



Take Me Fishing™ in Iowa:

An Evaluation of the 2005 Iowa DNR Marketing Program

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Executive Summary

The Iowa Department of Natural Resources (IDNR) has been experiencing declining or fluctuating fishing license sales over the past several years. From 2002 to 2004, the number of unduplicated fishing license buyers declined by five percent; the bulk of which occurred between 2003 and 2004. To begin addressing declining sales, the IDNR partnered with the Recreational Boating and Fishing Foundation (RBFF) to develop and implement an integrated marketing and grassroots education plan. A planning team established objectives of the program, developed strategies for accomplishing each objective, and identified a target area for implementing a pilot program. The objectives for the overall program were to:

Long-term Objective

- Using lessons learned from the first year efforts, increase resident fishing license sales to 2002 levels over a three-year period.

Short-term Objectives

- Reverse the recent trend of 3% annual decrease in fishing license sales. Sell same amount of licenses in target area as in 2004 (41,640) during 2005.
- Over the duration of the marketing campaign (May and June) license sales in the target counties will be 10 percentage points greater than in control counties.

The I-380 Corridor comprised of Linn, Johnson and Black Hawk Counties was chosen as the Target Counties for a pilot program to increase fishing license sales among lapsed anglers. The IDNR marketing activities included: creating a major fisheries presence on the IDNR website; mailing a Family Fishing Guide and reminder postcard to selected lapsed anglers; advertising at movie theaters and on the radio; distributing fishing information packets to area libraries; coordinating media coverage for Iowa fishing and IDNR fishing events; partnering with the Iowa Lottery for a special fishing promotion; and distributing special fishing campaign packets to license vendors. Nearly all of this activity occurred during May and June of 2005.

The pilot project was successful at achieving its first objective of reversing declining fishing license sales. Sales in the Target Counties increased by three percent during 2005 while the statewide the average was less than one percent. The target of 41,640 resident license sales during 2005 in the Target area was exceeded by 1,259.

In the three counties where the program occurred, license sales averaged nine percentage points higher during the May-June program compared to counties where no marketing was undertaken. The increase in sales in the Target Counties during May and June nearly reached the 10% goal in the second objective.

License renewals by lapsed anglers, those not buying during 2004, were significantly higher in the targeted counties than in the non-targeted counties during 2005. Further, the lapsed angler messages and information resonated with active anglers (those buying in 2004) as retention of these anglers was much higher in target counties also.

One or more advertising or information pieces provided during the marketing program were recalled by 58% of the lapsed anglers who responded to a post-campaign mail survey in the targeted counties. The direct mail advertising was the most common marketing tool reported seen by lapsed anglers. However, information on the IDNR web site, fishing tips and locations, and alternative fishing license buying methods all were seen by lapsed anglers at greater rates in the targeted counties.

Overall, the direct mail campaign, consisting of an initial mailing of the Family Fishing Guide followed two weeks later by an informational postcard, had no discernable effect on license sales. However, lapsed anglers who reported seeing the direct mail information were twice as likely to buy a license as those who did not recall receiving the direct mail.

Lapsed anglers recalling three or more of the marketing advertising and information pieces purchased licenses in 2005 twice as frequently as those seeing none or one to two of the marketing pieces. This finding further supports the need for multiple contacts with anglers to maximize benefits from fishing license marketing activities.

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Background

Like many similar agencies in the Midwest and throughout the country, the Iowa Department of Natural Resources (IDNR) has been experiencing declining or fluctuating fishing license sales over the past several years. Historic resident fishing license sales show that from 2002 to 2004 the number of individuals buying fishing license declined by five percent; the bulk of which occurred between 2003 and 2004. To begin addressing these declining sales, the IDNR began planning a marketing and outreach program for the spring of 2005. The Recreational Boating and Fishing Foundation (RBFF) partnered with the IDNR to develop and implement an integrated marketing and grassroots education plan. A planning team was established to identify goals and objectives of the program; develop strategies for accomplishing each objective; and determine a target area for implementing a pilot program.

Historical License Sales

This section is focused on the license buying behavior of Iowa residents during the years 2002 to 2004. These years were selected because they represent the years when the IDNR used license vendor terminals to electronically issue fishing and hunting licenses and capture the information electronically for storage and use. With the electronic database of license purchase records, we have the ability to analyze license buying patterns of individuals rather than simply tally numbers sold for monthly or yearly summaries.

Viewing historic license sales helps to understand recent sales trends. For purposes of discussion here, we will examine sales within the context of the regions used in the pilot project discussed below. The *Target Counties* of Linn, Johnson and Black Hawk were the focus of the marketing program. The *Control Counties* of Cerro Gordo, Polk, Pottawattamie, Scott, Story and Woodbury were used for comparison to help determine the impact of the marketing program. Sales in the *Remaining Counties* and *Total Statewide* were also used to assess the relative effect of the pilot project. The electronic license data file was used to calculate the number of individuals buying resident fishing licenses during 2002, 2003 and 2004. Having the electronic license database begin with the 2002 license year was fortuitous in that the most resident fishing licenses were sold during that year, thus establishing a benchmark for future sales comparisons.

Table 1 shows resident fishing license sales for the 2002-2004 period. Overall sales declined slightly from 2002 to 2003 and more dramatically from 2003 to 2004. These declines were very similar across the three regions and mirrored the Statewide trend. Between 2002 and 2004 the state lost about 15,000 or nearly five percent of its resident fishing license buyers.

Table 1: Individual resident fishing license sales by region: 2002 – 2004

	2002 Buyers	2003 Buyers	% Change	2004 Buyers	% Change
Target Counties	43,903	43,623	-1.6%	41,640	-4.5%
Control Counties	75,956	75,844	-1.0%	73,083	-3.6%
Remaining Counties	204,708	202,658	-0.1%	192,877	-4.8%
Total Statewide	324,567	322,125	-0.8%	307,600	-4.5%

For purposes of this project, our interest is focused on three types of license buyers which are the principal components of annual license sales: renewals from previous year buyers, renewals by lapsed buyers, and new buyers or recruits. Lapsed buyers are those who had purchased a license during any previous years, but not during the immediate past year. For example, an individual may have purchased a license in 2002 and/or 2003, and then failed to buy in 2004. This individual is considered a lapsed angler. Likewise, an individual could have purchased licenses in 2000 and 2003 then skipped 2004 and bought again in 2005. Recruits are first-time license buyers. For this study, they are defined as buyers appearing for the first time in a multi-year database. These individuals may have purchased a license in years prior to establishment of the database but there is no practical way of knowing and thus should be considered as recruits. Recruits buying for the first time in 2002 would become renewals if they purchased a license in 2003. If they failed to buy a license in 2003, they would then fall into the “lapsed” category. At the beginning of this project, the Iowa electronic license database consists of buyers from 2002 through 2004.

The three components of license buyers in 2004 by region are shown in Table 2. Statewide, two-thirds of the resident fishing license sales in 2004 came from renewals by 2003 buyers. Less than 10% were from lapsed anglers buying in 2002 but not 2003, while new recruits accounted for nearly one-fourth of all 2004 buyers.

