

Status of Fisheries Marketing Nationally— Survey Conclusions

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Abstract: National trends have indicated a decline in fishing license sales, which are a principle source of funding for fisheries conservation efforts at the state level. Moreover, fishing enthusiasts have historically been the most outspoken proponents for active fisheries management and aquatic habitat protection programs. Thus many state fisheries agencies are now talking about the need to market fishing in a manner more typical of commercial agencies. A survey was done in 1996 of all state fisheries agencies to determine what they were doing in the realm of fisheries marketing. Those results were presented at the 1996 American Sportfishing Association meeting. The survey was then replicated in 1998 for presentation at this meeting. The conclusion is that most states recognize the problem and consider marketing to be part of the solution; however, to date most have been slow in implementing marketing plans. A few examples of proactive marketing are cited.

Proc. Annu. Conf. Southeast. Assoc. Fish and Wildl. Agencies 52:161–166

One of the most dramatic changes in recent years affecting management of fisheries resources is the realization by many state and federal agencies that demographic trends require agencies to adopt marketing strategies to retain a base of political/social support and to ensure funding for conservation of aquatic resources. In 1991, there were 30,742,212 fishing license holders nationally. Five years later in 1996, there were only 29,935,533 fishing license holders—a 3% decline. During that same time period the United States population went from 252 million to 265 million, a 5% increase.

Further analysis of demographic trends pointed out that the traditional core of anglers—white males in their middle ages—was rapidly declining as a percentage of the population. Whereas, groups that were traditionally underrepresented among the fishing populace were increasing. For instance, women, Afro-Americans, and the Spanish speaking communities were becoming more prominent. Similarly, senior citizens, who in many situations are not required to purchase fishing licenses, were also becoming much more numerous and improving health allowed them to fish more frequently and for longer periods of time after retirement.

At a number of forums, including meetings of the American Fisheries Society, American Sportfishing Association, and Federal Aid in Sport Fish Restoration (SFR) administrators, it was recognized that something needed to be done to retain existing anglers and recruit new ones. Many agencies started talking about the need to take a more business-like approach to fisheries management. Specifically, the discussions turned to the need to market recreational fishing in much the same way as a commercial enterprise would market their product.

Methods

To assess what was actually going on beyond rhetoric, in 1996 a survey of the state fisheries agencies was conducted. The survey was simple in design and sought to get a feel for what was taking place with regard to recreational fisheries marketing nationally. Consequently, in the cover letter, marketing was defined as "simply attempting to create satisfied customers." The realm of customers was limited to existing and potential recreational anglers. It was stressed that marketing includes efforts to develop a quality Product, provided at an appropriate Place, for an acceptable Price. These are the three-P's of classic marketing, and together with Promotion (occasionally considered to be the fourth P) provided the scope for the survey.

Results were presented at the 1996 national meeting of the American Sportfishing Association. Most states indicated an interest in marketing and that they focused on providing a quality product (e.g., fishing, fisheries access, aquatic education), realized the importance of place (e.g., pristine natural settings, urban opportunities), and price (e.g., generally license-fee based or totally free, with some product/event specific fees). However, in general they did not view these activities as marketing. Promotional activities were in reality, for the most part, advertising or informational pieces (e.g., basic news releases, news letters, or fliers to make the public aware of opportunities). Few agencies instituted true promotions, which would create an immediate action such as purchasing a license. Only 4 agencies reported having fisheries marketing plans in place, with 5 others actively developing marketing plans.

Between 1996 and 1998 a number of major national developments took place affecting fisheries marketing. These included:

- Passage of the National Recreational Fishery Resources Conservation Plan.
- Approval of the 1998 Transportation Equity Act for the 21st Century (TEA-21) which provides a minimum of \$36 million over a 5-year period for marketing recreational fishing and boating.
- A change in the way the SFR program viewed marketing, making it easier for state agencies to spend up to 15% of their federal funds to generate interest and participation in recreational fishing.
- The Sportfishing and Boating Partnership Council's extensive consensus building efforts to develop a Strategic Plan for the National Outreach and Communication Program.

