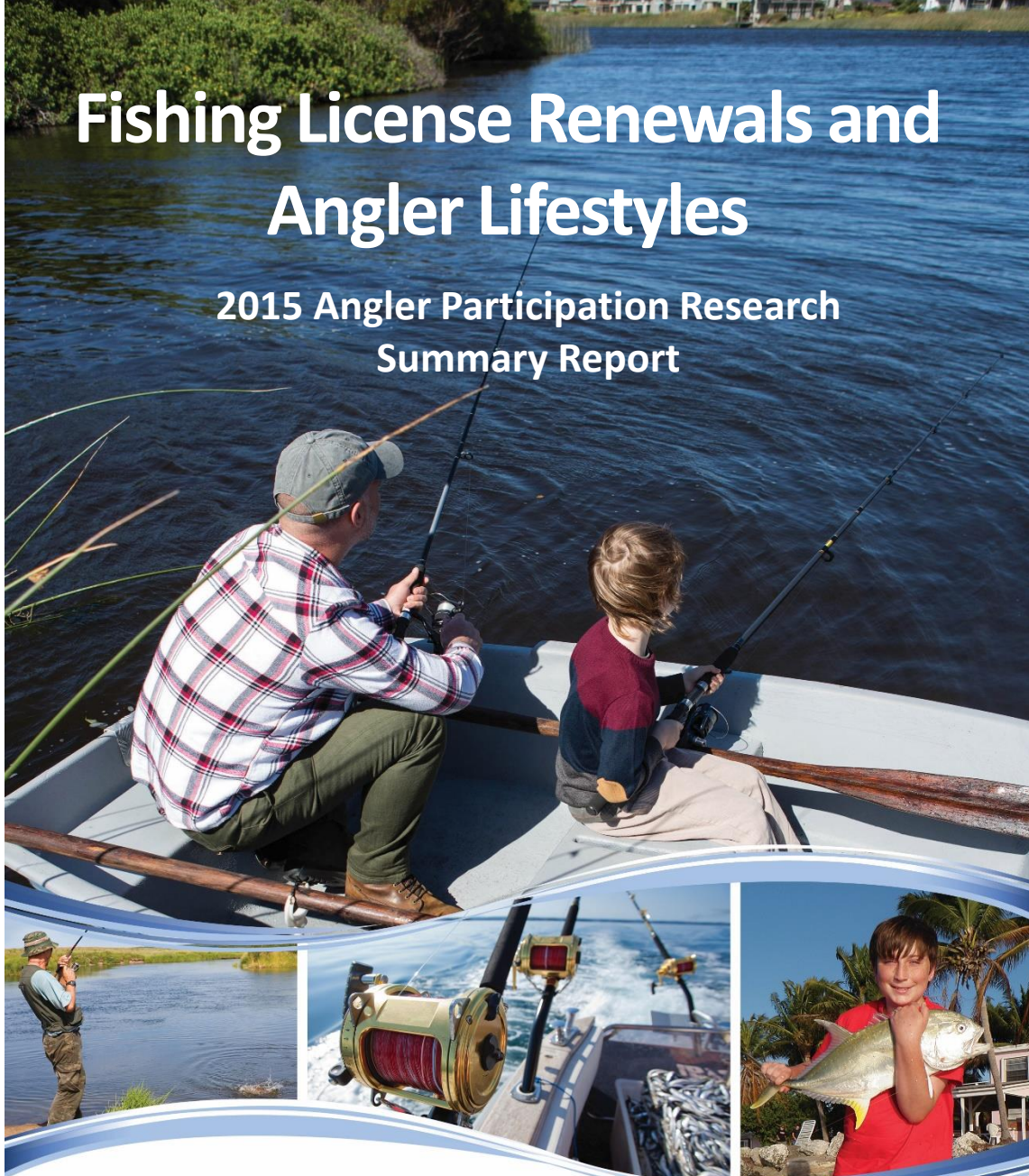


# Fishing License Renewals and Angler Lifestyles

## 2015 Angler Participation Research Summary Report



**American Sportfishing Association**  
*Leading the Way for Sportfishing's Future*

Released March 2016  
Final Report



# Background

- Produced for the American Sportfishing Association by Southwick Associates, Inc.
- The report summarize findings:
  1. *U.S Angler Population: Who Comes and Who Goes*
  2. *A Snapshot of the U.S. Angler Population by Region*
  3. *The New Anglers: Who Are They? Why Did They Try? Will They Continue?*
  4. *Looking at Licensed Anglers by Lifestyle*
  5. *Millennial Anglers and Crossover Licenses Buyers*
- Full results are available on the American Sportfishing Association's website, [www.ASAfishing.org](http://www.ASAfishing.org)
- Produced under funding from Multi-State Conservation Grant #F14AP00138 as part of the Federal Aid in Sport Fish Restoration Program, administered by the U.S. Fish and Wildlife Service and the Association of Fish and Wildlife Agencies
- This is the sixth and final installment of a series of research reports examining anglers' rate of renewing their fishing licenses, their lifestyle segments and other participation issues

# Purpose

To improve efforts to increase sportfishing participation and marketing by identifying:

- License renewal rates among different types of anglers
- Lifestyle characteristics among different types of anglers
- To better understand who fishes and why

# METHODS

# Methods

- Conducted by Southwick Associates, Fernandina Beach, Fla.
- Purchasing histories and profiles were developed for every individual who purchased at least one license – (CO, FL, GA, ME, MI, MN, MS, MT, NH, NY, UT, WA, from 2004-2013)
- A survey was conducted of these current and former license holders to learn why they did or did not buy again. This survey was conducted by Responsive Management, Harrisonburg, Va.
- Analyzed using SPSS, Access, ESRI GIS and lifestyle segmentation software