There were some small variations in sales for each of the three groups across regions. Lapsed angler renewals were the most stable with renewals ranging from a low of 8.5% to a high of 9.3% in the Control Counties. Somewhat greater variations were seen among 2003 buyers renewing in 2004 and new recruits.

Table 2: Resident license sales component groups for 2004 by region

Sales Component	2004 License Buyers							
	Target Counties		Control Counties		Remaining Counties		Total Statewide	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
2003 Renewals	28,169	67.6%	46,662	63.8%	133,435	69.2%	208,266	67.7%
2003 Lapsed	3,551	8.5%	6,777	9.3%	16,309	8.5%	26,637	8.7%
2004 Recruits	9,920	23.9%	19,644	26.9%	43,133	22.3%	72,697	23.6%
Total	41,640	100.0%	73,083	100.0%	192,877	100.0%	307,600	100.0%

Target Audience

The target audience for the IDNR pilot project was male lapsed anglers aged 25 to 54. Lapsed anglers were defined as individuals buying a resident fishing license during 2002 and/or 2003 but not in 2004. The target audience comprised 35% of license buyers from 2002 to 2004.

It was determined that the focus of a pilot marketing effort would be along the I380 corridor. This area included Black Hawk, Linn and Johnson counties. Two of these counties, Linn and Johnson, were adjacent and were treated as one unit as they shared the same media area. Black Hawk County was treated as a separate unit because it did not share the same media outlets as Linn and Johnson Counties.

Pilot Program

After several meetings during the winter of 2005, the planning group established one long-term objective and two short-term objectives for the pilot program, all focusing on increasing fishing license sales.

Long-term Objective

- Using lessons learned from the first year efforts, increase resident fishing license sales to 2002 levels over a three-year period.

Short-term Objectives

- Reverse the recent trend of 3% annual decrease in fishing license sales. Sell same amount of licenses in target area as in 2004 (41,640) during 2005.
- Over the duration of the marketing campaign (May and June) license sales in the target counties will be 10 percentage points greater than in control counties.

Building on the Take Me Fishing™ national advertising campaign, the marketing program designed for 2005 was multi-faceted and involved a variety of media and information for anglers. Additionally, a random sample of lapsed anglers in the three-county area received an initial mailing of a Family Fishing Guide followed by a postcard reminder. Most marketing activities occurred during May and June. However, some activities began during April or extended into July. Below is a listing of the marketing strategies undertaken and dates of occurrence. Most of these activities were executed during May and June of 2005.

- Family Fishing Guide
 - ◆ Customized for Linn, Johnson and Black Hawk counties
 - ◆ 21,000 pieces mailed week of May 9 to lapsed anglers
 - ◆ Tips, locations and testimonials
- Postcard
 - ◆ Follow-up reminder mailed week of May 23
 - ◆ Scheels coupon on back for Black Hawk area and general reminder for Linn/Johnson area

- Movie Theater Ads
 - ◆ Ran May 7 – July 31
 - ◆ Movie theaters in Waterloo, Cedar Rapids, Iowa City and Coralville
- IDNR Web Site Update
 - ◆ IDNR Front Page major fisheries presence
 - ◆ Redesigned fisheries front page
 - ◆ Links for eastern Iowa lakes
 - ◆ Fishing tips
- Live Radio Remotes
 - ◆ May 14: Gander Mountain, Cedar Rapids
 - ◆ May 21: Scheels, Cedar Falls
 - ◆ June 11: Scheels, Coralville
 - ◆ Giveaways, live fish, fish fry, kids games, handouts
- Media Coverage
 - ◆ Joe Wilkinson weekly news packets for stations
 - ◆ Arik Sloterdijk weekly radio show Fishing trips with Orlin Lover and John Campbell
 - ◆ Weekly Iowa Outdoors packet
 - ◆ Des Moines Register article
 - ◆ Iowa Conservationist – March/April issue
- License Vendor Packets
 - ◆ All vendors received: poster, Family Fishing Guides, campaign explanation
- DVD – Wal-Marts received customized DVD
- Library Packets
 - ◆ Libraries received: poster, Family Fishing Guides, campaign explanation
- Iowa Lottery Ticket: *Reelin' in the Cash*
 - ◆ Statewide campaign
 - ◆ Radio coverage on 133 stations April 25-May 8
 - ◆ Online survey of buyers

Evaluation Methods

To assess the impact of the various program components, an evaluation procedure was developed that focused on determining the effects of the direct mail program and the general advertising placement. The evaluation was conducted at three levels. The first level was a comparison of license purchase rates of anglers in the three “Target Counties” with those of a similar group of six counties with comparable demographic, economic and license purchasing characteristics. These “Control Counties” were Cero Gordo, Polk, Pottawattamie, Scott, Story and Woodbury. To determine if the general advertising and marketing activities had an impact

on lapsed anglers in the Target Counties, license sales rates for 2005 were compared to those in the Control Counties. If the program activities had an overall effect, then we would expect license purchase rates in the Target Counties to be higher than those in the Control Counties. This difference between the Target and Control purchase rates is termed “Lift” by market researchers. Lift is defined as the difference between the observed rate from the treatment group and the expected rate from the control group.

The second level of analysis focused within the Target Counties and compared renewal rates of lapsed anglers receiving the direct mail pieces, consisting of the Family Fishing Guide and follow-up postcard, with a similar group of lapsed anglers that did not receive the direct mailing. There were 8,413 lapsed anglers identified in Black Hawk County from the electronic license database. Of these, 7,311 were randomly selected to receive the direct mail pieces (Direct Mail Target Group) while the remaining 1,102 did not receive the mailing and became the Direct Mail Control Group. In Linn and Johnson Counties 16,429 lapsed anglers were identified. We randomly selected 13,202 to become the Direct Mail Target Group and assigned the remaining 3,227 to the Direct Mail Control Group. To test the effects of the direct mail program, license purchase rates for each group were calculated and compared. Individuals in both Direct Mail Target and Direct Mail Control Groups had an equal probability of being exposed to the general advertising and marketing activities.

The third level consisted of a mail survey of a sample of lapsed anglers from the Direct Mail Target Group and Direct Mail Control Group to assess recall of advertising and direct mail activities. Within these survey groups comparisons of license renewal rates among those who recalled and did not recall receiving the direct mail were made. This third level of analysis involved examining differences in awareness (recall) of the Family Fishing Guide and postcard between the samples from the Direct Mail Target and Direct Mail Samples. From the Black Hawk, and Linn and Johnson county areas, 1,250 individuals were selected from the two Direct Mail Target and two Direct Mail Control Groups forming a mail survey sample of 5,000 individuals. In the following discussion, these samples are referred to as Survey Target and Survey Control Groups. Each person was sent a four-page questionnaire (Appendix B) that collected information on the recall of the direct mail and general advertising components of the marketing program. It would be expected that the Survey Target Sample would recall receiving the direct mail pieces at a higher rate than the Survey Control Sample. Also it would be expected, there would be a difference in awareness of fishing advertising received in the mail, since the Survey Target Sample received the direct mail pieces.

