

RESULTS OF THE 2014-15 CONSERVATION PATRON LICENSE HOLDER SURVEY



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Executive Summary

Wisconsin's Conservation Patron License (CPL) offers a package of licenses, application fees, and access passes for \$165 that if purchased separately would cost significantly more. Documenting the activity use by CPL holders has been important for allocating revenues to agency programs. Understanding CPL activity use over time also provides insights into the degree to which the current package meets the needs of these customers. Documenting changes in use can help us understand changes in recreational demand across the broader population of Wisconsin outdoor users. In this report, we present findings from a survey of 2014-15 CPL holders.

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Introduction

We surveyed purchasers of the 2014-15 Conservation Patron License (CPL) to generate participation rates for the various activities included in the license. The survey marks the seventh iteration of this effort by the Department of Natural Resources (DNR). Previous surveys of CPL holders were conducted in 2012, 2010, 2007, 2005, 2004 and in 1993¹. To anticipate the detailed findings:

- Fifty-one percent of CPL holders exceeded the face value or broke even when dollar values for their individual activities and authorizations were totaled.
- The average CPL customer obtained \$161 worth of benefits, just shy of the \$165 cost of the CPL; for 20% of customers their total activities exceeded the \$200 value plateau.
- Convenience remains the most important reason people purchase the CPL.
- Gun-deer hunting (96%) and fishing (92%) remain the most utilized opportunities among CPL customers.
- Participation in numerous types of fishing, hunting, and property visitation was very similar to the 2012 results; notable exceptions being a decline in deer bow hunting (likely explained by the availability of crossbow hunting) and an overall increase in trapping.
- State fishery, wildlife, and natural areas are not common destinations for CPL holders. A small but notable minority did visit a property to pursue their hunting or nonconsumptive recreation interests.
- Of the social media resource options offered by the department, the website was the most frequented source for statewide information about hunting, fishing, and outdoor recreation. Very few CPL holders (5%) obtained their outdoor information from the DNR's Gov-delivery, Facebook page, or Twitter feed.
- CPL customers are a loyal group; three-fourths (76%) have bought a CPL in each of the past five years. Although CPL holders are aging, the mean age of 53 years old did not change.

Sampling Strategy

Results presented here come from a mailed questionnaire sent to holders of the 2014-15 Conservation Patron License. A sample of 800 CPL holders was randomly drawn from DNR license records. Eligibility for selection was restricted to Wisconsin residents at least 18 years old; junior CPL holders were excluded from the sampling.

¹ For a summary of past Conservation Patron License holder surveys, see the report *Trends in Outdoor Activity Participation by Conservation Patron License Holders, 1993-2012* available at <http://dnr.wi.gov/files/PDF/pubs/ss/SS1135.pdf>.

The Questionnaire

The questionnaire was developed by staff in the Bureau of Science Services under the direction of the department's Fish and Wildlife Management Team and in consultation with staff from the bureaus of Wildlife Management, Fisheries Management, Parks and Recreation, Law Enforcement, Customer and Outreach Services, Facilities and Lands, and Management and Budget, and the Office of Communication. Previous CPL surveys were used as a reference and revised to fit current research needs.

Survey Implementation

Standard mailed questionnaire techniques were used in the conduct of the survey. A maximum of three contacts was made with each license holder in our sample. These contacts included: 1) an initial questionnaire with a cover letter and a first-class stamped, return envelope; 2) a follow-up letter mailed to everyone as a "thank you" for returning the questionnaire or as a reminder to please complete and return it; and 3) a second questionnaire with a cover letter and a first-class stamped return envelope to all non-respondents. All correspondence was signed by Secretary Cathy Stepp. Eliminating four non-deliverable questionnaires and four from CPL holders that passed away reduced the sample size to 792. Usable questionnaires were returned by 660 respondents, yielding an 83% response rate.

The Bureau of Science Services conducted all tasks associated with the conduct of this survey. This included mail administration, data entry, data analyses, and reporting. The margin of error for the study is +/-3.7%.

Results

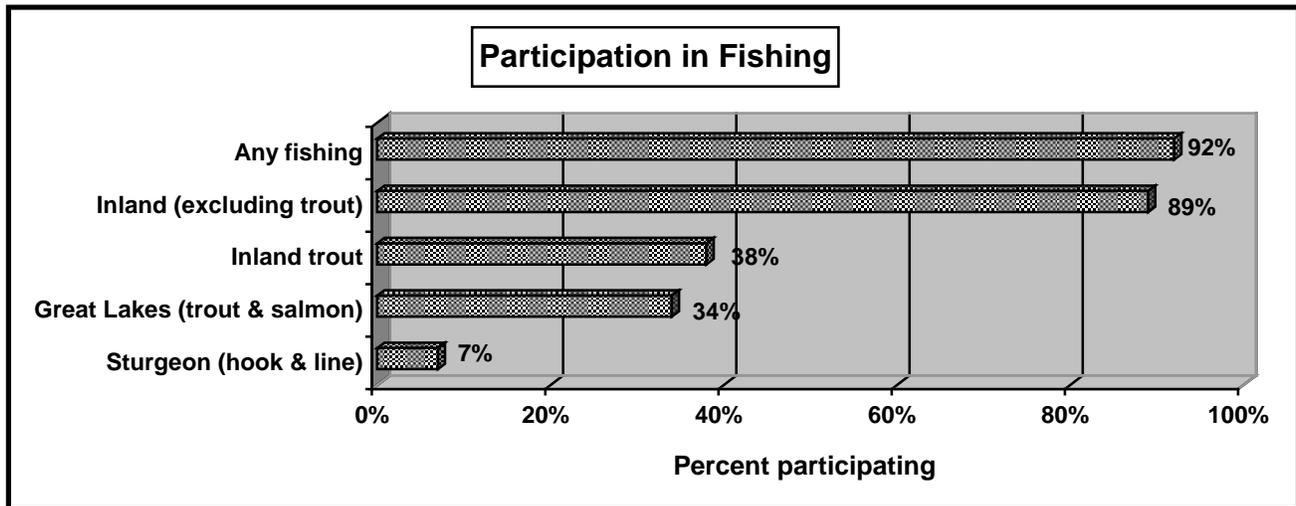


Figure 1: Participation in fishing.

