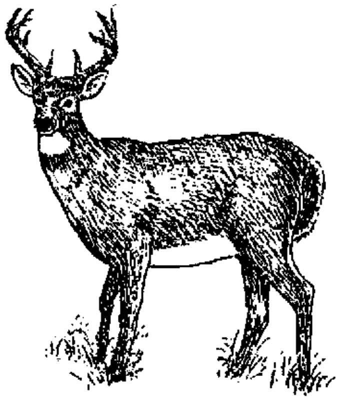
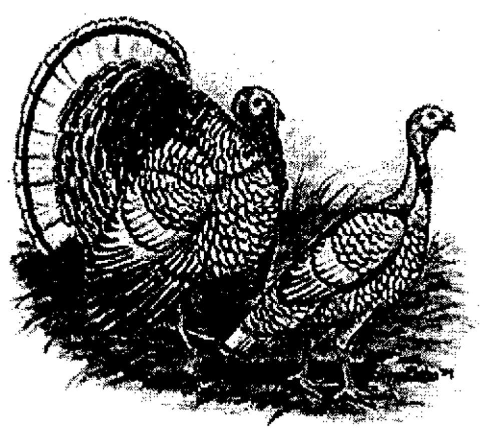


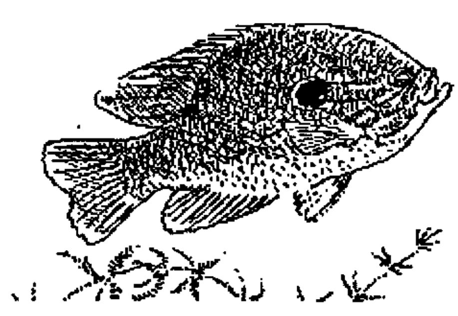
Review of Fishing and Hunting Licenses and Permits Issued by The Fish & Wildlife Conservation Commission

Interim Project

Final Report Prepared By:
Committee on Water and Resource Management
Florida House of Representatives

September 1999





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SUMMARY

The Fish & Wildlife Conservation Commission (FWCC) is responsible for managing Florida's freshwater aquatic life, wildlife, and marine life. This new agency was created by the enactment of Chapter 99-245, Laws of Florida, during the 1999 Regular Legislative Session and is largely funded through hunting and fishing licenses (both freshwater and saltwater), and through vessel registration fees, specialty license plates, federal grants, assorted hunting and fishing specialty tags, stamps, and permits, and general revenue provided by the state. Beginning with the year 2000 Regular Session, the Legislature must review the fees for licenses and permits issued by the FWCC, and also must review the license and permit exemptions authorized in Chapter 372, Florida Statutes.

The FWCC's predecessor, the Game & Fresh Water Fish Commission (GFC) was established by constitutional amendment in 1943 and charged with issuing more than 50 different types of hunting and freshwater fishing licenses, including commercial licenses such as Wildlife Exhibitors, Fresh Water Fish Dealers, and Alligator Trappers. In 1996, the GFC was authorized to issue saltwater recreational fishing licenses.

The GFC's State Game Trust Fund received revenues from the sale of hunting and freshwater fishing licenses. As early as 1993, the GFC was facing a shortfall in the trust fund due to declining sales of hunting permits and freshwater fishing licenses. Revenues from the sale of saltwater recreational fishing licenses in Florida have been deposited into the Marine Resources Conservation Trust Fund at DEP to be used for enhancements to saltwater recreational fishing, including law enforcement, resource protection, and conservation efforts. Effective July 1, 1999, the State Game Trust Fund and the Marine Resources Conservation Trust Fund have been transferred to the FWCC.

Overall, Florida is part of a national trend that indicates declining interest in recreational pursuits such as hunting and fishing. From 1991 through 1997, the sale of annual resident freshwater fishing licenses in Florida decreased by more than 15 percent, and the sale of annual resident hunting permits decreased by more than 45 percent. However, from 1991 through 1997, the sale of annual resident saltwater fishing licenses increased by approximately 10 percent. The fees for annual resident hunting and fishing licenses have not been raised in 10 years.

To determine where Florida stands nationally and to determine how the Legislature can assist the FWCC in the implementation of its constitutionally mandated activities, an analysis of hunting and fishing trends in other states is important. Comparisons of fees for hunting and fishing permits and licenses in other coastal states, states of similar size and with similar populations, and comparisons with states having a heavy tourism base can provide information that will allow the Legislature to assist the FWCC in addressing its continuing revenue shortfalls.

Historical Background on Hunting and Fishing Regulation in Florida

In 1927, the Florida Legislature enacted Chapter 11838, Laws of Florida, which created the Department of Game and Fresh Water Fish and the Office of the State Game Commissioner, whose mission was to enforce all laws of the state relating to game, non-game birds, freshwater fish, and fur-bearing animals. The Legislature also created a Wild Life Conservation Commission to assist the State Game Commissioner and provided fees for hunting, trapping and fishing licenses and permits. The State Game Commissioner also was vested with the authority to acquire in the name of the state lands and waters suitable for the protection and propagation of wildlife and fish, and for other purposes.

The 1929 Legislature enacted Chapter 139644, Laws of Florida, creating a new Department of Game & Fresh Water Fish and a new Office of the State Game Commissioner. This law did not provide for a Wild Life Conservation Commission, but for four deputy game commissioners, one from each congressional district. While the Wild Life Conservation Commission members of 1927 were appointed by the Governor, the deputy game commissioners of the 1929 law were appointed by the State Game Commissioner. The Commissioner and the deputy commissioners also were vested with the authority to enforce all Florida laws relating to game, non-game birds, freshwater fish, and fur-bearing animals.

These entities were combined into the Game & Fresh Water Fish Commission (GFC) pursuant to a constitutional amendment in 1943. By 1999, the GFC was responsible for issuing more than 50 different types of hunting and freshwater fishing licenses, including commercial licenses such as Wildlife Exhibitors, Fresh Water Fish Dealers and Alligator Trappers. The GFC's two primary funding sources were revenues from the sale of hunting and freshwater fishing licenses and permits, with the proceeds deposited into the State Game Trust Fund, and general revenue appropriated by the Legislature.

In November 1998, Florida voters passed Revision 5 to the State Constitution by a 72 percent to 28 percent margin to create the Fish and Wildlife Conservation Commission (FWCC) by merging the GFC and the MFC into one entity. During the 1999 Regular Session, the Legislature passed the CS/CS/SB 864 (Chapter 99-245, Laws of Florida), which implemented the constitutional amendment. The new FWCC is largely funded through hunting and fishing licenses (both freshwater and saltwater), and through vessel registration fees, specialty license plates, federal grants, assorted hunting and fishing specialty tags, stamps, and permits, and general revenue provided by the state. Revenues from the sale of saltwater licenses, tags and permits -- both recreational and commercial -- are deposited into the Marine Resources Conservation Trust Fund to be used for enhancements to saltwater fishing, including law enforcement, resource protection, and conservation efforts.

Effective July 1, 1999, the State Game Trust Fund and the Marine Resources Conservation Trust Fund were transferred to the FWCC.

The State Game Trust Fund was created to fund the operations and administrative expenses of the GFC and is the depository for revenues from the sale of licenses and permits issued by the

Commission. However, a review of the Commission's budget shows that general revenues appropriated by the Legislature have been increasing. In FY 1989-1990, the GFC's budget totaled $47.6 million of which $19.5 million was general revenue. In FY 1998-1999, the total budget was $86.2 million of which $29.5 million was general revenue. In that same ten year span, the Commission grew by only 83 FTEs.

This larger piece of the general revenue pie can be traced in part to the declining sales of hunting and fishing licenses and permits. As sales decreased, operational dollars available to the GFC decreased. Information provided by the FWCC shows that in FY 1997-98, the cost of administering the GFC's fisheries and wildlife programs was $14.4 million while fishing and hunting license revenues generated $12.4 million. The Division of Law Enforcement, with a budget that was almost entirely general revenue, was the GFC's biggest division and received the majority of the GFC's general revenue funding.

