

The New Anglers

Who Are They? Why Did They Try?
Will They Continue?



American Sportfishing Association
Leading the Way for Sportfishing's Future

Report three of six in a series
October, 2015

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Regardless of the contributions of many, Southwick Associates remains responsible for the content within.

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Executive Summary

Not many activities offer as many opportunities for tranquil relaxation or exhilarating surges of adrenaline, but both types of experiences have about equal appeal when it comes to fishing. This and other motivational factors are illuminated in this third report in a series examining sportfishing “churn,” a term that refers to anglers’ transitioning in and out of the sport from year to year.

Produced for the American Sportfishing Association by Southwick Associates and Responsive Management, sheds new light on anglers’ fishing habits and loyalty to the sport. This latest installment focuses on those new to the sport or trying it again after a long hiatus with detailed looks at demographic groups among recruited anglers versus retained ones. It also examines motivational and other factors influencing people’s decisions to fish.

As the first report in the series uncovered, the overall number of fishing participants remains quite stable from year to year, at around 33 million, but not because most anglers are avid. Rather it’s because about the same number of people joins and leaves the angling population each year. With recruited and reactivated anglers make up more than 40 percent of all fishing license holders in any given year, there’s huge potential to grow participation, tackle sales and angler-generated conservation funding if those millions of newcomers keep fishing year to year.

Younger, female, urban dwellers are more likely to be among the ranks of newly recruited anglers compared to retained anglers, who are much more likely to be male, rural residents, and over 35 years of age. Yet over the long term, there has been limited shift in the overall angler population towards those newcomer demographics due to the higher churn rates among them.

More than 80 percent of recruited anglers reported having fished previously in their lives, typically when they were quite young. They are frequently prompted to fish by family and friends, who also serve as their most common source of fishing information and instruction. These and other findings related to motivational factors tend to reassert previous research from the American Sportfishing Association and Recreational Boating & Fishing Foundation. However, this report reveals significant differences between new anglers’ intentions and their actions; while the vast majority think they will fish every year, only a small proportion actually do. Other highlights include:

- **Women make up one-third of new anglers.** When it comes to recruited anglers, 65 percent are male and 35 percent are female. However, only 18 percent of retained anglers are female.
- **Newcomers are younger.** More than one-half of recruited anglers are under age 35, compared to 28 percent of retained anglers. Conversely, only 12 percent of recruited anglers are between the ages of 55 and 64, compared to 22 percent of retained anglers.
- **Recruited anglers tend to live in more populous communities.** The largest portion of recruited anglers, about 47 percent, lives in suburban neighborhoods. However, the proportion of recruited anglers between the ages of 18-24 years is greatest in rural areas while the proportion of recruited anglers between the ages of 25-34 years is greatest in urban areas.
- **Recreational togetherness is a strong appeal.** The top three reasons people fish are to spend time with family and friends, to relax, and for the sport or recreation. For new recruits, the opportunity for relaxation is a strong driver while avid anglers tend to be in it for the excitement.
- **Age of introduction matters.** More than 80 percent of recruited anglers in the survey year reported it was not the first year they’d ever fished. Among those, more than a third tried the sport when they were five years old or younger. In fact, more than half of anglers who fish year after year say they first started fishing when they were five years old or younger.

- **Others' influence is strong.** The majority of both recruited and retained anglers say their parents had the most influence on their interest in fishing and their learning. Other factors that commonly prompted participation were an invitation from a friend or relative and a desire to spend time outdoors.
- **Intentions don't match up with actions.** More than three-quarters of recruited anglers think they will go fishing each year over the next five years; however, less than 10 percent are likely to do so.