Of the 5,000 surveys mailed to recipients, 650 (13%) usable responses were received with the single mailing, 316 from the Survey Target Sample and 334 from the Survey Control Sample. Mail survey respondents were also matched to their respective license database records so their 2005 purchases could be assessed.

Fishing license Database

In order to develop information on license buyers and analyze the effects of the marketing program, an integrated fishing license database was constructed with fishing license transaction records from the IDNR electronic license file. Purchase records are stored by the IDNR in

aggregate form. Thus, an aggregate file of all license purchases for a single year may include several records for individuals buying multiple short-term licenses, an annual license or trout stamp. The result is an inaccurate count of the actual number of license buyers and no ability to track individual buying patterns from year-to-year.

To overcome these limitations, a database was constructed with the individual as the basis for each record. The initial complete year of transactions in the IDNR database was 2002, which served as the base year for building the database. Each individual’s record in the database contained basic demographic information and the type and purchase date of each license the individual bought from 2002 through 2005. This database of individual buyers was then used to summarize buying trends over the four-year period and to produce information for the pilot program.

Results

Individual License Sales

The recent trend in individual resident fishing license sales in Iowa has been declining. As seen in Table 3, license sales in the Target and Control Counties, as well as the Remaining Counties declined from 2003 through 2004. The declines were similar across all two regions. However, in 2005 this trend was reversed as sales in the Target Counties were up by three percent while sales in the Control and Remaining Counties increased slightly. These modest increases were a marked improvement from the declines experienced during the previous two years.

Table 3: Individual resident fishing license sales and change by region: 2002 – 2005

Region	2002	2003	% Change	2004	% Change	2005	% Change
	Buyers	Buyers		Buyers		Buyers	
Target Counties	43,903	43,623	-1.6%	41,640	-4.5%	42,899	3.0%
Control Counties	75,956	75,844	-1.0%	73,083	-3.6%	72,905	0.2%
Remaining Counties	204,708	202,658	-0.1%	192,877	-4.8%	193,810	0.5%
Total Statewide	324,567	322,125	-0.8%	307,600	-4.5%	309,614	0.7%

Figure 1 shows a comparison of the change in sales by month from 2002 to 2003. Note how changes in monthly license sales for the Control and Target Counties closely follow each other and that for the entire state. What this means is that the change in license sales from 2002 to 2003, during a given month, was very similar for each region. Of particular interest is the decline in sales during May and June between 2002 and 2003. This is the main comparison period for assessing the impact of the marketing program in 2005. The data were truncated at the end of October sales because both the small number of sales and wide fluctuations from year-to-

year make comparisons very unreliable. Appendix A shows license sales by month and year. Sales through October normally account for 99% of yearly sales.

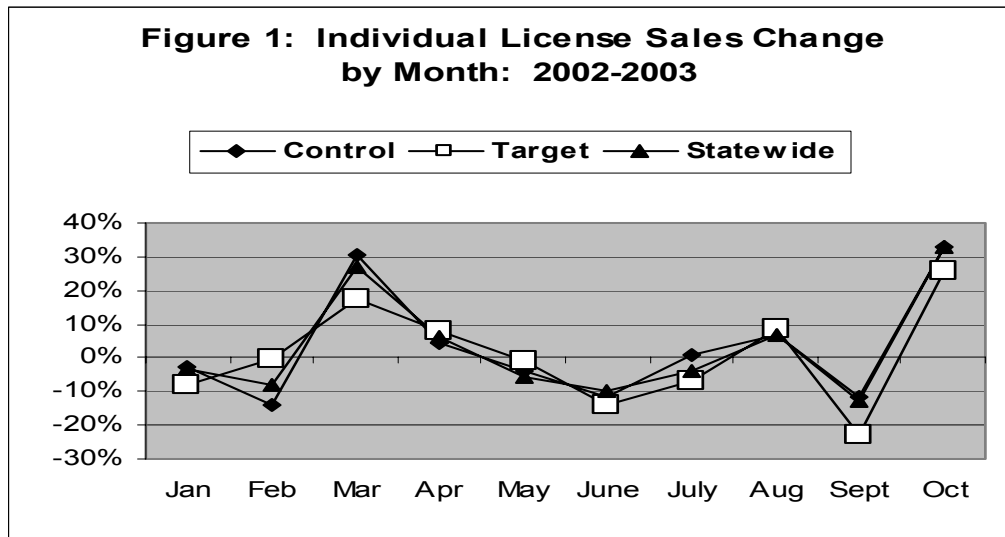


Figure 2 shows the change in license sales by month between 2003 and 2004. Note again that the percentage change in sales from 2003 to 2004 track very closely from month to month for each of the regions. However, the pattern of the sales changes is much different than those in Figure 1.

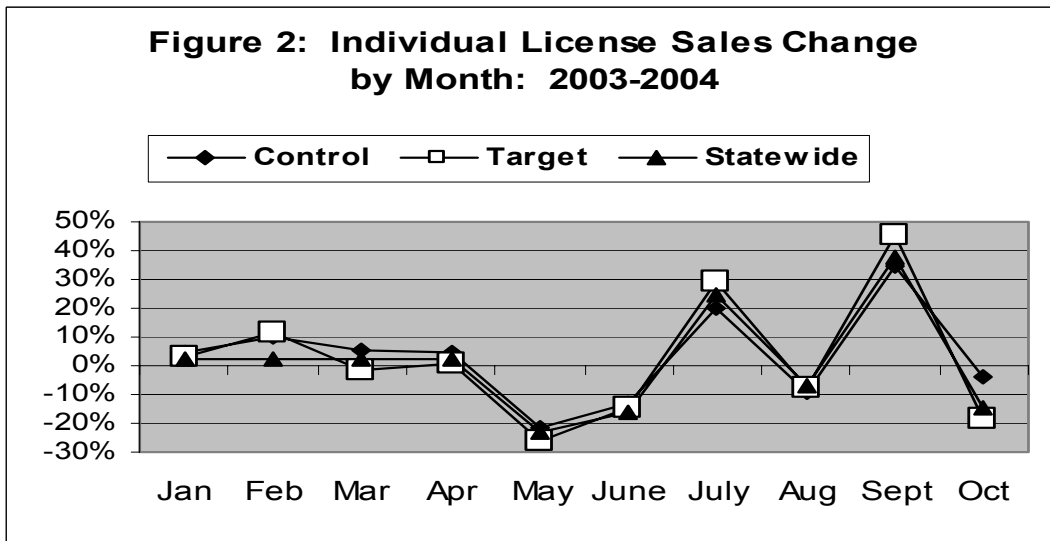
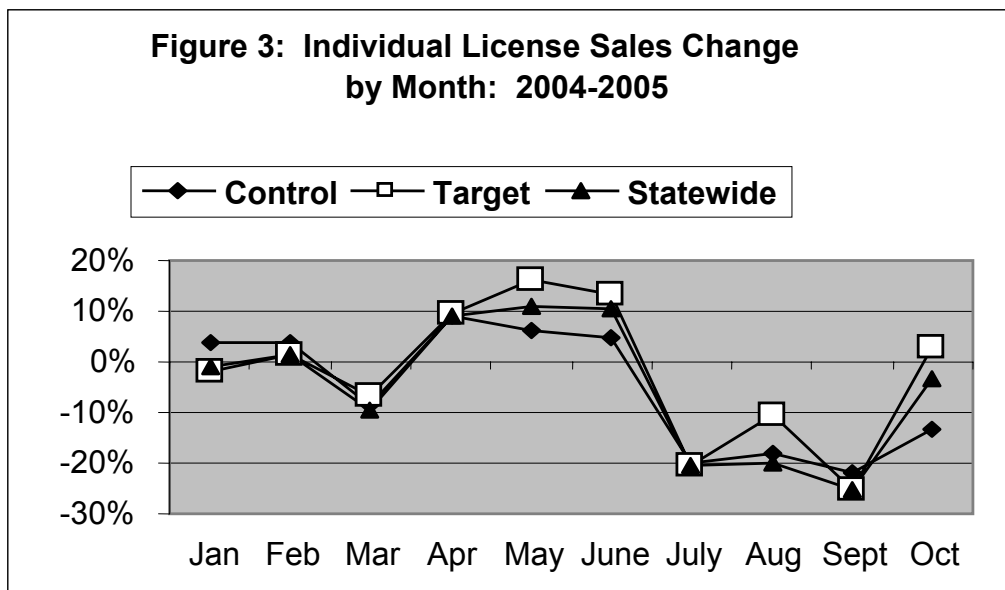


