



AFWA-ASA Data Mining Project
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Montana Findings

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This analysis, funded by a Sport Fish Restoration multi-state conservation grant awarded jointly to the Association of Fish and Wildlife Agencies and the American Sportfishing Association, is designed to help Montana improve efforts to increase fishing licenses sales and revenues. Fifteen additional states are participating. This report reviews an analysis of Montana’s fishing license data by Southwick Associates, Inc., the grant’s subcontractor. The results are intended to help Montana understand basic license sales trends. We encourage Montana to consider its current or potential future marketing efforts when reviewing this document. Southwick Associates, Inc. will be available to answer any questions (904-277-9765, rob@southwickassociates.com).

The analysis below is based on both resident and non-resident anglers separated into different tables. With a large percentage of annual license sales attributed to non-residents, separating results into resident and non-resident components seemed logical. The results of this report are based on anglers who purchased at least one fishing license between 2002 and 2005.

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Section 1: Basic License Sales Information

Tables 1 through 4 present initial information regarding Montana's 2005 license sales for all buyers. This is a basic look at Montana'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

Code	License Name	2005 Sales
2002001	CONSERVATION AND FISHING	177,058
Primary	TWO DAY FISHING	117,188
2001001	CONSERVATION LICENSE	31,551
2002012	SPORTSMAN WITHOUT BEAR	23,224
Primary	TEN DAY FISHING	20,525
2002010	SPORTSMAN WITH BEAR	13,463
2009100	GENERAL - BIG GAME COMBO	10,306
Primary	SEASON FISHING	6,715
2009110	OUTFITTER SPONSOR - BIG GAME COMBO	5,257
2009130	OUTFITTER SPONSOR - DEER COMBO	2,431
2009140	GENERAL - DEER COMBO	2,258
2009120	LANDOWNER SPONSOR - DEER COMBO	1,970
2090140	GENERAL - DEER COMBO	1,681
2012074	FLATHEAD RESIDENT CONSERVATION PERMIT (JOINT)	1,439
2002011	COOPERATOR SPORTSMAN WITHOUT BEAR	1,076
2009150	GENERAL - ELK COMBO	1,015
2009160	OUTFITTER SPONSOR - ELK COMBO	614
2090100	GENERAL - BIG GAME COMBO	260
2090120	LANDOWNER SPONSOR - DEER COMBO	120
2012081	DISABLED RESERVATION RESIDENT PERMIT	62
2090150	GENERAL - ELK COMBO	55
2090110	OUTFITTER SPONSOR - BIG GAME COMBO	34
2002015	MILITARY RECOGNITION SPORTSMAN	29
2002002	COOPERATOR BIG GAME COMBO	25
2090130	OUTFITTER SPONSOR - DEER COMBO	17
2090160	OUTFITTER SPONSOR - ELK COMBO	6

Table 2. 2005 Resident and Non-Resident License Distribution

	Percent
Resident	59.6%
Non-Resident	40.4%
Total	100.0%

Table 3. 2005 Licenses Sold by Gender

	Resident	Non-Resident
Female	14.4%	6.1%
Male	45.2%	34.3%

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

Age	All Buyers	Resident	Non-Resident
16 and under	4.3%	6.7%	0.9%
17 to 19	3.8%	4.5%	2.8%
20 to 29	13.6%	15.1%	11.4%
30 to 39	15.9%	15.6%	16.4%
40 to 49	20.3%	19.3%	21.8%
50 to 59	20.7%	18.4%	24.0%
60 to 69	14.1%	12.6%	16.5%
70 and older	7.2%	7.8%	6.2%
Total	100.0%	100.0%	100.0%

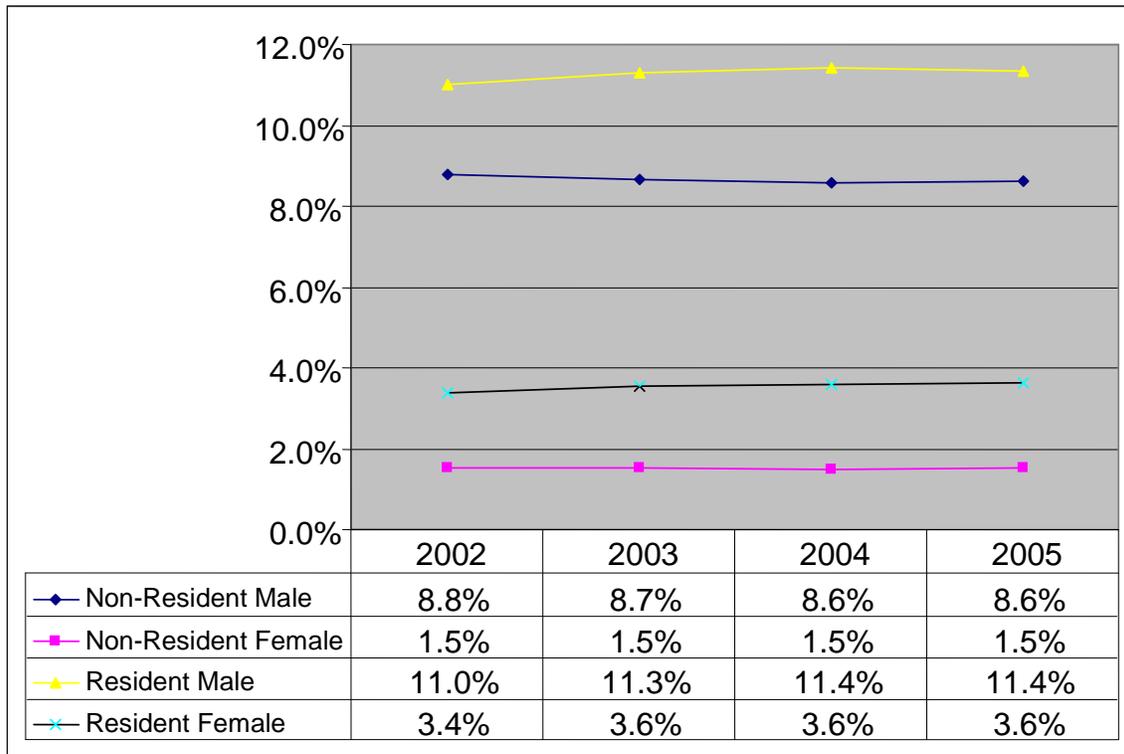
Montana's resident license customers are of the same age typically found of anglers in other states. However, non-resident license customers are slightly above average in age, which may reflect their greater ability (time and financial position) to travel to destination fishing states, such as Montana, compared to other anglers.

Tables 1-4 above give us a general one-year picture of license sales in Montana, 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.

Section 2: Licenses Sold, 2002-2005

By looking at multiple years of data, we can identify license sales trends.

Table 5. Resident License Sales Trends, 2002-2005 (Y axis = the percentage within the weighted sample of license buyers for the years 2002-2005)



Licenses show a slight increase from 2002 to 2005 for both male and female residents. Non-resident males show a slight decrease. Recognizing the many subgroups of license customers, the next step is to investigate which customer segments are experiencing greater increases and which ones may be decreasing.

Section 3: Lifestyle Analyses

People’s preferences are likely to vary based on 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 Montana’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 Montana angler 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 purchaser. 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 Montana 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 us take an initial look at the top license-purchasing LifeMode categories in 2005. These are ranked based on the total number of fishing licenses purchased by each group between 2002 and 2005. Table 6a and 6b ranks the resident LifeMode groups from the largest group of buyers to the least. Table 6a is for residents and the compares each LifeMode Group to Montana’s population to better ascertain trends. Table 6b examines non-resident license buyers and uses the U.S. population as its reference which sometimes results in different interpretations.

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

LifeMode Groups	% of State Pop.	% of 2006 Buyers	Cumulative %	Description
American Quilt	25.1%	29.6%	29.4%	Small towns/rural, modest income, blue-collar or rural nearing retirement, modest or mobile homes
Senior Styles	19.1%	14.9%	44.4%	Retirees, average income, depend soc sec & pensions
Factories and Farms	12.8%	13.3%	57.8%	Small towns often in America's breadbasket states, lower income, married, employed in ag & manufac.

LifeMode Groups	% of State Pop.	% of 2006 Buyers	Cumulative %	Description
Upscale Avenues	9.0%	10.9%	68.7%	Above average income
Traditional Living	11.0%	9.3%	78.1%	Hard working, modest income families, older towns losing kids to newer cities and growth areas
High Hopes	5.9%	7.3%	85.3%	Young, college educated, single or married w/out kids
High Society	4.0%	5.5%	90.8%	Fastest growing group, highest income, married
Scholars & Patriots	4.6%	2.9%	93.8%	Youthful, lower income, in college or military
Family Portrait	1.7%	2.2%	96.0%	Generally younger families, homeowners
Metropolis	3.8%	2.1%	98.1%	City families, row houses & public transportation
Solo Acts	1.6%	1.1%	99.2%	Young, educated, city life
Global Roots	1.4%	0.8%	100.0%	Ethnically diverse, recent immigrants, want to improve

As expected, the leading LifeMode categories for residents are rural or from small towns, have modest incomes and are often older citizens. The top three groups represent about 58% of the state population and purchase about the same percentage of the state's license sales. This differs from most states where we are likely to see the top groups' share of licenses to be greater than their share of their state's population. The exception in Montana is the top-ranked LifeMode group, American Quilt, which is more likely to buy a license compared to the average state resident (column #3 compared to column #2). Members of the "American Quilt" group are not only more likely to buy a license than the average resident but by far buy the most licenses than another other group with nearly 30 percent of all sales. On the other hand, urban and ethnically diverse groups are least likely to buy a license compared to the average resident, and also represent a small portion of the state's population. Residents with above average incomes are more likely to buy a license compared to the average state resident.

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

LifeMode Groups	% of National Pop.	% of 2006 Buyers	Cumulative %	Description
High Society	12.3%	27.1%	26.8%	Fastest growing group, highest income, married
Upscale Avenues	13.2%	17.1%	44.1%	Above average income
American Quilt	8.7%	12.1%	56.0%	Small towns/rural, modest income, blue-collar or rural nearing retirement, modest or mobile homes
Senior Styles	13.3%	10.2%	66.2%	Retirees, average income, depend soc sec & pensions
Factories and Farms	10.0%	7.2%	73.4%	Small towns often in America's breadbasket states, lower income, married, employed in ag & manufac.
Traditional Living	8.8%	6.3%	79.9%	Hard working, modest income families, older towns losing kids to newer cities and growth areas
Family Portrait	7.4%	6.4%	86.2%	Generally younger families, homeowners
Solo Acts	6.7%	5.4%	91.7%	Young, educated, city life
High Hopes	4.4%	3.0%	94.7%	Young, college educated, single or married w/out kids
Metropolis	5.7%	2.3%	97.1%	City families, row houses & public transportation
Global Roots	8.0%	1.7%	98.7%	Ethnically diverse, recent immigrants, want to improve
Scholars & Patriots	1.5%	1.2%	100.0%	Youthful, lower income, in college or military

Non-resident license customers have a much different look than residents. The top two LifeMode groups represent the highest income earners in the U.S. These groups are showing a very high likelihood of purchasing a non-resident license compared to the average U.S. resident. Just like resident license buyers, single people, lower income and ethnically diverse groups are less likely to purchase nonresident licenses.