Background on the report series

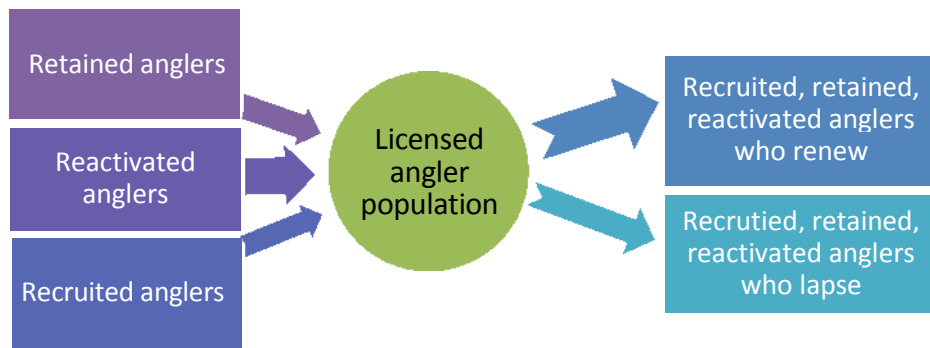
To produce these insights, 10 years of fishing license data covering 2004 to 2013 were compiled and studied for 12 states (CO, FL, GA, ME, MI, MN, MS, MT, NH, NY, UT, and WI) to provide regionally and nationally representative portraits of anglers for this and future reports in the series. In addition, this latest installment also included data and analysis from a national survey of nearly 1,000 anglers, conducted by Responsive Management, to learn more about anglers' motivations to fish, their fishing experience, and their plans about continuing.

The American Sportfishing Association will release the series of detailed reports in installments—about one report per month—examining specific aspects of angler participation data. The series focuses on angling participation topics such as regional churn rates, profiles of new recruits, trends for women and different cultural segments, lifestyle profiles and more.

Introduction

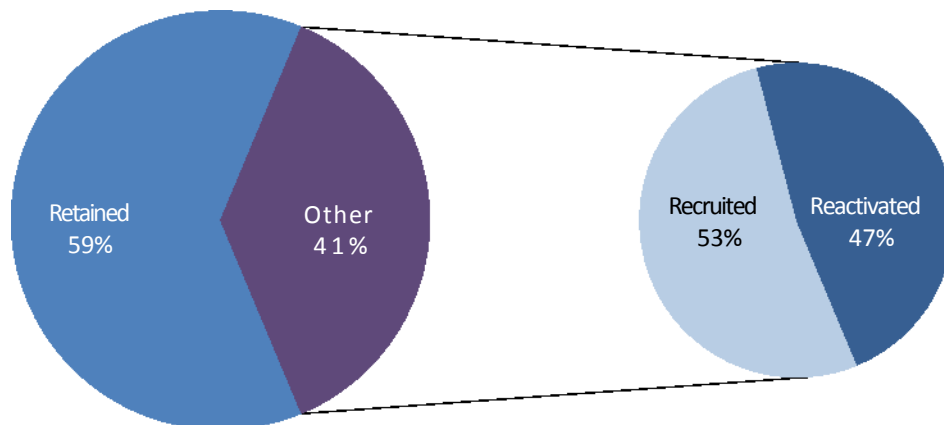
One way to categorize anglers is to consider their past and current license purchases. The result is three categories of anglers: retained anglers, reactivated anglers, and recruited anglers (R3). For this study, people who have renewed their licenses are retained anglers. Anglers who purchased a license at least once in the last five years but have lapsed before purchasing one in the current year are considered reactivated anglers. Finally, anglers who purchased a license in the current year but have not purchased a license in any of the five preceding years are considered new, or recruited anglers.

Figure 1. License holder composition each year.



As the third installment in a series of new reports, this report focuses on the “recruited” angler group, and provides context by comparing this group of new anglers to those who renew fishing privileges year after year. Through a comprehensive study of angler turnover among twelve participating states, results indicate that 41% of all license holders each year are “gained” over the previous years as either new or reactivated anglers. Specifically, these do not include the anglers who renew from the previous year (Figure 2). The recruited or new anglers contribute just over half, on average, of gains in the number of license holders each year.

Figure 2. Average annual distribution of license holders over R3 categories



Within this group of newly recruited anglers are people who will remain continuously engaged in the sport (dedicated anglers), lapse but then become reactivated (occasional anglers), or simply never renew again. A better understanding of recruited anglers and their motivations to initially engage in sport fishing allows marketers to develop plans and strategies to nurture their interest in the sport with the goal to increase the pool of dedicated anglers.

Approach

Ten years of complete fishing license sales records were obtained from twelve states. These data were harmonized into one comprehensive file, containing all fishing privileges sold in the twelve states from 2004 to 2013.¹ The total angler pool was limited to those who were at least age 18 and no older than 65 in the license year. This group is referred to as “licensed anglers” in the remainder of the report. The resulting data base permitted identifying trends in license sales and fishing participation, the type of people more likely to fish, and more. This specific report focuses on resident anglers only.