Figure 3 shows a comparison of the change in sales by month from 2004 to 2005. The data in Figure 3 shows a clear deviation from the patterns in Figures 1 and 2. License sales changes from 2004 to 2005 during May and June clearly differed from the January to April pattern. There was a 9.8 percentage point difference in the increase between Target and Control Counties

for May and an 8.5 percentage point difference for June. This is most likely associated with the marketing program as no other factors were evident during May and June in these counties to account for the differential increase in sales.

This notion is also reinforced by the fact that the rate of change in individual license sales from 2004-2005 came back together in July and September (Figure 3). The Control and Statewide changes were very similar (albeit negative) during August. However, the Target counties experienced less of a decline (-10%) than either Control Counties (-19.8%) or Statewide (-29.8%). The reasons for the sales declines from July through September are not known. Possible reasons may include anglers bought their licenses earlier in the year (April – June) during 2005, weather or the economy, the inherent variability in monthly license sale from year-to-year, or other unknown reasons. Regardless of the reasons for these latter monthly declines, they were very universally across the state which makes the May and June increases in the Target Counties all the more auspicious.



The individual license data in the 2002 to 2005 electronic database can be grouped according to the three buying components discussed earlier: renewals, lapsed and recruits. To adequately represent the three groups with the limited dataset, particularly the lapsed group, the 2004 buying year was used as the year for identifying lapsed buyers. Approximately two-thirds of the buyers from the immediate past year (2004) renewed their license during 2005 (Table 4). About 21% of the lapsed anglers bought a license in 2005 after skipping one or more years. The purchase rates for renewals and lapsed buyers were relatively consistent across the three regions.

Renewals by 2004 anglers in the Target Counties were 3.4 percentage points greater than in the Control Counties. Likewise, 2004 Lapsed angler buying rates were 3.7 percentage points greater than in the Control Counties. These percentages will vary from year-to-year, which reflects buying trends. However, any large changes in the proportion of renewal or lapsed buyers in a given year will likely be related to marketing activities specifically directed at that group to increase sales.

Table 5 shows the license buying cohort renewal rates over successive years. A “license buying cohort” is the group of individuals purchasing a license during one specific year (i.e., all license buyers in 2002). The most

important finding in Table 5 involves the retention of anglers first buying a license in 2002, 2003 or 2004. The difference in retention (renewals) of 2002 buyers in 2003 in the Target Counties (66.9%) was 4.4 percentage points higher than in Control Counties (62.5%). Similarly the retention rate of 2002 buyers in 2004 was 3.7 percentage points greater for anglers in the Target Counties. But, in 2005, the retention of 2002 anglers in the Target Counties jumped to a 9.4 percentage point difference over Control Counties.

Table 4: License sales components for 2005 by region

Target Counties	Number	2005 Buyers	Percent Buyers
2004 Renewals	41,640	27,369	65.7%
2004 Lapsed	27,093	6,385	23.5%
2005 Recruits	9,115	9,115	100.0%
Total	77,848	42,899	55.1%
Control Counties			
2004 Renewals	73,083	45,511	63.1%
2004 Lapsed	51,505	10,175	19.8%
2005 Recruits	17,219	17,219	100.0%
Total	141,807	72,905	51.4%
Remaining Counties			
2004 Renewals	192,877	129,173	67.3%
2004 Lapsed	119,780	25,894	21.9%
2005 Recruits	38,743	38,743	100.0%
Total	351,400	193,810	55.2%
Statewide			
2004 Renewals	307,600	202,053	65.7%
2004 Lapsed	198,378	42,454	21.3%
2005 Recruits	65,077	65,077	100.0%
Total	571,055	309,614	54.2%

Table 5: License renewals by year and buying year cohort

License Buying Cohort	Number Buying	Renewals in 2003		Renewals in 2004		Renewals in 2005	
		Number	Percent	Number	Percent	Number	Percent
Target Counties							
2002	43,903	29,127	66.9%	25,725	59.0%	24,028	55.1%
2003	43,623	n/a	n/a	28,169	65.0%	25,713	58.9%
2004	41,616	n/a	n/a	n/a	n/a	27,369	65.7%
Control Counties							
2002	75,956	47,475	62.5%	41,993	55.3%	34,727	45.7%
2003	75,844	n/a	n/a	46,662	61.5%	41,611	54.9%
2004	73,031	n/a	n/a	n/a	n/a	45,511	62.3%
Remaining Counties							
2002	204,708	137,389	67.1%	121,640	59.4%	81,587	39.9%
2003	202,658	n/a	n/a	133,435	66.0%	121,167	59.8%
2004	191,953	n/a	n/a	n/a	n/a	129,173	67.3%

On a smaller scale, the difference in 2004 renewal rates for the 2003 buying cohorts in Target and Control Counties was 3.5 percentage points. This difference increased to 4.0 percentage

points for renewals by the 2003 cohort in 2005. There was a clear departure from more modest renewal rates in the Control Counties when compared to the Target Counties. With this greater change in the 2005 retention rates for 2002 and 2003 buying cohorts, it is reasonable to conclude that the marketing program contributed strongly to these differences.

Another interesting observation from Table 5 is the change in renewal rates from year-to-year for similar buying cohorts among the three county groups. About 59.0% the 2002 cohort of the Target County anglers bought licenses in 2004. This rate declined 3.9 percentage points to 55.1 in 2005. However, in the Control Counties, the buying rate of the 2002 cohort was 55.3% in 2004 and 45.7% in 2005, a 9.6 percentage point difference. The higher renewal rate in the Target counties for both 2002 and 2003 angler cohorts strongly suggests there was a positive effect of the pilot marketing program.