The LifeMode categories presented in Table 6a and Table 6b provide an initial look at Montana’s anglers, and there are greater details still available. Let’s take a look at the top license-purchasers by TAPESTRY® segments from 2002 to 2005. These are ranked based on the number of licenses purchased by each segment for all four years. Table 7 is long and detailed, and summary discussions follow.

**Table 7a. 2002-2005 License Sales by Segment, Residents
ranked by market share (‘% of 2002-2005 License Sales’)**

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of State Pop.	Description
1	Rural Resort Dwellers	American Quilt	11.95%	11.95%	8.48%	Rural non-farm, married/kids moved out, typically older, avg income, boats/fish/hunt
2	Midland Crowd	American Quilt	11.51%	23.46%	9.59%	Avg age=36, married, ½ with kids, typical income, new housing in rural areas, blue collar, conservative, likes Fords & fishing
3	Prairie Living	Factories and Farms	11.04%	34.50%	10.42%	Midwest small farms mostly, avg age = 40, married, half have kids, typical income, pets, country music, hunts and fish
4	Green Acres	Upscale Avenues	8.02%	42.53%	6.26%	Married w/ kids, blue collar baby boomers with college ed., Above average income, suburban fringe, do-it-yourselfers, outdoors
5	Midlife Junction	Traditional Living	7.52%	50.04%	8.70%	Exiting child-rearing, mix married & single, slightly below avg income, 33% live in apts, suburban, conservative, budget-conscious
6	Heartland Communities	Senior Styles	6.99%	57.03%	7.79%	Above avg age, married, modest income, small Midwest towns, hunt/fish/bowl, country music, do-it-yourselfers
7	Great Expectations	High Hopes	4.71%	61.74%	4.32%	Young singles & married couples, lower income & growing, many rent, music taste varies: MTV to country, like outdoor sports
8	Rooted Rural	American Quilt	4.11%	65.85%	4.41%	Slightly older, rural, empty-nesters, lower income, less likely to have college experience, trucks, do-it-yourselfers
9	Exurbanites	High Society	3.85%	69.70%	2.69%	Affluent, likes open space on urban edge, married/empty nesters, golf, kayakers, active in volunteer groups and donate to causes
10	College Towns	Scholars & Patriots	2.64%	72.34%	4.19%	Avg age=24.3, almost ½ enrolled in college & others on staff, part-time jobs, low income, renters or some in dormitories.

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of State Pop.	Description
11	Simple Living	Senior Styles	2.51%	74.85%	3.90%	Older, ½ single, kids rare, low income, ¼ didn't finish high school, community is important
12	Rustbelt Retirees	Senior Styles	2.49%	77.34%	2.56%	Married/no kids, avg income, Great Lakes & Northeast, own homes, not inclined to move, loyal to community & country, gets involved
13	Aspiring Young Families	High Hopes	2.48%	79.82%	1.57%	Young start-up families, married or divorced, typical age=30, 22% with degrees, ½ rent, live in growing metro areas, avg income
14	Prosperous Empty Nesters	Senior Styles	2.13%	81.96%	2.68%	½ over 55, kids moved out, above avg income, still working, suburban, physically active, investors
15	Crossroads	American Quilt	1.78%	83.74%	2.60%	Married couples/single parents, 32 years, below avg income, smaller towns, mobile homes common, above avg unemployment
16	Metropolitans	Metropolis	1.73%	85.47%	2.23%	City living, older neighborhoods, single or childless couples, educated, slightly above average income, mobile, homeowners
17	Milk and Cookies	Family Portrait	1.60%	87.07%	1.07%	Young families but affluent for their age, two incomes, prefer single-family homes, focused on families & future, leisure time = kid time
18	Rustbelt Traditions	Traditional Living	1.58%	88.65%	1.89%	Older Great lakes industrial cities, avg age = 36, mix of married or single, slightly below avg income, don't move much, forego fads
19	Salt of the Earth	Factories and Farms	1.29%	89.94%	1.15%	Two-thirds are married with kids, blue collar, avg income, Midwestern, often rural, own single family homes, conservative
20	Sophisticated Squires	High Society	1.25%	91.19%	0.97%	Country living on urban fringe, above avg income, 35-54, SUVs, married w/ kids, golf
21	Cozy and Comfortable	Upscale Avenues	1.21%	92.40%	1.29%	Older suburban areas, middle aged, married, older kids, use computers, above avg income, not really do-it-yourselfers
22	Old and Newcomers	Solo Acts	0.97%	93.37%	1.28%	In transition-starting careers or retiring, renters, more single person and shared households, few families, lower income
23	In Style	Upscale Avenues	0.86%	94.24%	1.15%	Suburb living/prefers city lifestyles, married/no kids, age=38, higher income, tech savvy, rock music, health oriented
24	Home Town	Factories and Farms	0.81%	95.05%	0.97%	Young, tend to remain in hometown, low avg income, some married, 1/3 without diploma, suburban but prefer country lifestyle
25	Inner City Tenants	Global Roots	0.70%	95.75%	1.09%	Ethnically diverse, urban, 27 years=avg, single, lower than average income, college is a goal, rents, not outdoorsy.
26	Enterprising Professionals	Upscale Avenues	0.67%	96.42%	0.17%	Young, highly educated, single or recently married. Above average income, rent, mobile, tech savvy, likes

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of State Pop.	Description
						to travel
27	Up and Coming Families	Family Portrait	0.64%	97.06%	0.68%	Fast growing segment, avg age = 32, married with kids, affluent, own home on suburban fringe, little time, fast food.
28	Retirement Communities	Senior Styles	0.44%	97.49%	0.85%	Retired, 1/2 single, below avg income, 1/2 own single-family homes/others in multi-unit places, live in metro areas, health conscious
29	Suburban Splendor	High Society	0.39%	97.88%	0.32%	Maturing families, very affluent, dual incomes, avg age=40, younger neighborhoods (but not new), like to invest
30	Metro City Edge	Metropolis	0.38%	98.26%	1.61%	Many single parent families (1/3 married households), older children at home, below avg education & income, high unemployment
31	Senior Sun Seekers	Senior Styles	0.35%	98.61%	0.63%	Older, growing segment, many are winter snow-birds & go south, education levels are below avg, over half receive social security.
32	Main Street, USA	Traditional Living	0.34%	98.94%	0.39%	Suburbs of smaller metro areas in older homes, avg age= 36, 1/2 married, slightly above avg income, service/manufacturing
33	Military Proximity	Scholars & Patriots	0.27%	99.21%	0.34%	Young, married, embracing parenthood, second youngest Tapestry segment, 3/4's active duty or work on bases. Above avg education.
34	Young and Restless	Solo Acts	0.14%	99.35%	0.27%	Avg age=29, most are single, educated but income < avg. Renters, women more likely to work, metro areas, tech savvy.
35	Social Security Set	Senior Styles	0.12%	99.47%	0.56%	Mostly elderly, most live alone, ethnically diverse, very low income, apartment renters in high-rise urban locations, few recreation \$
36	Southern Satellites	Factories and Farms	0.12%	99.59%	0.20%	Primarily found in rural South, 37 yrs, most married, some with kids, below avg income, 1/3 without diploma, fishing, NASCAR
37	Urban Chic	Upscale Avenues	0.10%	99.70%	0.12%	Professional, urban couples, less than 1/2 with kids, 41 yrs, above avg income, uptown living (highrises) common, prefer city life
38	Rural Bypasses	Factories and Farms	0.08%	99.77%	0.09%	Rural, low income & education, trucks, fishing, NASCAR, mostly white & 1/3 African-American.
39	Silver and Gold	Senior Styles	0.06%	99.84%	0.12%	These are the wealthiest & older seniors, commonly live on the outer edge of suburbs, like to travel, active, seek sunshine
40	City Dimensions	Global Roots	0.05%	99.89%	0.12%	Young, 2/3's single, many single parents, low income, urban, lack education, renters, frequent moves, dense neighborhoods
41	Pleasant-ville	Upscale Avenues	0.04%	99.93%	0.05%	Slightly older, families with kids, above average income, urban/suburban, long commutes common, moves

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of State Pop.	Description
						infrequently
42	Dorms to Diplomas	Scholars & Patriots	0.03%	99.96%	0.06%	College students, youngest Tapestry segment. 3/4's hold part-time jobs. 1/2 live in dorms.
43	Industrious Urban Fringe	Global Roots	0.01%	99.97%	0.17%	Family is key. Largely hispanic, many foreign born, live on city's edge, avg. income, commonly owns home. Thrifty.
44	Boomburbs	High Society	0.00%	99.98%	0.00%	Younger families with busy upscale lifestyle, two incomes, college ed., homeowners, into computers & tech, CNN, Discovery channel
45	Connoisseurs	High Society	0.00%	99.98%	0.00%	Very high incomes, slightly older, slightly older & many still with kids, live in dense city centers, liberal, travel, like to spend
46	Metro Renters	Solo Acts	0.00%	99.99%	0.01%	Urban, young, educated & single, slightly above avg income & rising, internet savvy, have disposable income, ethnically diverse
47	Laptops and Lattes	Solo Acts	0.00%	99.99%	0.00%	Avg age = 38, mostly single, live in urban centers, affluent, cosmopolitan, educated, rents, traveled and tech savvy.
48	Top Rung	High Society	0.00%	99.99%	0.00%	Mature, married, well educated and wealthy. Live in coastal urban areas, travel frequently. Home values near \$1 million.
49	Wealthy Seaboard Suburbs	High Society	0.00%	99.99%	0.00%	Coastal metro areas, age=40's, white, few kids, high income & high wealth, professionals, travels, seldom moves
50	The Elders	Senior Styles	0.00%	100.00%	0.00%	Oldest Tapestry segment (73 years = avg), 96% white, growing in numbers, senior communities, golf, travel, above avg wealth
51	Trendsetters	Solo Acts	0.00%	100.00%	0.00%	Young, single, culturally diverse, above average income, educated. Most rent. Live the urban life style.
52	Southwestern Families	Family Portrait	0.00%	100.00%	0.00%	Young hispanic families, not recent immigrants, low income, high unemployment, prefer low-cost homes (2/3's own home)
53	City Lights	Metropolis	0.00%	100.00%	0.00%	Live in dense urban areas, 38 yrs, generally above avg income, families/singles and culture types, most in apts, not outdoorsy
54	Urban Rows	Metropolis	0.00%	100.00%	0.00%	Smallest tapestry segment & shrinking due to urban renewal programs. 70% black with many black hispanics. 1/2 = single parent households. Urban.
55	Modest Income Homes	Metropolis	0.00%	100.00%	0.00%	Mostly young singles & single parents, many grandparents raising kids, low income, low valued homes, 1/2 rent
56	International Marketplace	Global Roots	0.00%	100.00%	0.00%	Young families, many immigrants, ethnically diverse, common to NY and LA, lower income than urban villages.
57	Las Casas	Global Roots	0.00%	100.00%	0.00%	Newest Western immigrants, young, 62% married (above avg), \$35K income, mostly skilled workers, large