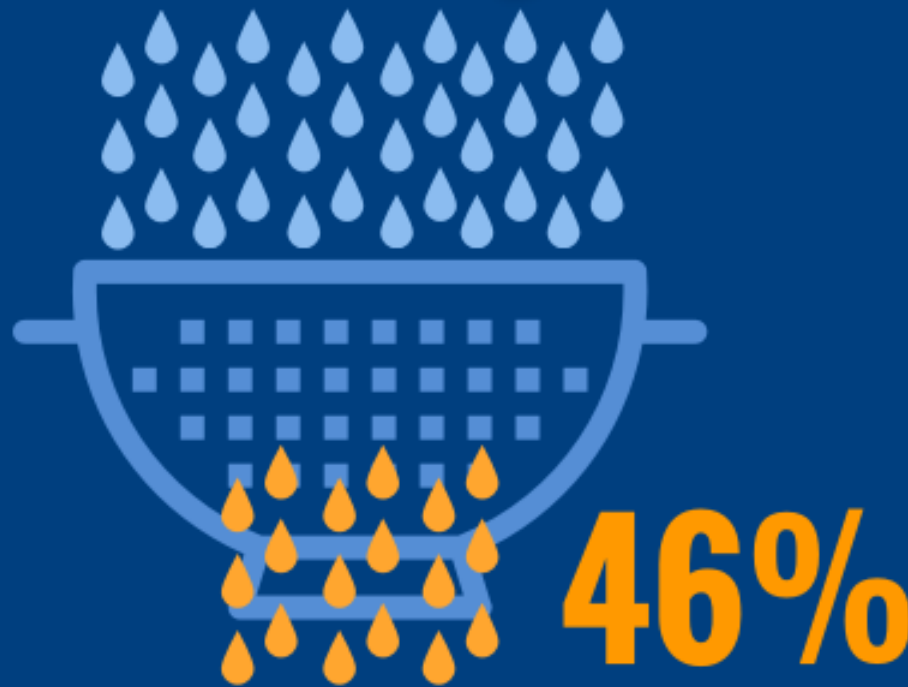


# Results were developed using 10 years of complete license data from 12 states



# RESULTS

# Nearly half of this year's anglers **will not** renew their license next year

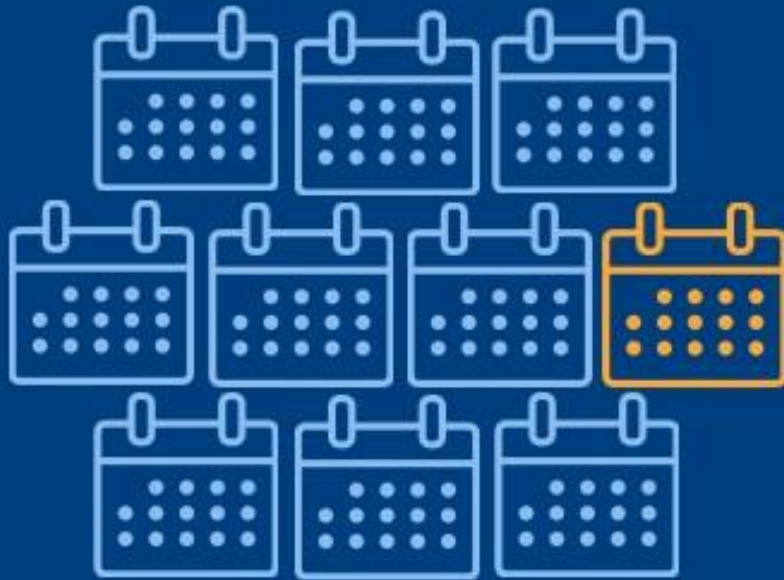




# The average angler will only buy a license in 2.4 out of every 5 years



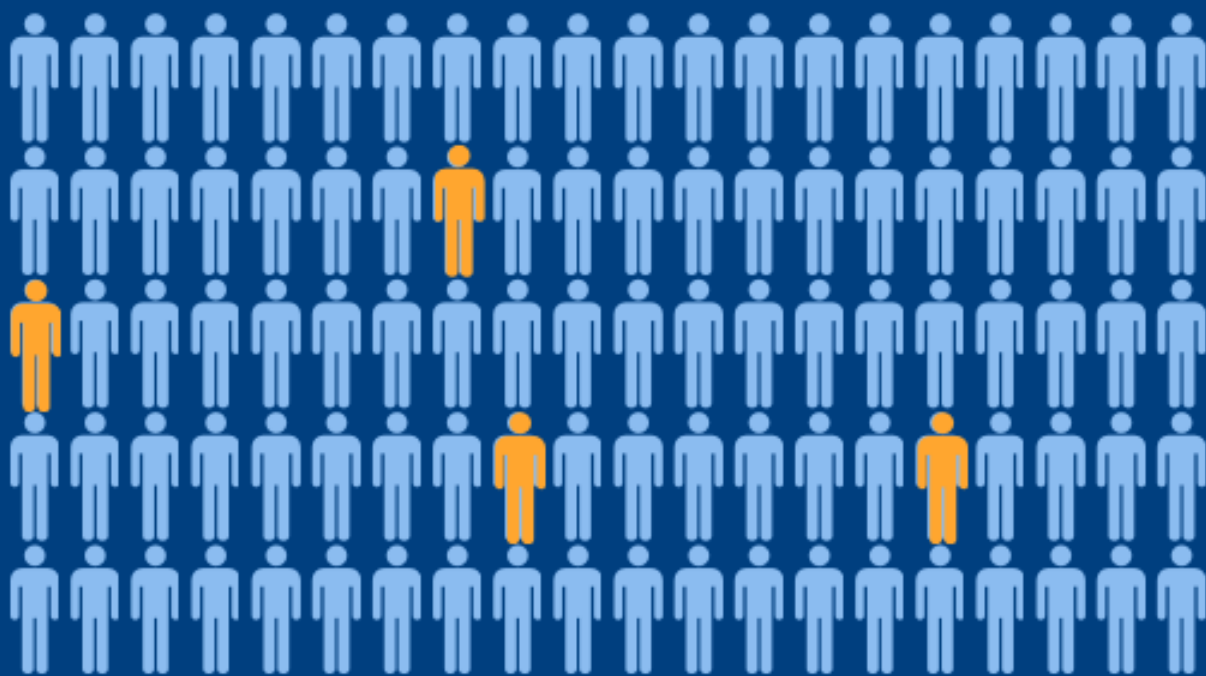
# Anglers purchasing licenses only **once** in ten years



