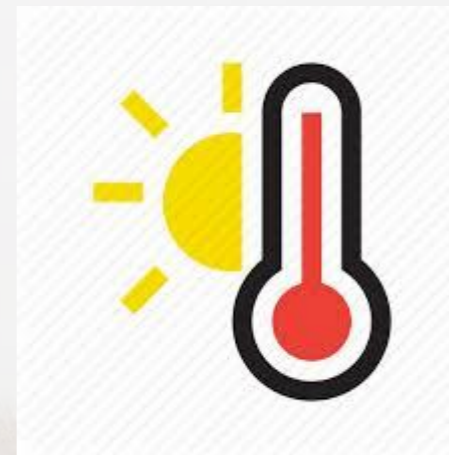
PRELIMINARY

# Information Used Includes:

**Participation**



**Environmental**



**Economic**



**Demographic**



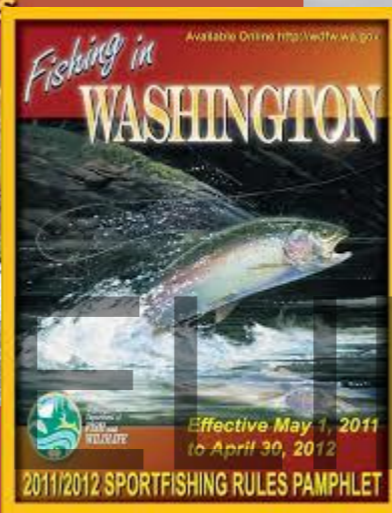
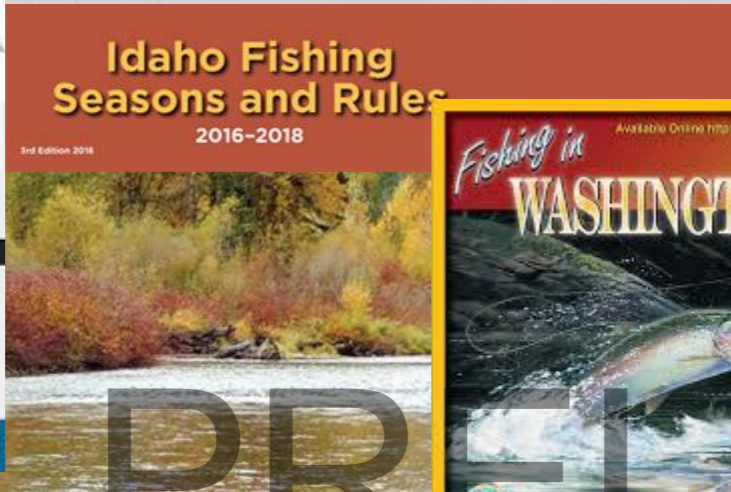
**PRELIMINARY**

# Information Used Includes:

## State agency actions:



Recruit | Retain | Reactivate



PRELIMINARY



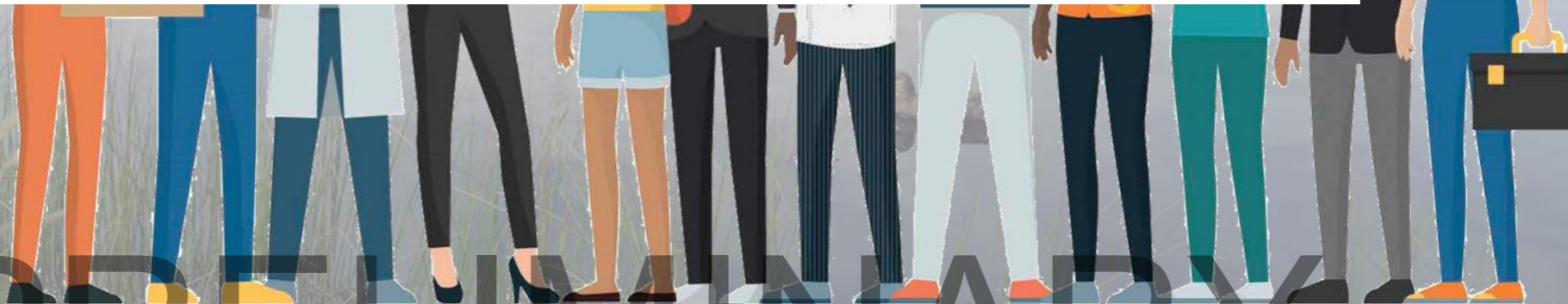
Free Fishing Day  
June 9, 2018

## RESULTS

- 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?