Observations:

Nearly all CPL holders did some type of fishing in Wisconsin under their license; more than nine in ten CPL holders (92%) used the license to fish in Wisconsin.

Eight percent of the CPL holders did not fish in Wisconsin, an identical non-participation rate as found in 2012.

Inland fishing (other than for trout) received the greatest participation, with nearly nine in ten CPL holders (89%) doing so.

Nearly two-fifths (38%) of the CPL holders participated in inland trout fishing.

Just over one-third (34%) fished the Great Lakes for trout and salmon.

Just over one CPL holder in 20 (7%) fished for sturgeon with a hook and line.

Just over one-half (53%) participated in at least two types of fishing.

Participation rates for inland trout and Great Lakes trout and salmon fishing were nearly identical to those measured in 2012.

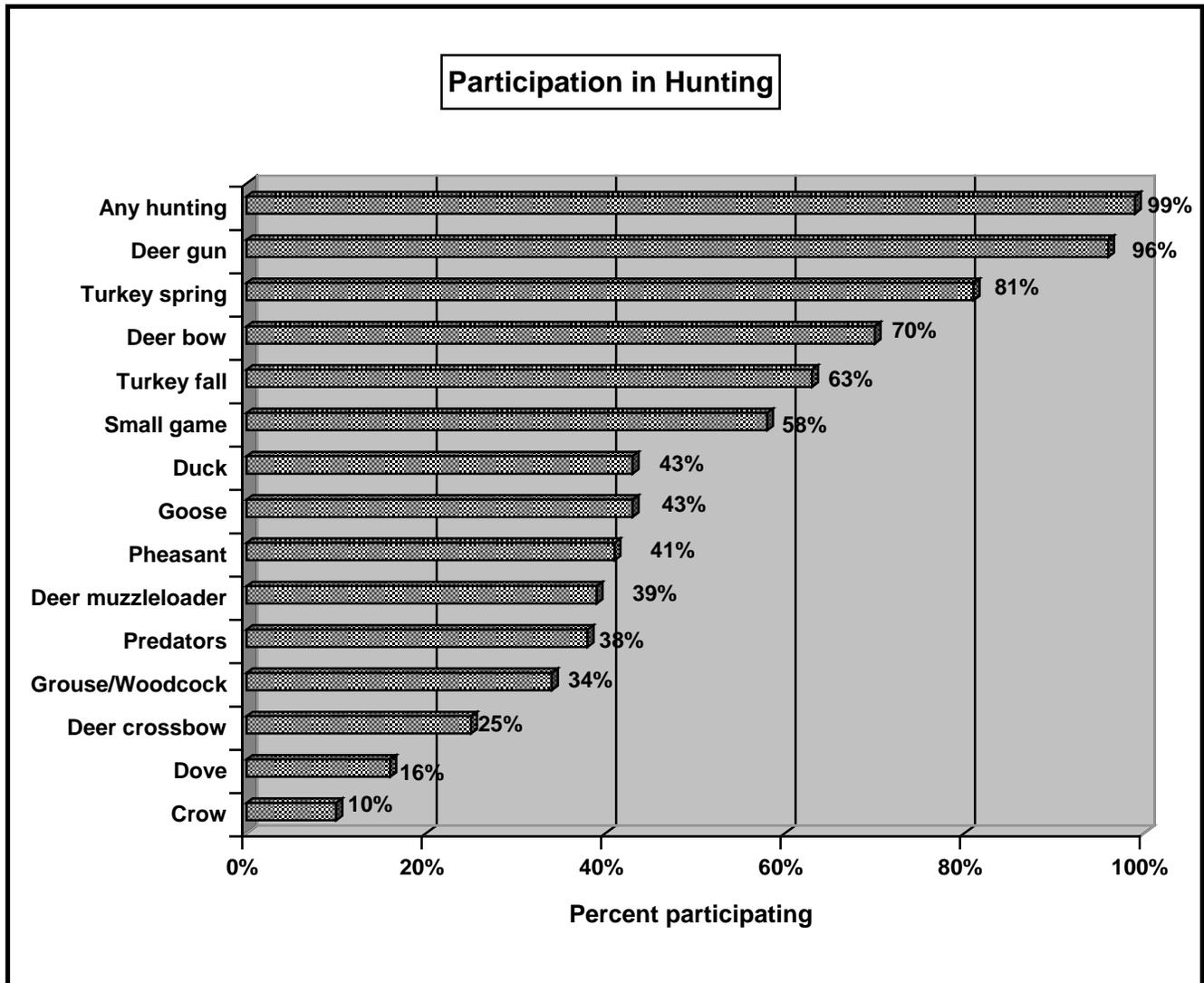


Figure 2: Participation in hunting.

Observations:

CPL holders are hunters – nearly everyone (99%) participated in some type of hunting.

Nearly all (96%) CPL holders went deer hunting with a gun in 2014.

Spring turkey hunting was the next most popular pursuit, attracting 81% of the CPL holders.

Seven in ten (70%) CPL holders pursued deer with a bow; a considerable decline from the 82% documented in 2012. Deer were pursued, however, with a crossbow by one-fourth (25%) of CPL holders. It is likely the decline in deer bow hunting reflects a segment of the population that switched to crossbow hunting, which became legal for everyone in 2014.

Fall turkey hunting was pursued by nearly two-thirds (63%) of the CPL holders.

Nearly two in five CPL holders (58%) went small game hunting.

Note: This response category replaced options of "squirrel" and "rabbit" used in previous surveys (2012 participation rates of 40% and 34%, respectively).