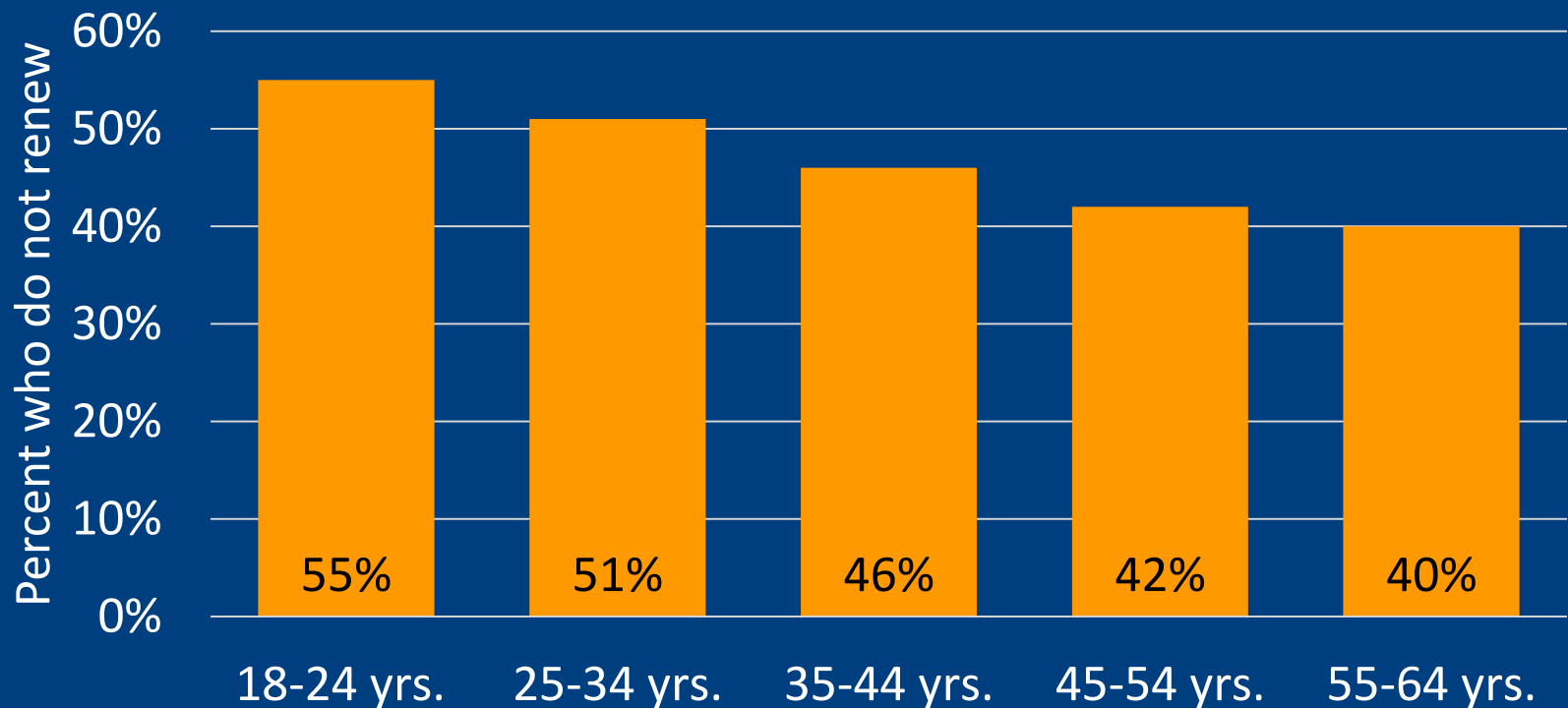
**49%**



# 4% of anglers purchased a fishing license in each of the last 10 years



# Younger anglers