

AFWA-ASA Data Mining Project

Initial Colorado Findings

August 10, 2006

This analysis, funded by a Sport Fish Restoration multi-state conservation grant awarded jointly to the Association of Fish and Wildlife Agencies and American Sportfishing Association, is designed to help Colorado improve efforts to increase fishing licenses sales and revenues. This report represents the first step, which is an initial review of Colorado's fishing license data by Southwick Associates, Inc., the grant's subcontractor. The results are intended to help Colorado understand basic license sales trends, and generate questions for additional investigation. The second step will be a second round of data analysis based on directions provided by Colorado. We encourage Colorado to consider its current or potential future marketing efforts when reviewing this document. The second round of analyses will seek insights in questions created by the results in this report. Southwick Associates, Inc. will be available by phone or email to answer any questions (904-277-9765, rob@southwickassociates.com). The analysis is based on available license information from 2001 to 2005 which is described in detail along with the tables.

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Section 1: Basic License Sales Information

Tables 1 through 4 present initial information regarding Colorado's 2005 license sales for all buyers. This is a basic look at Colorado's license sales, which mirrors the examinations traditionally available prior to the advent of electronic license systems.

***Table 1. 2005 Licenses Sales, by Type of Licenses Sold
Resident and Non-Resident***

License	Percent
Res. Fishing Annual	30.61%
Fishing-One Day	22.52%
Extra Rod Stamp	16.78%
Fishing Additional Day	9.30%
Res Combo Annual	8.04%
Fishing 5 Day	6.54%
Res Sr Fishing-Annual	3.38%
Non Res Fishing-Annual	2.73%
Sr Lifetime Low-Income Fishing	0.09%

Table 2. 2005 Residency License Distribution

	Percent
Non-Resident	31.7%
Resident	68.3%
Total	100.0%

Table 3. 2005 Licenses Sold by Gender

	Resident	Non-Resident
Female	14.1%	6.1%
Male	54.3%	25.5%

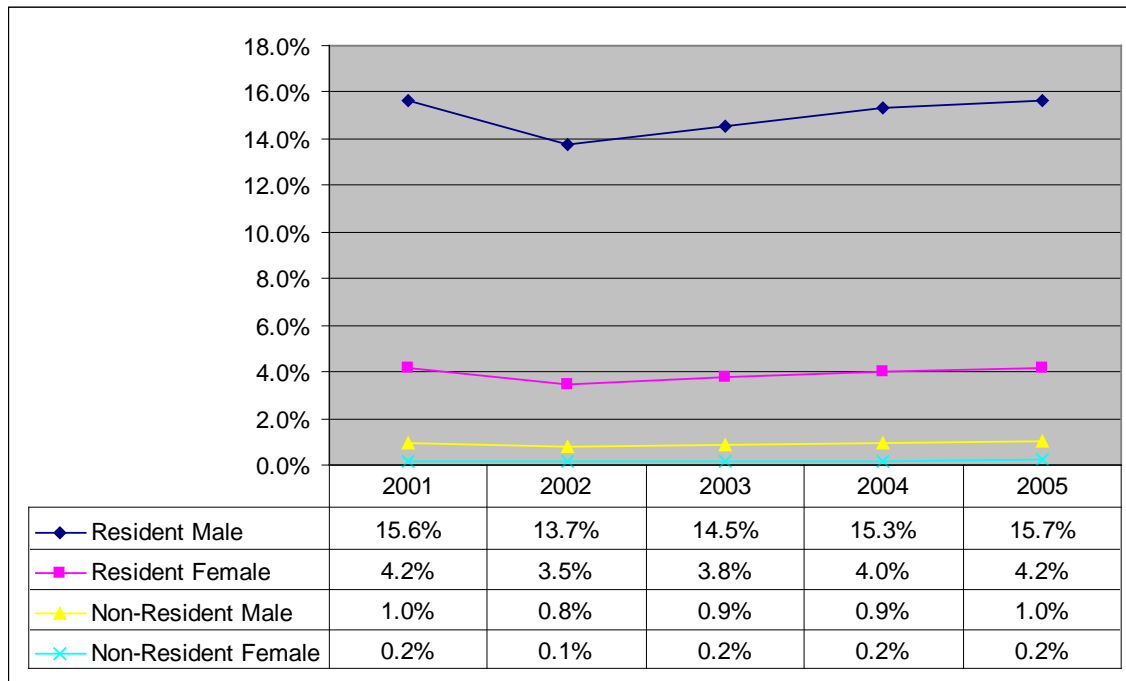
Table 4. 2005 Age of License Buyers at Time of Purchase

Age	All Buyers	Resident	Non- Resident
16 and Under	0.2%	0.2%	0.2%
17 to 19	3.4%	3.4%	3.5%
20 to 29	17.3%	18.4%	15.0%
30 to 39	19.7%	21.1%	16.5%
40 to 49	23.7%	24.2%	22.6%
50 to 59	19.6%	18.5%	22.0%
60 to 69	11.1%	9.7%	14.2%
70 and older	5.0%	4.5%	6.1%
	100.0%	100.0%	100.0%

Tables 1-4 above give us a general one-year picture of license sales in Colorado, but nothing very detailed, nothing new, and nothing that permits a focused marketing effort. Next, we will go into more detail by looking at multi-year trends.

By looking at multiple years of data, we can identify license sales trends. Colorado has electronic records for sales of annual licenses back to 2001. Sales of daily licenses are not included as they are not available for 2001, 2002 and for all of 2003. Therefore, five year trends are only available for annual licenses. The numbers in the table at the bottom of the chart total to 100% of all annual license sales from 2001 to 2005.

Table 5. Annual License Sales Trends, 2001-2005
(Y axis = the percentage of licenses for all annual sales)



Annual Licenses show a significant decrease from 2001 to 2002, then a steady increase each after that for all buyers. Other states show a slight decrease over the years making Colorado one of the few that show an upward trend from 2002 to 2005. We can not deduce if this is caused from people buying more annual licenses and foregoing daily licenses as data on short term licenses were not available.

While overall sales are increasing over the past few years, there are likely sub-groups of license buyers experiencing faster growth or losses. If true, who are these people?

Section 3: Lifestyle Analyses

Peoples' preferences vary based on their income, age, urban/rural lifestyle, where they are in life (single, family, empty-nest, retired, etc.) and more. This type of information is not available from the typical statistics provided by Colorado's electronic license database. To gain a better understanding of who is more likely to buy or not buy a license, we use TAPESTRY® lifestyle data:

ESRI of Arlington, VA provides the TAPESTRY® data service. TAPESTRY® is built from Census Bureau data and other sources. From the ESRI website: "The Community Tapestry segmentation system provides an accurate, detailed description of America's neighborhoods. U.S. residential areas are divided into 65 segments based on demographic variables such as age, income, home value, occupation, household type, education, and other consumer behavior characteristics." Using the ESRI service, we appended all of the Colorado license purchasers with TAPESTRY® data. The resulting information explains the lifestyle typical to people who live on the same block or local neighborhood as the license buyer. The appended data allow us to learn more about the lifestyles of people who purchase fishing licenses and gain a better understanding of who does and does not buy fishing licenses. The results will allow Colorado to better understand the license buying market and to become more focused and cost-effective in its marketing and recruitment programs.