CPL holders participated in waterfowl hunting; duck and goose hunting were each participated in by 43% of the CPL holders. Overall, nearly one-half (49%) of CPL holders participated in one or both types of waterfowl hunting.

Approximately two-fifths went pheasant hunting (41%), deer muzzleloader hunting (39%), and predator (e.g., coyote, fox) hunting (38%).

Note: Predator hunting was a new response option, based in-part on unsolicited comments from past survey respondents.

Grouse or woodcock were hunted by one-third (34%) of CPL holders.

Approximately one CPL holder in six (16%) hunted doves while one in ten (10%) hunted crows.

Note: Bear pursuit, bear hunting, bobcat hunting and sharp-tailed grouse were not included with the CPL.

Of the 14 types of hunting, CPL holders participated in an average of 6.5 different types, nearly identical to that found in 2012.

Nearly two-thirds of the CPL holders (64%) participated in six or more types of hunting; 16% of the CPL holders participated in ten or more types of hunting. Both measures of participation are an increase from those found in 2012 and may better reflect the change in response options than an actual change in hunting participation.

Overall, participation rates in all types of hunting by CPL holders were relatively unchanged between 2012 and 2014-15, the one exception being the decline in deer bow hunting which is likely explained by the availability of crossbow hunting.

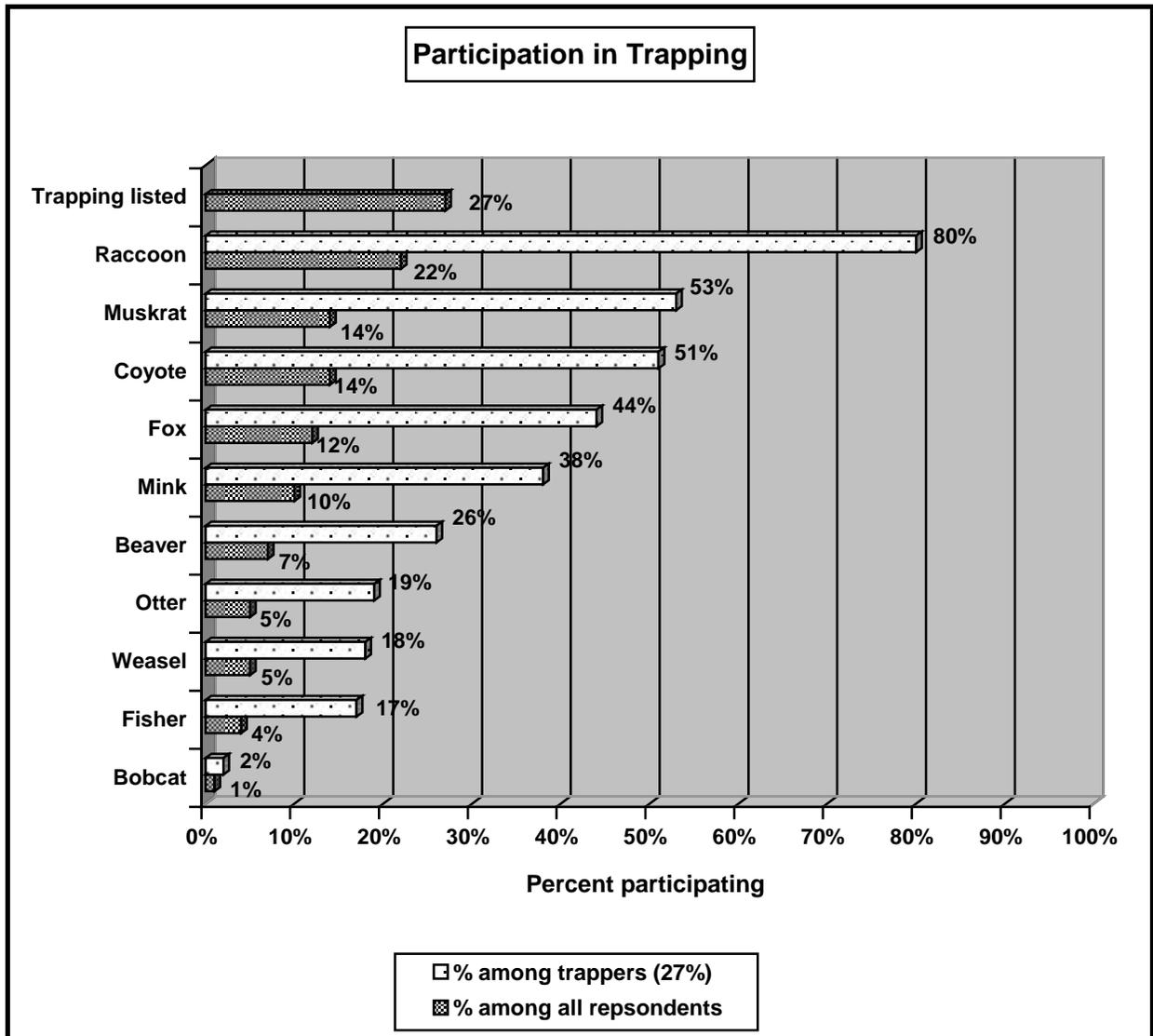


Figure 3: Participation in trapping.

Observations:

Trapping is a less common pursuit for CPL holders. Trapping activities also have a greater tendency than hunting or fishing to show variation between survey years owing to the effect of changes in fur prices and variations in the availability of harvest tags for closely regulated species like otter, fisher, and bobcats.

Slightly more than one-fourth (27%) of CPL holders did some type of trapping in 2014-15. This represents a 7% increase in trapping participation from that documented in 2012.

Raccoon trapping was the most common trapping activity, participated in by 22% of all CPL holders. Among those CPL holders who trapped, four out of five (80%) pursued raccoons.

Slightly more than one-half of CPL trappers pursued muskrats (53%) and coyotes (51%).

Approximately two CPL trappers in five pursued fox (44%) and mink (38%).