There are seven different buying patterns, or combinations of years, that anglers could have purchased licenses over the 2002-2004 marketing period. What is interesting about these combinations, shown in Table 6, is the wide range in the number of buyers for each group. The most loyal anglers, those buying in 2002, 2003 and 2004, were the largest group of license buyers. They also had the highest renewal percentage of all groups and were much more likely to renew than anglers purchasing licenses in both 2003 and 2004 but not in 2002. If an angler skipped buying a license during 2003 or 2004, the probability that they would buy again in 2005 dropped dramatically.

It is very evident that the more years skipped, the lower the probability of buying a fishing license in future years. Further, among new recruits, those buying only in 2004, about 40% renewed by year's end. This occurrence begs the question about why over half of these anglers will not renew and what prompted them to buy in the first place.

Table 6: 2005 purchase rates by license buying groups

License Buying Group	Target Counties			Control Counties			Remaining Counties		
	Total Anglers	2005 Buyers	Percent Buyers	Total Anglers	2005 Buyers	Percent Buyers	Total Anglers	2005 Buyers	Percent Buyers
2002, 2003 & 2004	22,174	17,952	81.0%	35,214	27,899	79.2%	105,331	85,692	81.4%
2003 & 2004	5,995	3,590	59.9%	11,448	6,615	57.8%	28,104	17,075	60.8%
2002 & 2004	3,551	1,885	53.1%	6,777	3,414	50.4%	16,309	8,488	52.0%
2004 Only	9,920	3,942	39.7%	19,644	7,583	38.6%	43,133	17,918	41.5%
2002 & 2003	6,953	2,323	33.4%	12,261	3,787	30.9%	32,058	10,549	32.9%
2003 Only	8,517	1,848	21.7%	16,967	3,310	19.5%	37,103	7,851	21.2%
2002 Only	11,623	1,868	16.1%	22,277	3,078	13.8%	50,619	7,840	15.5%
Total	68,733	33,408	48.6%	124,588	55,686	44.7%	312,657	155,413	49.7%

As seen in Table 7, new recruits comprised about one-fifth of the license buyers in 2005. This is consistent with the proportion of new recruits in other states. These percentages most likely over-estimate the proportion of new recruits among the 2005 license buyers since buyers from 2001 and earlier years could be classified as recruits in the limited electronic license database. As more years are added to the database it will become easier to identify true recruits and accurately track their buying patterns in subsequent years.

Area	Total 2005 Anglers	2005 Recruits	Percent Recruits
Target Counties	42,899	9,115	21.4%
Control Counties	72,905	17,219	23.6%
Remaining Counties	193,810	38,743	20.0%
Total Statewide	309,614	65,077	21.0%

Effect of Direct Mail

The final piece in the license sales evaluation focused on the direct mail campaign to lapsed anglers in Black Hawk, Linn and Johnson Counties. To initially determine if the direct mailings had an impact on license sales, 2005 purchase rates were calculated for the Direct Mail Target and Control Groups. The results, shown in Table 8, indicate that the direct mail campaign had little overall impact on the license sales of lapsed anglers. Renewal rates by anglers in Linn and Johnson counties were nearly identical for Target and Control Groups. Renewal rates in Black Hawk County were very similar to those in the Linn-Johnson area.

	Control			Target		
	Sample Size	2005 Buyers	% Buyers	Sample Size	2005 Buyers	% Buyers
Linn-Johnson						
2002 Only	1,365	245	17.9%	5,745	1,032	18.0%
2002 & 2003	836	317	37.9%	3,409	1,276	37.4%
2003 Only	1,026	229	22.3%	4,048	907	22.4%
Total	3,227	791	24.5%	13,202	3,215	24.4%
Black Hawk						
2002 Only	463	81	17.5%	3,125	562	18.0%
2002 & 2003	327	119	36.4%	1,984	678	34.2%
2003 Only	312	74	23.7%	2,202	530	24.1%
Total	1,102	274	24.9%	7,311	1,770	24.2%

Examining the renewal rates among sub-groups of lapsed anglers within each region also showed few differences between Direct Mail Target and Direct Mail Control Groups. More consistent buyers (2002 and 2003) had higher renewal rates than other lapsed groups, however, the differences between Direct Mail Controls and Direct Mail Targets were not significant. Some reasons for this occurrence are revealed in the next section.

Mail Survey Results

Table 9 shows the percentages of Survey Target and Survey Control respondents indicating they saw or used one or more of the various marketing program components. The initial question assessed fishing advertising awareness through six specific channels (Question 7). Overall, about 60% of both Survey Target and Control Samples reported seeing some type of advertising promoting fishing. As would be expected, there were no differences in awareness rates for magazine, television, radio, newspaper, and movie theater advertising between Survey Target and Control Samples since they both had similar opportunities to see or hear these types of advertising. However, as would be expected, there was a difference in awareness of fishing advertising received in the mail, since the Survey Target Sample received the direct mail pieces.

An index consisting of a summation of the number of advertising items as seen in Question 7 was created to understand how the number of ads seen was distributed. As shown in Table 9, the Survey Target Sample saw significantly more advertisements, on the average, than did the Survey Control Sample. This was related to the prevalence of the Survey Target Sample to recall the direct mail advertising.

Question 8 asked respondents who reported seeing advertising if they recalled seeing fishing advertising that included scenes with a child asking, “Take me Fishing.” Here again there was a significantly higher recall rate by the Survey Target Sample. Nearly 45% reported seeing a “Take me Fishing” advertisement.

When respondents seeing advertising were asked if they had seen any of the specific marketing program components, listed in Question 9, 92% of the Survey Target Sample indicated they had seen at least one. As expected, there was a substantial difference in the recall of the Family Fishing Guide and postcard.

Among the respondents who reported seeing the Family Fishing Guide and/or follow-up postcard, 14.5% indicated they only saw the Family Fishing Guide, about 35% saw the Guide and postcard, and half recalled the postcard only. Overall, 50% saw the Guide while 85% recalled the postcard.

When asked in Question 10 if the fishing information they saw (from the sources in Question 9) influenced them to buy a license and go fishing, 21% of the Survey Target Sample and 11% of the Survey Control Sample said it did. The difference between Target and Control Sample responses was highly significant.

Question 11 also asked about awareness of specific components included with the direct mail Family Fishing Guide or postcard. As shown in the table, all direct mail items were recalled at a significantly higher level by the Survey Target Sample with the exception of the lure coupon. Recall rates were very similar across all items except for the coupon which was sent with the postcard to the Direct Mail Target Group in Black Hawk County only.