TAPESTRY® divides the public into 12 major groupings called "LifeModes," each of which has sub-groupings referred herein as "segments." In all, there are 65 segments available. We give abbreviated descriptions of each LifeMode and segment when first presented, but encourage the reader to review the attached .pdf for more complete descriptions.

Who is Likely to Buy a Fishing License?

Let's take an initial look at the top license-purchasing LifeMode categories in 2005. The rank is based on the number of buyers that bought an annual license over the past five years. This method of rank is used consistently throughout the report.

**Table 6. Sales by LifeMode Categories, 2005,
Ranked from Largest Purchasers to Least, Residents**

LifeMode Groups	% of State Pop.	% of 2005 Buyers	Cumulative %	Description
High Society	22.1%	21.4%	21.4%	Fastest growing group, highest income, married
Upscale Avenues	16.1%	17.2%	38.6%	Above average income
Family Portrait	10.4%	12.6%	51.2%	Generally younger families, homeowners
American Quilt	11.7%	12.2%	63.4%	Small towns/rural, modest income, blue-collar or rural nearing retirement, modest or mobile homes
Traditional Living	7.1%	7.6%	71.0%	Hard working, modest income families, older towns losing kids to newer cities and growth areas
Senior Styles	8.5%	6.6%	77.5%	Retirees, average income, depend soc sec & pensions

LifeMode Groups	% of State Pop.	% of 2005 Buyers	Cumulative %	Description
Solo Acts	6.0%	5.4%	82.9%	Young, educated, city life
High Hopes	4.7%	5.4%	88.3%	Young, college educated, single or married w/out kids
Global Roots	4.1%	4.8%	93.0%	Ethnically diverse, recent immigrants, want to improve
Factories and Farms	5.0%	3.3%	96.4%	Small towns often in America's breadbasket states, lower income, married, employed in ag & manufacturing
Metropolis	2.5%	2.3%	98.6%	City families, row houses & public transportation
Scholars & Patriots	1.7%	1.4%	100.0%	Youthful, lower income, in college or military

Colorado's license sales generally mirror the population. The LifeMode groups "High Society" and "Upscale Avenues", with 38.2% of the state population, comprise 38.6 percent of the state's license buyers.

The next groups are families or from small towns and rural areas. These groups tend to buy licenses at a rate slightly greater than other groups (column #3 compared to column #2). The same has been seen for these groups in most other states as well.

The LifeMode categories presented in Table 6 provide an initial look at Colorado's anglers. There are greater details still available. Let's take a more-detailed look at the top annual license-purchasers by TAPESTRY® segments from 2001 to 2005. Table 7 only looks at trends for annual license buyers from 2001 to 2005 due to the lack of data on short term licenses. Table 7 is long and detailed, and summary discussions follow.

Table 7. 2001-2005 Annual License Sales by Segment, Residents ranked by market share ('% of 2001-2005 Annual License Sales')

Rank	Tapestry Segment	LifeMode Groups	% of 2001-2005 License Sales	Cumulative %	% of State Pop.	Description
1	Up and Coming Families	Family Portrait	7.84%	7.84%	6.59%	Fast growing segment, avg age = 32, married with kids, affluent, own home on suburban fringe, little time, fast food.
2	Boomburbs	High Society	6.06%	13.90%	5.57%	Younger families with busy upscale lifestyle, two incomes, college ed., homeowners, into computers & tech, CNN, Discovery channel
3	Green Acres	Upscale Avenues	5.10%	19.00%	4.45%	Married w/ kids, blue collar baby boomers with college ed., Above average income, suburban fringe, do-it-yourselfers, outdoors
4	Rural Resort Dwellers	American Quilt	4.97%	23.97%	3.62%	Rural non-farm, married/kids moved out, typically older, avg income, boats/fish/hunt
5	Sophisticated Squires	High Society	4.83%	28.80%	4.38%	Country living on urban fringe, above avg income, 35-54, SUVs, married w/ kids, golf
6	Exurbanites	High Society	4.67%	33.47%	4.36%	Affluent, likes open space on urban edge, married/empty nesters, golf, kayakers, active in volunteer groups and donate to causes
7	Midland Crowd	American Quilt	4.31%	37.78%	4.45%	Avg age=36, married, ½ with kids, typical income, new housing in rural areas, blue

Rank	Tapestry Segment	LifeMode Groups	% of 2001-2005 License Sales	Cumulative %	% of State Pop.	Description
						collar, conservative, likes Fords & fishing
8	Suburban Splendor	High Society	4.31%	42.09%	3.95%	Maturing families, very affluent, dual incomes, avg age=40, younger neighborhoods (but not new), like to invest
9	In Style	Upscale Avenues	4.08%	46.17%	3.58%	Suburb living/prefers city lifestyles, married/no kids, age=38, higher income, tech savvy, rock music, health oriented
10	Aspiring Young Families	High Hopes	3.77%	49.94%	3.31%	Young start-up families, married or divorced, typical age=30, 22% with degrees, ½ rent, live in growing metro areas, avg income
11	Enterprising Professionals	Upscale Avenues	3.68%	53.62%	3.09%	Young, highly educated, single or recently married. Above average income, rent, mobile, tech savvy, likes to travel
12	Milk and Cookies	Family Portrait	3.24%	56.86%	3.02%	Young families but affluent for their age, two incomes, prefer single-family homes, focused on families & future, leisure time = kid time
13	Main Street, USA	Traditional Living	3.16%	60.03%	2.44%	Suburbs of smaller metro areas in older homes, avg age= 36, ½ married, slightly above avg income, service/manufacturing
14	Midlife Junction	Traditional Living	2.88%	62.91%	2.90%	Exiting child-rearing, mix married & single, slightly below avg income, 33% live in apts, suburban, conservative, budget-conscious
15	Cozy and Comfortable	Upscale Avenues	2.58%	65.48%	2.38%	Older suburban areas, middle aged, married, older kids, use computers, above avg income, not really do-it-yourselfers
16	Metropolitans	Metropolis	2.27%	67.75%	2.16%	City living, older neighborhoods, single or childless couples, educated, slightly above average income, mobile, homeowners
17	Industrious Urban Fringe	Global Roots	2.03%	69.78%	1.81%	Family is key. Largely hispanic, many foreign born, live on city's edge, avg. income, commonly owns home. Thrifty.
18	Crossroads	American Quilt	2.00%	71.78%	2.00%	Married couples/single parents, 32 years, below avg income, smaller towns, mobile homes common, above avg unemployment
19	Prairie Living	Factories and Farms	1.95%	73.73%	2.10%	Midwest small farms mostly, avg age = 40, married, half have kids, typical income, pets, country music, hunts and fish
20	Old and Newcomers	Solo Acts	1.85%	75.58%	1.80%	In transition-starting careers or retiring, renters, more single person and shared households, few families, lower income
21	Young and Restless	Solo Acts	1.70%	77.28%	1.80%	Avg age=29, most are single, educated but income < avg. Renters, women more likely to work, metro areas, tech savvy.
22	Prosperous Empty Nesters	Senior Styles	1.63%	78.92%	2.09%	½ over 55, kids moved out, above avg income, still working, suburban, physically active, investors
23	Urban Chic	Upscale Avenues	1.58%	80.49%	1.79%	Professional, urban couples, less than ½ with kids, 41 yrs, above avg income, uptown living (highrises) common, prefer city life
24	Heartland Communities	Senior Styles	1.57%	82.06%	2.11%	Above avg age, married, modest income, small Midwest towns, hunt/fish/bowl, country music, do-it-yourselfers
25	Connoisseurs	High Society	1.45%	83.51%	1.99%	Very high incomes, slightly older, slightly older & many still with kids, live in dense city centers, liberal, travel, like to spend