are more likely to **not renew** licenses and fish the next year

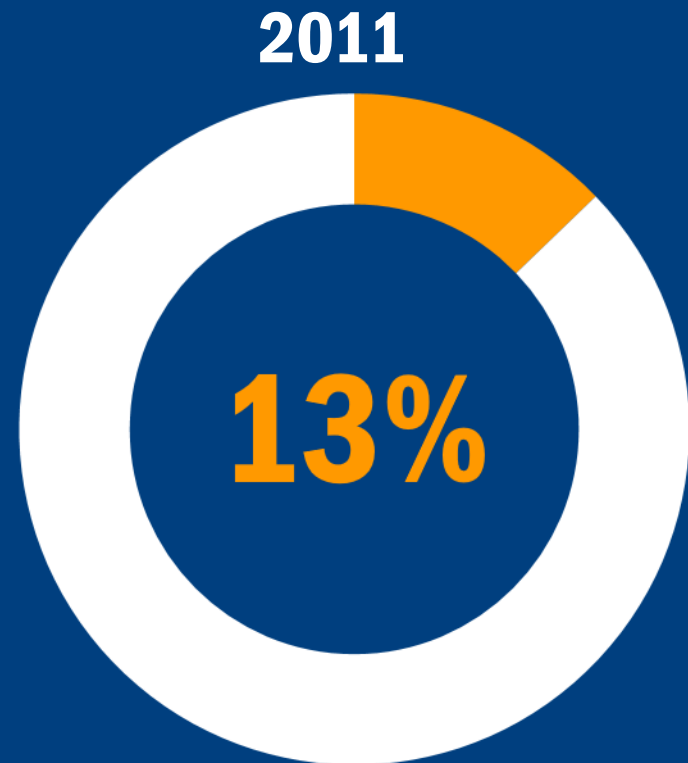
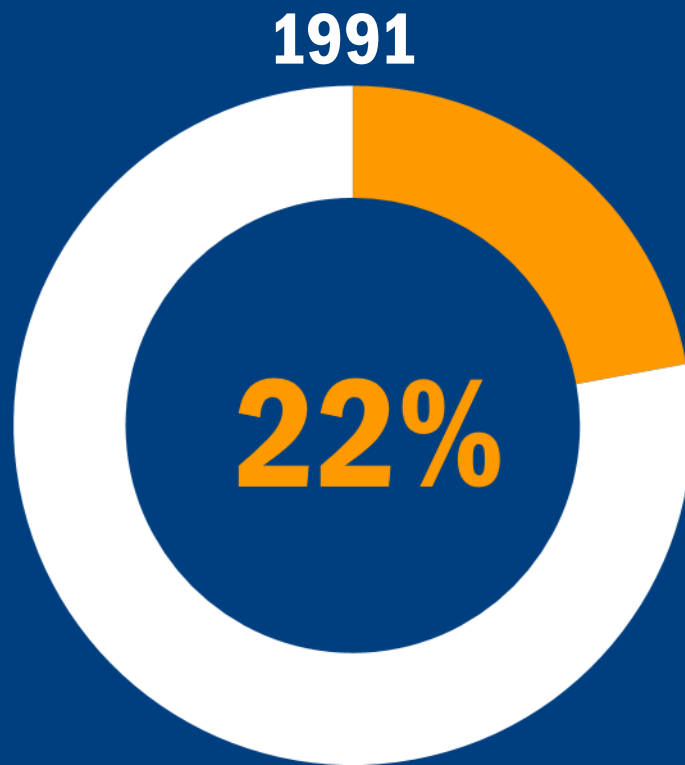