One-fourth of the CPL trappers set traps for beaver (26%).

Approximately one CPL trapper in five set traps for limited harvest species: otter (19%), weasels (18%), and fisher (17%). Bobcat, a species with a waiting list for harvest, was mentioned by only 2% of trappers.

Among CPL trappers, the mean number of species pursued was 3.5, exactly the same as measured in 2012.

Three CPL trappers in ten (30%) trapped five or more animals.

Overall, trapping participation increased from 2012 anywhere from 1% to 7% depending on species, with the exception of fisher which saw no change in participation.

One question asked about the respondent's intent to do any trapping. Its purpose was to explore the concern by some trappers that CPL holders grab tags with no or little intention of going trapping (though trapping program personnel inform trappers that permits are based on success ratios and unused tags are accounted for in subsequent years). Results are presented in Table 1.

Table 1: *Intention of trapping at time of license purchase.*

	Intention to trap at time of purchase?	
	Yes	No
	39%	61%
Did you trap?		
Yes	64%	2%
No	36%	98%

Observations:

At the time of license purchase, nearly two-fifths (39%) of CPL holders intended to do some trapping. This is an increase of 4% from 2012.

Of those who intended to trap, nearly two-thirds (64%) actually did some trapping. This is an increase of 9% from those who intended to trap in 2012.

Of the 61% who had no intention of trapping, 2% ended up doing some trapping, nearly identical to that found in 2012.

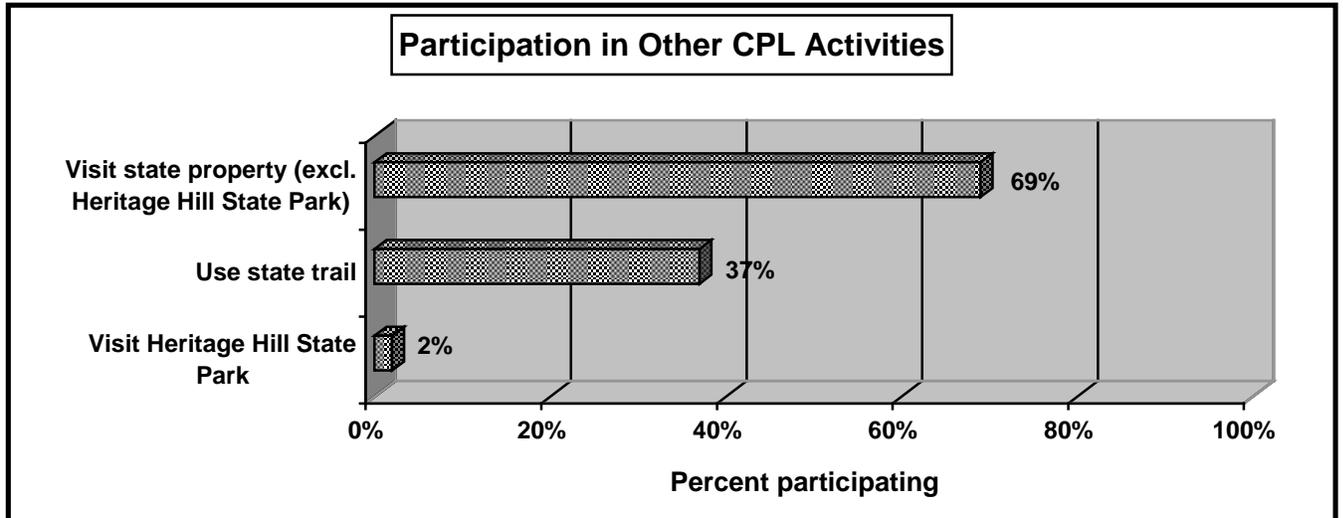


Figure 4: Participation in other Conservation Patron License activities.

Observations:

CPL holders are not just hunters and anglers – they visit our state properties; a smaller percentage make use of our state trails.

Nearly seven CPL holders in ten (69%) visited a state park, a state forest, or a state recreation area through the privilege afforded by the license, statistically unchanged from 2012.

CPL holders' use of state trails decreased slightly (3%) from 2012. Nearly four in ten (37%) of the respondents used a state trail for biking, hiking, cross-country skiing, or horseback riding.

As noted in prior studies, very few CPL holders (2%) visited Heritage Hill State Park.

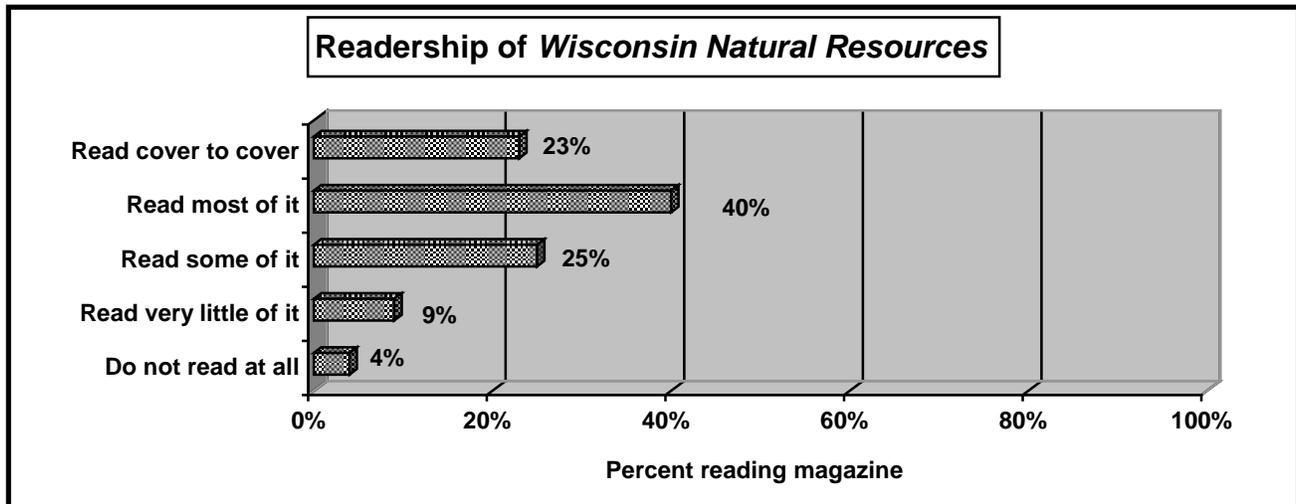


Figure 5: *Readership of Wisconsin Natural Resources magazine.*

Observations:

Similar to prior findings, CPL holders continue to be readers of the *Wisconsin Natural Resources* magazine.