General Information on Licenses Issued by the FWCC

The FWCC is responsible for issuing all hunting, freshwater fishing, and saltwater fishing licenses in Florida. Historical data provided by the Commission shows that beginning with the 1987-1988 fiscal year, the sale of recreational freshwater fishing and hunting licenses and permits began to decline. From 1987 through 1997, the sale of annual resident freshwater fishing licenses in Florida decreased by more than 25 percent. During the same time period, the sale of annual resident hunting permits decreased by 28 percent.

Recreational saltwater fishing licenses were created by the Legislature in 1989. To date, more than 7 million individual saltwater recreational licenses have been sold for a total of $78,157,592 in revenues. Unlike hunting and freshwater fishing licenses, the sale of annual resident saltwater fishing licenses has increased by approximately 10 percent since fiscal year 1990-1991, the first full year of implementation.

The FWCC also issues commercial hunting and fishing permits. (Prior to creation of the FWCC, the GFC issued commercial hunting and freshwater fishing permits, and DEP issued commercial saltwater fishing permits.) Traditionally, these licenses include game farm permits and fur dealer permits which were authorized in the 1929 act and which still cost the same as they did in 1929. Other licenses authorized in 1929 include freshwater fish dealers and whole fish dealers.

The FWCC permits the possession and exhibition of poisonous or venomous reptiles for an annual fee of $5 which was authorized in 1953. Private hunting preserve operations permits are issued by the FWCC for a fee of $25 as authorized in 1959. Commercial private hunting preserves are licensed by the FWCC for a fee of $500 as authorized in 1989, and private collectors of Class II wildlife, such as ocelots, wolves, badgers, and certain types of monkeys, may obtain a possession permit for a fee of $100 as authorized in 1974.

Additional licenses and fees created to provide revenue for the GFC include a wildlife exhibitors license created in 1967 and issued to entities such as Walt Disney World, SeaWorld, and Busch Gardens for a fee for $25 annually. Smaller exhibitors of 10 or less animals are charged $5 annually. The agency estimates that field inspections of the permitted wildlife facilities costs approximately $100 while administrative costs are about $10 per permit. Other types of captive wildlife facilities include businesses such as fish dealers, alligator farms, wildlife importers/exporters, pet shops, exotic bird dealers, and reptile dealers. During the 1997-1998 fiscal year, the former GFC issued 3,581 large wildlife exhibitor permits and 1,196 small wildlife exhibitor permits. The wildlife exhibitor license fees have not changed since their creation in 1967.

In 1987, the Legislature authorized the former GFC to commercially license alligator trappers and created approximately fourteen types of permits and licenses for the trapping, farming, and harvesting of alligator eggs and hides. The fees, varying from $2 for a private egg permit to $1000 for a Nonresident Alligator Trapper Permit, have remained unchanged since the creation of the program.

In 1989, the Legislature created temporary hunting and fishing permits for non-residents of the state, and the big daddy of all fishing licenses, the recreational saltwater fishing license. In 1991, the Legislature created twelve types of lifetime licenses for hunting and fishing along with 5-year licenses for freshwater and saltwater fishing. Lifetime licenses range from $125 to $1,000; five-year licenses cost $55-$60, annual resident fishing licenses for both freshwater and saltwater cost $12, and an annual resident hunting permit costs $11. None of these fees have been raised in the last 10 years.

In FY 1997-1998:

- 9,419 lifetime and 5-year licenses were sold, generating approximately $819,000 in revenue;

- 397,974 annual resident freshwater fishing licenses were sold for $4.7 million in revenue;

- 539,955 annual resident saltwater fishing licenses raised $6.4 million in revenue; and

- 104,175 annual resident hunting permits generated $1.1 million in revenue.

While specialty permits such as archery permits, muzzle loading permits, waterfowl permits, and turkey permits vary in price, residents and non-residents of Florida pay the same fee for those permits which altogether generated approximately $450,000 in fiscal year 1997-1998. Specialty fishing tags such as snook permits, crawfish permits, and tarpon tags raised about $740,000 during that same time.

Revenues from the sale of 5-year licenses are deposited into the Dedicated License Trust Fund created in 1991. The FWCC is entitled to use one-fifth of the total proceeds deposited into the fund and all interest earned by the fund. Revenues from the sale of lifetime licenses, with the exception of revenues from the sale of saltwater lifetime licenses, are deposited into the Lifetime Fish and Wildlife Trust Fund created in 1991 to be used in support of state fish and wildlife conservation programs. The State Game Trust Fund originated in 1929 as the State Game Fund and receives the majority of revenues generated from the sale of licenses and permits, including specialty tags, to fund the operations of the FWCC.

License Exemptions

As early as 1927, chapter laws contained exemptions from fishing license requirements for persons fishing within the county of residence, and for children under the age of 15. Resident Confederate veterans who received a pension from the state were exempt from getting licenses for fishing, hunting, or trapping. In 1929, the exemptions were expanded to include residents fishing with a hook and line, a rod and reel, a bob, spinner or troll; residents hunting on their homestead property, and resident minors taking game on the homestead of their parents.

Current hunting and freshwater fishing exemptions in Florida include any child under the age of 16 years of age; any person hunting or fishing in the county of residence on personal homestead property ; any Armed Forces Florida resident stationed outside of the state; any resident fishing with a cane pole; persons fishing in certain types of fish ponds; persons who have been accepted as developmental services clients by the Department of Children and Family Services (DCFS); residents 65 years of age or older; and totally and permanently disabled residents as certified by the U.S. Department of Veterans Affairs, the U.S. Social Security Administration, any branch of the Armed Forces, and certain physicians statements. Saltwater fishing exemptions include all of the above and persons fishing in saltwater from land or from structures fixed to land.

Resident population statistics provided by the U.S. Census Bureau show that in 1997, Florida's population was 14.6 million persons, and in 1999, Florida's population surpassed 15 million. Using 1997 data, Florida had 2.7 million residents aged 65 years or older (approximately 18.5% of the total population), and 3.4 million residents aged 17 years or younger (approximately 24% of the total population). Based on these statistics, approximately 42.5 percent of Florida's resident population was not required to have a license for hunting and fishing. This figure does not include licenses issued under the disability exemption criteria which the GFC estimated at 2,857 in FY 1997-1998.

Using an average cost of $11.66 for an annual license and assuming only one-fourth of the persons exempt would have purchased any annual license if required to do so, these exemptions cost the GFC approximately $18 million in revenue in 1997:

- 14,600,000 x 42.5% = 6,205,000
- 6,205,000 x 25% = 1,551,250
- 1,551,250 x $11.66 = $18,087,575

Florida's Hunting and Fishing License Fees

In fiscal year 1997-1998, Florida's biggest hunting and fishing license revenue producers were:

Resident Annual Freshwater Fishing Permit	$12.00	$ 4,775,688
Non-Resident Annual Freshwater Fishing Permit	$30.00	$ 1,310,338
Resident Annual Saltwater Fishing Permit	$12.00	$ 6,612,876
Non-Resident Annual Saltwater Fishing Permit	$30.00	$ 2,388,960
Resident Annual Hunting License	$11.00	$ 1,145,936
Annual Management Area Permit	$25.00	$ 1,403,475

Earlier Reviews of Hunting and Fishing License Activity in Florida

Office of Program Policy Analysis and Government Accountability (OPPAGA) - Review of GFC Funding Issues / Report No. 94-40

As early as 1993, the former GFC projected a shortage in the State Game Trust Fund due to general revenue reductions implemented by the Legislature, and unexpected reductions in revenue due to decreased sales of licenses and permits. For fiscal year 1994-1995, the former GFC estimated it would need an additional $5.4 million in revenue to avoid a funding shortfall.

On March 8, 1995, OPPAGA released a report to the Senate President, the House Speaker, and the Joint Legislative Auditing Committee outlining the findings of a performance audit of the former GFC. In an effort to determine permanent funding solutions to the shortage in the State Game Trust Fund, OPPAGA recommended the following:

- Reducing or eliminating expenditures for research;
- Merging the GFC with DEP;
- Eliminating private leases for Wildlife Management Areas;
- Implementation of a daily use fee within Wildlife Management Areas; and
- Implementation of a hunting and fishing license fee for persons older than 64 years of age.