In addition to the license database analysis, a national survey of anglers was conducted by Responsive Management of Harrisonburg, Virginia to learn more about their motivation to fish, their experience within the sport, and their plans about remaining engaged with the sport. The survey tool and target audience was originally designed for anglers recruited in 2013. License databases from sixteen states were analyzed to identify anglers fitting the criteria as a “new” angler in 2013 (Table 1). The survey was conducted as a phone interview. A total of 820 anglers completed the survey. The results of the survey are weighted based on the number of licensed angler to ensure the respondent sample reflects the population as accurately as possible.

Table 1. Survey response by state

State	Respondent sample	Total angler population	State	Respondent sample	Total angler population
Colorado	8%	5%	Mississippi	3%	5%
Connecticut	5%	3%	Montana	4%	1%
Florida	11%	15%	New Hampshire	2%	1%
Georgia	6%	6%	New York	13%	14%
Indiana	3%	6%	North Carolina	6%	10%
Maine	5%	1%	Oregon	7%	3%
Michigan	6%	11%	Utah	5%	3%
Minnesota	8%	10%	Wisconsin	7%	7%
			Total	100%	100%

The respondent group, however, did not consist exclusively of “new” anglers. Instead, it included anglers who reported they fish either occasionally from year to year and others who fish every year

¹ The twelve states providing complete records are Colorado, Florida, Georgia, Maine, Michigan, Minnesota, Mississippi, Montana, New Hampshire, New York, Utah, and Wisconsin.

(Table 2). The diversity of the respondent group does help to position recruited anglers in relation to retained anglers and identify important distinctions between the groups.

Table 2. Stated avidity group distributions among survey respondents

Avidity	Percent
I fished frequently every year	19%
I fished occasionally every year	36%
I fished occasionally but NOT every year	19%
I hadn't fished for at least 4 years before fishing in 2013	25%
Total	100%

Recruited Angler Purchasing Patterns

Fishing is cited as one of the three most popular outdoor recreational activities among both adults and youth across the nation.² A variety of factors influence the decision to purchase a license and we discuss some of those factors elsewhere in this report. In this section, we focus on the license purchasing behaviors of individuals identified as recruited anglers compared to retained anglers. We analyze the average purchases over a five year period to smooth year to year variances and develop three specific crosstabs to explore proportional differences between the recruited and retained groups across age, gender, and neighborhood characteristics.

The majority of the licensed angler population is male. However, recruited anglers are more likely than retained anglers to be female (35% versus 18%).

Figure 3. Gender distribution among recruited and retained anglers.

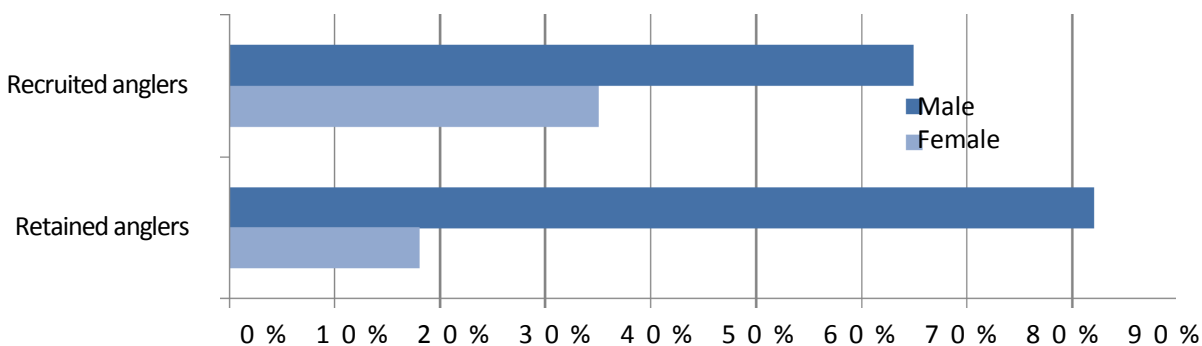


Figure 4 shows the distribution of recruited and retained anglers across five age categories. Not surprisingly, the newly recruited anglers are much more likely than retained anglers to be found in the younger categories. More than one-half of recruited anglers are under age 35 compared to 28% of the retained anglers. Conversely, only 12% of recruited anglers are between the ages of 55 and 64 compared to 22% of retained anglers.