Almost one-fourth of CPL holders (23%) read the magazine "cover to cover."

Two-thirds (65%) of CPL holders read "most" (40%) or "some" (25%) of the magazine.

Slightly more than one CPL holder in ten (13%) does not read the magazine or at most reads "very little of it."

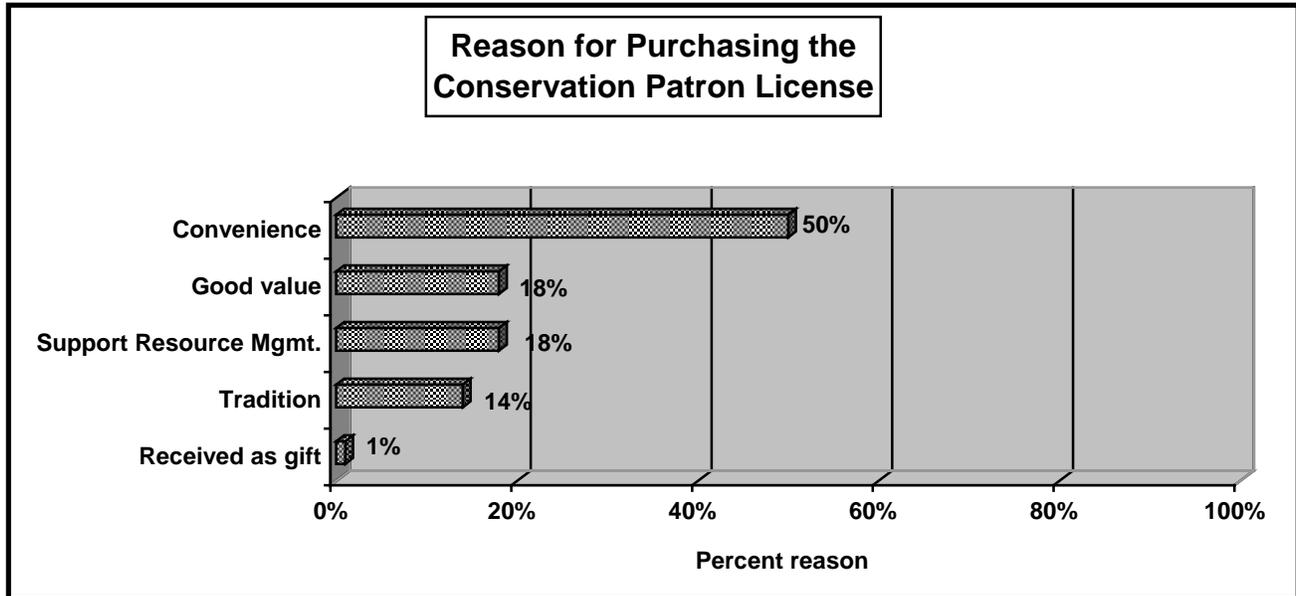


Figure 6: Primary reason for purchasing the Conservation Patron License.

Observations:

Convenience remains the most important reason that individuals purchase the CPL.

One-half (50%) of the CPL holders said the most important reason they purchase the license is for the convenience of possessing an all-inclusive license and the automatic application reminders.

Though convenience remains the primary reason for purchase, the finding is 5% lower than that documented in 2012. This decline in convenience as the primary reason for purchase was made up by an increase in good value. About one CPL holder in five (18%) said the primary reason s/he bought the CPL was because the license is a good value, an increase of 6% from 2012.

About one CPL holder in five (18%) bought the license because s/he wants to support resource management.

Slightly more than one CPL holder in ten (14%) has made the license a traditional purchase.

Very few CPL holders (1%) reported that they received the license as a gift.