Advertising Awareness	Awareness		P
	Survey Target (n=312)	Survey Control (n=332)	
Noticed Fishing Advertising (Q7)	60.8%	58.3%	ns
Magazine	27.2%	28.1%	ns
Television	41.0%	39.7%	ns
Radio	11.7%	10.9%	ns
Newspaper	23.3%	19.2%	ns
Movie Theater	2.8%	3.0%	ns
Mail	24.7%	9.3%	<.001
Q7 Index	(n=312)	(n=322)	
Saw no ads	41.3%	44.0%	0.045
Saw 1-2 ads	39.5%	44.3%	
Saw 3-6 ads	19.2%	11.7%	
Did you see a "Take Me Fishing" ad (Q8)	44.7%	32.4%	0.002
Do you recall seeing or hearing any of the following items (Q9)	(n=129)	(n=108)	
Family Fishing Guide mailed to home	31.1%	6.0%	<.001
Take Me Fishing postcard mailed to home	55.0%	14.0%	<.001
Fishing event at Gander Mountain or Scheels	26.4%	24.0%	ns
Take Me Fishing ad at local movie theater	12.4%	17.0%	ns
Event or information at park	25.0%	24.0%	ns
Information at Wal-Mart or other store	25.6%	35.0%	ns
Poster at a library	4.7%	1.0%	ns
Did not hear about any of these	7.8%	24.0%	<.001
Received Guide &/or Postcard	(n=91)		
Guide only	14.5%	n/a	
Guide & Postcard	34.9%	n/a	
Postcard only	50.6%	n/a	
Did information influence decision (Q10)	21.4%	11.5%	0.013
Did you notice or see any of the following items (Q11)	(n=312)	(n=332)	
Coupon for lure or other item	7.1%	3.6%	ns
Varying license buying methods	24.1%	15.1%	0.008
Visiting DNR website	27.3%	19.1%	ns
Local information on fishing	29.9%	21.8%	0.032
Tips and ideas to make fishing easier	24.1%	15.5%	0.033
Q11 Index	(n=312)	(n=332)	
Saw no items	49.1%	60.3%	0.045
Saw 1-2 items	33.5%	31.6%	
Saw 3-5 items	17.4%	8.1%	
Do you recall receiving Fishing Guide (Q12)	(n=312)	(n=332)	
	33.0%	8.9%	<.001
How useful was the Fishing Guide information (Q13)*	(n=103)	(n=27)	
	47.3%	37.0%	ns
Did Fishing Guide influence decision to buy license and go fishing Q14)			
	27.8%	15.8%	<.05

Notes: *Percentage of those responding very or extremely useful; ns = not significant at p=.05

An index was also created for Question 11, by summing the number of items listed in the question, to determine the number of items recalled by respondents. As shown in Table 9, about half of the Survey Target Sample and 60% of the Survey Control Sample did not recall any of the five items. Similar proportions of Target and Control Samples recalled 1-2 items but a significantly larger percentage of the Survey Target Sample saw 3-5 items.

When asked if they specifically recalled the Family Fishing Guide (Question 12), one-third of the Survey Target Sample recalled the Guide while less than 10% of the Survey Control Sample recalled the Guide. What the Control Sample considered as the Family Fishing Guide is not known, but the small percentage who did recall something indicated that it was useful (Question 13). About 47% of the Target Sample indicated the Fishing Guide was very or extremely useful. Because of the small sample sizes, the 10 percentage point difference between Target and Control Samples was not statistically significant.

Finally, Question 14 asked respondents who recalled the Family Fishing Guide if it influenced their decision to buy a fishing license. A significantly larger percentage of the Survey Target Sample (27.8%) indicated the Guide had influenced their decision compared to that of the Survey Control Sample (15.8%).

By examining license database records, fishing license purchase rates were calculated and compared for survey respondents who recalled and did not recall the various marketing program components. Table 10 summarizes these relationships. Individually, the advertising components in Question 7 did not elicit higher purchase rates in 2005 among those who recalled them and those who did not. However, the trend was for higher buying rates among those who had seen the advertisements.

The index of the number of ads seen in Question 7 clearly shows that the number of ads recalled is linearly related to license sales. Seeing more than two ads significantly raises the license buying rate.

While there was no direct relationship between recall of the marketing program items in Question 9 and license sales, there was a significant relationship between the recall of the Family Fishing Guide and the postcard, and license buying. Respondents recalling the Guide and Postcard were twice as likely to buy a 2005 fishing license as were respondents recalling only the Guide. Individuals recalling both Guide and postcard bought licenses at a much higher rate than the postcard-only group. Clearly, a combination of the fishing guide and postcard was more effective in generating license sales than either one alone.

Overall, respondents to Question 10 who indicated that the information from the items listed in Question 9 influenced their decision to buy a license and go fishing were much more likely to buy a license than those who said it did not influence them.

Recall of three or more of the five direct mail items measured in Question 11 was associated with higher license sales. Receiving the coupon, visiting the DNR website, and tips and ideas to make fishing easier all resulted in higher sales rates than those who did not see or use these items

Table 10: Relationship between advertising awareness and 2005 license sales			
Advertising Awareness	2005 Renewals		P
	Ad Aware	Not Aware	
Noticed Fishing Advertising (Q7)	27.5%	26.9%	ns
Magazine	31.5%	25.4%	ns
Television	28.1%	26.6%	ns
Radio	25.0%	27.5%	ns
Newspaper	24.8%	27.9%	ns
Movie Theater	15.8%	27.5%	ns
Mail	28.3%	26.9%	ns
Q7 Index			
Saw no ads	25.7%	n/a	0.049
Saw 1-2 ads	26.6%	n/a	
Saw 3-6 ads	34.1%	n/a	
Did you see a "Take Me Fishing" ad (Q8)	26.8%	27.6%	ns
Do you recall seeing or hearing any of the following items (Q9)			
Family Fishing Guide mailed to home	29.6%	26.5%	ns
Take Me Fishing postcard mailed to home	31.9%	24.7%	ns
Fishing event at Gander Mountain or Scheels	18.5%	29.5%	ns
Take Me Fishing ad at local movie theater	25.0%	27.4%	ns
Event or information at park	27.9%	26.9%	ns
Information at Wal-Mart or other store	29.7%	26.0%	ns
Poster at a library	37.5%	26.7%	ns
Did not hear about any of these	17.9%	28.5%	ns
Received Guide &/or Postcard			
Guide only	18.8%	n/a	0.048
Guide & Postcard	35.5%	n/a	
Postcard only	29.6%	n/a	
Did information influence decision (Q10)	35.7%	21.6%	0.011
Did you notice or see any of the following items (Q11)			
Coupon for lure or other item	35.5%	26.4%	0.047
Varying license buying methods	31.9%	25.8%	ns
Visiting DNR website	32.8%	25.2%	0.050
Local information on fishing	27.5%	26.7%	ns
Tips and ideas to make fishing easier	32.5%	25.6%	0.047
Q11 Index			
Saw no items	26.5%	n/a	0.040
Saw 1-2 items	23.4%	n/a	
Saw 3-5 items	38.4%	n/a	
Do you recall receiving Fishing Guide (Q12)	25.4%	27.7%	ns
How useful was the Fishing Guide information (Q13)*	28.0%	13.6%	0.050
Did Fishing Guide influence decision to buy license and go fishing (Q14)	36.6%	17.6%	0.031

Notes: *Percentage of those responding very or extremely useful, ns = not significant at p=.05

or services. The index of Question 11 items reinforces the importance of exposure to several items having a greater impact on license sales. Respondents recalling or using three or more of the direct mail-related items were almost twice as likely to buy a license as those seeing none or only one or two items.

While respondents recalling the Family Fishing Guide did not buy licenses at a greater or lesser rate than those who did not recall the Guide, respondents who found the Guide useful were much more likely to buy a license than those who did not. Likewise, respondents indicating the Guide influenced their decision to buy a license were twice as likely to buy a license as those who said the Guide had no influence.