As a result, the 1996 National Marketing Survey was slightly modified and re-implemented in 1998 to determine changes in marketing philosophy and activity during the intervening 2 years. We were especially interested in identifying what tools are being used as part of the marketing mix by various states. To get a rough assessment of the value of these programs, the respondent was asked to subjectively evaluate the cost effectiveness of each tool in relationship to their identified objectives. Perceived-cost-effectiveness was framed by also asking the respondent questions about the program's cost, how many participants used the program, what fees were collected, what sponsors helped defray the cost, and how successful they were in achieving their objective.

Results

Of the 49 state agencies that responded to the survey in 1998, only 5 had marketing plans either proposed or in place. Of those, only 1 had a specific marketing budget allocated to implement the plan, although 4 had requested funding.

The Marketing Mix

Intensively managed fisheries areas were defined as requiring a special fee. They receive a high degree of management and are typically developed for a particular market segment (e.g., urban ponds, trophy management lakes, trout streams).

Outreach events were described as hands-on fishing opportunities. Programs such as kids fishing rodeos, "Cast Across America," or "Pathways to Fishing" were cited as examples. This category of program was nearly universally used and considered cost-effective, especially when sponsors were found to defray cost.

Aquatic Education programs were specified as those including a classroom component, such as "Aquatic Wild," "The Wonders of Wetlands," or "Hooked on Fishing—Not on Drugs." Most states also used these programs but gave them a slightly lower cost effectiveness rating. With this topic in particular, the issue of defining goals and how to go about measuring success, let alone cost effectiveness, was identified as a challenge.

Temporary displays, such as at sportsmen's shows, fairs, public aquaria, or state hatchery sites were each considered to be an important agency showcase. The vast majority of states used this approach and felt they were moderately cost effective.

Fishing tournaments were only promoted or sponsored by 5 responding agencies. However, 4 of the 5 felt tournaments were highly cost effective, and the fifth rated them as moderately cost effective. Amateur fishing tournaments would seem to offer a unique opportunity to partner with industry and raise the excitement and visibility of fishing in a local area. Large tournaments with big purses can also attract nonresident anglers and, if combined with family events and educational displays, attract new anglers while spreading the aquatic education message.

Tagging Tournaments are special tournaments, like "Crappiethons," that add an element of luck by providing special prizes for someone who is registered and catches a tagged fish. These tournaments create a lot of interest and measurably increase fishing activity in a given water body. To date, no state agency has sponsored

such a tournament. (Note: during 1999 the Florida Game and Fresh Water Fish Commission successfully collaborated on several such events.)

Promotional festivals, such as the Hampton Fund promotional event in South Carolina or the Frank Sargeant show in Florida, are other ways of increasing interest in fishing and aquatic conservation. They provide fun activities for many family members and help create a cooperative atmosphere between the industry and agency. More than half the reporting states sponsor such events, but there was a distinct lack of information about the cost effectiveness of these shows when it comes to retaining or recruiting anglers.

Angler recognition programs were divided into 3 categories. First is a certification program for state record fish, which all of the states that responded have. Second is providing a certificate, badge, pin or other award for anglers who catch a particularly large fish. Two-thirds of the states said they had such programs. Third is use of a more elaborate master-angler program for individuals who catch a multitude of large fish, or qualifying fishes from different species. Most states did not respond to the cost effectiveness question relative to angler recognition programs, but several stated the operational cost of the program was low enough that the public relations value alone justified continuation.

Tackle loaner programs were first initiated in Arkansas and later picked up on by the American Sportfishing Association. Now two-thirds of responding agencies are involved in some form of tackle loaner program, either at libraries, parks, or their own facilities. Respondents with sponsors tended to think these were cost effective. The American Sportfishing Association helps coordinate these programs and is conducting an evaluation of them.

Free-fishing days are offered in the vast majority of states with almost all having them in conjunction with National Fishing Week. However, most considered this to be low on the cost-effectiveness scale, indicating that more research is needed to see if giving away fishing privileges one weekend per year actually helps recruit new anglers. Some states now have license fee waivers for individuals participating in state-sponsored events.