OPPAGA's report and recommendations did not include raising any of the current fees for hunting or fishing licenses or permits.

Although the former GFC agreed that implementing a hunting and fishing license for persons 65 years of age and older would raise additional revenues in light of Florida's currently elder population, it noted a lack of support from the Legislature and from the general public at that time.

The 1995 Responsive Management Report

To understand the reasons behind declining sales of hunting and fishing licenses as identified in the OPPAGA report, the former GFC commissioned Responsive Management, a public opinion polling and survey research firm out of Virginia that specializes in fisheries, wildlife, natural resource, outdoor recreation, and other environmental issues.

After surveying 271 active, 175 inactive, and 27 ex-hunters, Responsive Management was able to conclude the following:

- All three groups of hunters expressed strong dissatisfaction with hunting due to a lack of access to hunting areas.

- All three groups surveyed expressed dissatisfaction with the number of hunting sites available.

- Ex-hunters had stopped hunting due to the behavior of other hunters, the number of hunters in any given field, and not enough access to hunting sites. Their dissatisfaction with all three factors was equally spread.

- Very few of any group were dissatisfied with the cost of a hunting license.

- Most active hunters in Florida were satisfied with the experience, although 48 percent were only “somewhat satisfied”.

The results of the focus group meetings indicated the following:

- Development in Florida has caused a rapid loss of good hunting lands, including the development of agriculture.

- Wildlife Management Areas had reduced hunting quality because of overcrowded conditions and bad hunting behavior.

- Many of the active hunting participants were hunting out-of-state.

As for recreational fishing, the GFC’s mail survey of 695 1990-1991 Florida’s freshwater anglers determined the following:

- Fewer than 50 percent of the 1990-1991 license holders held a current freshwater fishing license although some of the former license holders were now exempt due to age or disability.

- Most former license holders stated that lack of fishing time was the reason they didn’t have a current license.

- Other factors included poor fishing, the costs of a license ($12 annually in 1995), a preference for saltwater fishing, and too many rules to follow.

The results of the fishing focus groups meetings indicated the following:

- Fishing experiences were only rated as fair instead of excellent or good.

- Anglers expressed dissatisfaction with catching smaller fish, interference from jetskiers, and poor management of the resource.

- The decline in fish population was attributed to pollution and development.

- More enforcement of boating speed regulations and regulation of personal watercraft were priorities.

Responsive Management's survey indicated that the lack of participation in hunting and fishing in Florida was based on resource considerations and not a general lack of interest. Recommendations included items such as improving access to and creating more hunting opportunities, improving safety factors including hunter education so that hunters feel safer, and improved quality and quantity of wildlife for hunters in Wildlife Management Areas. Recommendations for the improvement of fishing opportunities included stock enhancement, improved water quality, and better management of other recreational users to prevent interference in fishing habitat areas. None of the recommendations suggested a reduction in license or permit fees.

Legislative Implementation of OPPAGA and Responsive Management Recommendations

The 1996 Legislature adopted several measures designed to assist the former GFC with its funding shortfall. The Department of Highway Safety & Motor Vehicles was authorized to develop a largemouth bass specialty license plate along with a $25 annual user fee. The proceeds from the user fee, estimated at $500,000 annually, were to be deposited into the State Game Trust Fund. In the highest year of sales since implementation (1998), the license plate generated $398,000 in revenue.

The Legislature also created a special use permit for limited entry hunting and fishing activities of up to $100 per day but not more than $250 per week, along with a $10 application fee. In fiscal year 1997-1998, these Special Opportunity Hunt Permits generated about $11,500 in revenue. No Special Opportunity Fishing Permits were issued.

The former GFC was authorized to charge a short-term use fee for lands it owns, manages, or leases. In addition to the $25 Management Area Permit annual fee, the former GFC created a one-day Management Area Permit with sliding fees based on the number of persons in a party. For fiscal year 1997-1998, the 1-day permit generated $80,300 in revenue.

In addition, the Legislature transferred the authority to sell recreational saltwater fishing licenses from the DEP to the GFC and raised the issuance fee for all freshwater fishing, hunting licenses and management area permits from $1 to $1.50. The additional 50 cents was to be retained by the GFC and was estimated to raise $412,000 annually. For fiscal year 1997-1998, the additional fee raised $396,602.

Also in 1996, the Legislature authorized the GFC to issue a 3-day, nonresident freshwater fishing license at a cost of $5 per license in addition to the non-resident, 7-day license which was being sold at that time. In fiscal year 1997-1998, the first full year of sales, the 3-day license raised $385,000 in revenue.

Despite actions taken by the 1996 Legislature to shore up the State Game Trust Fund, including the authorization of additional fees, in a follow-up report issued on March 3, 1997, OPPAGA noted that the State Game Trust Fund faced a shortfall of $3 million for fiscal year 1997-1998. While the report did not speak specifically to any of the 1996 changes, revenue estimates for almost every area did not meet expectations.

And in a review of the Responsive Management survey, it is important to note that although survey respondents were asked about hunting and fishing deficiencies, they were not asked to suggest ways of improving those deficiencies. More specifically, Responsive Management did not ask survey respondents if they would be willing to pay increased fees if it meant enhanced access to enhanced resources.

To determine where Florida stands nationally and to determine how the Legislature can assist the FWCC in the implementation of its constitutionally mandated activities, an analysis of hunting and fishing trends in other states is important. Comparisons of fees for hunting and fishing permits and licenses in other coastal states, states of similar size and with similar populations, and comparisons with states having a heavy tourism base can provide information that will allow the Legislature to assist the FWCC in addressing its continuing revenue shortfalls.

1999 Legislative Survey

To prepare the 1999 Legislature for the required fee review, staff of the House Water & Resource Management Committee prepared a survey and a sample spread sheet which was mailed to 67 other state agencies nationwide. In addition to a 10-year history of hunting and fishing license fees and permits, the survey asked for specific information with regard to commercial hunting and fishing fees, hunting fees for wildlife management areas leased or owned by the responding state, examples of fishing and hunting trends within the responding state, and types of exemptions for hunting and fishing licenses and permits.

Because some states have separate fish and wildlife agencies, varied responses were received from thirty-six states. Not all of the respondents answered all of the questions for a variety of reasons: some states had only freshwater and hunting resources, some states did not have significant commercial hunting or fishing resources, some states only returned one portion of the survey. In some instances, the survey questions were completed and returned but the license and permits fee history was incomplete.

In the survey, the states were requested to provide information on the importance and the economic impacts of freshwater and saltwater fisheries within the state. While the questionnaire asked the respondents to differentiate between commercial and recreational impacts, the majority of the responding states provided the most information on recreational fishing impacts. The survey also requested general information on trends in the sale of fishing licenses, especially with regard to any increase or decreases in the costs of licenses and the numbers of licenses sold.

States also were requested to provide information with regard to: the importance of and economic impact of recreational hunting; the availability and use of public or private lands for hunting purposes; the use of wildlife management areas set aside for recreational hunting; and trends in the sale of hunting licenses and permits. As a final question, the states were asked to provide information on hunting and fishing issues to be addressed during each state's upcoming legislative session.

Recreational Fishing License Information

Of the 36 states responding to survey, 21 states reported that freshwater fishing was the only recreational fishing available in the state; one state (Washington) reported only recreational saltwater fishing information; and 12 states reported economic benefits from both freshwater and saltwater recreational fishing. Of the states reporting benefits from both sources, nine states reported a higher benefit from freshwater fishing, and three states reported higher economic benefits from saltwater fishing. Of the three states with higher saltwater economic benefits, New Jersey and North Carolina do not require a recreational saltwater fishing license. In New Jersey, saltwater fishermen are estimated to have expended $747 million to fish. In North Carolina, it is estimated that expenditures generated by all saltwater fishing could reach as high as $1 billion. And in Louisiana, where saltwater fishermen are licensed, expenditures for 1997 were estimated at $450 million.

Some states report significant benefit from freshwater fisheries. In Texas, annual resident fishing fees generated approximately $15.9 million in revenue in 1997-1998. In Ohio, resident freshwater licenses raised $10.6 million; in Pennsylvania, $14.3 million; and in Wisconsin, $7.2 million. California reported the highest revenues of any responding state -- $35 million in 1997 for a combination freshwater/saltwater license.