Rank	Tapestry Segment	LifeMode Groups	% of 2001-2005 License Sales	Cumulative %	% of State Pop.	Description
26	Great Expectations	High Hopes	1.29%	84.80%	1.37%	Young singles & married couples, lower income & growing, many rent, music taste varies: MTV to country, like outdoor sports
27	Rustbelt Traditions	Traditional Living	1.27%	86.07%	1.63%	Older Great lakes industrial cities, avg age = 36, mix of married or single, slightly below avg income, don't move much, forego fads
28	Rooted Rural	American Quilt	1.21%	87.28%	1.65%	Slightly older, rural, empty-nesters, lower income, less likely to have college experience, trucks, do-it-yourselfers
29	Inner City Tenants	Global Roots	1.13%	88.42%	1.12%	Ethnically diverse, urban, 27 years=avg, single, lower than average income, college is a goal, rents, not outdoorsy.
30	Rustbelt Retirees	Senior Styles	1.03%	89.45%	1.24%	Married/no kids, avg income, Great Lakes & Northeast, own homes, not inclined to move, loyal to community & country, gets involved
31	Pleasant-ville	Upscale Avenues	0.94%	90.39%	0.81%	Slightly older, families with kids, above average income, urban/suburban, long commutes common, moves infrequently
32	Simple Living	Senior Styles	0.87%	91.26%	0.83%	Older, 1/2 single, kids rare, low income, 1/4 didn't finish high school, community is important
33	Metro Renters	Solo Acts	0.86%	92.12%	1.12%	Urban, young, educated & single, slightly above avg income & rising, internet savvy, have disposable income, ethnically diverse
34	College Towns	Scholars & Patriots	0.79%	92.91%	0.89%	Avg age=24.3, almost 1/2 enrolled in college & others on staff, part-time jobs, low income, renters or some in dormitories.
35	Laptops and Lattes	Solo Acts	0.67%	93.58%	0.92%	Avg age = 38, mostly single, live in urban centers, affluent, cosmopolitan, educated, rents, traveled and tech savvy.
36	Salt of the Earth	Factories and Farms	0.62%	94.20%	1.26%	Two-thirds are married with kids, blue collar, avg income, Midwestern, often rural, own single family homes, conservative
37	Retirement Communities	Senior Styles	0.56%	94.76%	0.68%	Retired, 1/2 single, below avg income, 1/2 own single-family homes/others in multi-unit places, live in metro areas, health conscious
38	Home Town	Factories and Farms	0.50%	95.26%	0.76%	Young, tend to remain in hometown, low avg income, some married, 1/3 without diploma, suburban but prefer country lifestyle
39	Top Rung	High Society	0.46%	95.72%	1.31%	Mature, married, well educated and wealthy. Live in coastal urban areas, travel frequently. Home values near \$1 million.
40	NeWest Residents	Global Roots	0.44%	96.16%	0.43%	Over 1/2 foreign born, largely hispanic, urban, renters in mid-to-high rise apts. Low education rates but modest (not low) income.
41	Senior Sun Seekers	Senior Styles	0.41%	96.57%	0.59%	Older, growing segment, many are winter snow-birds & go south, education levels are below avg, over half receive social security.
42	Wealthy Seaboard Suburbs	High Society	0.40%	96.98%	0.59%	Coastal metro areas, age=40's, white, few kids, high income & high wealth, professionals, travels, seldom moves
43	Dorms to Diplomas	Scholars & Patriots	0.34%	97.31%	0.42%	College students, youngest Tapestry segment. 3/4's hold part-time jobs. 1/2 live in dorms.

