

Responsive Management Report



Specializing in Survey Research on Natural Resource and Outdoor Recreation Issues

March 2014

Targeted Marketing Approach Paves Way for \$1.7 Million Increase in Washington State Fishing License Revenue

Roughly five years worth of marketing and applied research conducted by Responsive Management for the Washington Department of Fish and Wildlife (WDFW or the Department) has begun to yield dramatic increases in fishing participation in the state. A targeted marketing approach, based on an analysis of license sales and demographic trends as well as the findings of several scientific telephone surveys and focus groups, has helped WDFW create enough anglers to increase sales of its freshwater fishing licenses by 9%, its temporary licenses by 16%, and its combination licenses by 28%. Overall revenue from fishing license sales in Washington is up \$1.7 million. These encouraging results demonstrate that, when implemented correctly, high-quality, scientific state-specific research helps agencies not only to better understand and serve constituents but to bolster the stability of the organization as well.

In 2009, Responsive Management partnered with WDFW and established a long-term goal of increasing freshwater

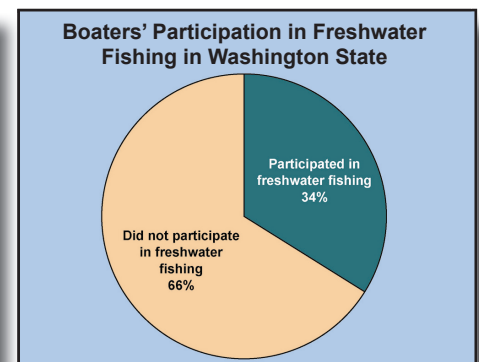
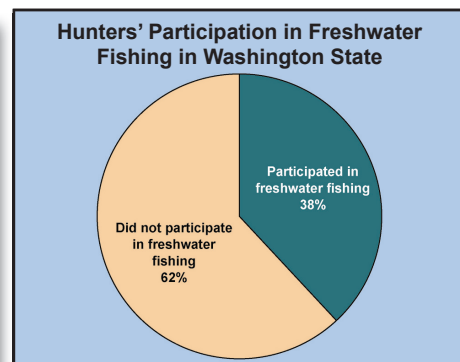
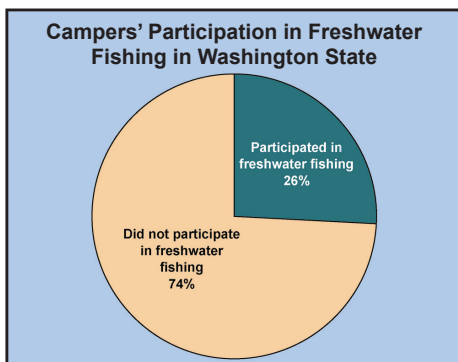


All photos provided by WDFW

fishing participation in the state. The initial step in the process was the creation of a comprehensive marketing plan, which identified the opportunities and challenges then facing the WDFW Fish Program.

One of the chief purposes of the plan was to determine how to market fishing to the needs and desires of Washington residents—this meant exploring demographic trends within

key target markets (first-time buyers, urban residents, sporadic license buyers, women, youth, etc.) to assist WDFW in better understanding its constituencies. In addition to the analysis of state demographic trends, the initial marketing plan provided an in-depth assessment of historical fishing participation and license sales in the state. The plan also incorporated research examining the





efforts on other outdoor recreation groups. For example, a 2007 survey conducted as part of the Washington State Comprehensive Outdoor Recreation Plan found that only 26% of Washington campers and 38% of Washington hunters participated in freshwater fishing. At the same time, the data also indicated that those with a preexisting interest in relevant outdoor recreation (such as camping and hunting) would be among the most likely groups to begin participating in freshwater fishing.