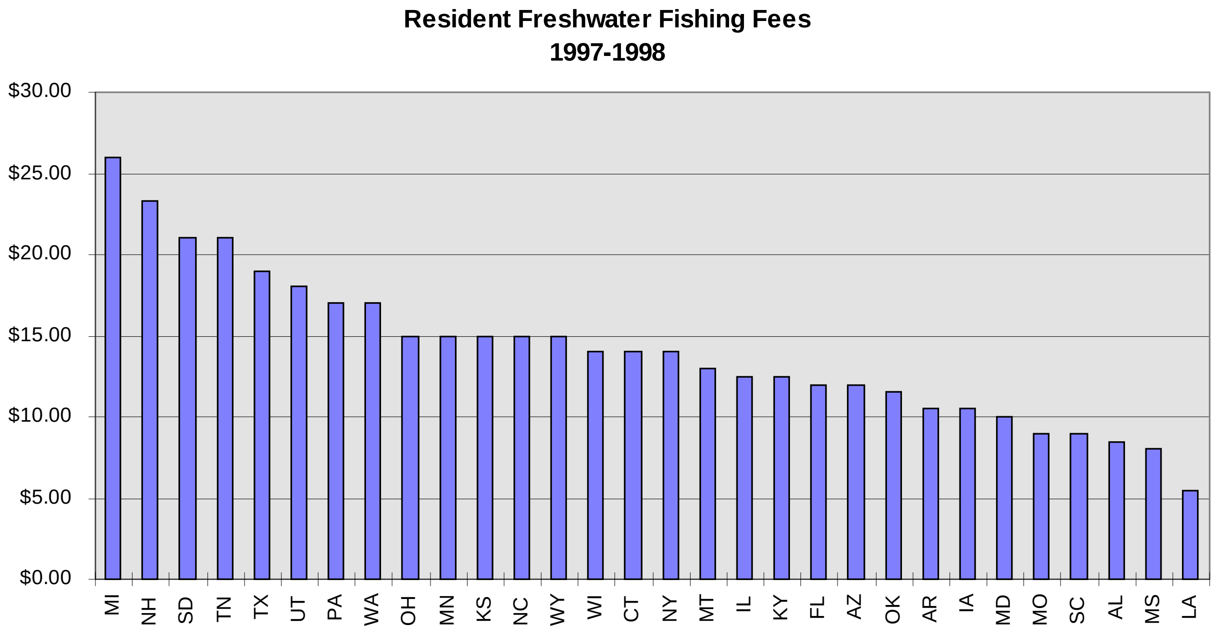
Overall, survey respondents indicated that prices for fishing licenses, both freshwater and saltwater, had increased during the past ten years with only three states reporting stability in amount of fees charged. Three states reported a combination freshwater/saltwater fishing license and one state reported a freshwater fishing license with a saltwater stamp available. From 1990-1997, states reporting increased annual residential fishing fees, all types, included the following

- California, which rose from $20.50 to $25.75 (combined license);
- Connecticut, from $8 to $14;
- Ohio, from $11 to $15;
- Pennsylvania, from $12.50 to $17;
- Texas, from $13 to $19; and
- Wisconsin, from $9 to $14.

During the same period, annual non-resident license fees were raised as follows:

- Arkansas went from $25 to $30;
- Connecticut went from $16 to $24;
- Kentucky went from $20 to $30;
- Louisiana went from $15.50 to $31;
- Montana went from $36 to $45; and
- Pennsylvania went from $20.50 to $35.

With regard to the sale of licenses, responses covered the spectrum of declining sales, to declining sales but now recovering, declining residential sales with an increase in non-residential sales, stable sales, stable to increasing sales, and increased sales. For freshwater residential licenses, 13 states reported a decline in sales and nine reported an increase. Five states reported a decline in the sale of residential combination fishing licenses. Three of those same states reported an increase in the sale of non-residential combination licenses. For non-residential freshwater licenses, six states reported increase sales while 11 states reported decreased sales. Two states reported increases in the sale of recreational saltwater fishing licenses and one state reported a decrease in the sale of non-residential recreational saltwater fishing licenses.



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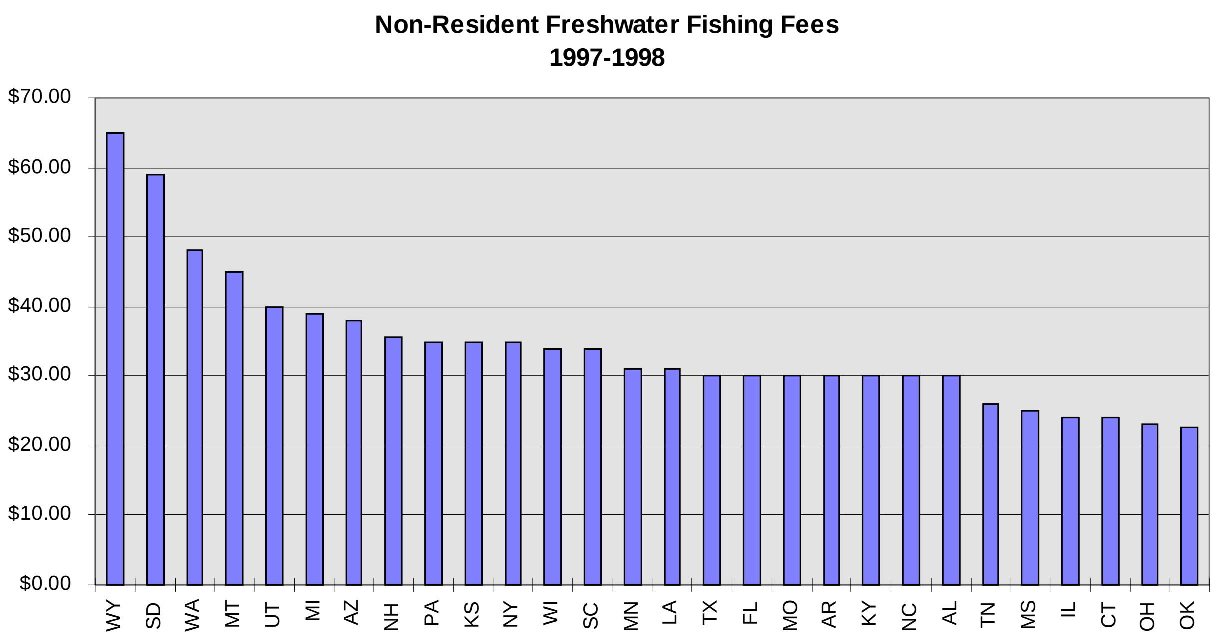

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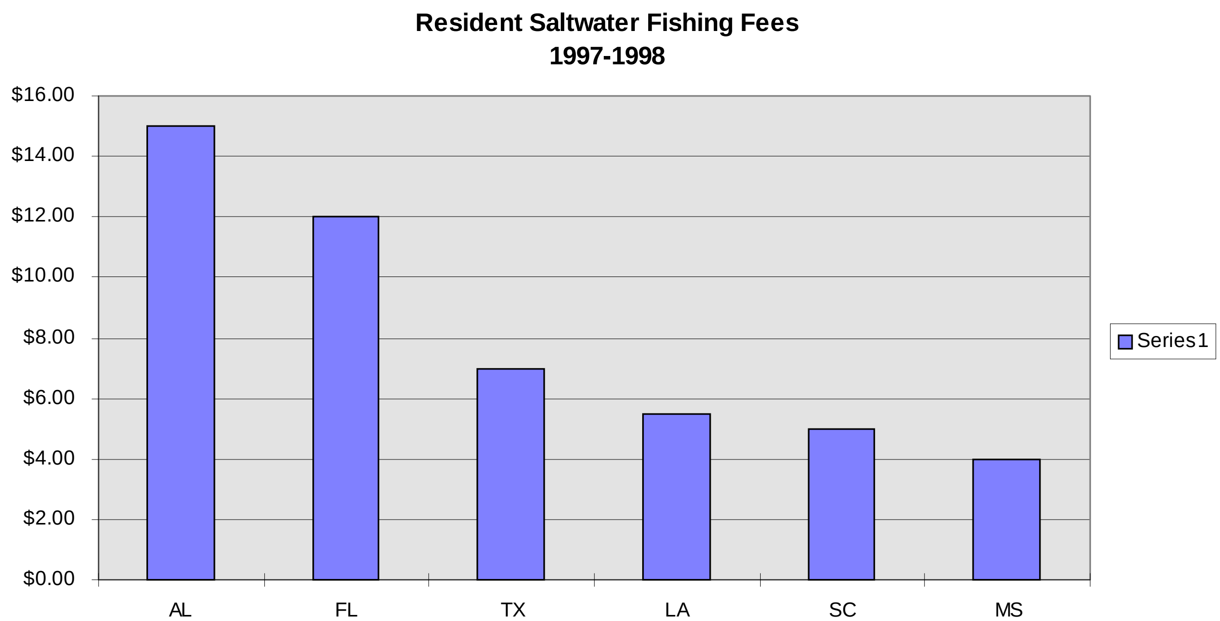