² Outdoor Industry Association. 2014. Outdoor recreation participation: Topline report 2014. Available: <https://outdoorindustry.org/images/researchfiles/ResearchParticipation2014Topline.pdf?207>

Figure 4. Age distribution among recruited and retained anglers

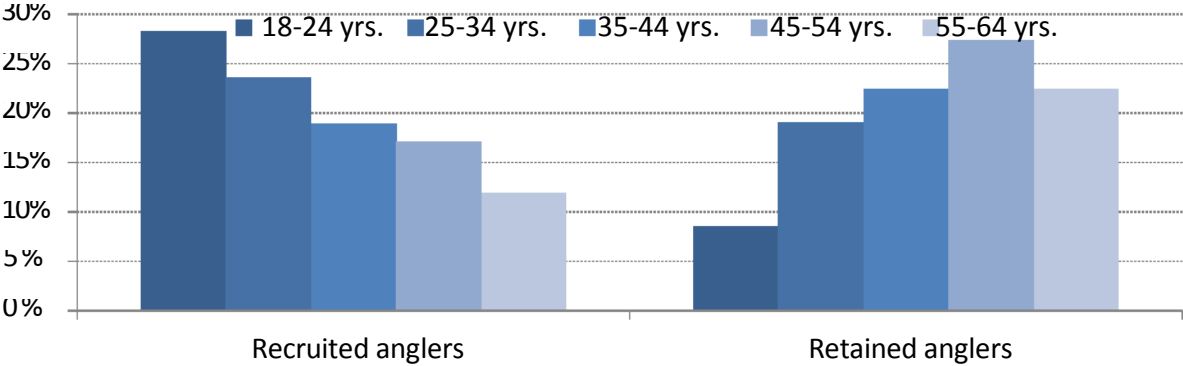


Table 3 shows the distribution of recruited and retained anglers, by gender, across five age categories. There is little difference between the genders of anglers in the age distribution of either recruited or retained anglers.

Table 3. Age (categorical) and gender distribution of recruited license holders, relative to retained anglers

Year of age	Recruited anglers			Retained anglers		
	All license holders	Gender		All license holders	Gender	
		Male	Female		Male	Female
18-24 yrs. old	28%	29%	27%	9%	8%	10%
25-34 yrs. old	24%	23%	24%	19%	19%	19%
35-44 yrs. old	19%	19%	19%	22%	23%	21%
45-54 yrs. old	17%	17%	18%	27%	27%	28%
55-64 yrs. old	12%	12%	12%	22%	23%	22%
Total	100%	100%	100%	100%	100%	100%

Recruited anglers reside in neighborhoods that are slightly less rural and more suburban or urban in nature, relative to retained anglers (Figure 5 and Table 4). The largest portion of recruited anglers lives in suburban neighborhoods. Yet, recruited female anglers are more likely to live in rural neighborhoods than their male counterparts.

Figure 5. Neighborhood types among recruited and retained anglers

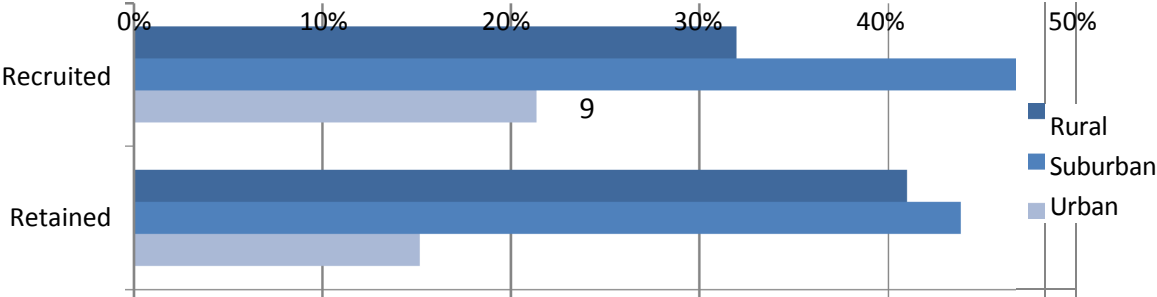


Table 4. Neighborhood characteristic and gender distribution of recruited license holders, relative to retained anglers