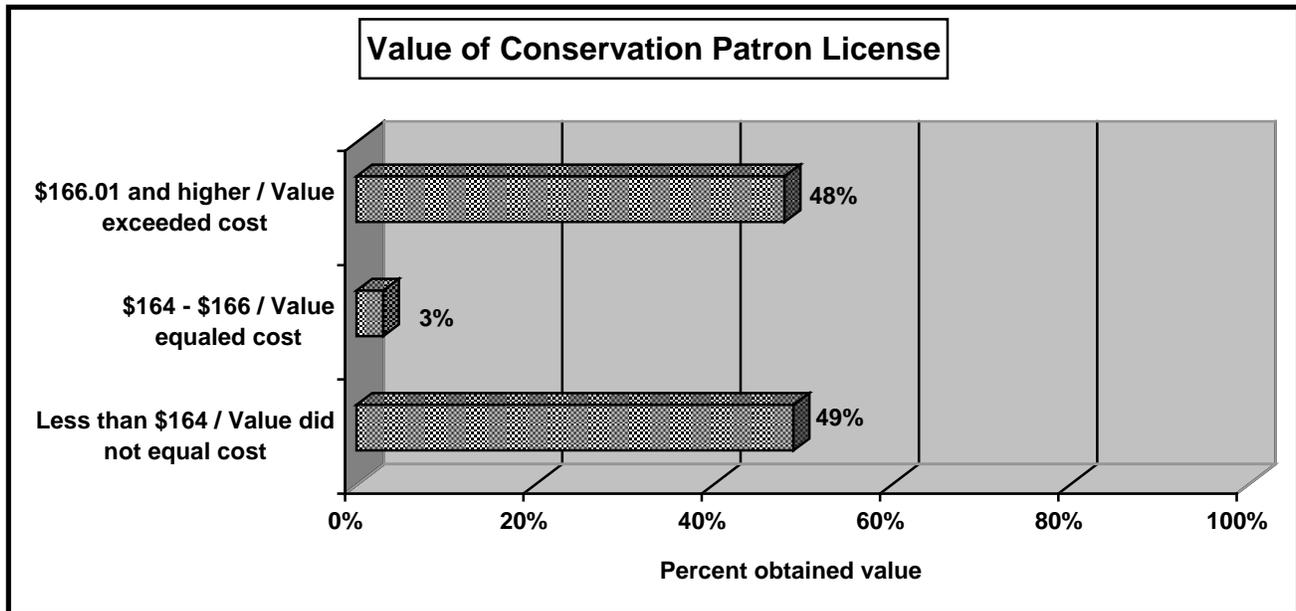


Figure 7: Value of the Conservation Patron License.

Observations:

Approximately one-half (48%) of CPL holders participated in enough activities to exceed the price (\$165) of the license. A nearly equal percentage of CPL holders (49%) had a participation value below the license price. Another 3% broke even, meaning the costs of purchasing each license or authorization separately would have equaled the CPL cost. These values are within one or two percentage points from those documented in 2012.

The average fee value of activities participated in during 2014-15 was \$161, identical to that found in 2012.

Nearly one in five CPL holders (17%) utilized \$200 or more worth of license and authorization privileges with savings ranging from \$35 to \$103.

Note: For analysis purposes, the CPL cost was expanded to a range of \$164 to \$166.99.

Table 2: Value of Conservation Patron License across six study years.

Actual cost of participation	2014-15	2012	2010	2007	2005	2004
Used more than face value of CPL	48%	50%	41%	51%	45%	43%
Broke even	3%	4%	3%	0%	2%	2%
Used less than face value of the CPL	49%	46%	55%	49%	53%	55%

Observations:

Results from six survey years have varied by about 10% in the monetary value received by CPL holders. The 48% whose participation in various authorizations exceeded the cost of having purchased those fees individually in 2014-15 represents a 7% increase from 2010's low mark on this measure. The 49% in 2014-15 that could have purchased individual licenses for less than the cost of the CPL represents the second lowest frequency since we began tracking it in 2004. Table 3 explains how customer motivation for purchasing the CPL relates to the value they received from the license.

Table 3: Reason for Conservation Patron License purchase by actual participation cost.

Actual cost of participation	Reason for CPL purchase			
	Good value	Convenience	Tradition	Support resource management
Less than \$164	40%	47%	59%	54%
\$164-\$166.99	3%	2%	25%	4%
\$167+	57%	51%	39%	41%

Observations:

As noted in 2012, the data support the hypothesis that those who purchased the CPL because they believe it to be a good value were most likely to participate in the most activities (i.e., required to purchase many alternative licenses).

More than one-half (57%) of those who said the primary reason for purchasing the CPL was because "it's a good value" did indeed receive a greater value through its purchase.

To a lesser degree, a slight majority (51%) of those who identified "convenience" as the primary reason for their purchase also received a value that exceeded the purchase price.

Those who purchased the CPL out of tradition or to support resource management were more likely to participate in fewer activities (59% and 54%, respectively); consistent with a hypothesis that exceeding the license value is not a primary motivation for purchase.

New Questions

The 2014-15 survey included several new questions. These included topics of recreation use on state fishery, wildlife, or natural areas, motorized recreation on public waters and public lands and license use compared to past years.

The 2012 survey asked if CPL holders visited a state fishery, wildlife, or natural area to pursue their fishing, hunting, and trapping interests. The current survey expanded the inquiry by including motorized recreation and wildlife watching, hiking, or photography (identified as nonconsumptive uses below). The results build upon department efforts to understand what public lands are being used for.

Table 4: Visitation at a DNR state fishery, wildlife, or natural area for fishing, hunting, trapping, motorized recreation, or wildlife watching, hiking, or photography (i.e. nonconsumptive uses).

Visitation at DNR property?	Fishing	Hunting	Trapping	Motorized recreation	Nonconsumptive uses
Yes	26%	40%	6%	11%	31%
No	67%	55%	93%	85%	66%
Unsure	8%	6%	2%	4%	4%

Observations:

A small but notable minority visited a state fishery, wildlife, or natural area to pursue hunting or nonconsumptive recreation interests.

One-fourth (26%) of CPL holders visited a property to go fishing.

Hunting was the most common reason for visiting a state fishery, wildlife, or natural area; two-fifths (40%) of CPL holders hunted on of these properties.

As one might expect, little trapping by CPL holders occurred at a state fishery, wildlife, or natural area; fewer than one CPL holder in ten (6%) reported doing so, representing a decline of 7% from 2012's participation rate of 13%.

Approximately one CPL holder in ten (11%) visited a property for motorized recreation.

Almost one-third of CPL holders (31%) visited a property for hiking, wildlife watching, or photography. Volunteered survey comments indicate that visitation may be prompted by a desire to exercise one's dog in a natural, uncrowded setting.

Overall, exactly one-half of CPL holders (50%) visited a state fishery, wildlife, or natural area for their outdoor pursuits.

A second new inquiry measured the use of various recreation vehicles on Wisconsin waters and public lands. Results are presented below (Figure 8).