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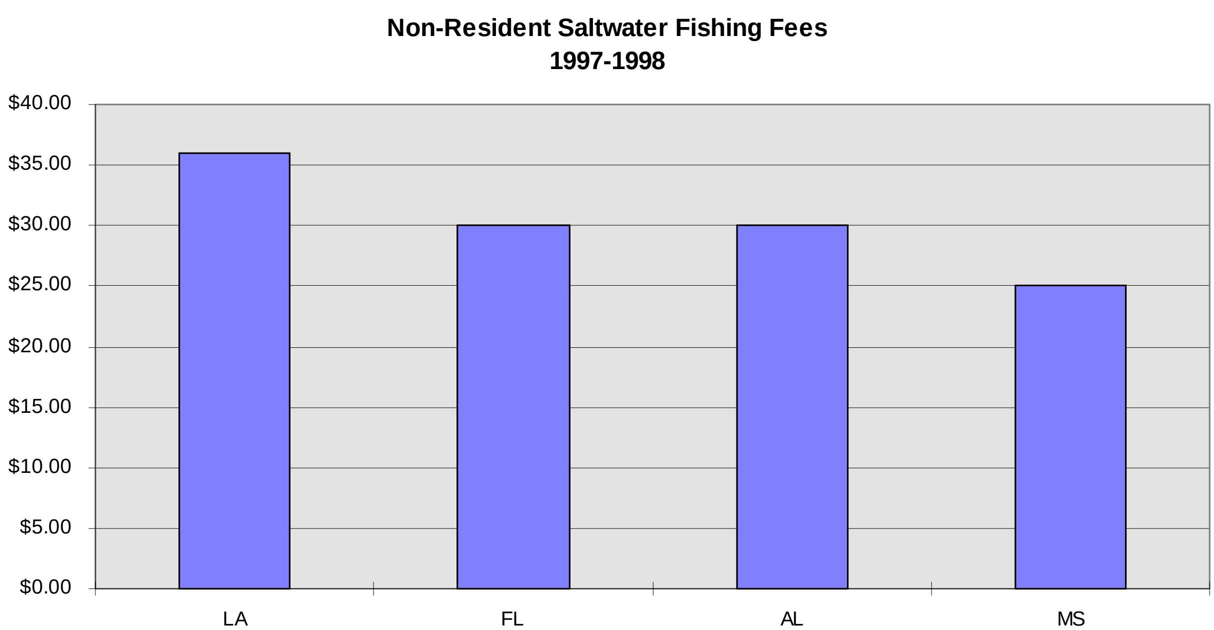


Figure 4

Hunting License Information:
With regard to hunting, all states reported hunting as a source of income but two states provided incomplete data. Three states reported that hunting was a management tool as well as having a recreational purpose, and one state reported that hunting was at least as equally important as fishing for purposes of economic benefit. Four states -- Minnesota, Montana, New York, and Wisconsin -- reported that hunting was more important than fishing as an economic benefit, but none provided revenue figures.

Nineteen of the 36 states responding to the survey reported that annual residential hunting fees had been increased within the last ten years, and four states reported that fees had remained stable. Sixteen states reported declining license sales, although two reported that sales were stable to declining. Kansas reported an overall general decline in sales but maintained an increase in big game permits. Oklahoma reported an increase in license sales for 1998 which is attributed to an increase in the growth of the deer herd. States reporting a decrease in the sale of annual residential hunting licenses include:

- Arizona, which sold 78,378 permits in 1990 and 67,177 permits in 1997;
- Arkansas, which sold 131,360 permits in 1990 and 124,362 in 1997;
- California, which sold 359,509 permits in 1990 and 277,829 in 1997;
- Montana, which sold 71,980 permits in 1990 and 56,664 in 1997;
- Minnesota, which sold 114,100 permits in 1990 and 97,300 permits in 1997;
- Pennsylvania, which sold 911,839 permits in 1990 and 811,985 in 1997; and
- Florida, which sold 192,085 permits in 1990 and 104,176 in 1997.

With annual non-residential sales, a different trend arises. Most states are showing an increase in the sale of out-of-state licenses from 1990 to 1997. States reporting increases include the following:

- Alaska, which issued 7,180 permits in 1990 and 11,099 permits in 1997;
- Arizona which issued 7,023 permits in 1990 and 13,239 in 1997;
- Georgia, which issued 8,637 permits in 1990 and 21,104 in 1997;
- Kansas, which issued 30,427 permits in 1990 and 44,092 in 1997;
- Texas, which issued 14,779 permits in 1990 and 17,992 in 1997; and
- Florida, which issued 297 permits in 1990 and 460 in 1997 (high of 2,968 in 1987).

Over the past 10 years, fees have been increased for all types of hunting licenses. The states responded with information on resident hunting permits, non-resident hunting permits, resident and non-residents sportsman's permits, and resident combined hunting/freshwater fishing permits. Thirteen states had raised resident and non-resident annual hunting fees while seven states had remained at the 1990 level. And one state, Oregon, had actually reduced non-resident hunting fees from $100 annually to $52 annually.

States reporting increases on resident annual hunting fees include the following:

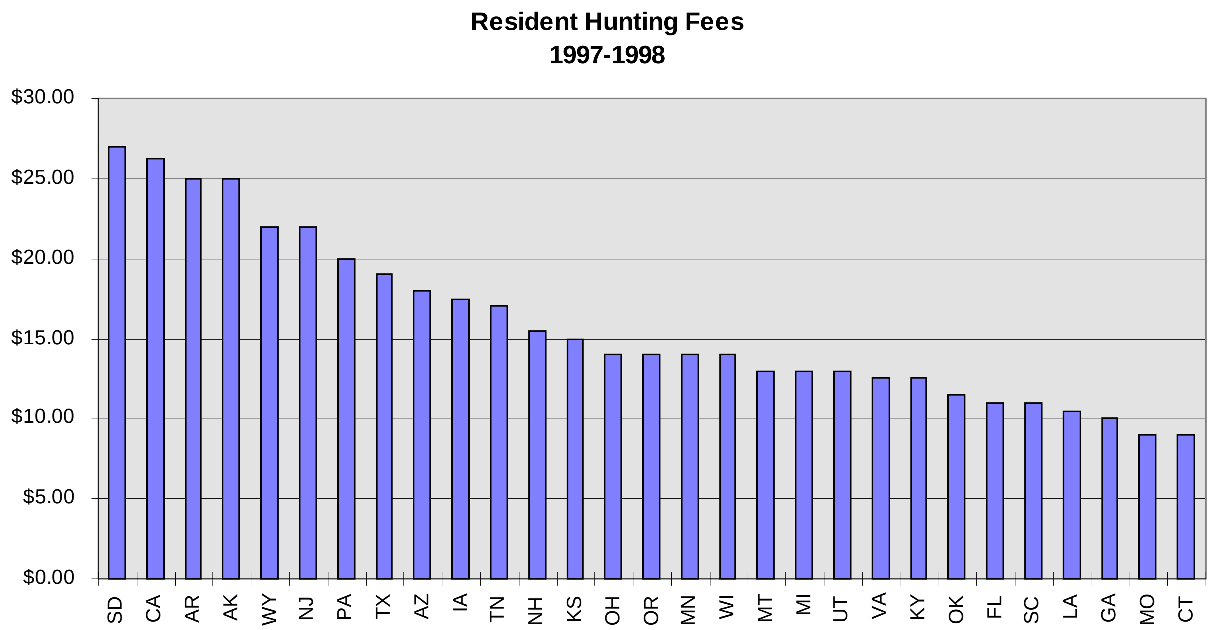
- Arkansas raised its fees from $12 to $25;
- California raised its fees from $21 to $26.25;
- Minnesota raised its fees from $9 to $13;
- Oregon raised its fees from $9 to $14; and
- Texas raised its fees from $10 to $19.