Rank	Tapestry Segment	LifeMode Groups	% of 2001-2005 License Sales	Cumulative %	% of State Pop.	Description
44	Urban Villages	Family Portrait	0.32%	97.63%	0.31%	Multicultural areas, young families, in dense urban centers, 40% with no diploma, often hispanic, older single-family homes
45	Military Proximity	Scholars & Patriots	0.28%	97.92%	0.40%	Young, married, embracing parenthood, second youngest Tapestry segment, 3/4's active duty or work on bases. Above avg education.
46	Trendsetters	Solo Acts	0.28%	98.19%	0.40%	Young, single, culturally diverse, above average income, educated. Most rent. Live the urban life style.
47	Rural Bypasses	Factories and Farms	0.25%	98.45%	0.32%	Rural, low income & education, trucks, fishing, NASCAR, mostly white & 1/3 African-American.
48	Las Casas	Global Roots	0.24%	98.68%	0.23%	Newest Western immigrants, young, 62% married (above avg), \$35K income, mostly skilled workers, large household size.
49	Silver and Gold	Senior Styles	0.24%	98.92%	0.63%	These are the wealthiest & older seniors, commonly live on the outer edge of suburbs, like to travel, active, seek sunshine
50	International Marketplace	Global Roots	0.24%	99.16%	0.28%	Young families, many immigrants, ethnically diverse, common to NY and LA, lower income than urban villages.
51	Southwestern Families	Family Portrait	0.22%	99.38%	0.48%	Young hispanic families, not recent immigrants, low income, high unemployment, prefer low-cost homes (2/3's own home)
52	City Dimensions	Global Roots	0.19%	99.56%	0.22%	Young, 2/3's single, many single parents, low income, urban, lack education, renters, frequent moves, dense neighborhoods
53	Social Security Set	Senior Styles	0.12%	99.68%	0.15%	Mostly elderly, most live alone, ethnically diverse, very low income, apartment renters in high-rise urban locations, few recreation \$
54	Family Foundations	Traditional Living	0.07%	99.75%	0.08%	Mostly African-American, slightly older families, active in community, average income, urban.
55	Metro City Edge	Metropolis	0.06%	99.81%	0.17%	Many single parent families (1/3 married households), older children at home, below avg education & income, high unemployment
56	The Elders	Senior Styles	0.05%	99.86%	0.16%	Oldest Tapestry segment (73 years = avg), 96% white, growing in numbers, senior communities, golf, travel, above avg wealth
57	Southern Satellites	Factories and Farms	0.04%	99.90%	0.52%	Primarily found in rural South, 37 yrs, most married, some with kids, below avg income, 1/3 without diploma, fishing, NASCAR
58	City Lights	Metropolis	0.04%	99.94%	0.09%	Live in dense urban areas, 38 yrs, generally above avg income, families/singles and culture types, most in apts, not outdoorsy
59	City Strivers	Metropolis	0.03%	99.97%	0.03%	Live in dense urban areas, 38 yrs, generally above avg income, families/singles and culture types, most in apts, not outdoorsy
60	City Commons	Family Portrait	0.02%	99.99%	0.03%	Young, single or single parents in urban areas. Mostly African American. Blue collar, service-oriented employment. Low income, low rent.

Rank	Tapestry Segment	LifeMode Groups	% of 2001-2005 License Sales	Cumulative %	% of State Pop.	Description
61	Modest Income Homes	Metropolis	0.01%	100.00%	0.04%	Mostly young singles & single parents, many grandparents raising kids, low income, low valued homes, 1/2 rent
62	Urban Rows	Metropolis	0.00%	100.00%	0.00%	Smalles tapestry segment & shrinking due to urban renewal programs. 70% black with many black hispanics. 1/2 = single parent households. Urban.
63	Urban Melting Pot	Global Roots	0.00%	100.00%	0.02%	Mostly immigrants, ethnically diverse, urban, income below avg (\$37K), public transportation, fashion conscious,
64	Pacific Heights	Upscale Avenues	0.00%	100.00%	0.06%	Upscale urban neighborhoods on Pacific coast, ¾ are families, 38 yrs, one income earner, high annual income.

The above table gives us a better picture of Colorado's license buyers. Twelve of the top 13 segments (highlighted in yellow) all show a significantly greater-than-average tendency to buy licenses and (column 6 is greater than column 3) and comprise 60 percent of Colorado's license buyers. Most of these are rural or suburban (no urban segments), generally families or married. The urban, ethnic, lower income and young singles segments are not the major sources of Colorado license buyers. The limited presence of people in the younger or ethnic segments is not an indicator these people will not fish in the future. These observations are generalizations, with some rural and suburban segments not listed as major buyers of licenses (i.e. Prairie Living and Heartland Communities), and several young and urban-oriented segments appearing as significant buyers (i.e. In Style and Enterprising Professionals).

Where Do We Find Residents More or Less Likely to Buy Licenses?

Table 8 below lists all segments recorded as having bought an annual license in Colorado between 2001 and 2005, for residents only. The fourth column presents the urban-rural areas in which the segments are generally located. The sixth column presents the percentage of buyers of all fishing licenses from 2001 through 2005, based on the real number of licenses sold. This column is used to determine the rankings and order in Table 8.

The change in actual, or real, licenses bought by each segment is in column five. For example, referring to the first row, the total number of licenses bought by "Up and Coming Families" households increased 13.81 percent from 2001 to 2005. The sixth column reports each segment's total share of annual licenses sold from 2001-2005 (7.84 percent), and the last column reports how much each segment's share increased or decreased during this time (12.99 percent). Column six is important as it allows the agency to decide if the trends represented by a specific segment are worth the agency's time to focus on strategies to maintain or boost sales to this segment.

**Table 8. Resident License Buyers by Segment,
as a Percentage of All Annual Licenses Sold**

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2001 -2005	6) Percentage Market Share from 2001-2005	7) Percentage Change in Market Share from 2001-2005
1	Up and Coming Families	Family Portrait	Suburban Periphery I	13.81%	7.84%	12.99%
2	Boomburbs	High Society	Urban Outskirts I	14.54%	6.06%	13.71%
3	Green Acres	Upscale Avenues	Rural I	6.12%	5.10%	5.35%
4	Rural Resort Dwellers	American Quilt	Rural I	5.26%	4.97%	4.50%
5	Sophisticated Squires	High Society	Suburban Periphery I	1.56%	4.83%	0.83%
6	Exurbanites	High Society	Suburban Periphery I	3.04%	4.67%	2.30%
7	Midland Crowd	American Quilt	Rural I	5.48%	4.31%	4.72%
8	Suburban Splendor	High Society	Suburban Periphery I	6.48%	4.31%	5.71%
9	In Style	Upscale Avenues	Suburban Periphery I	-0.46%	4.08%	-1.18%
10	Aspiring Young Families	High Hopes	Metro Cities II	-6.07%	3.77%	-6.75%
11	Enterprising Professionals	Upscale Avenues	Metro Cities I	1.36%	3.68%	0.62%
12	Milk and Cookies	Family Portrait	Metro Cities I	-1.15%	3.24%	-1.87%
13	Main Street, USA	Traditional Living	Urban Outskirts I	-7.35%	3.16%	-8.02%
14	Midlife Junction	Traditional Living	Suburban Periphery II	-1.12%	2.88%	-1.84%
15	Cozy and Comfortable	Upscale Avenues	Suburban Periphery II	-7.28%	2.58%	-7.95%
16	Metropolitans	Metropolis	Metro Cities I	-5.66%	2.27%	-6.35%
17	Industrious Urban Fringe	Global Roots	Urban Outskirts I	-8.51%	2.03%	-9.17%
18	Crossroads	American Quilt	Small Towns	-2.83%	2.00%	-3.53%
19	Prairie Living	Factories and Farms	Rural II	-2.68%	1.95%	-3.39%
20	Old and Newcomers	Solo Acts	Metro Cities II	-13.72%	1.85%	-14.34%
21	Young and Restless	Solo Acts	Metro Cities II	-10.42%	1.70%	-11.07%
22	Prosperous Empty Nesters	Senior Styles	Suburban Periphery I	0.44%	1.63%	-0.28%
23	Urban Chic	Upscale Avenues	Metro Cities I	3.94%	1.58%	3.19%
24	Heartland Communities	Senior Styles	Small Towns	-4.96%	1.57%	-5.65%
25	Connoisseurs	High Society	Metro Cities I	2.29%	1.45%	1.55%
26	Great Expectations	High Hopes	Urban Outskirts I	-4.39%	1.29%	-5.08%
27	Rustbelt Traditions	Traditional Living	Urban Outskirts I	-6.03%	1.27%	-6.71%
28	Rooted Rural	American Quilt	Rural II	2.18%	1.21%	1.44%
29	Inner City Tenants	Global Roots	Metro Cities II	-16.92%	1.13%	-17.52%
30	Rustbelt Retirees	Senior Styles	Suburban Periphery II	-3.32%	1.03%	-4.02%
31	Pleasant-ville	Upscale Avenues	Metro Cities I	-6.77%	0.94%	-7.44%
32	Simple Living	Senior Styles	Urban Outskirts II	-5.90%	0.87%	-6.58%
33	Metro Renters	Solo Acts	Principal Urban Centers I	-2.30%	0.86%	-3.00%
34	College Towns	Scholars & Patriots	Urban Outskirts II	2.42%	0.79%	1.68%
35	Laptops and Lattes	Solo Acts	Principal Urban Centers I	4.16%	0.67%	3.41%
36	Salt of the Earth	Factories and Farms	Rural I	2.27%	0.62%	1.53%
37	Retirement	Senior Styles	Metro Cities II	-1.36%	0.56%	-2.07%