To build on the concept of engaging outdoor recreationists who were not active freshwater anglers, the researchers recommended a marketing theme based on the message, “Fish Washington—Expand Your Outdoor Experience.”

impact of changes in license fees on fishing participation and the results of previously implemented marketing and promotional efforts focusing on fishing. The marketing plan resulted in a series of communications strategies and outreach recommendations for increasing freshwater fishing participation and related license sales in Washington State.

workshops with WDFW personnel, reviewed research offering insights into successful elements of WDFW’s past communications efforts, and identified

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Chris Donley, WDFW inland fish program manager, described some of the steps the agency took following the marketing research. “To put it in context, our fishing license sales were flat in 2009 and 2010. We implemented some changes with the way we stocked fish and then promoted it through the marketing plan that Responsive Management developed, targeting the right audiences: intermittent anglers, boaters, campers, hunters. There were a number of different promotions: stocking fish and promoting it over Father’s Day, doing splash landing pages and targeted emails to intermittent anglers, and reaching out to nontraditional media outlets instead of just the sportsmen’s magazines.”

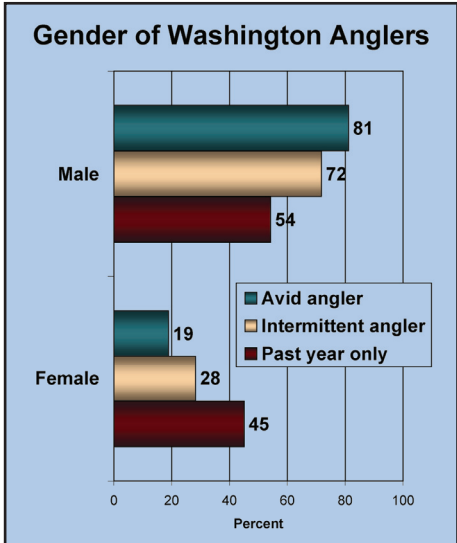
In 2011, Responsive Management worked with Jodi Valenta of Mile Creek Communications to further build on the recommendations in the 2009 plan by developing a larger-scale effort to provide strategic direction to WDFW’s Inland Fisheries Program. During this phase, Responsive Management conducted various marketing

related challenges, barriers, and best practices for future outreach and marketing.

The marketing plan set a goal of increasing fishing participation among specific target markets within active, occasional, and lapsed angler groups. In addition, one of the most important recommendations to come out of the 2011 phase of research was a strategy to focus WDFW freshwater fishing communications and outreach

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About Responsive Management

RESPONSIVE MANAGEMENT is an internationally recognized public opinion and attitude survey research firm specializing in natural resource and outdoor recreation issues. Our mission is to help natural resource and outdoor recreation agencies and organizations better understand and work with their constituents, customers, and the public.

We offer an in-house, full-service, computer-assisted telephone, mail, and web-based survey center with 50 professional interviewers who specialize in research on public attitudes toward natural resource, fish and wildlife, and outdoor recreation issues. Responsive Management has completed a wide range of projects during the past 24 years, including dozens of studies of hunters, anglers, wildlife viewers, boaters, park visitors, historic site visitors, hikers, birdwatchers, campers, and rock climbers.

Responsive Management has conducted...

- More than 700 research studies on natural resource, fish and wildlife, and outdoor recreation issues; more than \$50 million in outdoor recreation research
- Studies in all 50 states and 15 countries worldwide
- Research for every state fish and wildlife agency; most federal resource agencies; and most DNRs and NGOs, including the National Shooting Sports Foundation, the Archery Trade Association, the Rocky Mountain Elk Foundation, Ducks Unlimited, SCI, and dozens of others
- Research for numerous outdoor recreation industry leaders, including Winchester, Trijicon, Yamaha, and many others
- Data collection for the nation's top universities: Auburn University, Colorado State University, Duke University, George Mason University, Michigan State University, Mississippi State University, North Carolina State University, Oregon State University, Penn State University, Rutgers University, Stanford University, Texas Tech, University of California-Davis, University of Florida, University of Montana, University of New Hampshire, University of Southern California, Virginia Tech, and West Virginia University

Mark Damian Duda, Executive Director

Mark Damian Duda is the Executive Director of Responsive Management, a survey research firm specializing in natural resource, hunting and fishing, and outdoor recreation issues. Mark holds a Master's degree with an emphasis on natural resource policy and planning from Yale University, where he attended on two academic scholarships. During the past 25 years, Mark has conducted more than 700 studies on how people relate to the outdoors, including more than 200 studies on hunting and fishing participation. Mark is the author of four books on wildlife and outdoor recreation.