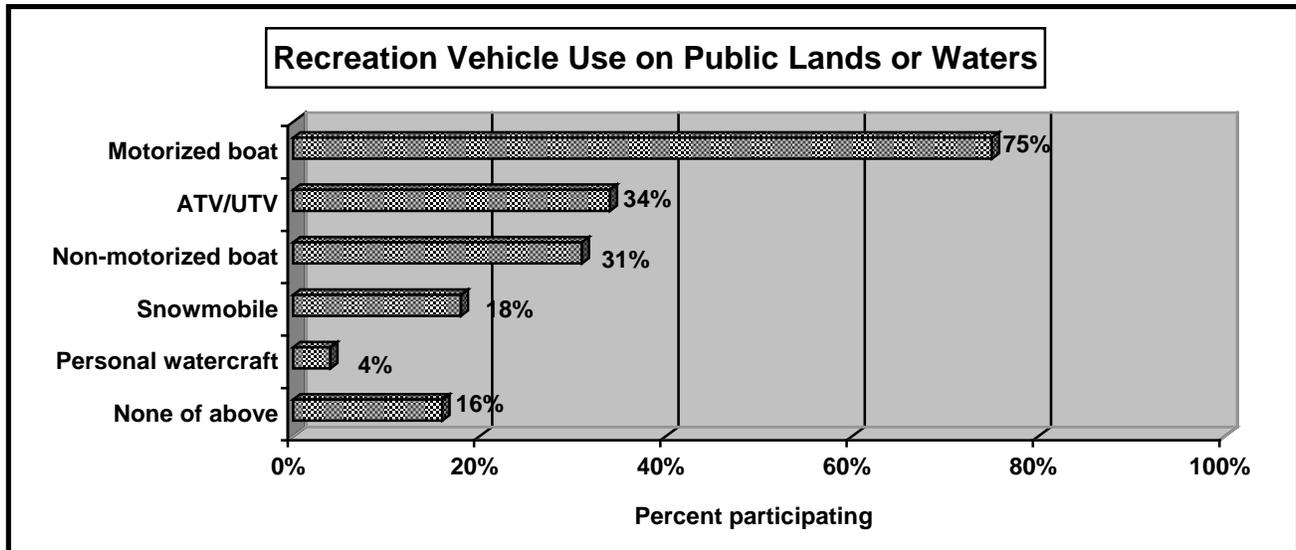


Figure 8: Recreation vehicle use on public lands and waters.

Observations:

Of the five recreation vehicle types, CPL holders most frequently used motorized boats.

Three-fourths (75%) of all CPL holders used a motorized boat on Wisconsin waters.

Motorized boat use was highly correlated with inland fishing. Of those who used a motorized boat on Wisconsin waters, more than nine in ten (96%) did some inland fishing in the state.

One-third (34%) of all CPL holders did some ATV/UTV riding on Wisconsin public lands.

Three CPL holders in ten (31%) recreated on our state's waters in a non-motorized boat.

Slightly less than one-fifth (18%) of CPL holders rode a snowmobile on our public lands and few CPL holders (4%) used a personal watercraft on our waters, perhaps an indication of an aging CPL population.

Overall, more than eight CPL holders in ten (84%) used some type of recreation vehicle on our state's waters and public lands.

An additional new question asked: "We realize you may visit many areas of the state for your outdoor pursuits, but in which county would you say you do **most** of your outdoor recreation"? Results show that a majority of outdoor recreation occurs in the southern half of the state (delineated by Highway 10), perhaps an effect of population distribution. More than one-half (57%) of CPL holders identified a southern county as their primary recreation destination while just more than two-fifths (43%) identified a northern county.

The fourth new inquiry establishes a benchmark for license use from which future study results can be compared. Results are presented in Figure 9.

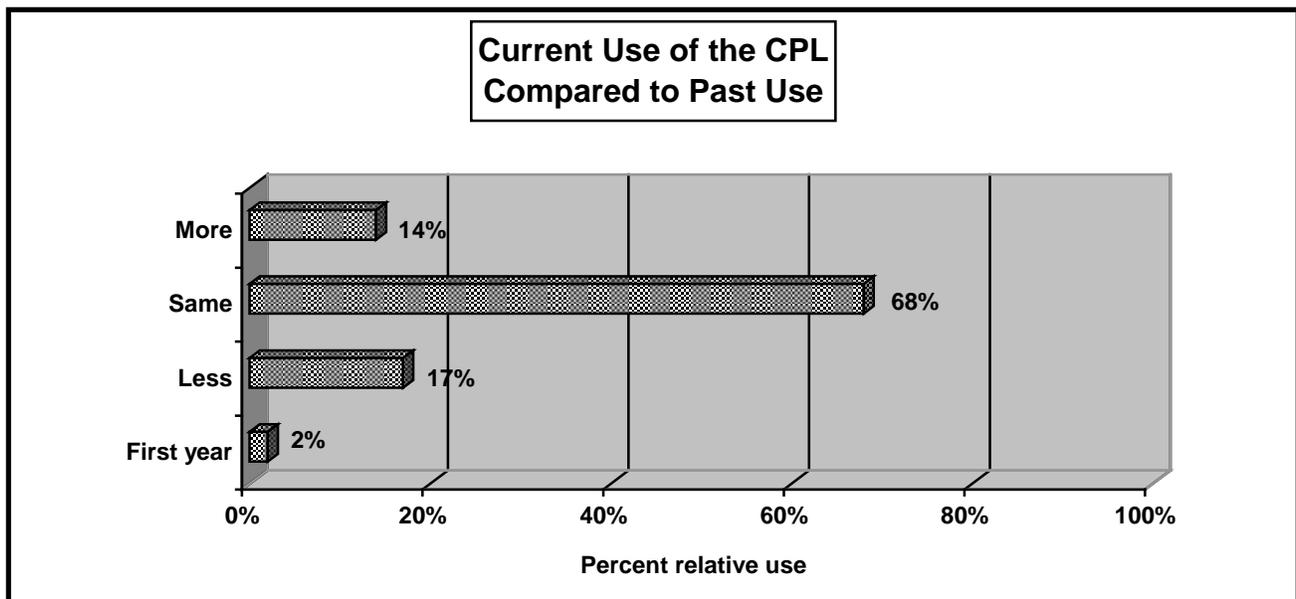


Figure 9: Conservation Patron License holder current use of the license relative to prior use.