Non-resident annual hunting permits received the biggest fee increases:

- Arkansas went from $60 to $85;
- Arizona went from $150 to $195;
- Kansas went from $60 to $65;
- Kentucky went from $75 to $95;
- Oklahoma went from $68.50 to $79; and
- Texas went from $200 to $250.

Nineteen of the responding states reported that most hunting took place on private lands. Five states reported that most hunting took place on public lands; six states reported activity on both public and private lands. Of those states reporting activities on both public and private lands, one had higher activity on public lands; two had higher activity on private lands, and three had equal hunting activity.

Twenty-three of responding states reported wildlife management areas. Five states specified that the lands were for recreational hunting purposes; two states specified habitat purposes, and other others had no specified purpose. Only three of the states indicated that fees were assessed for management purposes but some states specified parking fees and user fees for users other than hunters or anglers.



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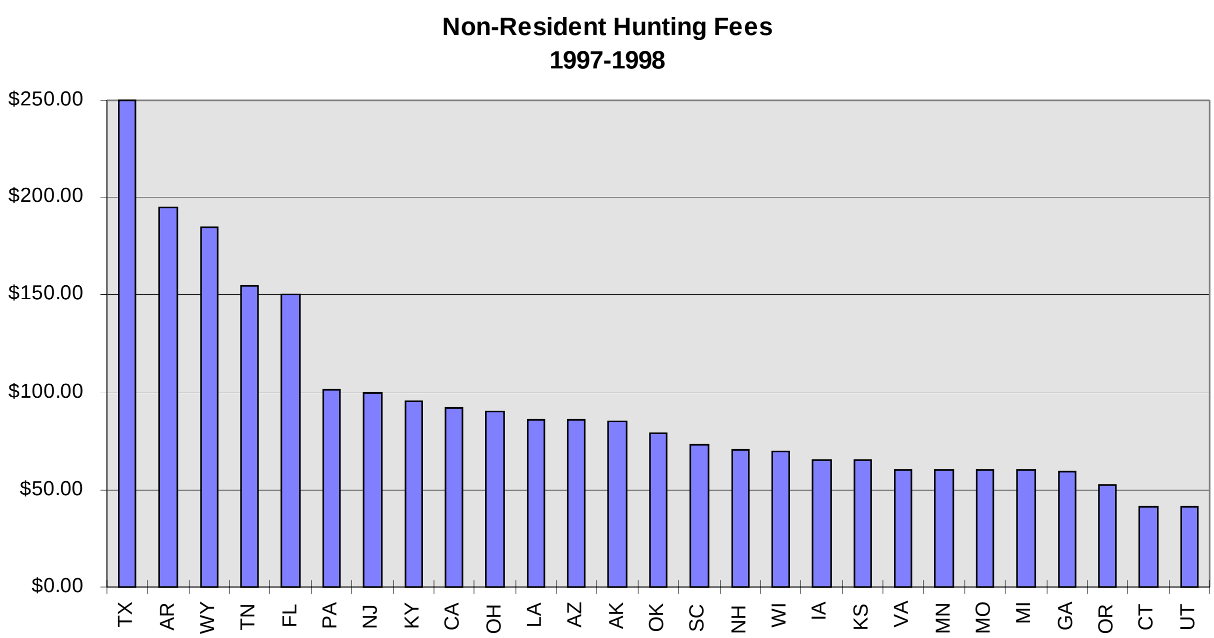

Figure 6

Other States’ Exemptions

All states reported exemptions from licensing requirements with the most common exemptions existing for persons under the of 16 years and over the age of 65 years. Other common exemptions included disabled veterans, blind persons, and developmentally disabled persons. Some states reported additional exemptions such as former prisoners of war; persons fishing with cane or pole; persons in the Armed Forces on active duty who are residents; and landowners or tenants and their families fishing on property owned or leased personally.

Additionally, some states, such as California, offer reduced fees for persons meeting certain requirements such as age and income limitations. Other variations include different criteria for hunting and fishing license exemptions, exemptions for owners of agricultural lands, and reciprocal agreements with other states.

Comparisons of Florida and Other States’ license fees

Of the 36 states responding to the Water and Resource Management Committee survey, 30 states reported a permit fee for a freshwater fishing license although not all states reported the number of licenses sold and revenues raised. Eight states reported permit fees for saltwater fishing licenses, and six states reported permit fees for a combined freshwater/saltwater license.

For freshwater residential fees, Florida ranked 21st out of 30 for cost of resident permits ($12); ninth out of 20 for reporting revenues; and eighth out of 20 in reporting the number of permits sold (397,947). Texas charges the highest fee for a residential freshwater permit ($19) and Louisiana reports the lowest ($5.50).

For freshwater non-residential fees, Florida ranks third out of 20 reporting revenues; sixth out of 20 reporting the number of permits sold (79,632); and of 30 states reporting a fee, Florida ranks 20th and ties with Texas, North Carolina, Montana, Kentucky, Arizona, and Alabama ($30). The highest non-residential fee is charged by Wyoming ($65) and the lowest fee reported is charged by Maryland ($20).

For the seven states reporting annual resident saltwater fishing fees, Florida ranks second in price at $12, first in residential permits sold (551,073), and first in revenues reported. Alabama charges a resident fee of $15 and Mississippi charges a fee of $4. For non-resident fees, both Alabama and Florida charge $30, but Louisiana is highest at $36. Florida has sold the most permits (79,632) and raised the most revenue ($2.38 million) from out-of-state saltwater fishermen.

Of states reporting a combined freshwater/saltwater fishing license, California ranks first with revenues of $33 million, sales of 1.28 million, and a fee of $25.75 for residents. For non-resident fees, Alaska is highest with a fee of $100, revenues of $1.1 million, and sales of 11,712 permits. Florida does not have a combined license.

Of the 36 states responding to the survey, 29 provided information relative to resident annual hunting fees in fiscal year 1997-1998. Of the states providing information, Florida ranked twenty-fourth in the cost of a resident annual hunting permit at $12.00. South Dakota had the highest fee at $27.00 and Montana had the lowest fee at $9.00. Pennsylvania was the top state in number of sales at 811,985 with Tennessee at the bottom. Florida ranked thirteenth with 104,175 resident permits sold. Pennsylvania also ranked first in revenues raised with $16.2 million; Tennessee was last with $65,000, and Florida ranked seventeenth with $1.145 million in revenues.

For non-resident annual hunting permits, twenty-seven states provided information on fees, sales and revenues. Texas has the highest permit fee at $250.00 with Connecticut and Utah at the bottom with a $41.00 fee. Florida ranks fifth among responding states with a fee of $150.00. Pennsylvania is again first in sales with 67,386 permits sold. Wisconsin reported 8 permits sold and Florida ranks next to last with 460 permits sold. Pennsylvania received $6.8 million in revenue, Wisconsin received $572, and Florida again ranks next to last with $69,000 in revenue from non-residential annual hunting permits. In Florida, the non-resident 10-day hunting license, at $25.00, is more popular with sales of 4,971 and revenues of $124,275 in 1997.

Florida's Resident Sportman's License, authorizing hunting, freshwater fishing and saltwater fishing, is the highest in the nation among states responding to the survey. At $66 annually, Florida is ahead of Texas and Alaska in the cost of a permit, and Montana ranks last at $15.00. Tennessee sells the highest number of resident sportman's licenses with 988,833 and Montana sells the lowest number with 11,074, with Florida at the next lowest with 19,793. Texas generates the most revenue with $8.5 million, Montana generates revenues of $708,000, and Florida ranks fifteenth in states reporting revenues with $1.3 million. States generating more revenues from the sale of sportman's licenses include Georgia, Oregon, Wisconsin, and Alaska.