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2001 -2005	6) Percentage Market Share from 2001- 2005	7) Percentage Change in Market Share from 2001-2005
	Communities					
38	Home Town	Factories and Farms	Suburban Periphery II	-3.75%	0.50%	-4.44%
39	Top Rung	High Society	Metro Cities I	11.06%	0.46%	10.25%
40	NeWest Residents	Global Roots	Principal Urban Centers II	-22.45%	0.44%	-23.01%
41	Senior Sun Seekers	Senior Styles	Small Towns	6.97%	0.41%	6.20%
42	Wealthy Seaboard Suburbs	High Society	Metro Cities I	-2.06%	0.40%	-2.77%
43	Dorms to Diplomas	Scholars & Patriots	Metro Cities II	-11.35%	0.34%	-11.99%
44	Urban Villages	Family Portrait	Principal Urban Centers I	-9.72%	0.32%	-10.37%
45	Military Proximity	Scholars & Patriots	Suburban Periphery II	-13.25%	0.28%	-13.88%
46	Trendsetters	Solo Acts	Principal Urban Centers I	-2.10%	0.28%	-2.81%
47	Rural Bypasses	Factories and Farms	Rural II	12.94%	0.25%	12.12%
48	Las Casas	Global Roots	Principal Urban Centers II	-20.27%	0.24%	-20.84%
49	Silver and Gold	Senior Styles	Suburban Periphery I	0.81%	0.24%	0.08%
50	International Marketplace	Global Roots	Principal Urban Centers I	-14.62%	0.24%	-15.23%
51	Southwestern Families	Family Portrait	Urban Outskirts II	-12.83%	0.22%	-13.46%
52	City Dimensions	Global Roots	Metro Cities II	-17.20%	0.19%	-17.79%
53	Social Security Set	Senior Styles	Principal Urban Centers II	-6.90%	0.12%	-7.58%
54	Family Foundations	Traditional Living	Metro Cities II	-16.22%	0.07%	-16.82%
55	Metro City Edge	Metropolis	Urban Outskirts II	-3.11%	0.06%	-3.81%
56	The Elders	Senior Styles	Suburban Periphery II	19.44%	0.05%	18.58%
57	Southern Satellites	Factories and Farms	Rural II	2.55%	0.04%	1.81%
58	City Lights	Metropolis	Principal Urban Centers I	-9.58%	0.04%	-10.23%
59	City Strivers	Metropolis	Principal Urban Centers II	-27.63%	0.03%	-28.15%
60	City Commons	Family Portrait	Principal Urban Centers II	-20.83%	0.02%	-21.41%
61	Modest Income Homes	Metropolis	Urban Outskirts II	11.63%	0.01%	10.82%
62	Urban Rows	Metropolis	Principal Urban Centers II	0.00%	0.00%	-0.72%
63	Urban Melting Pot	Global Roots	Principal Urban Centers I	#DIV/0!	0.00%	#DIV/0!
64	Pacific Heights	Upscale Avenues	Principal Urban Centers I	#DIV/0!	0.00%	#DIV/0!

* Each urbanization group is divided into two categories, I and II. "I" categories are typically more affluent, with higher incomes, than "II" categories.

The top two segments make up nearly 14 percent of the buyers and the top ten segments nearly 50 percent. These top segments are largely from the suburban periphery. The LifeMode Group "High Society" repeatedly appears in the top segments and represent segments with above average income. These top ten segments need special

consideration since they are the bigger part of the State's annual license revenue stream especially considering their net change in licenses sold has increased since 2001.

In Table 8 above, we added TAPESTRY® Urban Groups. These describe the level of urbanization where the segments, or neighborhoods, are found. In Table 9, we consolidated the resident data to get a better idea of the rural versus urban characteristics of resident license buyers.

Table 9. License Sales Market Share by Urbanization Group, Residents only

Urbanization Group	Market Share	% Change in Market Share	% of State Pop in each Group
Suburban Periphery	33.99%	0.86%	30.8%
Metro Cities	22.96%	-1.10%	31.2%
Rural	19.08%	0.68%	10.8%
Urban Outskirts	15.47%	0.05%	16.8%
Small Towns	4.96%	-0.16%	3.5%
Principal Urban Centers	3.54%	-0.28%	7.0%

Table 9 shows the importance of the suburban areas to Colorado's fishing license revenue base (second column). Suburban residents are slightly increasing their market share, and currently have the largest share at nearly 34 percent. The Metro Cities has an unusually high market share compared to other states, but their percentage is slightly decreasing. Rural and Urban Outskirts are the next two larger sources of license sales and they show very slight increases in overall numbers. These shares and trends likely reflect the general population shifts within the state, with more suburban housing being built. The decreases seen in several groups may not be real decreases, but their numbers are being overshadowed by population increases in others. More investigations could be done about this issue, but seeing that the overall changes are typically less than one percent, these trends are not seen as a major issue at this time.

When looking at the percentage of the overall state population represented by each urbanization group, we see that the percentage of license sales from people in the suburban periphery group is greater than the total percentage of the population represented by this group. The same is especially true for the Rural and Small Towns groups. These are the urbanization groups that have a higher likelihood of purchasing licenses compared to the other groups. In general, people from more-urbanized neighborhoods are less likely to buy a fishing license.