Observations:

The modal response for license use was "about the same as I always have."

Two-thirds (68%) of CPL holders said they are using the license with similar frequency as in past years.

A nearly equal number of CPL holders indicated they are using their license either more or less frequently than in past years, with a slight edge indicating less use now; 14% said they are using the license more now while 17% said they are using the license less frequently.

Few CPL holders indicated that 2014-15 was the first time they purchased the license.

The final new inquiry explored CPL holder use of web-based resources to obtain information about hunting, fishing and outdoor recreation in Wisconsin. Results are found in Figure 10.

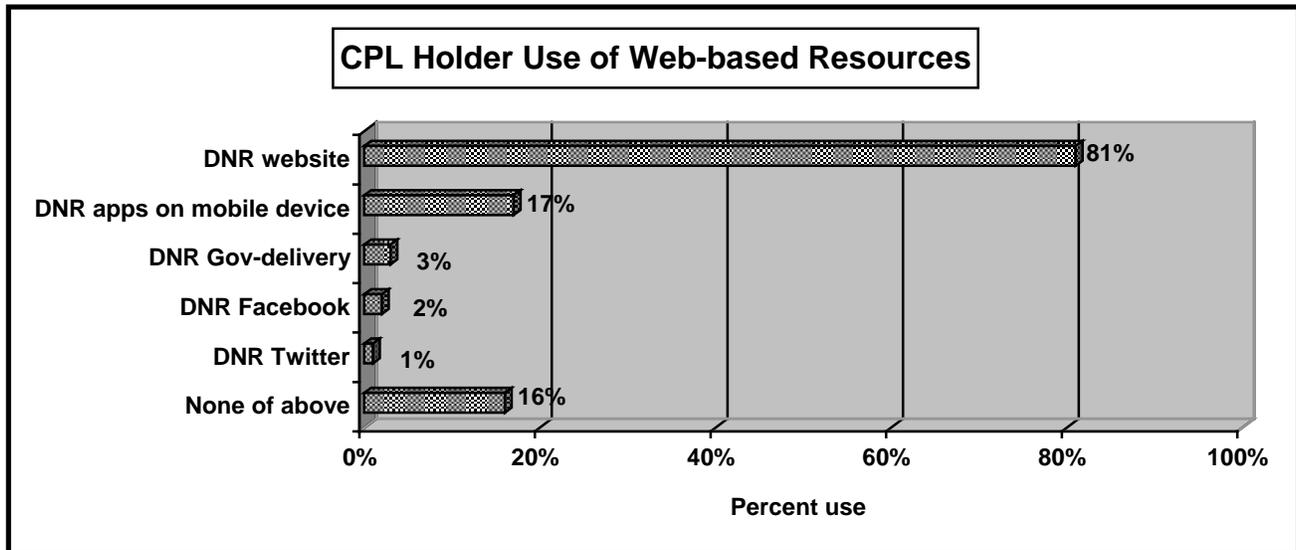


Figure 10: Conservation Patron License holder use of web-based resources for information on hunting, fishing, and outdoor recreation in Wisconsin.

Observations:

The department's website was the most frequented web-based resource for information about hunting, fishing and outdoor recreation in the state. This finding has been consistent across a number of department survey efforts.

A large majority of 81% of CPL holders visited the department's website, far surpassing the combined use of all other digital-based resources.

A small minority of 17% of CPL holders turned to the DNR app on a mobile device (e.g., Smart phone) to obtain their outdoor information.

Very few CPL holders (5%) indicated they obtained their outdoor information from the DNR's Gov-delivery, Facebook page, or Twitter feed.

Overall, more than eight CPL holders in ten (84%) obtained information about hunting, fishing and outdoor recreation in the state from a web-based resource.

Respondent Background

Table 5: Respondent purchase history of Conservation Patron License.

Purchase history	Percent responding
Purchase CPL prior to 2014	98%
Purchase CPL with past 5 years	95%
Purchase in 2013	93%
Purchase in 2012	89%
Purchase in 2011	83%
Purchase in 2010	80%
Purchase in 2009	78%
Purchase all 5 preceding years	76%

Observations:

CPL holders are loyal customers of the DNR.

Nearly all (98%) had purchased a CPL prior to 2014 and 95% had purchased the license within the past five years.

Three-fourths of the CPL holders (76%) said they purchased the license each of the preceding five years. This represents a 5% decline in annual purchase behavior from the 2012 survey and equal to that found in 2010.

Table 6: Respondent background characteristics.

Respondent characteristic	Percent responding
Gender	
Male	98%
Female	2%
Age	
Under 30	7%
30 – 39	9%
40 – 49	19%
50 – 59	29%
60 and older	35%
Mean age	53 years old
County residence (Hwy 10)	
North	32%
South	68%
Primary recreation county (Hwy 10)	
North	43%
South	57%
Endangered Resources license plate	
Yes	1%
No	99%

Observations:

Nearly all (98%) CPL holders are male.

The mean age of CPL holders remained stable at 53 years old, maintaining an increase of nearly three years since 2010.

One in six CPL holders (16%) are under 40 years old.

Nearly two-thirds of the license holders (64%) are at least 50 years old.

CPL ownership continues to be dominated by people living in the southern half of the state (delineated by Highway 10), most likely an effect of population distribution. Approximately two-thirds (68%) of CPL holders reside in the southern half of the state and one-third (32%) reside in the northern half.

Although a majority of CPL holders reside in and recreate in a southern county, there is a slight shift in the population distribution when the two county measures are examined. Nearly one-fifth (19%) of the CPL holders residing in a southern county most frequently travel to a northern county for their outdoor recreation. A significantly smaller proportion (7%) of northern county residents identified a southern county as their primary recreation destination ($p < 0.000$).

CPL holders are not owners of an Endangered Resources license plate. A barely measurable 1% indicated that they have an Endangered Resources plate on at least one of their vehicles, a finding identical to that of 2012.

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