# First-time anglers think they'll buy licenses for five years, **but few do.**



# Fishing is falling in popularity with younger crowds

## Percent of 16-34 year olds in U.S. who fished





# Females and young anglers lapse more often



**55%**

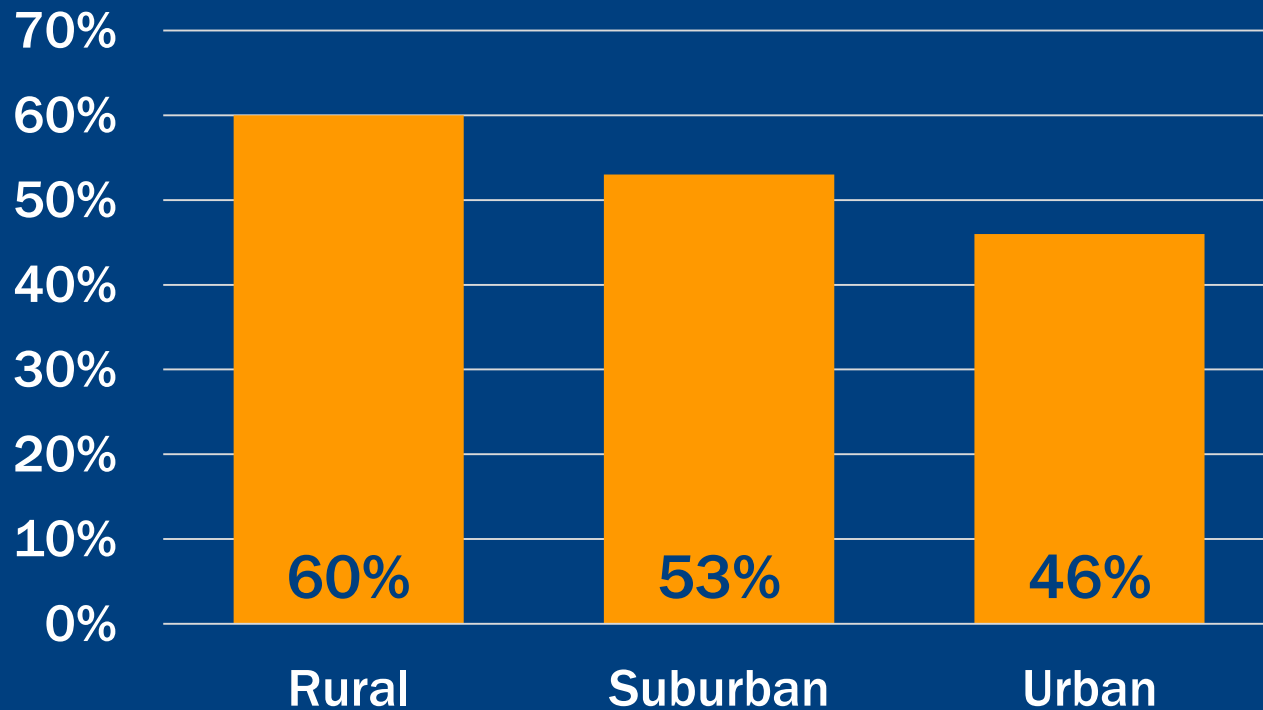


