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:
  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
• 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

1991: 22%
2011: 13%

Source: USFWS 2011 National Survey
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.

- West: 39%
- Midwest: 28%
- Northeast: 33%
- Southeast: 53%
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

- Retained anglers: 51%
- Recruited anglers: 28%
- Re-activated anglers: 19%
- Lifetime or Multi-year license holders: 3%
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.
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 as 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

- 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

4.6% of U.S. anglers

#5 of 68 tapestry segments among 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

Parenting Professionals

Suburban Living
Rural Resort Dwellers

Rural & Ready to Retire

4.1% of U.S. anglers

#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

Resort Areas in Midwest
The Great Outdoors

Active Outdoors

3.9% of U.S. 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

Small Towns
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
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

#9 of 68 tapestry segments among anglers
Rooted Rural

Forests for Work & Play

3.1% of U.S. anglers

#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