Please note the data in this report is based on the purchaser's home residence, not where he or she purchased their license. If a trend exists in Colorado for urban residents to buy their licenses close to their fishing site, that trend cannot be identified in this report.

Let us now take a look at those segments with the fastest growing market share. These groups have increased their share of annual license sales from 2001 to 2005. Table 10 presents the top 15 segments ranked by who is buying a greater portion of Colorado's licenses.

Table 10. Top 15 Segments Ranked by Fastest Growth in Market Share, 2001-2005

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2001 - 2005	6) Percentage Market Share from 2001-2005	7) Percentage Change in Market Share from 2001-2005
56	The Elders	Senior Styles	Suburban Periphery II	19.44%	0.05%	18.58%
2	Boomburbs	High Society	Urban Outskirts I	14.54%	6.06%	13.71%
1	Up and Coming Families	Family Portrait	Suburban Periphery I	13.81%	7.84%	12.99%
47	Rural Bypasses	Factories and Farms	Rural II	12.94%	0.25%	12.12%
61	Modest Income Homes	Metropolis	Urban Outskirts II	11.63%	0.01%	10.82%
39	Top Rung	High Society	Metro Cities I	11.06%	0.46%	10.25%
41	Senior Sun Seekers	Senior Styles	Small Towns	6.97%	0.41%	6.20%
8	Suburban Splendor	High Society	Suburban Periphery I	6.48%	4.31%	5.71%
3	Green Acres	Upscale Avenues	Rural I	6.12%	5.10%	5.35%
7	Midland Crowd	American Quilt	Rural I	5.48%	4.31%	4.72%
4	Rural Resort Dwellers	American Quilt	Rural I	5.26%	4.97%	4.50%
35	Laptops and Lattes	Solo Acts	Principal Urban Centers I	4.16%	0.67%	3.41%
23	Urban Chic	Upscale Avenues	Metro Cities I	3.94%	1.58%	3.19%
6	Exurbanites	High Society	Suburban Periphery I	3.04%	4.67%	2.30%
57	Southern Satellites	Factories and Farms	Rural II	2.55%	0.04%	1.81%

The majority of growth has been experienced in the cities and suburban areas although most of these have less than one percent overall market share. Of note is the number one ranked segment "Up and Coming Families" and number two ranked "Boomburbs". We do not know how much of these segment's growth is stimulated by general population growth in these segments.¹ To an unknown degree, growth in these segments may reflect similar increases in population from 2001 to 2005. Outside of these two segments and the others with a ranking (column 1) greater than 23, the other segments in Table 10 have such a small share of the market that a change of just a few licenses from 2001 to 2005 had a major impact on their ranking. We encourage these groups be overlooked as it is not known if the change is related to real trends or not, and their overall impact is negligible. The higher ranked segments are providing the greatest numbers of new anglers, and could be looked to as sources of even more new anglers.

¹ Tapestry data regarding overall state population trends back five years were not available.

It may be worth knowing which segments are shrinking the fastest. Table 11 presents the segments suffering the worst declines.

Table 11. Top 15 Segments Ranked By Shrinking Market Share

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2001 -2005	6) Percentage Market Share from 2001-2005	7) Percentage Change in Market Share from 2001-2005
59	City Strivers	Metropolis	Principal Urban Centers II	-27.63%	0.03%	-28.15%
40	NeWest Residents	Global Roots	Principal Urban Centers II	-22.45%	0.44%	-23.01%
60	City Commons	Family Portrait	Principal Urban Centers II	-20.83%	0.02%	-21.41%
48	Las Casas	Global Roots	Principal Urban Centers II	-20.27%	0.24%	-20.84%
52	City Dimensions	Global Roots	Metro Cities II	-17.20%	0.19%	-17.79%
29	Inner City Tenants	Global Roots	Metro Cities II	-16.92%	1.13%	-17.52%
54	Family Foundations	Traditional Living	Metro Cities II	-16.22%	0.07%	-16.82%
50	International Marketplace	Global Roots	Principal Urban Centers I	-14.62%	0.24%	-15.23%
20	Old and Newcomers	Solo Acts	Metro Cities II	-13.72%	1.85%	-14.34%
45	Military Proximity	Scholars & Patriots	Suburban Periphery II	-13.25%	0.28%	-13.88%
51	Southwestern Families	Family Portrait	Urban Outskirts II	-12.83%	0.22%	-13.46%
43	Dorms to Diplomas	Scholars & Patriots	Metro Cities II	-11.35%	0.34%	-11.99%
21	Young and Restless	Solo Acts	Metro Cities II	-10.42%	1.70%	-11.07%
44	Urban Villages	Family Portrait	Principal Urban Centers I	-9.72%	0.32%	-10.37%
58	City Lights	Metropolis	Principal Urban Centers I	-9.58%	0.04%	-10.23%

This table demonstrates that the worst declines are primarily in the denser urban neighborhoods. The roman numeral “II” accompanying the descriptions in column 4 indicate the segment is from the lower income strata. A roman numeral “I” indicates higher incomes. The overall results of this table, when compared to Table 10, is that the denser, lower income neighborhoods are buying a smaller percentage of the state’s annual licenses. This trend would indicate the efforts to recruit new anglers from these areas are not as likely to succeed compared to recruiting anglers from the top ranked segments in Table 10.

Next we will look at the loyalty of these anglers.

Section 4: The “Churn” or Frequency of Purchase Issue

Purchasing Frequencies: Gender Differences

During the review of the five year sales trends, a question was raised if the frequency of fishing license purchases over five years differed between men and women. In other words, for people who only bought a license once in the past five years, what percentage were female, and what percentage were female for anglers who bought licenses five out of the past five years. This analysis was run for resident license holders only and the results are presented below:

# of Years Bought a License Over Last Five Years	Male	Female
1	70.9%	29.1%
2	75.0%	25.0%
3	78.2%	21.8%
4	81.5%	18.5%
5	87.4%	12.6%

Men are much more likely to buy a license in multiple years than women, indicating men are more likely to fish regularly. Multiple reasons could be offered as to why, but the main purpose of this paper is to explore *what* is happening versus *why*. Any promotions encouraging anglers to purchase licenses more frequently, or any new initiatives such as a five-year license, would likely be more effective if targeted towards males.

Let’s look at the “churn” issue. The “churn” issue refers to the rate of anglers entering and dropping out of the customer base for annual licenses considering all Colorado residents who purchased a license at least once over the past five years. Table 12 reports the percentage who bought a license x out of five years.