**55%**





# Rural anglers are **more likely to renew their licenses** (60%) versus suburban (53%) and urban (46%) anglers



# Non-renewal rates for annual fishing licenses vary by region





# RENEWAL CATEGORIES

# License Renewal Categories

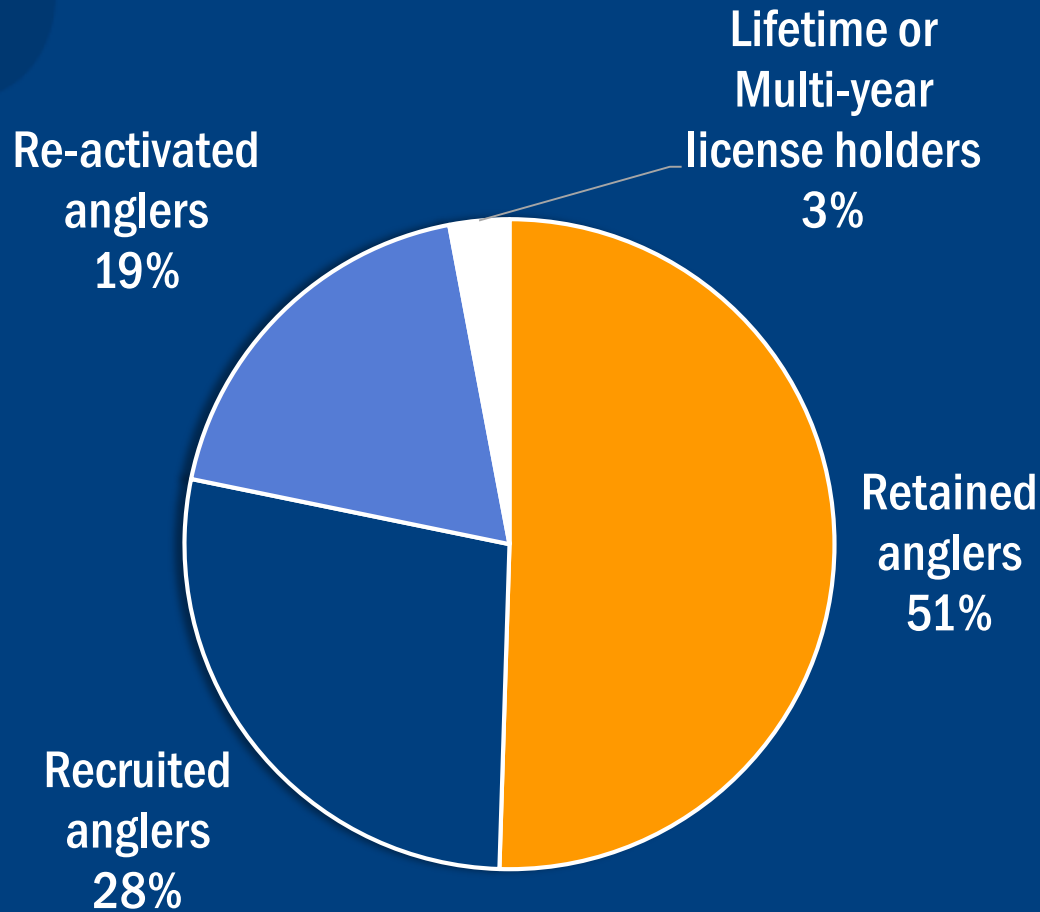
Based on their license buying history, licensed anglers are divided into three groups:

**Avid anglers:** Anglers who purchased a license in the most recent year and the previous one

**Recruited anglers:** Also known as new anglers, these anglers bought a license in the most recent year but not in at least five of the preceding years

**Re-activated anglers:** Anglers who bought a license in the most recent year and at least one of the previous five years, but not the immediate preceding year

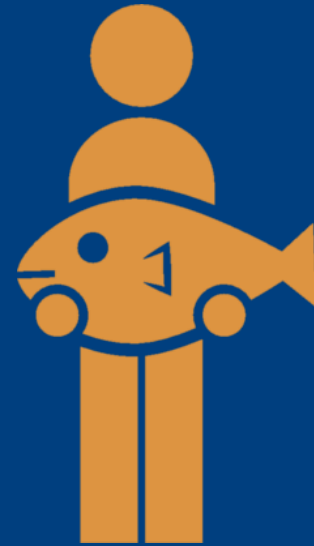
# Distribution of Anglers of License Renewal Categories



More than 80% of **new** license  
buyers fished when they were  
children



More than 50% of anglers who  
fish year after year, started fishing  
when they were 5 years old or  
younger





# The social aspects of fishing is a strong appeal



## Top three reasons for fishing

- To spend time with family and friends
- To relax
- For the sport or recreation

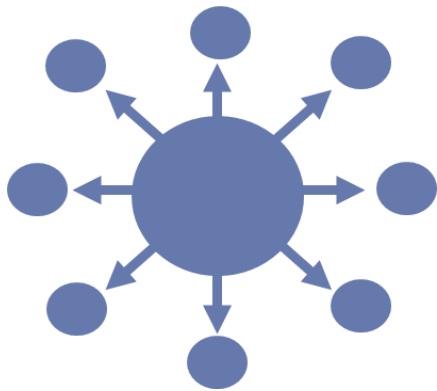
# How fishing appeals to anglers



**New recruits  
seek relaxation**



**Avid anglers seek  
excitement**



# LIFESTYLE SEGMENTATION

# Lifestyle Segmentation

- Groups anglers based on their lifestyle preferences, motivations, purchasing habits and more
- Recognizes people typically live in neighborhoods populated by others with similar lifestyles, attitudes, and interests
- Allows marketing and recruitment efforts to become more effective by better targeting their audience and messaging
- Each grouping of similar people is a “lifestyle segment”
- By understanding angling’s various segments we can identify neighborhoods:
  - a) Where fishing is popular
  - b) Where specific products and services will sell better
  - c) Where to find higher densities of people more likely to fish

# Lifestyle Segmentation: Method

- Based on fishing license sales records from 12 state fish and wildlife agencies – CO, FL, GA, ME, MI, MN, MS, MT, NH, NY, UT, WA (2004-2013)
- Analyzed license data using ESRI's Address Coder™ and Tapestry™ lifestyle segmentation software and data
  - Every U.S. household assigned to one of the 14 distinct neighborhood types, known as LifeModes
  - LifeModes were then divided into a total of 68 detailed 'Tapestry' segments that make up the U.S. population
  - All LifeMode and Tapestry results are in the full reports found at [www.ASAfishing.org](http://www.ASAfishing.org).