Discussion and Conclusions

The success of the pilot program in the Target Counties showed that license sales can be affected by marketing activities. Reversal of the downward trend in sales from 2002 to 2004 in effect accomplished the first Short-term Objective of the marketing program. While this objective was accomplished to a lesser degree statewide, the greatest success occurred in the Target Counties. The increase was due in part to higher purchase rates by lapsed anglers, but also to the retention of a greater percentage of the 2002 and 2003 license buying cohorts. Retention of anglers buying a license in 2002 in the Target and Control Counties differed by 4.4 percentage points in 2003 and 3.7 percentage points in 2004. However, in 2005 the difference was 9.4 percentage points. Likewise, renewals by the 2003 cohort of license buyers was 3.5 percentage points higher in Target Counties during 2004 and 4.0 percentage points higher in 2005. The greater retention of active anglers in the Target Counties was clearly an unanticipated benefit since the project focused on lapsed anglers.

Short-term Objective 2 was also achieved in large measure. During the two-month promotional timeframe, license sales in the Target Counties were 9 percentage points higher than the Control Counties. This differential was very close to the 10 percentage point target.

The overall lack of a significant difference in license sales between Direct Mail Target and Control Groups for the direct mail evaluation is not surprising. The marketing program in the Target Counties most likely over-shadowed the effects of the direct mail pieces which were sent to only a sample of the lapsed anglers within the region. This was further exacerbated by the fact that only a fraction of the lapsed anglers targeted with the direct mail actually recalled receiving the pieces.

The direct mail Family Fishing Guide and follow-up postcard were related to increased fishing license purchases from the standpoint that the lapsed anglers who recalled seeing both direct mail pieces bought licenses at a rate twice that of those only recalling the Guide. Anglers that recalled receiving both the Family Fishing Guide and postcard were slightly more likely to buy a license than if only the postcard was recalled. Further, lapsed anglers that found the direct mail information useful were twice as likely to buy a license in 2005 as those who reported the information was of little value.

Reinforced by the data was the commonly held marketing principle that the greater the number of impressions, the greater the awareness and likelihood of action by the consumer. This was borne out by the fact that as the number of general advertising and direct mail components recalled increased the probability of buying a license also increased. It is also apparent that the overall marketing program was effective in raising license sales. Different aspects of the overall suite of activities appealed to different segments of license buyers in the Black Hawk, Linn and Johnson county areas.

Recommendations and Next Steps

As marketing program efforts are being continued for 2006, the following recommendations should be considered as next steps are developed:

- ◆ A variety of angler education and media strategies should be employed because of the differential effect these multiple contacts had on license sales.
- ◆ The marketing campaign should be replicated in the three-county area to confirm that results were attributable to the marketing program. Replication of results is important during the early stages of long-term programs. Expansion of the program to other areas should be carefully controlled to ensure that adequate control areas are retained so adequate evaluation opportunities are available to assess the results of the 2006 activities.
- ◆ Consideration should be given to both retaining new recruits in 2005 as well as retaining the avid angler base.
- ◆ Renewals by the previous year's anglers are the single largest source of license sales. While this license buying component seemed to respond to the marketing program, there may be some additional strategies that would retain a larger proportion of the 2005 license buyer group.

Appendix A: Post-Campaign Marketing Evaluation Survey

DNR BANNER HERE

June 27, 2005

Dear Fellow Iowan:

You are one of a small number of people in your community we are asking for views concerning fishing and Iowa's water resources. The purpose of this survey is to help us better meet your outdoor-related recreational needs, and the needs of Iowans.

Your responses to this survey are important, so please complete all sections that apply to you. You were randomly selected for our survey, and your responses represent those of many other Iowans in your local area. Please help us improve outdoor recreation opportunities for everyone by completing this questionnaire and returning it in the postage-paid envelope provided.

Please understand that your participation in this survey is voluntary. Be assured that your responses will be kept confidential.

To thank you for taking the time to help us improve the services we provide to fellow Iowans, we will enter your name into a drawing for a \$100 gift certificate to the DNR's Nature Store for free apparel. Plus, the first 500 respondents will receive a free subscription to the *Iowa Conservationist* magazine, just for returning this survey. We would greatly appreciate your completed survey to be mailed back to us by July 22, 2005.

Sincerely,



Jeffrey R. Vonk
Director

Return this survey and:

Receive a free, one-year subscription to the
Iowa Conservationist magazine!
(first 500 respondents only)

PLUS

You will become eligible to win a
\$100 gift certificate to the Iowa Nature Store.

WALLACE STATE OFFICE BUILDING / 502 EAST 9th STREET / DES MOINES, IOWA 50319
515-281-5918 TDD 515-242-5967 FAX 515-281-6794
www.iowadnr.com

We want to know how Iowa's fish and wildlife resources fit into your outdoor activities and what the Department of Natural Resources can do to make these activities more enjoyable.
Everyone's opinion counts in Iowa! Your responses will remain anonymous and confidential.

1. Which of the following outdoor activities do you regularly participate in, and of these, which does your family enjoy? (*Check all that apply.*)

Check the activities you do:	Is this an activity your family enjoys?
<input type="checkbox"/> Boating	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Fishing	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Camping	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Wildlife viewing	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> River, Lake & Pond Swimming	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Other: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No

2. Have you gone **fishing** during 2005?

Yes

No → How likely is it that you *will* go fishing during 2005? (*Please circle one number.*)

Not at all likely 1 - - - - 2 - - - - 3 - - - - 4 - - - - 5 *Extremely likely*

Many people enjoy fishing in Iowa. We would like to know what you think about fishing in Iowa, even if you haven't gone recently.

3. Have you gone fishing in Iowa since 2000?

No, I have not fished in Iowa since 2000. (*Please go to **Question 6.***)

Yes, I have fished in Iowa since 2000. (*Please continue with **Question***)

4. Overall, on a scale of 1 to 10, how satisfied were you with your last fishing trip in Iowa?

very dissatisfied 1 - - - 2 - - - 3 - - - 4 - - - 5 - - - 6 - - - 7 - - - 8 - - - 9 - - - 10 *very satisfied*

5. How many times in the past 12 months have you fished in Iowa? _____ times

6. How important are each of the following in **preventing** you from fishing or fishing more often?

	Not at all		Somewhat		Very Important				
Family commitments	1	.....	2	.....	3	.....	4	.....	5
Work commitments	1	.....	2	.....	3	.....	4	.....	5
Nowhere nearby to fish	1	.....	2	.....	3	.....	4	.....	5
No one to go fishing with	1	.....	2	.....	3	.....	4	.....	5
Rather spend time on other leisure activities	1	.....	2	.....	3	.....	4	.....	5
Water is too polluted to fish in	1	.....	2	.....	3	.....	4	.....	5
Others using the water interfere with fishing	1	.....	2	.....	3	.....	4	.....	5
Don't know <i>how</i> to fish	1	.....	2	.....	3	.....	4	.....	5
Don't know <i>where</i> to fish	1	.....	2	.....	3	.....	4	.....	5
Don't think the fish I catch are safe to eat	1	.....	2	.....	3	.....	4	.....	5
Had a bad fishing experience in the past	1	.....	2	.....	3	.....	4	.....	5
Just not interested in fishing	1	.....	2	.....	3	.....	4	.....	5

We recently conducted a public awareness campaign about fishing in your community. We would like to know if you saw or heard any of the information spots we placed.