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of State Pop.	Description
						household size.
58	NeWest Residents	Global Roots	0.00%	100.00%	0.00%	Over 1/2 foreign born, largely hispanic, urban, renters in mid-to-high rise apts. Low education rates but modest (not low) income.
59	High Rise Renters	Global Roots	0.00%	100.00%	0.00%	Diverse race and ethnic mix, younger (29 yrs), low income, lots in NYC, rent in medium to high rises
60	Urban Villages	Family Portrait	0.00%	100.00%	0.00%	Multicultural areas, young families, in dense urban centers, 40% with no diploma, often hispanic, older single-family homes

Table 7b. 2002-2005 License Sales by Segment, Non-Residents ranked by market share ('% of 2002-2005 License Sales')

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of National Pop.	Description
1	Green Acres	Upscale Avenues	6.12%	6.12%	3.17%	Married w/ kids, blue collar baby boomers with college ed., Above average income, suburban fringe, do-it-yourselfers, outdoors
2	Exurbanites	High Society	5.97%	12.09%	2.44%	Affluent, likes open space on urban edge, married/empty nesters, golf, kayakers, active in volunteer groups and donate to causes
3	Sophisticated Squires	High Society	4.84%	16.92%	2.90%	Country living on urban fringe, above avg income, 35-54, SUVs, married w/ kids, golf
4	Midland Crowd	American Quilt	4.83%	21.75%	3.72%	Avg age=36, married, 1/2 with kids, typical income, new housing in rural areas, blue collar, conservative, likes Fords & fishing
5	Up and Coming Families	Family Portrait	4.21%	25.96%	2.99%	Fast growing segment, avg age = 32, married with kids, affluent, own home on suburban fringe, little time, fast food.
6	Rural Resort Dwellers	American Quilt	4.17%	30.13%	1.44%	Rural non-farm, married/kids moved out, typically older, avg income, boats/fish/hunt
7	Suburban Splendor	High Society	4.02%	34.15%	1.74%	Maturing families, very affluent, dual incomes, avg age=40, younger neighborhoods (but not new), like to invest
8	Connoisseurs	High Society	3.75%	37.90%	1.42%	Very high incomes, slightly older, slightly older & many still with kids, live in dense city centers, liberal, travel, like to spend
9	Boomburbs	High Society	3.46%	41.36%	2.00%	Younger families with busy upscale lifestyle, two incomes, college ed., homeowners, into computers & tech, CNN, Discovery channel
10	Top Rung	High Society	3.45%	44.81%	0.74%	Mature, married, well educated and wealthy. Live in coastal urban areas, travel frequently. Home values near \$1 million.
11	Midlife Junction	Traditional Living	3.20%	48.01%	2.67%	Exiting child-rearing, mix married & single, slightly below avg income, 33% live in apts, suburban, conservative, budget-conscious
12	In Style	Upscale Avenues	3.15%	51.17%	2.45%	Suburb living/prefers city lifestyles, married/no kids, age=38, higher income, tech savvy, rock music, health oriented
13	Urban Chic	Upscale Avenues	3.01%	54.17%	1.40%	Professional, urban couples, less than 1/2 with kids, 41 yrs, above avg income, uptown living (highrises) common, prefer city life

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of National Pop.	Description
14	Salt of the Earth	Factories and Farms	2.99%	57.16%	3.02%	Two-thirds are married with kids, blue collar, avg income, Midwestern, often rural, own single family homes, conservative
15	Prosperous Empty Nesters	Senior Styles	2.61%	59.77%	2.11%	½ over 55, kids moved out, above avg income, still working, suburban, physically active, investors
16	Prairie Living	Factories and Farms	2.26%	62.03%	1.04%	Midwest small farms mostly, avg age = 40, married, half have kids, typical income, pets, country music, hunts and fish
17	Cozy and Comfortable	Upscale Avenues	2.16%	64.19%	2.92%	Older suburban areas, middle aged, married, older kids, use computers, above avg income, not really do-it-yourselfers
18	Rooted Rural	American Quilt	2.06%	66.25%	2.31%	Slightly older, rural, empty-nesters, lower income, less likely to have college experience, trucks, do-it-yourselfers
19	Heartland Communities	Senior Styles	1.92%	68.17%	2.50%	Above avg age, married, modest income, small Midwest towns, hunt/fish/bowl, country music, do-it-yourselfers
20	Metropolitans	Metropolis	1.90%	70.07%	1.38%	City living, older neighborhoods, single or childless couples, educated, slightly above average income, mobile, homeowners
21	Aspiring Young Families	High Hopes	1.78%	71.85%	2.35%	Young start-up families, married or divorced, typical age=30, 22% with degrees, ½ rent, live in growing metro areas, avg income
22	Main Street, USA	Traditional Living	1.76%	73.61%	2.27%	Suburbs of smaller metro areas in older homes, avg age= 36, ½ married, slightly above avg income, service/manufacturing
23	Enterprising Professionals	Upscale Avenues	1.74%	75.34%	1.63%	Young, highly educated, single or recently married. Above average income, rent, mobile, tech savvy, likes to travel
24	Milk and Cookies	Family Portrait	1.72%	77.06%	2.11%	Young families but affluent for their age, two incomes, prefer single-family homes, focused on families & future, leisure time = kid time
25	Laptops and Lattes	Solo Acts	1.69%	78.76%	0.94%	Avg age = 38, mostly single, live in urban centers, affluent, cosmopolitan, educated, rents, traveled and tech savvy.
26	Rustbelt Traditions	Traditional Living	1.48%	80.24%	3.24%	Older Great lakes industrial cities, avg age = 36, mix of married or single, slightly below avg income, don't move much, forego fads
27	Wealthy Seaboard Suburbs	High Society	1.39%	81.63%	1.47%	Coastal metro areas, age=40's, white, few kids, high income & high wealth, professionals, travels, seldom moves
28	Silver and Gold	Senior Styles	1.36%	82.99%	0.85%	These are the wealthiest & older seniors, commonly live on the outer edge of suburbs, like to travel, active, seek sunshine
29	Great Expectations	High Hopes	1.30%	84.29%	2.23%	Young singles & married couples, lower income & growing, many rent, music taste varies: MTV to country, like outdoor sports
30	Southern Satellites	Factories and Farms	1.27%	85.56%	2.99%	Primarily found in rural South, 37 yrs, most married, some with kids, below avg income, 1/3 without diploma, fishing, NASCAR
31	Old and Newcomers	Solo Acts	1.27%	86.83%	2.00%	In transition-starting careers or retiring, renters, more single person and shared households, few families, lower income
32	Rustbelt Retirees	Senior Styles	1.26%	88.09%	2.61%	Married/no kids, avg income, Great Lakes & Northeast, own homes, not inclined to move, loyal to community & country, gets involved
33	Metro Renters	Solo Acts	1.22%	89.31%	1.43%	Urban, young, educated & single, slightly above avg income & rising, internet savvy,

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of National Pop.	Description
						have disposable income, ethnically diverse
34	Retirement Communities	Senior Styles	0.99%	90.30%	1.48%	Retired, ½ single, below avg income, ½ own single-family homes/others in multi-unit places, live in metro areas, health conscious
35	Pleasant-ville	Upscale Avenues	0.92%	91.22%	1.46%	Slightly older, families with kids, above average income, urban/suburban, long commutes common, moves infrequently
36	Crossroads	American Quilt	0.88%	92.10%	1.48%	Married couples/single parents, 32 years, below avg income, smaller towns, mobile homes common, above avg unemployment
37	College Towns	Scholars & Patriots	0.82%	92.92%	0.81%	Avg age=24.3, almost ½ enrolled in college & others on staff, part-time jobs, low income, renters or some in dormitories.
38	Simple Living	Senior Styles	0.80%	93.72%	1.60%	Older, ½ single, kids rare, low income, ¼ didn't finish high school, community is important
39	Senior Sun Seekers	Senior Styles	0.78%	94.51%	1.16%	Older, growing segment, many are winter snow-birds & go south, education levels are below avg, over half receive social security.
40	Young and Restless	Solo Acts	0.67%	95.18%	1.61%	Avg age=29, most are single, educated but income < avg. Renters, women more likely to work, metro areas, tech savvy.
41	Trendsetters	Solo Acts	0.67%	95.85%	0.94%	Young, single, culturally diverse, above average income, educated. Most rent. Live the urban life style.
42	Inner City Tenants	Global Roots	0.54%	96.39%	1.60%	Ethnically diverse, urban, 27 years=avg, single, lower than average income, college is a goal, rents, not outdoorsy.
43	Industrious Urban Fringe	Global Roots	0.50%	96.88%	1.40%	Family is key. Largely hispanic, many foreign born, live on city's edge, avg. income, commonly owns home. Thrifty.
44	Home Town	Factories and Farms	0.37%	97.25%	1.69%	Young, tend to remain in hometown, low avg income, some married, 1/3 without diploma, suburban but prefer country lifestyle
45	Dorms to Diplomas	Scholars & Patriots	0.33%	97.58%	0.50%	College students, youngest Tapestry segment. 3/4's hold part-time jobs. 1/2 live in dorms.
46	The Elders	Senior Styles	0.27%	97.86%	0.67%	Oldest Tapestry segment (73 years = avg), 96% white, growing in numbers, senior communities, golf, travel, above avg wealth
47	Rural Bypasses	Factories and Farms	0.27%	98.12%	1.56%	Rural, low income & education, trucks, fishing, NASCAR, mostly white & 1/3 African-American.
48	City Lights	Metropolis	0.25%	98.37%	1.05%	Live in dense urban areas, 38 yrs, generally above avg income, families/singles and culture types, most in apts, not outdoorsy
49	International Marketplace	Global Roots	0.24%	98.61%	1.21%	Young families, many immigrants, ethnically diverse, common to NY and LA, lower income than urban villages.
50	Urban Villages	Family Portrait	0.23%	98.84%	0.78%	Multicultural areas, young families, in dense urban centers, 40% with no diploma, often hispanic, older single-family homes
51	Social Security Set	Senior Styles	0.21%	99.05%	0.71%	Mostly elderly, most live alone, ethnically diverse, very low income, apartment renters in high-rise urban locations, few recreation \$
52	Pacific Heights	Upscale Avenues	0.19%	99.24%	0.54%	Upscale urban neighborhoods on Pacific coast, ¾ are families, 38 yrs, one income earner, high annual income.