PRELIMINARY

# 1) Which factors or characteristics beyond our control impact fishing participation?



PRELIMINARY

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



PRELIMINARY

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



**4 of 6 growth states**

**VS.**

**1 of 6 declining states**

**PRELIMINARY**

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

- R3

- Email campaigns: Georgia (2016) & Connecticut (2013)
- Urban fishing programs: Kansas (2016) & Indiana (2014)
- Arizona's Fish Arizona (2005)
- Kansas' non-profit volunteer partnership (2012)



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### 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



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# Highlight: Kansas

- Licensed Anglers **↑ 10%**

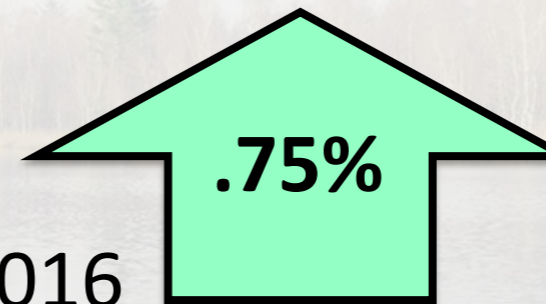
– License restructuring (2016)

- Multi-year and lifetime licenses (2016)

Effective Date	Start Date	Expiration Date
06-14-2007	05-2007	<del>06-14-2017</del> <b>NEVER</b>

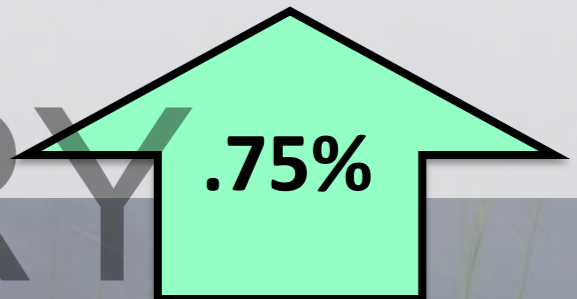
– Urban Fishing

- Urban fishing initiative in 2016



– R3: Partnered with a non-profit to engage volunteer force (2012)

PRELIMINARY

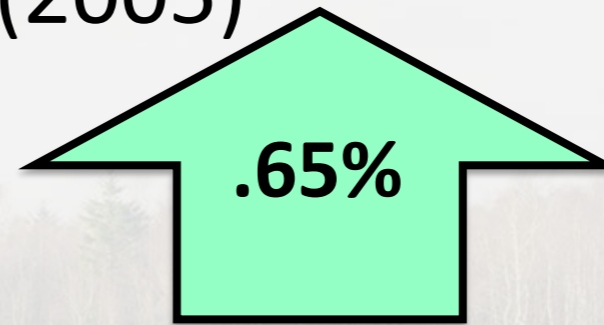


## Highlight: Arizona

- *Licensed Anglers* ↑ **12%**

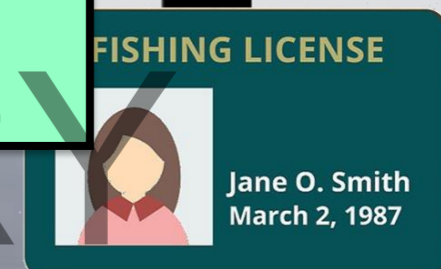
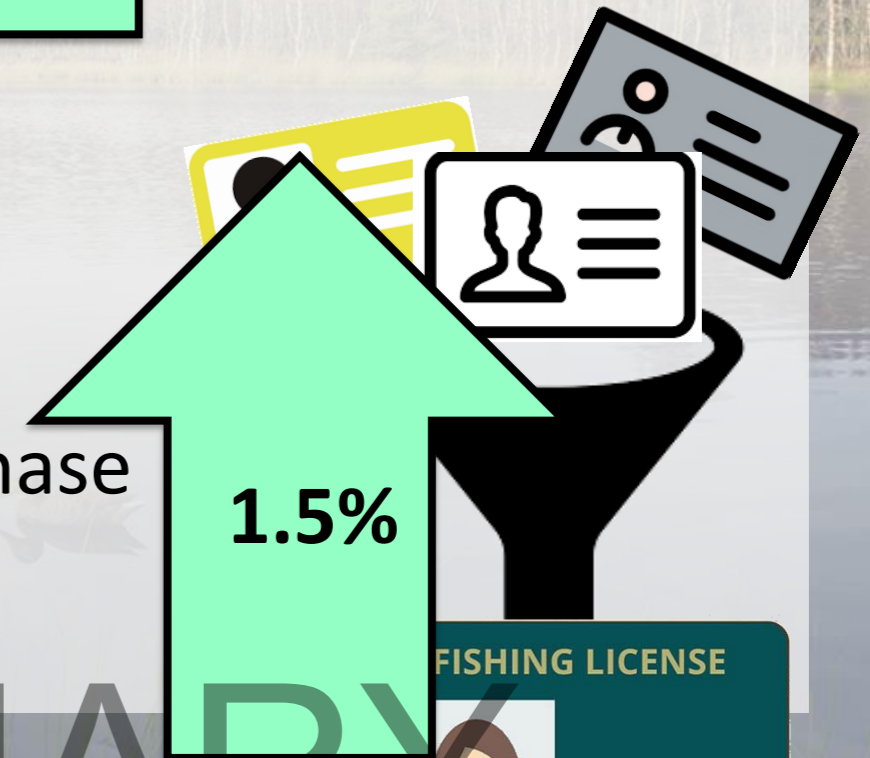
– Integrated R3 approaches (2005)

- Utilized volunteers
- Large marketing effort



– License restructuring (2014)

- Condensed suite of licenses
- Valid for 365 days from date of purchase



PRELIMINARY

## 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

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## 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

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## 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

PRELIMINARY

## 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**

PRELIMINARY

A serene landscape featuring a calm pond in the foreground. Two ducks are swimming in the water. The background is filled with a dense forest of trees, some bare and some evergreen, under a cloudy sky. The overall scene is peaceful and natural.

# QUESTIONS?

# PRELIMINARY