Only four states responding to our survey reported information on a non-resident sportsman's license. Two states reported a fee of $135 and all four states reported low sales and low revenues. Four states, including Florida, provided information on sales of Resident Hunting/Fishing Permits. Fees ranged from $16.00 to $22.00. Montana reported sales of 119,961 licenses and revenues of $2 million, while Florida reported sales of 40,756 licenses and revenues of approximately $900,000.

<u>Comparisons of Specialty Tags and Stamps</u>

In addition to the required licenses for hunting and fishing, several states require specialty stamps and tags for varieties of wildlife and fish. For example:

Alaska: Residents are required to purchase a $25 tag to hunt brown and grizzly bears, bison, caribou, deer, elk and moose along with a $25 hunting license. Nonresidents pay much more for specialty tags ranging from $75 for a deer tag to $250 for a brown bear/grizzly bear tag. Only non-residents are required to purchase King Salmon stamps for day trips at fees ranging from $10 for a 1-day stamp to $50 for a 14-day stamp. Residents pay $10 for an annual King Salmon Stamp and non-residents pay $100.

California: In California, residents are required to purchase specialty stamps for upland game birds, certain types of waterfowl, additional fishing gear, duck, and certain types of fish such as abalone, steelhead and striped bass. These stamps are in addition to regular hunting and fishing licenses. Tags are required for hunting deer, bear, and wild pig. Also, California sells an annual fishing license that is restricted to the Pacific Ocean.

Texas: Texans and non-residents under the age of 17, and 65 years of age or older, may purchase a special resident hunting or fishing license for $6. Non-residents of Texas may pay $255 for a general hunting permit with a turkey tag, or may purchase a Spring Turkey license for $100 but may not purchase both. Residents and non-residents can purchase an archery stamp for $7, muzzleloader stamps for $10, and waterfowl stamps, turkey stamps, dove stamps, and bonus deer tags all in addition to a regular hunting license.

Oregon: In addition to a hunting license, residents of Oregon are required to purchase tags for bear hunting, bighorn sheep, cougar, buck deer, anterless deer, elk, turkey, waterfowl, and upland birds. The tags range in fee from $11 for a turkey tag to $91 for a bighorn sheep or rocky mountain goat controlled hunting tag. Non-residents also pay tag fees ranging in price from $41 for a turkey tag to $976 for a bighorn sheep controlled hunt tag. For fishing, residents and non-residents pay $10.50 for annual salmon-steelhead tags, $6 for annual sturgeon tags, and $6 annual halibut tags in addition to an angling license fee.

Florida: In additional to an annual hunting license, residents and non-residents of Florida may purchase wildlife management area permits for $25; and archery, muzzleloading gun, and turkey permits for $5 each. Florida waterfowl permits cost $3 each. In fishing, specialty permits include a snook permit for $2, a tarpon tag for $50, and a crawfish permit for $2. Anglers are limited in the taking of snook and tarpon, and both fisheries are primarily catch and release for which no special permit is required. The crawfish permit allows recreational anglers to harvest crawfish at bag limits set by the FWCC.

Conclusions

Overall, Florida is part of a national trend that indicates declining interest in recreational pursuits such as hunting and fishing. The U.S. Department of the Interior, in a paper entitled "National Survey of Fishing, Hunting, and Wildlife-Associated Recreation" issued in November 1997, reports that nationwide, hunters have expressed dissatisfaction with hunting conditions such as access to hunting areas and amount of game available, behavior of other hunters, education requirements, and increased restrictions on bag limits. Anglers have expressed practically the same dissatisfactions and cite interference from other recreational users as a prime motivating factor when declining to pursue angling interests. These pattern match the results of the Responsive Management Survey prepared for the former GFC in 1995.

The FWCC is carrying on the GFC's long-time goal to increase customer satisfaction by improving the quality and quantity of access to recreational areas; improving the quality and quantity of fish and wildlife; and improving the public's knowledge of, use of, and enjoyment of Florida's biggest natural attractions - its tremendous coastal shoreline, numerous freshwater lakes, and the natural variety of wildlife inhabiting upland areas. The FWCC's use of its wildlife management areas for quota hunts is so popular that an ever-increasing number of permit applicants are turned away each year. Lands purchased under the Preservation 2000 program are being managed and used for outdoor recreational purposes. Habitat restoration efforts also extend to Florida's freshwater lakes. Improved access, improved water quality, and restocking of fish, provide increased fishing opportunities.

It is not a question of habitat alone. The survey results show that Florida ranks from the middle to the lower end of the states when factoring the costs of permits and licenses for hunting and fishing. Yet, figures from the 1997-1998 fiscal year reporting period show that fewer than 3 million persons, including non-residents, participated in hunting and fishing recreational pursuits. In a state with a population of almost 15 million, and an annual visitor estimate of 46.9 million (based on FLAUSA Visit Florida - 1997 Air and Auto Visitor estimates), licensed recreational hunting and fishing attracted less than 4 percent of residents and visitors. It is important to note that the key word is "licensed." With approximately 42 percent of Florida's population exempt from licensing requirements, and with license exemptions for persons fishing in saltwater from land, or for structures fixed to the land, and persons fishing with cane poles, it is difficult to determine exactly how many people hunt and fish in Florida for free.

Factors which must be considered when looking at the decline in recreational hunting and fishing are outside influences such as increased recreational opportunities. Other pursuits such as jetskiing, parasailing, water skiing, and huge tourist attractions such as Disney World, Busch Gardens, SeaWorld, and the Miami Seaquarium, draw both resident and non-resident users. The urbanization of the state contributes greatly to a decreasing interest in recreational pursuits that typically take place in mostly rural areas. The use of mitigation has negated some of the impact but the restoration of wildlife recreational areas is a long way from being complete.

Clearly, the survey results indicate that increased fees will not result in an increase in the number of participants. The former GFC survived for a very long time on revenues generated from the sale of licenses and permits. In the last 15 or so years, the agency relied on the generosity of the state Legislature with a general revenue appropriation to maintain its operations. With the merger of the GFC and the MFC into the FWCC, the new fish and wildlife conservation agency has doubled in size and its budget has increased from $86 million in 1998-1999 to more than $155 million in 1999-2000, of which approximately $53 million is general revenue. For FY 2000-01, the FWCC has asked the Legislature for $197.4 million, of which $86.8 million is general revenue.

The FWCC has prepared a legislative proposal for the 2000 Regular Legislative Session that is expected to address certain fees for licenses and permits. This proposal is projected to raise approximately $2 million in revenues, yet the FWCC also projects that the State Game Trust Fund will face a $1.8 million shortfall in the State Game Trust Fund for fiscal year 2000-2001; a $2.8 million shortfall in FY 2001-2002; and a $3.3 million shortfall in FY 2002-2003.

Although the Legislature is required by the State Constitution to prescribe by general law all license fees for the taking of wildlife, freshwater aquatic life, and marine life, it is the responsibility of the FWCC to ensure that the agency programs are implementing its constitutional mission to protect and manage those resources.

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APPENDIX A

Florida Statistics

Florida has a total area of 59,928 square miles - 1,308 square miles of coastline, 4,683 square miles of inland water areas, and a land area of 53,937 square miles. Florida has more than 7,700 lakes greater than 10 acres, more than 1,700 streams, and approximately 3,000,000 acres of wetlands. In 1997, the total population of Florida was 14,654,000; in 1998, Florida's population was 14,916,000; and in 1999, Florida passed the 15,000,000 mark. In terms of population, statistics of the U.S. Census Bureau show that Florida has the highest population of persons 65 years of age and older in the country (2.7 million).   With 18.5 percent of the population at 65 years or older, the next highest states are West Virginia with 15.1 percent and Iowa at 15 percent. Several states have larger populations of citizens younger than 18 years of age - California, New York, and Texas are the top three. In Florida, 31.7 percent of the population (4.6 million) were younger than age 18.