Rank	Tapestry Segment	LifeMode Groups	% of 2002-2005 License Buyers	Cumulative %	% of National Pop.	Description
53	NeWest Residents	Global Roots	0.13%	99.37%	0.90%	Over 1/2 foreign born, largely hispanic, urban, renters in mid-to-high rise apts. Low education rates but modest (not low) income.
54	City Dimensions	Global Roots	0.12%	99.49%	1.01%	Young, 2/3's single, many single parents, low income, urban, lack education, renters, frequent moves, dense neighborhoods
55	Southwestern Families	Family Portrait	0.12%	99.61%	1.02%	Young hispanic families, not recent immigrants, low income, high unemployment, prefer low-cost homes (2/3's own home)
56	Military Proximity	Scholars & Patriots	0.11%	99.72%	0.22%	Young, married, embracing parenthood, second youngest Tapestry segment, 3/4's active duty or work on bases. Above avg education.
57	Metro City Edge	Metropolis	0.10%	99.82%	1.09%	Many single parent families (1/3 married households), older children at home, below avg education & income, high unemployment
58	Las Casas	Global Roots	0.08%	99.90%	0.82%	Newest Western immigrants, young, 62% married (above avg), \$35K income, mostly skilled workers, large household size.
59	Modest Income Homes	Metropolis	0.06%	99.96%	1.27%	Mostly young singles & single parents, many grandparents raising kids, low income, low valued homes, 1/2 rent
60	Family Foundations	Traditional Living	0.04%	100.00%	0.95%	Mostly African-American, slightly older families, active in community, average income, urban.

The above table gives us a better picture of Montana's license buyers. The segments highlighted in yellow purchase larger shares of Montana's annual license sales and show a significantly greater-than-average tendency to buy licenses. For residents, these highlighted segments are typically rural with families and with average incomes. The young-educated-urban types do not appear in the top segments. This does not mean these people will not fish in the future, but at this stage in their lives, fishing is not a common activity. Resident license sales are concentrated in a smaller number of Tapestry segments compared to nonresidents. The top five resident segments purchase 50% of Montana's annual resident license sales, while the top five nonresident segments only purchase half that amount.

Table 7b gives us a more-detailed picture of Montana's nonresident customers. Compared to residents, nonresidents tend to be more suburban or urban and much more affluent. These types of people will likely respond to different types of fishing promotions and advertisements than would the generally more rural and lower income resident customer. Nonresidents would be more likely to seek a different type of fishing experience such as catch and release fishing, fly-fishing, etc. and would expect different types of fisheries management regimens compared to resident anglers who would likely be more interested in keeping their catch and minimizing the overall cost of fishing. These differences have likely long been noticed by Montana's fisheries managers.

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

Table 8 below lists all segments recorded as having bought a license in Montana between 2002 and 2005, for residents only. The third column presents the larger LifeMode group each belongs to, and the fourth column presents the urban-rural areas in which the segments are located. The fifth column reports the increase or decrease in the number of licenses bought by each segment from 2002 through 2005, based on the real number of licenses sold. The sixth column reports each segment's total share of all licenses sold from 2002-2005. This number is important as it allows the agency to decide if the trends and revenue represented by a specific segment are worth the agency's attention. The last column reports how much each segment's share increased or decreased from 2002 to 2005. Two tables are actually presented: Table 8a represents resident license buyers and Table 8b represents non-residents.

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

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
1	Rural Resort Dwellers	American Quilt	Rural I	4.59%	11.95%	0.52%
2	Midland Crowd	American Quilt	Rural I	6.66%	11.51%	2.50%
3	Prairie Living	Factories and Farms	Rural II	2.90%	11.04%	-1.11%
4	Green Acres	Upscale Avenues	Rural I	4.36%	8.02%	0.30%
5	Midlife Junction	Traditional Living	Suburban Periphery II	2.08%	7.52%	-1.90%
6	Heartland Communities	Senior Styles	Small Towns	1.63%	6.99%	-2.33%
7	Great Expectations	High Hopes	Urban Outskirts I	6.70%	4.71%	2.55%
8	Rooted Rural	American Quilt	Rural II	4.40%	4.11%	0.33%
9	Exurbanites	High Society	Suburban Periphery I	3.74%	3.85%	-0.30%
10	College Towns	Scholars & Patriots	Urban Outskirts II	2.24%	2.64%	-1.74%
11	Simple Living	Senior Styles	Urban Outskirts II	3.43%	2.51%	-0.60%
12	Rustbelt Retirees	Senior Styles	Suburban Periphery II	0.53%	2.49%	-3.39%
13	Aspiring Young Families	High Hopes	Metro Cities II	10.94%	2.48%	6.62%
14	Prosperous Empty Nesters	Senior Styles	Suburban Periphery I	1.78%	2.13%	-2.19%
15	Crossroads	American Quilt	Small Towns	7.60%	1.78%	3.41%
16	Metropolitans	Metropolis	Metro Cities I	4.58%	1.73%	0.50%
17	Milk and Cookies	Family Portrait	Metro Cities I	0.60%	1.60%	-3.32%
18	Rustbelt Traditions	Traditional Living	Urban Outskirts I	2.38%	1.58%	-1.60%
19	Salt of the Earth	Factories and Farms	Rural I	3.64%	1.29%	-0.40%
20	Sophisticated Squires	High Society	Suburban Periphery I	6.19%	1.25%	2.05%
21	Cozy and Comfortable	Upscale Avenues	Suburban Periphery II	6.39%	1.21%	2.25%
22	Old and Newcomers	Solo Acts	Metro Cities II	1.54%	0.97%	-2.41%
23	In Style	Upscale Avenues	Suburban Periphery I	2.42%	0.86%	-1.57%

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
24	Home Town	Factories and Farms	Suburban Periphery II	-0.33%	0.81%	-4.21%
25	Inner City Tenants	Global Roots	Metro Cities II	15.29%	0.70%	10.80%
26	Enterprising Professionals	Upscale Avenues	Metro Cities I	0.48%	0.67%	-3.44%
27	Up and Coming Families	Family Portrait	Suburban Periphery I	10.99%	0.64%	6.66%
28	Retirement Communities	Senior Styles	Metro Cities II	-2.34%	0.44%	-6.14%
29	Suburban Splendor	High Society	Suburban Periphery I	3.94%	0.39%	-0.11%
30	Metro City Edge	Metropolis	Urban Outskirts II	0.36%	0.38%	-3.55%
31	Senior Sun Seekers	Senior Styles	Small Towns	0.39%	0.35%	-3.52%
32	Main Street, USA	Traditional Living	Urban Outskirts I	6.37%	0.34%	2.23%
33	Military Proximity	Scholars & Patriots	Suburban Periphery II	-2.65%	0.27%	-6.44%
34	Young and Restless	Solo Acts	Metro Cities II	8.74%	0.14%	4.51%
35	Social Security Set	Senior Styles	Principal Urban Centers II	8.02%	0.12%	3.81%
36	Southern Satellites	Factories and Farms	Rural II	0.75%	0.12%	-3.18%
37	Urban Chic	Upscale Avenues	Metro Cities I	-0.88%	0.10%	-4.75%
38	Rural Bypasses	Factories and Farms	Rural II	1.85%	0.08%	-2.12%
39	Silver and Gold	Senior Styles	Suburban Periphery I	9.42%	0.06%	5.16%
40	City Dimensions	Global Roots	Metro Cities II	-8.77%	0.05%	-12.33%
41	Pleasant-ville	Upscale Avenues	Metro Cities I	-11.46%	0.04%	-14.91%
42	Dorms to Diplomas	Scholars & Patriots	Metro Cities II	1.54%	0.03%	-2.42%
43	Industrious Urban Fringe	Global Roots	Urban Outskirts I	45.83%	0.01%	40.15%
44	Boomburbs	High Society	Urban Outskirts I	-30.00%	0.00%	-32.73%
45	Connoisseurs	High Society	Metro Cities I	83.33%	0.00%	76.19%
46	Metro Renters	Solo Acts	Principal Urban Centers I	-45.45%	0.00%	-47.58%
47	Laptops and Lattes	Solo Acts	Principal Urban Centers I	-28.57%	0.00%	-31.35%
48	Top Rung	High Society	Metro Cities I	0.00%	0.00%	-3.89%
49	Wealthy Seaboard Suburbs	High Society	Metro Cities I	200.00%	0.00%	188.32%
50	The Elders	Senior Styles	Suburban Periphery II	-25.00%	0.00%	-27.92%
51	Trendsetters	Solo Acts	Principal Urban Centers I	-75.00%	0.00%	-75.97%
52	Southwestern Families	Family Portrait	Urban Outskirts II	100.00%	0.00%	92.21%
53	City Lights	Metropolis	Principal Urban Centers I	-50.00%	0.00%	-51.95%
54	Urban Rows	Metropolis	Principal Urban Centers II	0.00%	0.00%	-3.89%
55	Modest Income Homes	Metropolis	Urban Outskirts II	-100.00%	0.00%	-100.00%
56	International Marketplace	Global Roots	Principal Urban Centers I	-100.00%	0.00%	-100.00%
57	Las Casas	Global Roots	Principal Urban Centers II	0.00%	0.00%	-3.89%
58	NeWest Residents	Global Roots	Principal Urban Centers II	n/a	0.00%	n/a
59	High Rise Renters	Global Roots	Principal Urban Centers II	n/a	0.00%	n/a
60	Urban Villages	Family Portrait	Principal Urban Centers I	n/a	0.00%	n/a

* 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 five segments in Table 8a produce half of Montana's annual license sales. The first four segments are from the Rural Urban Group. These top five segments need

special consideration since they are the lion’s share of the State’s annual license revenues. Unlike many other states, Montana has few segments with negative growth in terms of annual license purchases, indicating fishing remains a strong, popular pastime. The #13 ranked “Aspiring Young Families” deserves special mention. With a ten percent increase in license purchases, having grown its market share by 6.62 percent, and representing a much higher percentage of the license market than it does the state population, this segment is growing rapidly in importance in regards to revenue generation and angling participation.