Table 12. License Purchasing Frequency

License Purchasing Frequency	Percentage of Customers, 2001 to 2005
1 of 5 years:	44.2%
2 of 5 years:	20.2%
3 of 5 years:	12.6%
4 of 5 years:	9.6%
5 of 5 years:	13.4%

It could be argued that over 64 percent of license customers are not loyal customers and bought only one or two years of the past five years. These people are finding other ways to spend their free time in many years. Time constraints or competing recreations may be diverting their attention. Encouraging existing anglers to fish more often or adding convenience and simplicity to the license buying and renewal process could result in increased license revenues. Of note though is the loyalty shown by those that bought licenses for all five years. What can not be determined from the data is whether the angler is buying a daily license rather than an annual license in some years.

The next steps are to find out which type of angler is more or less likely to purchase a license frequently or infrequently.

Tables 13 and 14 present purchasing frequencies for specific segments of resident customers.²

Table 13. Top 15 Segments Likely to Buy Frequently, Residents Only

Rank	Tapestry Segment	Bought 1 or 2 years only, out of 5 years	Bought 4 or 5 years, out of 5 years
41	Senior Sun Seekers	50.34%	27.34%
4	Rural Resort Dwellers	51.72%	27.21%
3	Green Acres	51.23%	27.02%
36	Salt of the Earth	50.09%	26.58%
28	Rooted Rural	49.31%	25.79%
49	Silver and Gold	55.03%	25.72%
6	Exurbanites	53.09%	25.64%
22	Prosperous Empty Nesters	52.27%	25.36%
7	Midland Crowd	52.25%	25.11%
30	Rustbelt Retirees	50.86%	24.48%
14	Midlife Junction	53.31%	24.23%
42	Wealthy Seaboard Suburbs	55.24%	24.21%
19	Prairie Living	51.93%	24.12%
15	Cozy and Comfortable	52.98%	23.75%
24	Heartland Communities	52.60%	23.55%

Of all the segments ranked as those with the greatest rate of buying a license in four or five of the past five years, all of them had even greater rates of buying a license in only one or two of the past five years. The issue of anglers being infrequent customers is common to all segments of Colorado's population.

Four of the top six segments ranked in Table 13 come from rural areas. The other segments range from the top to the bottom of the ranking with no clear evidence from this

² Non-residents are less likely to buy a Nebraska license annually. Their inclusion in this specific analysis could mislead the analysis.

perspective as to why. For these segments, use the rule that the rank (column 1) is an indication of a segment's impact on overall state license sales. Segments with a ranking in the 30+ range only need a change of a few buyers to impact the change over time.

Of the segments holding the greatest shares of annual license sales (tables 7 & 8), we six of the top ten missing from Table 13. Recall that the top ten segments represent half of Colorado's annual license sales. Efforts to encourage anglers from the six missing segments to purchase licenses more frequently may likely have a positive effect on the state's annual license revenues.

**Table 14. Top Segments Likely to Buy Licenses
Only 1 or 2 of the Past 5 Years, Residents Only**

Rank	Tapestry Segment	Bought 1 or 2 years only, out of 5 years	Bought 4 or 5 years, out of 5 years
62	Urban Rows	100.00%	0.00%
63	Pacific Heights	100.00%	0.00%
64	Urban Melting Pot	100.00%	0.00%
45	Military Proximity	80.75%	1.18%
43	Dorms to Diplomas	68.58%	9.07%
46	Trendsetters	63.57%	14.89%
21	Young and Restless	63.47%	12.13%
33	Metro Renters	62.77%	11.67%
48	Las Casas	60.91%	14.03%
60	City Commons	60.69%	8.62%
40	NeWest Residents	60.55%	13.44%
34	College Towns	60.28%	17.43%
57	Southern Satellites	59.45%	19.73%
20	Old and Newcomers	59.40%	16.51%
11	Enterprising Professionals	59.00%	19.60%

In Table 14, the rankings indicate that less loyal segments hail from cities and suburban segments that are primarily insignificant in terms of overall license sales. In general, the more urbanized the neighborhood, the less likely its residents are to buy licenses regularly.

Propensity to Buy a License

Focusing on segments with a greater "propensity" to purchase a license may yield greater returns. "Propensity" is a person's likelihood to purchase a license compared to the likelihood of the average angler buying a license. Table 15 uses a ratio to determine each segment's propensity. This ratio is the segment's "market share of all licenses sold" divided by the "percentage of the Colorado population" held by that segment. This ratio is also known as the "Sales to Population" ratio. People from segments with a "Sales/Pop Ratio" greater than one are more likely to buy a license compared to the average

Colorado resident. Efforts to recruit new anglers or to encourage greater purchasing frequencies would likely have higher success if they targeted the segments with ratios greater than one.

Table 15. Segments with a Greater Propensity to Buy Licenses, Residents Only

Rank	Tapestry Segment	LifeMode Group	% of 2005 License Sales	% of State Population	Sales/Pop Ratio
13	Main Street, USA	Traditional Living	3.30%	2.44%	1.35
1	Up and Coming Families	Family Portrait	8.49%	6.59%	1.29
17	Industrious Urban Fringe	Global Roots	2.28%	1.81%	1.26
4	Rural Resort Dwellers	American Quilt	4.54%	3.62%	1.26
10	Aspiring Young Families	High Hopes	3.96%	3.31%	1.20
32	Simple Living	Senior Styles	0.97%	0.83%	1.17
44	Urban Villages	Family Portrait	0.36%	0.31%	1.16
59	City Strivers	Metropolis	0.04%	0.03%	1.14
12	Milk and Cookies	Family Portrait	3.45%	3.02%	1.14
29	Inner City Tenants	Global Roots	1.27%	1.12%	1.13
31	Pleasant-ville	Upscale Avenues	0.91%	0.81%	1.13
48	Las Casas	Global Roots	0.26%	0.23%	1.13
11	Enterprising Professionals	Upscale Avenues	3.44%	3.09%	1.12
3	Green Acres	Upscale Avenues	4.95%	4.45%	1.11
2	Boomburbs	High Society	6.19%	5.57%	1.11
15	Cozy and Comfortable	Upscale Avenues	2.64%	2.38%	1.11
9	In Style	Upscale Avenues	3.93%	3.58%	1.10
5	Sophisticated Squires	High Society	4.76%	4.38%	1.09
54	Family Foundations	Traditional Living	0.09%	0.08%	1.08
18	Crossroads	American Quilt	2.15%	2.00%	1.07
40	NeWest Residents	Global Roots	0.46%	0.43%	1.06
20	Old and Newcomers	Solo Acts	1.88%	1.80%	1.05
52	City Dimensions	Global Roots	0.23%	0.22%	1.04
8	Suburban Splendor	High Society	4.05%	3.95%	1.03
26	Great Expectations	High Hopes	1.39%	1.37%	1.01
21	Young and Restless	Solo Acts	1.81%	1.80%	1.00
6	Exurbanites	High Society	4.34%	4.36%	1.00
16	Metropolitans	Metropolis	2.11%	2.16%	0.98
14	Midlife Junction	Traditional Living	2.82%	2.90%	0.97
7	Midland Crowd	American Quilt	4.29%	4.45%	0.96
50	International Marketplace	Global Roots	0.26%	0.28%	0.94
53	Social Security Set	Senior Styles	0.14%	0.15%	0.93
30	Rustbelt Retirees	Senior Styles	1.09%	1.24%	0.88
19	Prairie Living	Factories and Farms	1.84%	2.10%	0.88
34	College Towns	Scholars & Patriots	0.76%	0.89%	0.86
47	Rural Bypasses	Factories and Farms	0.28%	0.32%	0.86
27	Rustbelt Traditions	Traditional Living	1.36%	1.63%	0.84
37	Retirement Communities	Senior Styles	0.56%	0.68%	0.82
60	City Commons	Family Portrait	0.03%	0.03%	0.81