Neighborhood	Recruited anglers			Retained anglers		
	All license holders	Gender		All license holders	Gender	
		Male	Female		Male	Female
Rural	32%	30%	36%	41%	40%	45%
Suburban	47%	48%	45%	44%	44%	41%
Urban	21%	22%	19%	15%	16%	14%
Total	100%	100%	100%	100%	100%	100%

Table 5 also explores the types of neighborhoods anglers reside in across five different age categories. It is interesting to note that the proportion of recruited anglers between the ages of 18-24 years is greatest in rural areas while the proportion of recruited anglers between the ages of 25-34 years is greatest in urban areas. This may be related to the rural lifestyle where fishing is more convenient to youth, and who are more likely to fish than younger people in urban and suburban areas. Also, distinct life stages often occur during these two periods. The first period is typical of the transition from home to college and the second is typical of the transition from college to the career. Employment opportunities can be one factor that draws people to more urbanized areas. It is possible that people from rural backgrounds who move to urban areas are more likely to take up fishing compared to their friends who grew up in urbanized areas, hence greater recruitment rates at older ages in urbanized areas. A challenge for fishing recruitment efforts in urban areas is these areas offer more recreational choices which directly compete for people's free time, maybe more than experienced in rural areas. Its interesting to note that recruitment rates for older anglers is higher in rural areas, which might relate to people moving to, or buying second homes , in rural areas as they become older.

Table 5. Age and neighborhood characteristic distribution of recruited license holders, relative to retained anglers

Year of age	Recruited anglers				Retained anglers			
	All recruited anglers	Neighborhood characteristics			All retained anglers	Neighborhood characteristics		
		Rural	Suburban	Urban		Rural	Suburban	Urban
18-24 yrs.	28%	31%	28%	25%	9%	9%	8%	8%
25-34 yrs.	24%	20%	23%	30%	19%	18%	19%	22%
35-44 yrs.	19%	17%	19%	19%	22%	21%	23%	23%
45-54 yrs.	17%	17%	17%	16%	27%	27%	28%	26%
55-64 yrs.	12%	14%	12%	10%	22%	24%	22%	20%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Using a slightly different lens, Table 6 reports the distribution of recruited and retained anglers by neighborhoods within each of the five age categories. Roughly one third (28%-35%) of recruited anglers reside in rural neighborhoods, lower than retained anglers (39%-43%). Approximately one-fifth (18%-27%) of recruited anglers live in urban neighborhoods, higher than retained anglers (14%-18%). In most cases, the largest proportion of each group resides in suburban neighborhoods. Please keep in

mind a larger proportion of the U.S. population lives in suburban and urban areas compared to rural areas, meaning that a larger proportion of rural residents are license holders compared to other areas. This topic will be explored further in upcoming reports within this series.

Table 6. Distribution of recruited anglers by age categories across neighborhood characteristics, relative to retained anglers

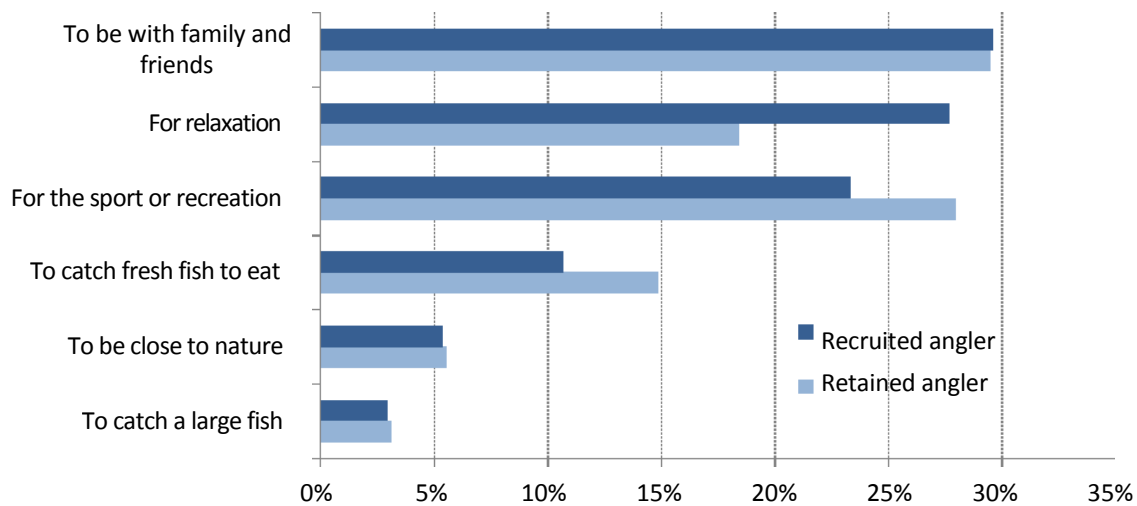
Year of age	Recruited anglers				Retained anglers			
	<i>Neighborhood characteristics</i>				<i>Neighborhood characteristics</i>			
	<i>Rural</i>	<i>Suburban</i>	<i>Urban</i>	Total	<i>Rural</i>	<i>Suburban</i>	<i>Urban</i>	Total
18-24 yrs.	35%	46%	19%	100%	43%	42%	15%	100%
25-34 yrs.	28%	46%	27%	100%	39%	43%	18%	100%
35-44 yrs.	30%	48%	22%	100%	40%	45%	15%	100%
45-54 yrs.	33%	47%	20%	100%	41%	45%	15%	100%
55-64 yrs.	35%	46%	18%	100%	43%	43%	14%	100%