Table 8b. Non-Resident License Buyers by Segment, as a Percentage of All Licenses Sold Annually

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
1	Green Acres	Upscale Avenues	Rural I	-3.74%	6.11%	-1.70%
2	Exurbanites	High Society	Suburban Periphery I	-3.35%	5.96%	-1.30%
3	Sophisticated Squires	High Society	Suburban Periphery I	-2.16%	4.83%	-0.08%
4	Midland Crowd	American Quilt	Rural I	-1.06%	4.82%	1.04%
5	Up and Coming Families	Family Portrait	Suburban Periphery I	2.60%	4.21%	4.78%
6	Rural Resort Dwellers	American Quilt	Rural I	-2.87%	4.17%	-0.81%
7	Suburban Splendor	High Society	Suburban Periphery I	-0.34%	4.01%	1.77%
8	Connoisseurs	High Society	Metro Cities I	3.26%	3.74%	5.46%
9	Boomburbs	High Society	Urban Outskirts I	10.72%	3.45%	13.08%
10	Top Rung	High Society	Metro Cities I	-1.37%	3.45%	0.72%
11	Midlife Junction	Traditional Living	Suburban Periphery II	-6.41%	3.20%	-4.43%
12	In Style	Upscale Avenues	Suburban Periphery I	-2.11%	3.15%	-0.03%
13	Urban Chic	Upscale Avenues	Metro Cities I	-4.13%	3.00%	-2.09%
14	Salt of the Earth	Factories and Farms	Rural I	2.37%	2.99%	4.55%
15	Prosperous Empty Nesters	Senior Styles	Suburban Periphery I	-4.70%	2.60%	-2.67%
16	Prairie Living	Factories and Farms	Rural II	-3.79%	2.26%	-1.75%
17	Cozy and Comfortable	Upscale Avenues	Suburban Periphery II	-6.69%	2.16%	-4.71%
18	Rooted Rural	American Quilt	Rural II	3.97%	2.06%	6.18%
19	Heartland Communities	Senior Styles	Small Towns	-3.63%	1.92%	-1.58%
20	Metropolitans	Metropolis	Metro Cities I	-5.26%	1.89%	-3.25%
21	Aspiring Young Families	High Hopes	Metro Cities II	-3.32%	1.77%	-1.27%
22	Main Street, USA	Traditional Living	Urban Outskirts I	-7.56%	1.76%	-5.60%
23	Enterprising Professionals	Upscale Avenues	Metro Cities I	-2.82%	1.73%	-0.75%
24	Milk and Cookies	Family Portrait	Metro Cities I	-5.68%	1.72%	-3.67%
25	Laptops and Lattes	Solo Acts	Principal Urban Centers I	-4.31%	1.69%	-2.28%
26	Rustbelt Traditions	Traditional Living	Urban Outskirts I	-9.61%	1.48%	-7.69%
27	Wealthy Seaboard Suburbs	High Society	Metro Cities I	-4.91%	1.39%	-2.89%
28	Silver and Gold	Senior Styles	Suburban Periphery I	6.16%	1.36%	8.41%
29	Great Expectations	High Hopes	Urban Outskirts I	-8.03%	1.30%	-6.08%
30	Southern Satellites	Factories and Farms	Rural II	1.66%	1.27%	3.83%

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
31	Old and Newcomers	Solo Acts	Metro Cities II	-6.59%	1.26%	-4.60%
32	Rustbelt Retirees	Senior Styles	Suburban Periphery II	-4.11%	1.26%	-2.08%
33	Metro Renters	Solo Acts	Principal Urban Centers I	-7.66%	1.22%	-5.70%
34	Retirement Communities	Senior Styles	Metro Cities II	1.30%	0.99%	3.45%
35	Pleasant-ville	Upscale Avenues	Metro Cities I	-7.36%	0.92%	-5.40%
36	Crossroads	American Quilt	Small Towns	1.37%	0.88%	3.53%
37	College Towns	Scholars & Patriots	Urban Outskirts II	-5.28%	0.82%	-3.27%
38	Simple Living	Senior Styles	Urban Outskirts II	-1.41%	0.80%	0.69%
39	Senior Sun Seekers	Senior Styles	Small Towns	-3.18%	0.78%	-1.12%
40	Young and Restless	Solo Acts	Metro Cities II	-10.17%	0.67%	-8.27%
41	Trendsetters	Solo Acts	Principal Urban Centers I	-4.07%	0.67%	-2.03%
42	Inner City Tenants	Global Roots	Metro Cities II	-0.95%	0.54%	1.15%
43	Industrious Urban Fringe	Global Roots	Urban Outskirts I	1.17%	0.50%	3.32%
44	Home Town	Factories and Farms	Suburban Periphery II	1.99%	0.37%	4.16%
45	Dorms to Diplomas	Scholars & Patriots	Metro Cities II	-12.41%	0.33%	-10.54%
46	The Elders	Senior Styles	Suburban Periphery II	3.36%	0.27%	5.55%
47	Rural Bypasses	Factories and Farms	Rural II	21.88%	0.27%	24.47%
48	City Lights	Metropolis	Principal Urban Centers I	-1.59%	0.24%	0.50%
49	International Marketplace	Global Roots	Principal Urban Centers I	-9.54%	0.24%	-7.61%
50	Urban Villages	Family Portrait	Principal Urban Centers I	-2.92%	0.23%	-0.86%
51	Social Security Set	Senior Styles	Principal Urban Centers II	10.58%	0.21%	12.93%
52	Pacific Heights	Upscale Avenues	Principal Urban Centers I	-18.55%	0.19%	-16.82%
53	NeWest Residents	Global Roots	Principal Urban Centers II	21.71%	0.13%	24.30%
54	City Dimensions	Global Roots	Metro Cities II	-0.55%	0.12%	1.56%
55	Southwestern Families	Family Portrait	Urban Outskirts II	6.99%	0.12%	9.26%
56	Military Proximity	Scholars & Patriots	Suburban Periphery II	1.84%	0.11%	4.00%
57	Metro City Edge	Metropolis	Urban Outskirts II	7.09%	0.10%	9.37%
58	Las Casas	Global Roots	Principal Urban Centers II	-15.63%	0.08%	-13.83%
59	Modest Income Homes	Metropolis	Urban Outskirts II	-14.42%	0.06%	-12.60%
60	Family Foundations	Traditional Living	Metro Cities II	-6.78%	0.04%	-4.80%
61	Urban Melting Pot	Global Roots	Principal Urban Centers I	-1.61%	0.04%	0.48%
62	City Commons	Family Portrait	Principal Urban Centers II	-11.54%	0.03%	-9.66%
63	City Strivers	Metropolis	Principal Urban Centers II	27.59%	0.02%	30.30%
64	High Rise Renters	Global Roots	Principal Urban Centers II	50.00%	0.02%	53.19%
65	Urban Rows	Metropolis	Principal Urban Centers II	57.14%	0.01%	60.48%

Non-resident license customers are different than resident license buyers. They are more diverse regarding the types of communities where they live. Unlike residents, where the top 50 percent of customers are mostly rural and come from just five TAPESTRY[®] segments, twelve segments are required to acquire the top 50 percent of license buyers and they have a greater likelihood of hailing from suburban and more urbanized areas. Most noticeably, these top non-resident segments are relatively affluent, with three-quarters of them belonging to the affluent “High Society” and “Upscale Avenues” LifeMode groups. This is not true of the top resident license buyers. Based on their differences, Montana fisheries officials likely face differing and often competing demands from each major user group regarding the types of fisheries and fishing experiences to be provided.

Overall, license sales to non-residents are not growing as fast as resident license sales, a fact also seen in Table 5. Although the majority of the non-resident segments show flat or negative growth over the past four years, some segments shine brighter such as “Boomburbs”. With a growth rate in the number of licenses purchased exceeding 10 percent, and recognize its share of the license market is significantly greater than its percentage of the U.S. population, efforts to find out why fishing is so attractive to people from this segment may shed insights into how fishing can be promoted to other non-residents.

In Table 8 above, we added TAPESTRY[®] Urban Groups. These describe the level of urbanization where the segments, or neighborhoods, are found. In Tables 9a and 9b, we take a direct look and residents and non-residents based on the relative urbanization of their home communities.

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

Category	Fishing License Market Share	% Change in Market Share	% of the State Population
Rural	48.12%	0.25%	40.6%
Suburban Periphery	21.49%	-0.26%	22.5%
Urban Outskirts	12.18%	0.03%	16.5%
Small Towns	9.11%	-0.12%	11.0%
Metro Cities	8.96%	0.10%	8.8%
Principal Urban Centers	0.13%	0.00%	0.6%

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

Category	Market Share	% Change in Market Share	% of the National Population
Suburban Periphery	33.50%	-0.02%	25.3%
Rural	23.94%	0.24%	18.9%
Metro Cities	23.58%	-0.21%	21.4%
Urban Outskirts	10.39%	0.13%	16.8%
Principal Urban Centers	5.02%	-0.12%	12.8%
Small Towns	3.58%	-0.01%	4.7%

Table 9 shows the importance of rural areas to Montana’s resident fishing license revenue base. As seen in Table 8, the actual, or real, number of licenses sold to rural residents is slightly increasing and has the largest market share, over 48 percent. The Suburban Periphery and Urban Outskirts are the next two larger sources of license sales. Non-residents from suburban or rural areas tend to be more likely to fish in Montana. Future license and fishing promotions may want to consider this point when designing messaging and planning media buys.

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 Montana 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 2002 to 2005. Table 10 presents the top 15 segments ranked by who is buying a greater portion of Montana’s licenses.

Table 10a. Top 15 Segments Ranked by Fastest Growth in Market Share, 2002-2005, Residents

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
49	Wealthy Seaboard Suburbs	High Society	Metro Cities I	200.00%	0.00%	188.32%
52	Southwestern Families	Family Portrait	Urban Outskirts II	100.00%	0.00%	92.21%
45	Connoisseurs	High Society	Metro Cities I	83.33%	0.00%	76.19%
43	Industrious Urban Fringe	Global Roots	Urban Outskirts I	45.83%	0.01%	40.15%
25	Inner City Tenants	Global Roots	Metro Cities II	15.29%	0.70%	10.80%
27	Up and Coming Families	Family Portrait	Suburban Periphery I	10.99%	0.64%	6.66%
13	Aspiring Young Families	High Hopes	Metro Cities II	10.94%	2.48%	6.62%
39	Silver and Gold	Senior Styles	Suburban Periphery I	9.42%	0.06%	5.16%
34	Young and Restless	Solo Acts	Metro Cities II	8.74%	0.14%	4.51%
35	Social Security Set	Senior Styles	Principal Urban Centers II	8.02%	0.12%	3.81%
15	Crossroads	American Quilt	Small Towns	7.60%	1.78%	3.41%
7	Great Expectations	High Hopes	Urban Outskirts I	6.70%	4.71%	2.55%
2	Midland Crowd	American Quilt	Rural I	6.66%	11.51%	2.50%
21	Cozy and Comfortable	Upscale Avenues	Suburban Periphery II	6.39%	1.21%	2.25%
32	Main Street, USA	Traditional Living	Urban Outskirts I	6.37%	0.34%	2.23%

Table 10b. Top 15 Segments Ranked by Fastest Growth in Market Share, 2002-2005, Non-Residents