Rank	Tapestry Segment	LifeMode Group	% of 2005 License Sales	% of State Population	Sales/Pop Ratio
38	Home Town	Factories and Farms	0.59%	0.76%	0.77
45	Military Proximity	Scholars & Patriots	0.30%	0.40%	0.77
33	Metro Renters	Solo Acts	0.86%	1.12%	0.77
23	Urban Chic	Upscale Avenues	1.35%	1.79%	0.75
22	Prosperous Empty Nesters	Senior Styles	1.57%	2.09%	0.75
24	Heartland Communities	Senior Styles	1.57%	2.11%	0.74
28	Rooted Rural	American Quilt	1.19%	1.65%	0.72
43	Dorms to Diplomas	Scholars & Patriots	0.30%	0.42%	0.71
41	Senior Sun Seekers	Senior Styles	0.40%	0.59%	0.69
46	Trendsetters	Solo Acts	0.26%	0.40%	0.65
25	Connoisseurs	High Society	1.27%	1.99%	0.64
42	Wealthy Seaboard Suburbs	High Society	0.37%	0.59%	0.62
35	Laptops and Lattes	Solo Acts	0.57%	0.92%	0.62
51	Southwestern Families	Family Portrait	0.25%	0.48%	0.52
36	Salt of the Earth	Factories and Farms	0.60%	1.26%	0.48
55	Metro City Edge	Metropolis	0.07%	0.17%	0.43
58	City Lights	Metropolis	0.03%	0.09%	0.37
61	Modest Income Homes	Metropolis	0.01%	0.04%	0.37
56	The Elders	Senior Styles	0.05%	0.16%	0.33
39	Top Rung	High Society	0.43%	1.31%	0.33
49	Silver and Gold	Senior Styles	0.20%	0.63%	0.32
62	Urban Rows	Metropolis	0.00%	0.00%	0.09
57	Southern Satellites	Factories and Farms	0.04%	0.52%	0.08
63	Urban Melting Pot	Global Roots	0.00%	0.02%	-
64	Pacific Heights	Upscale Avenues	0.00%	0.06%	-

Interestingly we have segments from the top market share holder, middle of the road and bottom segments all have a propensity to buy a fishing license greater than the average resident. Typically, in most states, the top ranked segments (column 1) have the greater propensity to buy licenses. This is true in Colorado. Of the top 10 segments, only #7 (Midland Crowd) has a propensity less than 1.0. We do see a high frequency of purchase in many lower ranked segments. These lower ranked segments obviously value fishing, but based on their small percentage of the state population, are not major sources of license sales. The high placement of Inner City Tenants was a surprise, given their highly urban locations and lower income.

Section 5: “Upgraders” and “Downgraders”

Current customers moving to higher- or lower-priced license options also drive revenue trends. Since Colorado has incomplete data from 2001 to 2003 on daily licenses,



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it was not possible to fully and fairly analyze who is more likely to upgrade or downgrade their purchases and the rate of such.

In 2005, over 68 percent of Colorado's fishing licenses were purchased by residents. Approximately 80 percent of the purchasers are male, indicating females are more likely to favor other forms of recreation. Resident license buyers are more likely to be in the 40-49 year old age bracket. Over the past five years, Colorado's total number of annual license buyers has increased by 1.4 percent, but much of this came after a severe drop from 2001 to 2002. The data used in this project were unable to identify the reason for this drop.

The TAPESTRY® data helps drill down to neighborhood types and their buying habits. The leading segments in market share as shown by rank are not necessarily the segments with the highest loyalty rates (more likely to buy a license in four or five of the past five years). Of the top ten segments representing half of all licenses sold, the segments are primarily suburban and urban with above-average incomes and families. However, these segments are not necessarily the most loyal license purchasers. Loyal segments are more likely to be rural. Immigrant neighborhoods and the young that have not started families yet are less likely to purchase licenses. People from denser, more urbanized neighborhoods are less likely to purchase licenses compared to people from rural and semi-rural areas. The TAPESTRY® data reports the specific segments more likely to purchase fishing licenses. Recruitment efforts focused on these neighborhoods are more likely to achieve higher levels of success.

Drop-out or infrequent anglers from the suburban and urban groups have a much more severe impact on license revenues. Promotions directed toward these segments for license renewals will likely have the greatest impact on increasing license sales for Colorado. Using standard human-dimensions research, contrasting this group with other segments may shed light into which benefits of fishing may be the most useful to promote in marketing efforts, or which stages of life or issues cause people to stray away from fishing.

Current customers moving to higher- or lower-priced license options also drive revenue trends. Unfortunately, the data were not available to permit such an analysis. In about two years when more data is available for short term licenses, this analysis can be conducted.

Efforts to increase license revenues could take one of several directions. Such efforts could include:

- A. Recruit new anglers,
- B. Retain existing anglers,
- C. Encourage anglers to buy licenses more frequently, or
- D. Encourage anglers to upgrade their license purchases.

Only 23 percent of Colorado's annual license buyers purchased a license in four or five of the past five years. Efforts to increase the frequency of purchase for these individuals may prove successful in boosting revenues. One way to do this is to use the State's electronic licensing database. Promotional mailings could target segments that have a higher frequency of license purchases, but only send to individuals within the target segments who have bought only once, twice, even three times in the last five years. Control groups could be established by mailing to people from segments showing higher purchasing frequencies. New types of licenses, such as five-year licenses, may also help boost revenues. Efforts to develop statistical models that identify current license holders more likely to drop out may also succeed. The data used in this analysis is largely the data needed for such a model.

Closing Notes:

The purpose of this initial analysis is to identify the major trends regarding license sales and to help identify general strategies that can boost license revenues. We will assist in developing additional, more detailed analyses based on the contents of this report, per Colorado's request.

Next step: we will wait for Colorado's questions and requests for additional analysis (should the necessary data be available).