7. During the past two months did you notice any **Television, Magazine, Radio, Newspaper or Movie Theater** advertising specifically promoting fishing? (Please **check all that apply.**)

- No, I didn't notice any of this advertising (Please go to **Question 11.**)
- Yes, in magazines
- Yes, on television
- Yes, on the radio
- Yes, in the newspaper
- Yes, at a movie theater
- Yes, on things I received in the mail

8. Did you see fishing advertising that includes scenes with a child asking, "take me fishing?"

- No (Please go to **Question 11.**)
- Yes (Continue with **Question 9.**)

9. Do you recall seeing or hearing about any of the following items in the past two months? (Please **check all that apply.**)

- Family Fishing Guide mailed to my home
- "Take Me Fishing" postcard mailed to my home
- Fishing event at Gander Mountain in Cedar Rapids, or Scheels All Sports in Cedar Falls or Coralville
- "Take Me Fishing" ad at a movie theater
- Event or information at state or county park
- Information at Wal-Mart or other store
- Poster at a library
- No, I didn't hear about or see any of these (Please go to **Question 11.**)

10. Did any of this fishing information influence you to buy a fishing license and go fishing? (Please **check only one.**)

- Yes
- No
- I already had a 2005 fishing license

11. Did you notice and/or use any of the following that may have been sent to you by mail? (Please **check all that apply.**)

	Did Not Notice	Noticed	Used
Coupon for lure or other item when purchasing a license from a local retailer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Various license purchasing options including web site, telephone, or retailer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visiting the DNR web site (www.iowadnr.com) for more fishing information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local information on fishing locations and amenities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tips and ideas to make fishing easier and improve family fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



We recently sent many Iowans a *Fishing Guide* that had many helpful tips about local fishing spots, fishing techniques, and other helpful information.

12. Do you recall receiving the *Fishing Guide* with the above picture on it?
- No, I don't recall receiving the *Fishing Guide*. (Please skip to **Question 15**.)
 - Yes, I remember receiving the *Fishing Guide*. (Please continue with **Question**

13. How useful did you find the information in the *Fishing Guide*? (Please **circle one** number.)
Not at all Useful 1 - - - - - 2 - - - - - 3 - - - - - 4 - - - - - 5 **Extremely Useful**

14. Did this *Fishing Guide* influence you to buy a fishing license this year? (Please **check one**.)
- No, it did not influence me to buy a license.
 - Yes, it did influence me to get a license.
 - I already had a 2005 fishing license.

15. To thank you for completing and returning this survey, you are eligible for a drawing for a \$100 Gift Certificate to the Iowa Nature Store, the DNR's outlet for Iowa outdoor apparel. Plus, the first 500 respondents will receive a free one-year subscription to the *Iowa Conservationist* magazine.

Please check the box below to be entered in the drawing.

- Please enter me in the drawing!** (Please enter name and address below)
- Do not enter me in the drawing.
- Do not send me the *Iowa Conservationist* magazine if I am among the first 500 to respond to this survey.

Please provide your name, address, and email so we can send your subscription and notify you if you win the drawing.

Name: _____ Email: _____

Address: _____

City, State, Zip: _____

Appendix B: Total individuals buying resident fishing licenses and change: 2002 – 2005¹

Statewide	2002	2003	Change	2004	Change	2005	Change
Jan	46,196	44,697	-3.2%	45,775	2.4%	45,383	-0.9%
Feb	14,777	13,608	-7.9%	13,949	2.5%	14,131	1.3%
Mar	23,797	30,262	27.2%	31,049	2.6%	28,128	-9.4%
Apr	57,613	61,139	6.1%	62,776	2.7%	68,337	8.9%
May	79,816	75,351	-5.6%	58,198	-22.8%	64,518	10.9%
June	53,705	48,326	-10.0%	40,431	-16.3%	44,668	10.5%
July	26,768	25,719	-3.9%	32,027	24.5%	25,496	-20.4%
Aug	14,275	15,259	6.9%	14,247	-6.6%	11,411	-19.9%
Sept	5,984	5,224	-12.7%	7,205	37.9%	5,384	-25.3%
Oct	1,636	2,171	32.7%	1,856	-14.5%	1,790	-3.6%
Nov	442	313	-29.2%	87	-72.2%	536	516.1%
Dec	138	56	-59.4%	0	-	89	-
Total	324,567	322,125	-0.9%	307,600	-4.5%	309,871	0.8%

Target Counties	2002	2003	Change	2004	Change	2005	Change
Jan	5,842	5,361	-8.2%	5,526	3.1%	5,410	-2.1%
Feb	1,861	1,858	-0.2%	2,079	11.9%	2,107	1.3%
Mar	3,715	4,373	17.7%	4,315	-1.3%	4,025	-6.7%
Apr	7,688	8,311	8.1%	8,377	0.8%	9,166	9.4%
May	9,992	9,892	-1.0%	7,333	-25.9%	8,512	16.1%
June	7,661	6,575	-14.2%	5,596	-14.9%	6,350	13.5%
July	4,013	3,736	-6.9%	4,830	29.3%	3,847	-20.4%
Aug	2,154	2,339	8.6%	2,164	-7.5%	1,939	-10.4%
Sept	977	751	-23.1%	1,091	45.3%	816	-25.2%
Oct	283	356	25.8%	290	-18.5%	298	2.8%
Nov	78	61	-21.8%	15	-75.4%	74	393.3%
Dec	14	10	-28.6%	0	-	9	-
Total	43,903	43,623	-1.6%	41,616	-4.6%	42,853	3.0%

Control Counties	2002	2,003	Change	2,004	Change	2,005	Change
Jan	7,319	7,104	-2.9%	7,414	4.4%	7,679	3.6%
Feb	3,145	2,711	-13.8%	2,974	9.7%	3,081	3.6%
Mar	5,149	6,710	30.3%	7,073	5.4%	6,473	-8.5%
Apr	13,982	14,576	4.2%	15,273	4.8%	16,625	8.9%
May	20,453	19,710	-3.6%	15,403	-21.9%	16,376	6.3%
June	13,688	12,062	-11.9%	10,470	-13.2%	10,992	5.0%
July	6,807	6,864	0.8%	8,245	20.1%	6,610	-19.8%
Aug	3,707	3,960	6.8%	3,584	-9.5%	2,935	-18.1%
Sept	1,706	1,505	-11.8%	2,027	34.7%	1,579	-22.1%
Oct	428	568	32.7%	547	-3.7%	473	-13.5%
Nov	92	67	-27.2%	21	-68.7%	134	538.1%
Dec	16	7	-56.3%	0	-	24	-
Total	75,956	75,844	-1.0%	73,031	-3.7%	72,981	0.7%

¹Individuals buying resident licenses.