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
65	Urban Rows	Metropolis	Principal Urban Centers II	57.14%	0.01%	60.48%
64	High Rise Renters	Global Roots	Principal Urban Centers II	50.00%	0.02%	53.19%
63	City Strivers	Metropolis	Principal Urban Centers II	27.59%	0.02%	30.30%
47	Rural Bypasses	Factories and Farms	Rural II	21.88%	0.27%	24.47%
53	NeWest Residents	Global Roots	Principal Urban Centers II	21.71%	0.13%	24.30%
9	Boomburbs	High Society	Urban Outskirts I	10.72%	3.45%	13.08%
51	Social Security Set	Senior Styles	Principal Urban Centers II	10.58%	0.21%	12.93%
57	Metro City Edge	Metropolis	Urban Outskirts II	7.09%	0.10%	9.37%
55	Southwestern Families	Family Portrait	Urban Outskirts II	6.99%	0.12%	9.26%
28	Silver and Gold	Senior Styles	Suburban Periphery I	6.16%	1.36%	8.41%
18	Rooted Rural	American Quilt	Rural II	3.97%	2.06%	6.18%
46	The Elders	Senior Styles	Suburban Periphery II	3.36%	0.27%	5.55%
8	Connoisseurs	High Society	Metro Cities I	3.26%	3.74%	5.46%
5	Up and Coming Families	Family Portrait	Suburban Periphery I	2.60%	4.21%	4.78%
14	Salt of the Earth	Factories and Farms	Rural I	2.37%	2.99%	4.55%

Most of the faster growing segments are from urban areas that have less than one percent overall market share. For residents, though, the “Midland Crowd” and “Great Expectation” segments are providing the most growth in terms of actual licenses purchases based on their large sizes. For non-residents, the most rapidly growing buyers of licenses are from urban areas, too, but their percentages of the overall market are so small that a change of one or two licenses from 2002 to 2005 had a major impact on the rankings. PLEASE NOTE: We encourage these groups to be overlooked as it is not known if the change is related to real trends or not, and their overall impact is negligible. Just a change of a few licenses, or the opening of a new local fishery, can make a big difference in the rankings of small segments. Of the top 15 growth segments listed in Table 10, only a few have a market share greater than two percent of total licenses purchased. These are the ones worth consideration.

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

Table 11a. Top 15 Segments Ranked By Shrinking Market Share, Residents

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
55	Modest Income Homes	Metropolis	Urban Outskirts II	-	0.00%	-100.00%
56	International Marketplace	Global Roots	Principal Urban Centers I	-	0.00%	-100.00%
51	Trendsetters	Solo Acts	Principal Urban Centers I	-75.00%	0.00%	-75.97%
53	City Lights	Metropolis	Principal Urban Centers I	-50.00%	0.00%	-51.95%
46	Metro Renters	Solo Acts	Principal Urban Centers I	-45.45%	0.00%	-47.58%
44	Boomburbs	High Society	Urban Outskirts I	-30.00%	0.00%	-32.73%
47	Laptops and Lattes	Solo Acts	Principal Urban Centers I	-28.57%	0.00%	-31.35%
50	The Elders	Senior Styles	Suburban Periphery II	-25.00%	0.00%	-27.92%
41	Pleasant-ville	Upscale Avenues	Metro Cities I	-11.46%	0.04%	-14.91%
40	City Dimensions	Global Roots	Metro Cities II	-8.77%	0.05%	-12.33%
33	Military Proximity	Scholars & Patriots	Suburban Periphery II	-2.65%	0.27%	-6.44%
28	Retirement Communities	Senior Styles	Metro Cities II	-2.34%	0.44%	-6.14%
37	Urban Chic	Upscale Avenues	Metro Cities I	-0.88%	0.10%	-4.75%
24	Home Town	Factories and Farms	Suburban Periphery II	-0.33%	0.81%	-4.21%
48	Top Rung	High Society	Metro Cities I	0.00%	0.00%	-3.89%

This table demonstrates that the worst declines are primarily in the cities and suburbs. As mentioned after Table 10, a change by just a few people in the smaller segments of Montana’s population can have a big change in that segment’s ranking. Also, comparing the results of Table 11a with 11b, we see that not all segments within an urbanization category march together. Please be cautious when interpreting and using the results.

Table 11b. Top 15 Segments Ranked By Shrinking Market Share, Residents

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
52	Pacific Heights	Upscale Avenues	Principal Urban Centers I	-18.55%	0.19%	-16.82%
58	Las Casas	Global Roots	Principal Urban Centers II	-15.63%	0.08%	-13.83%
59	Modest Income Homes	Metropolis	Urban Outskirts II	-14.42%	0.06%	-12.60%
45	Dorms to Diplomas	Scholars & Patriots	Metro Cities II	-12.41%	0.33%	-10.54%
62	City Commons	Family Portrait	Principal Urban Centers II	-11.54%	0.03%	-9.66%

1) Rank	2) Tapestry Segment	3) LifeMode Groups	4) Urban Group	5) Net Change in Real Licenses Sold from 2002-2005	6) Percentage Market Share from 2002-2005	7) Percentage Change in Market Share from 2002-2005
40	Young and Restless	Solo Acts	Metro Cities II	-10.17%	0.67%	-8.27%
26	Rustbelt Traditions	Traditional Living	Urban Outskirts I	-9.61%	1.48%	-7.69%
49	International Marketplace	Global Roots	Principal Urban Centers I	-9.54%	0.24%	-7.61%
29	Great Expectations	High Hopes	Urban Outskirts I	-8.03%	1.30%	-6.08%
33	Metro Renters	Solo Acts	Principal Urban Centers I	-7.66%	1.22%	-5.70%
22	Main Street, USA	Traditional Living	Urban Outskirts I	-7.56%	1.76%	-5.60%
35	Pleasant-ville	Upscale Avenues	Metro Cities I	-7.36%	0.92%	-5.40%
60	Family Foundations	Traditional Living	Metro Cities II	-6.78%	0.04%	-4.80%
17	Cozy and Comfortable	Upscale Avenues	Suburban Periphery II	-6.69%	2.16%	-4.71%
31	Old and Newcomers	Solo Acts	Metro Cities II	-6.59%	1.26%	-4.60%

Next we will look at the loyalty levels of Montana anglers.

Purchasing Frequencies: Gender Differences

During the review of the data, a question was raised if the frequency of fishing license purchases over four years differed between men and women. This analysis was run separately for resident and non-resident license holders with the results presented below:

Resident

# of Years Bought a License Over the Last First Years	Male	Female
1	59.7%	40.3%
2	67.3%	32.7%
3	73.7%	26.3%
4	83.9%	16.1%

Non-Resident

# of Years Bought a License Over the Last First Years	Male	Female
1	82.3%	17.7%
2	87.3%	12.7%
3	88.2%	11.8%
4	88.9%	11.1%

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 four-year license, would likely be more effective if targeted towards males.

Section 4: The “Churn” Issue

Let’s look at the “churn” issue. The “churn” issue refers to the rate of anglers entering and dropping out of the customer base. Considering all Montana residents who purchased a license at least once over the past four years, Table 12 reports the percentage who bought a license in just one, two, up to all four years.

Table 12. License Purchasing Frequency

License Purchasing Frequency	Percentage of Resident Customers, 2002 to 2005	Percentage of Non-Resident Customers, 2002 to 2005	All Customers
1 of 4 years:	31.6%	73.3%	54.3%
2 of 4 years:	19.7%	15.0%	17.2%
3 of 4 years:	17.0%	6.8%	11.4%
4 of 4 years:	31.7%	4.8%	17.1%

It could be argued that over 51 percent of license customers are not loyal customers and only bought licenses in one or two years of the past four years. These people are finding other ways to spend their free time each year. 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. Selling more multi-year licenses may help capture revenues from anglers before they are ‘taken away’ by other competing activities. Of note though is the loyalty shown by those who bought licenses for all four years. Montana’s percentage of customers who bought in all four of the past years appears higher than seen in most other states. 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.¹

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

Rank	Tapestry Segment	Bought 1 or 2 years only, out of 4 years	Bought 3 or 4 years, out of 4 years
54	Urban Rows	0.00%	100.00%
4	Green Acres	46.74%	53.26%
3	Prairie Living	47.09%	52.91%
19	Salt of the Earth	47.50%	52.50%
20	Sophisticated Squires	47.91%	52.09%

¹ Non-residents are less likely to buy a Nebraska license annually. Their inclusion in this specific analysis could mislead the analysis.

Rank	Tapestry Segment	Bought 1 or 2 years only, out of 4 years	Bought 3 or 4 years, out of 4 years
1	Rural Resort Dwellers	48.69%	51.31%
12	Rustbelt Retirees	48.69%	51.31%
17	Milk and Cookies	49.32%	50.68%
9	Exurbanites	49.53%	50.47%
14	Prosperous Empty Nesters	49.67%	50.33%
8	Rooted Rural	49.75%	50.25%
48	Top Rung	50.00%	50.00%
21	Cozy and Comfortable	50.23%	49.77%
2	Midland Crowd	50.31%	49.69%
26	Enterprising Professionals	50.48%	49.52%

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

Rank	Tapestry Segment	Bought 1 or 2 years only, out of 4 years	Bought 3 or 4 years, out of 4 years
6	Rural Resort Dwellers	85.16%	14.84%
10	Top Rung	85.56%	14.44%
46	The Elders	85.59%	14.41%
2	Exurbanites	86.58%	13.42%
8	Connoisseurs	86.65%	13.35%
28	Silver and Gold	86.71%	13.29%
13	Urban Chic	86.90%	13.10%
51	Social Security Set	87.15%	12.85%
11	Midlife Junction	87.21%	12.79%
15	Prosperous Empty Nesters	87.23%	12.77%
12	In Style	87.29%	12.71%
27	Wealthy Seaboard Suburbs	87.30%	12.70%
7	Suburban Splendor	87.34%	12.66%
25	Laptops and Lattes	87.50%	12.50%
34	Retirement Communities	87.56%	12.44%

Not unexpected, the top four resident segments, in terms of total licenses bought annually, are also the most loyal buyers. The other segments range from the top to the bottom of the ranking with no clear evidence from this perspective as to why. Even for the segments showing the greatest loyalty rates, members within each are nearly as likely to have bought a license only once or twice in the last four years.