Funding Alternatives

Although not truly marketing, we also asked several questions about alternative methods of raising funds for fisheries conservation. One of the most prominent solutions is the sale of a specialty plate for cars or trailers. Nearly half of the responding state agencies received funds from one or more designer plates. Tags ranged from \$10 to \$35 each and generated significant additional monies for management.

Fishing stamps or permits that are required to fish for a particular species are sold in about a third of the states and generated from \$25,000 to more than a million dollars per state. These funds were typically dedicated to a particular species such as trout or tarpon.

Fisheries publications are sold by more than half of the states for more than the cost of producing them. The most typical publication sold is a state fish and wildlife

magazine, followed by fish identification guides, and directories to fishing areas and access points.

Value-Added—Direct Promotion of Fishing Licenses

Only 1 state (Florida) had a value-added program to attempt to increase license sales directly. In this case, a bonus-package was provided with sponsor-donated fishing magazines, lures and other angling-related samples, coupons, and special offers to increase the sale of 5-year freshwater fishing licenses. The results indicated a nearly 7-fold increase in license sales during the initial 2-month trial, the next year a second 2-month promotion provided nearly 12 times as many license sales as during the base period. These licenses are more cost effective to the state than the sale of 5 annual licenses for a number of reasons including the ability to invest the money, no lapse in coverage between license renewals, and having the money up front from anglers who may change their minds about fishing all 5 years, be unable to fish consistently, or move out of state. Still another important benefit is the extra motivation that having a pre-paid license gives to anglers to use their fishing privileges.

Advertising Venues

To get an idea of how effective various advertising media were, we asked the respondents to rate them subjectively. For the most part, respondents did not have objective data to rank these alternatives, so this information in particular should be viewed cautiously, especially where it does not support traditional marketing research. However, respondents felt the Internet was the most cost effective media (presumably because of very low cost side). Radio PSAs were considered the least cost effective (again the presumption is that few states pay for air time and thus PSAs are seldom heard by the target audience).

Program Awareness

The final set of questions in the survey looked at the awareness state agencies had of 3 fisheries marketing developments that were taking place at the time. Respondents were asked if they were aware of each and, if so, how much faith they had that the programs would produce “meaningful results.”

Most of the respondents knew about TEA-21 and the National Strategy, fewer were aware of the Future of Fishing Grant that is being implemented by the International Association of Fish and Wildlife Agencies. However, in all 3 situations, respondents were cautiously optimistic.

Conclusions

Marketing is becoming the “in-thing” in fisheries management. However, it clearly needs more formalized planning, staffing, budgeting, and cooperative inter-

actions between the industry, non-government organizations, and conservation agencies to ensure cost-effectiveness and efficiency. Very few states have formal plans in place, and fewer still have dedicated marketing budgets, although quite a few have recently hired staff with marketing expertise. Also, more time is being spent at major fisheries conferences and more pages are being printed in fisheries publications dealing with human dimensions, aquatic education and fisheries marketing. I am confident we will see more documented progress in these areas in the near future and sharing ideas and experiences will facilitate restoring recreational fishing to its former status as a top-of-mind outdoor recreational activity and stimulate license sales.

National programs and research are now available to support and help coordinate the efforts of the states and industry. In the next few years, more “wanna be” anglers will be recruited and find that fishing can be a relaxing, fun opportunity to spend quality time with family and friends. Marketing will reinforce this perspective, while also stressing enjoying nature. Agencies and industry will provide information to show that it really does not take that much time, money, or expertise to have a fun time fishing—once the right information and opportunities are made available to the public.

For fisheries marketing to be effective, a constant emphasis needs to be maintained on conserving and enhancing aquatic habitats and implementing sound fisheries management practices. Marketing will need to become part of the culture surrounding fisheries professionals. Administration will need to encourage experimentation with various marketing ideas, evaluate them, and share their successes and failures. The result will be happier anglers, who help conserve our fisheries resources by personal stewardship, financial contributions (e.g., license buying, excise taxes, motorboat fuels, and direct donations), and social activism.