# LifeMode Groups

## Top 10 Fishing License Groups

Cozy Country Living

Rustic Outposts

GenXurban

Family Landscapes

Affluent Estates

Middle Ground

Ethnic Enclaves

Senior Styles

Hometown

Midtown Singles



People in these communities are

**59%**

**more likely to fish  
than the average American**

# Tapestry Segments

## Top 10 Fishing Tapestry Segments

Green Acres

Southern Satellites

Middleburg

Salt of the Earth

Soccer Moms

Rural Resort Dwellers

The Great Outdoors

Savvy Suburbanites

Up and Coming Families

Rooted Rural

People in these groups are

**Twice**

**as likely to fish**

**than the average American neighborhood**

*Details of the top ten fishing Tapestry segments are provided in the Appendix at end of the report*



# Acknowledgements

- American Sportfishing Association
- Association of Fish and Wildlife Agencies
- The 12 participating state fish & wildlife agencies
  - CO, FL, GA, ME, MI, MN, MS, MT, NH, NY, UT, WA
- Southwick Associates, Inc.
- U.S. Fish & Wildlife Service
- Multi-State Conservation Grant program
- Responsive Management
- Recreational Boating & Fishing Foundation

# APPENDIX: TOP 10 TAPESTRY NEIGHBORHOODS WHERE ANGLERS LIVE

Per ESRI Business Analyst® & Tapestry® sources

# Green Acres

Outdoorsy & Self-reliant

7.0%  
of U.S. anglers

Rural  
Acreage

#1 of 68 tapestry segments among anglers



Married couples, most with no children



Mostly white collar jobs



Affluent do-it-yourselfers



Outdoor lifestyle includes gardening, hunting & fishing



Active in their community



# Southern Satellites

Southern Country Folks

6.6%  
of U.S. anglers

Rural  
South

#2 of 68 tapestry segments among anglers



Slightly older with median age of 40, married couples



Blue collar jobs



Below average income, cost conscious



Activities include hunting and fishing



Obtain information from TV, listen to country music



# Middleburg

Suburb Meets Country

5.0%  
of U.S. anglers

Semi-Rural  
Subdivisions



Younger couples, median age of 35, with children



Easy-paced country living paired with suburbia



Thrifty and prefer to purchase American-made items



Conservative and family-oriented



Tech savvy



# Salt of the Earth

Traditional Rural Living

4.7%  
of U.S. anglers

Rural  
Midwest

#4 of 68 tapestry segments among anglers



Slightly older, median age 43,  
empty-nesters



Manufacturing and related  
industries



Average income



Outdoor sports and activities  
including hunting and fishing



Prefer to conduct their business  
in person and not online

# Soccer Moms

Parenting Professionals

4.6%  
of U.S. anglers



Two working parents with school-aged children



Professional positions in nearby cities



Affluent and willing to pay for time-saving services



Family-oriented activities, bicycling, golfing, boating



Tech savvy

Suburban Living





# Rural Resort Dwellers

Rural & Ready to Retire

4.1%  
of U.S. anglers

Resort  
Areas in  
Midwest

#6 of 68 tapestry segments among anglers



Married couples nearing retirement



Blue collar jobs



Moderate income



Passionate hunters and anglers



Satellite television and dial-up internet

# The Great Outdoors

Active Outdoors

3.9%  
of U.S. anglers

Small  
Towns

#7 of 68 tapestry segments among anglers



Educated empty-nesters  
nearing retirement



Service jobs



Modest income, likely to invest  
in real estate



Active outdoor lifestyle includes  
hiking, hunting and fishing



Not dependent on technology,  
but use it lightly



#8 of 68 tapestry segments among anglers

# Savvy Suburbanites

Affluent and established

3.4%  
of U.S. anglers



Married empty-nesters or  
have adult children at home



Well-educated and  
well-traveled



Affluent and willing to pay for  
time-saving services



Enjoy gardening and home  
remodeling



Use technology to find quality  
products

Older  
suburban  
homes



# Up & Coming Families

Diverse, Active Families

3.2%  
of U.S. anglers



Young families with small children



Most diverse segment with high proportion of anglers



Above average income, many 2-income families



Active lives. Family activities include sports & exercise

Suburban Living



Tech savvy



# Rooted Rural

Forests for Work & Play

3.1%  
of U.S. anglers

Eastern  
Mountain  
Woods

#10 of 68 tapestry segments among anglers



Married, few with children,  
living in Appalachian mountains



Forestry and related jobs



Lower income, thrifty shoppers



Outdoor lifestyle including  
hunting and fishing



Prefer to conduct their business  
in person and not online