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

Rank	Tapestry Segment	Bought 1 or 2 years only, out of 4 years	Bought 3 or 4 years, out of 4 years
52	Southwestern Families	100.00%	0.00%
55	High Rise Renters	100.00%	0.00%
56	International Marketplace	100.00%	0.00%
57	Las Casas	100.00%	0.00%
58	Modest Income Homes	100.00%	0.00%
59	NeWest Residents	100.00%	0.00%
60	Urban Villages	100.00%	0.00%
46	Metro Renters	88.89%	11.11%
45	Connoisseurs	85.71%	14.29%
44	Boomburbs	85.19%	14.81%
50	The Elders	83.33%	16.67%
33	Military Proximity	82.71%	17.29%
51	Trendsetters	80.00%	20.00%
43	Industrious Urban Fringe	79.73%	20.27%
35	Social Security Set	69.54%	30.46%

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

Rank	Tapestry Segment	Bought 1 or 2 years only, out of 4 years	Bought 3 or 4 years, out of 4 years
64	High Rise Renters	97.30%	2.70%
56	Military Proximity	94.53%	5.47%
47	Rural Bypasses	94.15%	5.85%
61	Urban Melting Pot	94.06%	5.94%
58	Las Casas	93.46%	6.54%
44	Home Town	93.34%	6.66%
60	Family Foundations	93.30%	6.70%
65	Urban Rows	93.18%	6.82%
54	City Dimensions	92.86%	7.14%
57	Metro City Edge	92.39%	7.61%
55	Southwestern Families	92.03%	7.97%
45	Dorms to Diplomas	91.31%	8.69%
26	Rustbelt Traditions	91.30%	8.70%
52	Pacific Heights	91.25%	8.75%
42	Inner City Tenants	91.25%	8.75%

In Table 14, the rankings indicate that less loyal segments hail from urban areas that are primarily insignificant in terms of license sales and do not offer much information. In general, the rural and suburban segments are more loyal than the urban ones. Rural residents are Montana’s most loyal anglers, even though more of them are likely to buy a license only one or two times in the past four years. Drop-out anglers from rural segments will have a much more severe impact on license revenues than drop-outs from metro and urban areas. Efforts to encourage rural anglers to renew their license each year may have more success in boosting revenues versus trying the same with anglers from more-urbanized areas.

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 Montana population” held by that segment, and is known as the “Sales to Population” ratio. All segments with a “Sales/Pop Ratio” greater than one are more likely to buy a license compared to the average Montana 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 15a. 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
26	Enterprising Professionals	Upscale Avenues	0.65%	0.17%	3.92
13	Aspiring Young Families	High Hopes	2.55%	1.57%	1.62
17	Milk and Cookies	Family Portrait	1.57%	1.07%	1.47
9	Exurbanites	High Society	3.83%	2.69%	1.43
1	Rural Resort Dwellers	American Quilt	12.01%	8.48%	1.42
20	Sophisticated Squires	High Society	1.27%	0.97%	1.31
4	Green Acres	Upscale Avenues	8.03%	6.26%	1.28
2	Midland Crowd	American Quilt	11.69%	9.59%	1.22
29	Suburban Splendor	High Society	0.39%	0.32%	1.20
45	Connoisseurs	High Society	0.00%	0.00%	1.14
19	Salt of the Earth	Factories and Farms	1.28%	1.15%	1.10
7	Great Expectations	High Hopes	4.74%	4.32%	1.10
3	Prairie Living	Factories and Farms	10.99%	10.42%	1.05
27	Up and Coming Families	Family Portrait	0.66%	0.68%	0.97
12	Rustbelt Retirees	Senior Styles	2.44%	2.56%	0.95
21	Cozy and Comfortable	Upscale Avenues	1.21%	1.29%	0.94
8	Rooted Rural	American Quilt	4.09%	4.41%	0.93
6	Heartland Communities	Senior Styles	6.90%	7.79%	0.89
32	Main Street, USA	Traditional Living	0.34%	0.39%	0.87
5	Midlife Junction	Traditional Living	7.44%	8.70%	0.86
38	Rural Bypasses	Factories and Farms	0.07%	0.09%	0.85
24	Home Town	Factories and Farms	0.80%	0.97%	0.83
18	Rustbelt Traditions	Traditional Living	1.56%	1.89%	0.83
37	Urban Chic	Upscale Avenues	0.10%	0.12%	0.81

Rank	Tapestry Segment	LifeMode Group	% of 2005 License Sales	% of State Population	Sales/Pop Ratio
14	Prosperous Empty Nesters	Senior Styles	2.11%	2.68%	0.79
16	Metropolitans	Metropolis	1.74%	2.23%	0.78
33	Military Proximity	Scholars & Patriots	0.26%	0.34%	0.77
22	Old and Newcomers	Solo Acts	0.96%	1.28%	0.75
23	In Style	Upscale Avenues	0.86%	1.15%	0.75
41	Pleasant-ville	Upscale Avenues	0.04%	0.05%	0.74
15	Crossroads	American Quilt	1.81%	2.60%	0.69
25	Inner City Tenants	Global Roots	0.74%	1.09%	0.68
11	Simple Living	Senior Styles	2.51%	3.90%	0.64
10	College Towns	Scholars & Patriots	2.65%	4.19%	0.63
36	Southern Satellites	Factories and Farms	0.12%	0.20%	0.61
39	Silver and Gold	Senior Styles	0.07%	0.12%	0.54
31	Senior Sun Seekers	Senior Styles	0.34%	0.63%	0.54
42	Dorms to Diplomas	Scholars & Patriots	0.03%	0.06%	0.52
34	Young and Restless	Solo Acts	0.14%	0.27%	0.51
28	Retirement Communities	Senior Styles	0.43%	0.85%	0.50
40	City Dimensions	Global Roots	0.05%	0.12%	0.38
46	Metro Renters	Solo Acts	0.00%	0.01%	0.28
30	Metro City Edge	Metropolis	0.38%	1.61%	0.23
35	Social Security Set	Senior Styles	0.13%	0.56%	0.22
43	Industrious Urban Fringe	Global Roots	0.02%	0.17%	0.09
44	Boomburbs	High Society	0.00%	0.00%	-
47	Laptops and Lattes	Solo Acts	0.00%	0.00%	-
48	Top Rung	High Society	0.00%	0.00%	-
49	Wealthy Seaboard Suburbs	High Society	0.00%	0.00%	-
50	The Elders	Senior Styles	0.00%	0.00%	-
51	Trendsetters	Solo Acts	0.00%	0.00%	-
52	Southwestern Families	Family Portrait	0.00%	0.00%	-
53	City Lights	Metropolis	0.00%	0.00%	-
54	Urban Rows	Metropolis	0.00%	0.00%	-
55	Modest Income Homes	Metropolis	0.00%	0.00%	-
56	International Marketplace	Global Roots	0.00%	0.00%	-
57	Las Casas	Global Roots	0.00%	0.00%	-
58	NeWest Residents	Global Roots	0.00%	0.00%	-
59	High Rise Renters	Global Roots	0.00%	0.00%	-
60	Urban Villages	Family Portrait	0.00%	0.00%	-

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

Rank	Tapestry Segment	LifeMode Group	% of 2005 License Sales	% of National Population	Sales/Pop Ratio
10	Top Rung	High Society	3.43%	0.72%	4.78
6	Rural Resort Dwellers	American Quilt	4.14%	1.40%	2.96
8	Connoisseurs	High Society	3.81%	1.37%	2.77
2	Exurbanites	High Society	5.89%	2.37%	2.49
7	Suburban Splendor	High Society	4.04%	1.69%	2.40
13	Urban Chic	Upscale Avenues	2.98%	1.36%	2.19
16	Prairie Living	Factories and Farms	2.21%	1.01%	2.19
1	Green Acres	Upscale Avenues	6.08%	3.07%	1.98

Rank	Tapestry Segment	LifeMode Group	% of 2005 License Sales	% of National Population	Sales/Pop Ratio
9	Boomburbs	High Society	3.68%	1.94%	1.90
25	Laptops and Lattes	Solo Acts	1.68%	0.91%	1.85
3	Sophisticated Squires	High Society	4.84%	2.81%	1.72
28	Silver and Gold	Senior Styles	1.40%	0.83%	1.69
5	Up and Coming Families	Family Portrait	4.27%	2.90%	1.47
20	Metropolitans	Metropolis	1.87%	1.34%	1.39
4	Midland Crowd	American Quilt	4.89%	3.60%	1.36
12	In Style	Upscale Avenues	3.11%	2.37%	1.31
15	Prosperous Empty Nesters	Senior Styles	2.56%	2.04%	1.25
11	Midlife Junction	Traditional Living	3.14%	2.58%	1.22
23	Enterprising Professionals	Upscale Avenues	1.74%	1.58%	1.10
14	Salt of the Earth	Factories and Farms	3.07%	2.92%	1.05
37	College Towns	Scholars & Patriots	0.82%	0.78%	1.05
18	Rooted Rural	American Quilt	2.16%	2.24%	0.96
27	Wealthy Seaboard Suburbs	High Society	1.36%	1.42%	0.96
33	Metro Renters	Solo Acts	1.18%	1.38%	0.86
24	Milk and Cookies	Family Portrait	1.70%	2.05%	0.83
22	Main Street, USA	Traditional Living	1.74%	2.20%	0.79
19	Heartland Communities	Senior Styles	1.90%	2.42%	0.79
21	Aspiring Young Families	High Hopes	1.76%	2.27%	0.77
17	Cozy and Comfortable	Upscale Avenues	2.13%	2.83%	0.75
41	Trendsetters	Solo Acts	0.66%	0.91%	0.72
39	Senior Sun Seekers	Senior Styles	0.79%	1.13%	0.70
34	Retirement Communities	Senior Styles	0.98%	1.43%	0.69
45	Dorms to Diplomas	Scholars & Patriots	0.31%	0.48%	0.64
31	Old and Newcomers	Solo Acts	1.24%	1.94%	0.64
35	Pleasant-ville	Upscale Avenues	0.89%	1.42%	0.63
36	Crossroads	American Quilt	0.88%	1.43%	0.62
29	Great Expectations	High Hopes	1.26%	2.16%	0.58
38	Simple Living	Senior Styles	0.79%	1.55%	0.51
56	Military Proximity	Scholars & Patriots	0.11%	0.22%	0.51
32	Rustbelt Retirees	Senior Styles	1.25%	2.53%	0.50
30	Southern Satellites	Factories and Farms	1.30%	2.89%	0.45
26	Rustbelt Traditions	Traditional Living	1.40%	3.14%	0.45
46	The Elders	Senior Styles	0.29%	0.65%	0.44
40	Young and Restless	Solo Acts	0.65%	1.56%	0.42
43	Industrious Urban Fringe	Global Roots	0.52%	1.36%	0.38
42	Inner City Tenants	Global Roots	0.55%	1.55%	0.36
51	Social Security Set	Senior Styles	0.23%	0.68%	0.33
52	Pacific Heights	Upscale Avenues	0.17%	0.52%	0.33
50	Urban Villages	Family Portrait	0.22%	0.76%	0.29
48	City Lights	Metropolis	0.25%	1.02%	0.24
44	Home Town	Factories and Farms	0.37%	1.64%	0.23
49	International Marketplace	Global Roots	0.23%	1.17%	0.20
47	Rural Bypasses	Factories and Farms	0.29%	1.51%	0.19
53	NeWest Residents	Global Roots	0.14%	0.87%	0.16
55	Southwestern Families	Family Portrait	0.13%	0.99%	0.13
54	City Dimensions	Global Roots	0.12%	0.98%	0.12
57	Metro City Edge	Metropolis	0.10%	1.05%	0.10
58	Las Casas	Global Roots	0.07%	0.80%	0.09

Rank	Tapestry Segment	LifeMode Group	% of 2005 License Sales	% of National Population	Sales/Pop Ratio
59	Modest Income Homes	Metropolis	0.06%	1.24%	0.05
60	Family Foundations	Traditional Living	0.04%	0.92%	0.04

Any new efforts to recruit new anglers or generate additional license revenues may have greater success if targeted at the segments ranked highly in the above tables. Affluent and rural segments, not surprisingly, dominate the higher-ranked segments.