According to the "Statistical Abstract of the United States, 1998", Florida ranks sixth in coastal area size of the states responding to the survey. Alaska, Washington, Louisiana, Maryland, and Virginia have more square miles of coastline when island coastline measurements are included in the calculation.   Florida ranks fourth in population behind California, Texas and New York, with Illinois and Pennsylvania following.

In total land mass, Alaska, Texas and California are the largest of the responding states. Florida ranks seventeenth in size and is comparable to Wisconsin, Georgia, Illinois, Iowa and New York. With respect to inland water areas, Florida ranks 4th among respondents with 4,683 square miles of inland water areas behind Alaska, Texas and Minnesota, and followed by Louisiana and North Carolina.

APPENDIX B

June 16, 1999

FIELD(1)

Dear FIELD(2),

Staff of the Florida Legislature's House Committee on Water and Resource Management is conducting a review of all fees charged for hunting and fishing permits and licenses issued in Florida. As part of this review, we have developed a survey and spread sheet to determine the fees and charges assessed by other states.

Enclosed with this letter is a hard copy sample spread sheet, an IBM formatted diskette containing the same spread sheet in Excel 5.0, and a short survey asking for information that may be helpful in developing our interim report. Please complete the survey and the spread sheet using the diskette, and return both items to our office no later than July 19, 1999. A metered envelope is also enclosed for your convenience.

We hope that you will choose to participate in our survey. If you should have any questions or require further information, please feel free to contact our office at (850) 488-0711. We look forward to hearing from you.

Sincerely,

Karon A. Molloy
Legislative Analyst

PERMITS & LICENSES FEE SURVEY

AGENCY: ______________________________

STATE: ______________________________

NAME & TITLE OF PERSON
COMPLETING SURVEY: ______________________________

ADDRESS & PHONE # OF
PERSON COMPLETING SURVEY: ______________________________

1. **What are the major types of commercial fishing licenses and permits issued by your agency? Please differentiate between freshwater and saltwater licenses and permits.**

____

____

2. **Do trends in your state indicate a rise or decline in the sale of commercial fishing permits? Please differentiate between sales of freshwater and saltwater licenses and permits.**

____

____

3. **If you are a state with both freshwater and saltwater recreational fishing, which fishery has a bigger impact on your state and why?**

____

____

4. **Please explain any trends your state may have experienced in the sale of saltwater or freshwater recreational fishing licenses including items such as a rise or fall in the sale or price of residential licenses, or the impact out-of-state fishermen have on your fisheries.**

____

____

5. **What qualifications must be met to receive an exemption for either a freshwater or a saltwater recreational fishing license, or a hunting permit in your state?**

____

____

6. **What is the role of hunting in your state? If hunting has a bigger impact on your natural resources than fisheries, please explain what that impact is and why.**

____

____

7. Does the majority of hunting in your state take place on public or private property? Does your state have wildlife management areas set aside for recreational hunting? If so, how are the fees assessed and what is the money used for?

____

____

8. Please explain any trends your state may have experienced in the rise or decline in the sale of, or the price of, hunting permits and licenses.

____

____

9. What fishing or hunting issues will be addressed by your state legislature during the next legislative session?

____

____

APPENDIX C

RESIDENT FRESHWATER FISHING FEES
1997-1998

RANK	STATE	FEE	# SOLD
1	MI	$26.00	0
2	NH	$23.25	74,722
3	SD	$21.00	0
4	TN	$21.00	0
5	TX	$19.00	885,112
6	UT	$18.00	0
7	PA	$17.00	884,324
8	WA	$17.00	366,423
9	OH	$15.00	757,241
10	MN	$15.00	367,203
11	KS	$15.00	191,989
12	NC	$15.00	0
13	WY	$15.00	0
14	WI	$14.00	543,561
15	CT	$14.00	115,395
16	NY	$14.00	0
17	MT	$13.00	148,100
18	IL	$12.50	545,587
19	KY	$12.50	268,975
20	**FL**	$12.00	397,947
21	AZ	$12.00	205,915
22	OK	$11.50	292,842
23	AR	$10.50	310,016
24	IA	$10.50	0
25	MD	$10.00	0
26	MO	$9.00	534,859
27	SC	$9.00	196,568
28	AL	$8.50	0
29	MS	$8.00	100,252
30	LA	$5.50	557,947

APPENDIX D

NON-RESIDENT FRESHWATER FISHING FEES
1997-1998

RANK	STATE	FEE	# SOLD
1	WY	$65.00	0
2	SD	$59.00	0
3	WA	$48.00	7,549
4	MT	$45.00	26,900
5	UT	$40.00	0
6	MI	$39.00	0
7	AZ	$38.00	2,487
8	NH	$35.50	23,708
9	PA	$35.00	47,626
10	NY	$35.00	0
11	KS	$35.00	8,147
12	WI	$34.00	100,091
13	SC	$34.00	17,974
14	MN	$31.00	48,388
15	LA	$31.00	19,527
16	TX	$30.00	48,336
17	NC	$30.00	0
18	MO	$30.00	40,893
19	KY	$30.00	33,484
20	FL	$30.00	43,694
21	AR	$30.00	40,307
22	AL	$30.00	0
23	TN	$26.00	0
24	MS	$25.00	17,968
25	IL	$24.00	22,031
26	CT	$24.00	5,756
27	OH	$23.00	45,229
28	OK	$22.50	31,914
29	IA	$22.50	0
30	MD	$20.00	0

APPENDIX E

RESIDENT SALTWATER FISHING FEES
1997-1998

RANK	STATE	FEE	# SOLD
1	**AL**	$15.00	0
2	**FL**	$12.00	551,073
3	**TX**	$7.00	490,874
4	**LA**	$5.50	284,152
5	**SC**	$5.00	94,063
6	**MS**	$4.00	63,306

APPENDIX F

NON-RESIDENT SALTWATER FISHING FEES
1997-1998

RANK	STATE	FEE	# SOLD
1	LA	$36.00	9,649
2	FL	$30.00	79,632
3	AL	$30.00	0
4	MS	$25.00	2,040

APPENDIX G

RESIDENT HUNTING FEES
1997-1998

RANK	STATE	FEE	# SOLD
1	SD	$27.00	0
2	CA	$26.25	277,829
3	AR	$25.00	124,362
4	AK	$25.00	23,043
5	WY	$22.00	42,199
6	NJ	$22.00	0
7	PA	$20.00	811,985
8	TX	$19.00	286,870
9	AZ	$18.00	67,117
10	IA	$17.50	0
11	TN	$17.00	3,782
12	NH	$15.50	24,163
13	KS	$15.00	93,026
14	OH	$14.00	344,206
15	OR	$14.00	127,047
16	MN	$14.00	120,234
17	WI	$14.00	108,737
18	MT	$13.00	97,300
19	MI	$13.00	0
20	UT	$13.00	0
21	VA	$12.50	236,370
22	KY	$12.50	127,060
23	OK	$11.50	65,440
24	FL	$11.00	104,176
25	SC	$11.00	8,606
26	LA	$10.50	284,152
27	GA	$10.00	192,403
28	MO	$9.00	56,664
29	CT	$9.00	12,462

APPENDIX H

NON-RESIDENT HUNTING FEES
1997-1998

RANK	STATE	FEE	# SOLD
1	TX	$250.00	17,992
2	AR	$195.00	7,749
3	WY	$185.00	21,026
4	TN	$155.00	892
5	FL	$150.00	460
6	PA	$101.00	67,386
7	NJ	$100.00	0
8	KY	$95.00	14,188
9	CA	$92.25	2,620
10	OH	$90.00	10,587
11	LA	$86.00	2,222
12	AZ	$85.50	13,239
13	AK	$85.00	11,099
14	OK	$79.00	2,902
15	SC	$73.00	16,235
16	NH	$70.50	10,626
17	WI	$70.00	8
18	IA	$65.50	53,058
19	KS	$65.00	44,092
20	VA	$60.50	14,697
21	MN	$60.00	7,168
22	MO	$60.00	3,933
23	MI	$60.00	0
24	GA	$59.00	21,104
25	OR	$52.00	18,011
26	CT	$41.00	1,928