Mark's research has been upheld in U.S. District Courts; used in peer-reviewed journals; and presented at major natural resource, hunting and fishing, and outdoor recreation conferences around the world. His work has also been featured in most of the nation's top media, including NPR's "Morning Edition," CNN, *The New York*

Times, *Newsweek*, and the front pages of *The Wall Street Journal*, *The Washington Post*, and *USA Today*. For 7 years, Mark served as a columnist for *North American Hunter* and *North American Fisherman* magazines.

Mark has been named Conservation Educator of the Year by both the Florida Wildlife Federation and National Wildlife Federation, was a recipient of the Conservation Achievement Award from the Western Association of Fish and Wildlife Agencies, and was named Wildlife Professional of the Year by the Virginia Wildlife Society. He also received the Conservation Achievement Award in Communications from Ducks Unlimited, as well as an award from the Potomac Ducks Unlimited Chapter for his contributions as a researcher and writer. Mark was also honored as Qualitative Researcher of the Year by the National Shooting Sports Foundation.

Responsive Management conducts:

- Telephone surveys
- Mail surveys
- Personal interviews
- Park/outdoor recreation intercepts
- Web-based surveys (where appropriate)
- Focus groups
- Needs assessments
- Literature reviews
- Data collection for researchers and universities

Responsive Management develops:

- Marketing plans
- Communications plans
- Outreach plans
- Program evaluations
- Needs assessments
- Policy analysis
- Public relations plans



Mark Damian Duda presenting research to the Florida Fish and Wildlife Conservation Commissioners.



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According to Donley, early license sales indicators were promising. “Our revenue in 2012, which is the first year that’s measurable after implementation of a lot of the marketing things, was up 5.9%. In 2013, revenue is up 15.2%.”

As WDFW began incorporating the “Fish Washington” marketing materials in outreach and on its website, Responsive Management conducted two additional studies for the Department.

A series of focus groups with non-anglers and a telephone survey of Washington freshwater anglers were conducted, with the latter exploring the differences between avid, intermittent, and past-year-only anglers (i.e., those who had fished only in the year prior to the survey).

Donley notes that the freshwater angler survey helped WDFW gauge satisfaction among its current customers. “From the retention perspective, we look at the current angler survey to see if we’re missing changing trends in

our anglers, and whether we have the fisheries that appeal to them. You want to retain your current user group. The angler survey gives us the information to see if we’re hitting the mark.”



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**~ Chris Donley,
WDFW**

“The non-angler focus groups feed into the same information that we’ll get from campers and boaters who don’t fish,” says Donley. “It’s putting all this information together to understand how we can be appealing, and what information do those folks need to get them interested? Responsive Management did a great job identifying who our target markets are; now we have to figure out what to do to focus on them. We just launched a family vacation planner targeting campers and other users that breaks down 14 really

good fishing and camping opportunities across the state. It’s our first shot at trying to get campers involved.”

As with the earlier data, each new component of research allowed WDFW to continue refining and enhancing its freshwater fishing marketing and outreach. The long-term nature of the study was also instrumental to the subsequent growth in freshwater fishing license sales, as the timeline allowed the researchers to build on previous findings and test the results of concepts implemented at earlier periods. Today, thanks in part to the marketing and outreach recommendations outlined in the plan, the Washington Department of Fish and Wildlife has experienced notable increases in its freshwater fishing license sales, reinforcing the importance of basing such initiatives on a solid foundation of data developed through an ongoing collaboration between the agency and researchers. Says Donley about WDFW’s recent increases in license revenue: “That’s not just having a good salmon run. We’ve had good salmon runs in the past and not seen that. There’s something there.”