Section 5: “Upgraders” and “Downgraders”

Current customers moving in and out of fishing drive revenue trends. Table 16 looks at residents who specifically bought a license in 2002 or in 2005². Those who bought a license in the intervening years were excluded for this particular analysis. The table reports the percentage who a) downgraded to a lower priced license, b) dropped out, c) are new customers (which only means they did not buy in 2002), d) are steady customers and bought the same license each time, or e) upgraded to a higher-priced license.

Table 16. Upgrading/Downgrading Trends

Resident Purchasing Behavior, 2002 vs. 2005	Percentage of Resident Customers Who Bought a License in Both 2002 and 2005	Percentage of Non-Resident Customers Who Bought a License in Both 2002 and 2005	All Customers
Downgraded	2.55%	2.12%	2.35%
Dropped	25.50%	43.19%	33.82%
“New”	28.39%	42.09%	34.84%
Steady	37.83%	9.83%	24.65%
Upgraded	5.73%	2.78%	4.34%

Fortunately for Montana, license buyers are twice as likely to upgrade their licenses as they are to downgrade. This is not the case in most other states where anglers are only slightly more likely to upgrade their purchases. In Montana, encouraging anglers to upgrade when they are renewing their licenses could generate a decent boost in revenues.

Using the TAPESTRY[®] data, we can gain a better understanding of who is more likely to upgrade or downgrade. Tables 17a and 17b rank the segments based on the segment providing the biggest boost to agency revenues. This is measured using the ratio in the last column. This ratio takes into consideration each segment’s market share and percentage who upgraded their purchases. Table 17 is also based on purchases made in 2002 and also in 2005 exclusive of what was purchased in-between.

Table 17a. Top 15 Segments Ranked by Those with Highest Upgrading Volume, Residents

Rank	Segment	LifeMode Groups	Urban Groups	% Downgraded	% Upgraded	% Market Share, '02-'05	% Upgraded X Market Share Ratio
2	Rural Resort Dwellers	American Quilt	Rural I	2.73%	4.64%	8.80%	0.41%
3	Prairie Living	Factories and Farms	Rural II	1.98%	4.76%	7.49%	0.36%
1	Midland Crowd	American Quilt	Rural I	1.78%	3.61%	8.81%	0.32%
4	Green Acres	Upscale Avenues	Rural I	1.80%	3.20%	7.25%	0.23%

² If a resident bought more than one license in a year, the license that cost the most was used.

Rank	Segment	LifeMode Groups	Urban Groups	% Downgraded	% Upgraded	% Market Share, '02-'05	% Upgraded X Market Share Ratio
5	Midlife Junction	Traditional Living	Suburban Periphery II	1.74%	3.88%	5.77%	0.22%
6	Heartland Communities	Senior Styles	Small Towns	1.93%	4.07%	4.94%	0.20%
7	Exurbanites	High Society	Suburban Periphery I	1.66%	3.07%	4.70%	0.14%
9	Rooted Rural	American Quilt	Rural II	2.25%	4.32%	3.28%	0.14%
8	Great Expectations	High Hopes	Urban Outskirts I	1.52%	3.07%	3.33%	0.10%
14	Rustbelt Retirees	Senior Styles	Suburban Periphery II	1.64%	4.05%	1.99%	0.08%
11	Prosperous Empty Nesters	Senior Styles	Suburban Periphery I	1.64%	3.46%	2.32%	0.08%
18	Simple Living	Senior Styles	Urban Outskirts II	1.55%	3.51%	1.82%	0.06%
10	Sophisticated Squires	High Society	Suburban Periphery I	1.34%	2.24%	2.70%	0.06%
12	Aspiring Young Families	High Hopes	Metro Cities II	1.62%	2.75%	2.20%	0.06%
16	College Towns	Scholars & Patriots	Urban Outskirts II	1.42%	3.05%	1.91%	0.06%

Table 17b. Top 15 Segments Ranked by Those with Highest Upgrading Volume, Non-Residents

Rank	Segment	LifeMode Groups	Urban Groups	% Downgraded	% Upgraded	% Market Share, '01-'05	% Upgraded X Market Share Ratio
2	Exurbanites	High Society	Suburban Periphery I	1.40%	2.03%	5.96%	0.12%
1	Green Acres	Upscale Avenues	Rural I	1.18%	1.57%	6.11%	0.10%
8	Connoisseurs	High Society	Metro Cities I	1.69%	2.53%	3.74%	0.09%
10	Top Rung	High Society	Metro Cities I	1.82%	2.54%	3.45%	0.09%
4	Midland Crowd	American Quilt	Rural I	1.13%	1.75%	4.82%	0.08%
7	Suburban Splendor	High Society	Suburban Periphery I	1.53%	2.04%	4.01%	0.08%
3	Sophisticated Squires	High Society	Suburban Periphery I	1.23%	1.65%	4.83%	0.08%
6	Rural Resort Dwellers	American Quilt	Rural I	1.59%	1.87%	4.17%	0.08%
13	Urban Chic	Upscale Avenues	Metro Cities I	1.75%	2.46%	3.00%	0.07%
5	Up and Coming Families	Family Portrait	Suburban Periphery I	1.15%	1.50%	4.21%	0.06%
9	Boomburbs	High Society	Urban Outskirts I	1.12%	1.79%	3.45%	0.06%
15	Prosperous Empty Nesters	Senior Styles	Suburban Periphery I	1.51%	2.15%	2.60%	0.06%
12	In Style	Upscale Avenues	Suburban Periphery I	1.69%	1.72%	3.15%	0.05%
11	Midlife Junction	Traditional Living	Suburban Periphery II	1.47%	1.55%	3.20%	0.05%
25	Laptops and Lattes	Solo Acts	Principal Urban Centers I	1.61%	2.58%	1.69%	0.04%

The above table shows a segment's ranking (by market share) correlates with their likelihood of upgrading to higher priced licenses. With members of the top license purchasing groups showing a willingness to buy new or upgrade their licenses, greater revenues could be earned from marketing efforts that target individuals who have not upgraded in the past four years and promote the benefits of higher-priced licenses. The same effort could help encourage others to not downgrade.

Conclusion

For 2005, 60 percent of Montana's fishing licenses were purchased by residents. Approximately 80 percent of the purchasers were male, indicating females were more likely to favor other forms of recreation. Resident license buyers were more likely to be in the 40-49 year old age bracket while non-resident customers were more often found in the 50-59 year old bracket. Over the past four years, Montana's total number of buyers decreased by one and a half percent. Licenses were more likely to be purchased by people in rural areas. This may also be an indication of a general population trend with increases in the suburban areas and urban outskirts. In general, the majority of segments of Montana's population are showing license sales increases.

To gain a better understanding of who is more likely to buy or not buy a license, we used TAPESTRY® lifestyle data. ESRI of Arlington, VA provides the TAPESTRY® data service. TAPESTRY® was 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 Montana angler 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 purchaser. 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 more common source of resident license sales come from rural areas and small towns, have modest incomes and are often older citizens (Table 6a). The top three groups represent about 58% of the state population and purchase about the same percentage of the State's license sales. This differs from most states where we are likely to see the top groups' share of licenses to be greater than their share of their state's population. On the other hand, urban and ethnically diverse groups are least likely to buy a license compared to the average resident, and also represent a small portion of the state's population. Residents with above average incomes are more likely to buy a license compared to the average state resident.

Non-resident license customers have a much different look than residents (Table 6b). The top two LifeMode groups represent the highest income earners in the U.S. These groups are showing a very high likelihood of purchasing a non-resident license compared to the average U.S. resident. Just like resident license buyers, single people, lower income and ethnically diverse groups are less likely to purchase nonresident licenses.

Tables 7a and 7b take a much more detailed look at Montana's license residents. Rural residents most likely to buy licenses are typically rural with families and with average incomes. The young-educated-urban types do not appear in the top segments.

This does not mean these people will not fish in the future, but at this stage in their lives, fishing is not a common activity. Resident license sales are concentrated in a smaller number of Tapestry segments compared to non-residents. The top five resident segments purchase 50% of Montana’s annual resident license sales, while the top five nonresident segments only purchase half that amount. The #13 ranked “Aspiring Young Families” deserves special mention (Table 8a). With a ten percent increase their license purchases since 2002, having grown its market share by 6.62 percent, and representing a much higher percentage of the license market than it does the state population, this segment is growing rapidly in importance in regards to revenue generation and angling participation.

Table 7b gives us a more-detailed picture of Montana’s nonresident customers. Compared to residents, nonresidents tend to be more suburban or urban and much more affluent. These types of people will likely respond to different types of fishing promotions and advertisements than would the generally more rural and lower income resident customers. Nonresidents would be more likely to seek a different type of fishing experience such as catch and release fishing, fly-fishing, etc. and would expect different types of fisheries management regimens compared to resident anglers who would likely be more interested in keeping their catch and minimizing the overall cost of fishing.

Overall, license sales to non-residents are not growing as fast as resident license sales (Tables 5 and 8b). Although the majority of the non-resident segments show flat or negative growth over the past four years, some segments shine brighter such as “Boomburbs”. With a growth rate in the number of licenses purchased exceeding 10 percent, and recognizing its share of the license market is significantly greater than its percentage of the U.S. population, efforts to find out why fishing is so attractive to people from this segment may shed insights into how fishing can be promoted to other non-residents.

Not unexpectedly, 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 four-year license, would likely be more effective if targeted towards males.

The table below shows that Montana’s license buyers are not loyal customers and only bought licenses in one or two years of the past four years. This has also been seen in every other state examined. Many anglers are finding other ways to spend their free time each year. 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 who bought licenses for all four years. Montana’s percentage of customers who bought in all four of the past years appears higher than seen in most other states. However, even for the Tapestry™ segments showing the greatest

loyalty rates, members within each are nearly as likely to have bought a license only once or twice in the last four years (Table 13a).

License Purchasing Frequency

License Purchasing Frequency	Percentage of Resident Customers, 2002 to 2005	Percentage of Non-Resident Customers, 2002 to 2005	All Customers
1 of 4 years:	31.6%	73.3%	54.3%
2 of 4 years:	19.7%	15.0%	17.2%
3 of 4 years:	17.0%	6.8%	11.4%
4 of 4 years:	31.7%	4.8%	17.1%

Fortunately for Montana, license buyers are twice as likely to upgrade their licenses as they are to downgrade (Table 16). This is not the case in most other states where anglers are only slightly more likely to upgrade their purchases. In Montana, encouraging anglers to upgrade when they are renewing their licenses could generate a decent boost in revenues.