The Angler Survey

This research and earlier monographs tell us that angler characteristics differ between recruited and retained anglers. Recruited anglers tend to be younger, have a greater likelihood to be female and live in more urban neighborhoods while retained anglers tend to be older, male and live in more rural neighborhoods. Analysis of the survey looks beyond the limited demographic data available through license sales records to detect differences in motivation, interest and other factors influencing the decision to fish. Angler marketing efforts are encouraged to tap into the lifestyles and motivations of each group to maximize the efficacy of those efforts.

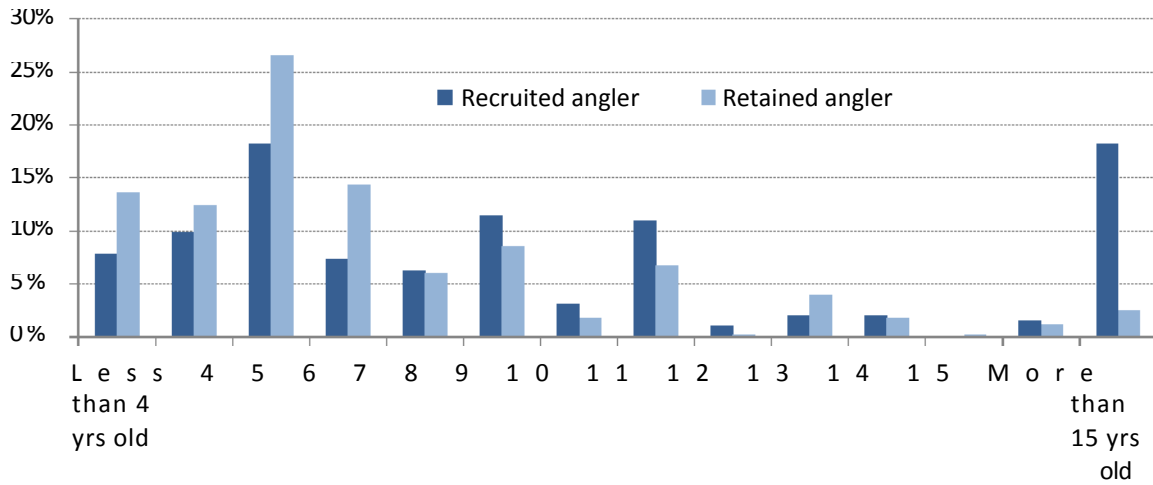
As a sport, fishing can offer a variety of characteristics that can appeal to people looking for solitary or more social endeavors. As found in previous American Sportfishing Association (ASA) research, among the anglers surveyed, spending time with family and friends is cited as the most important reason for going fishing in 2013 among both recruited and retained anglers (Figure 6). Both types of anglers are likely to fish with others (72% of recruited anglers and 63% of retained anglers). Relaxation is also a strong motivational factor for recruited anglers. Retained anglers are influenced more strongly by the excitement of the sport and the chance to harvest fish to eat.

Figure 6. What was your most important reason for fishing in 2013?



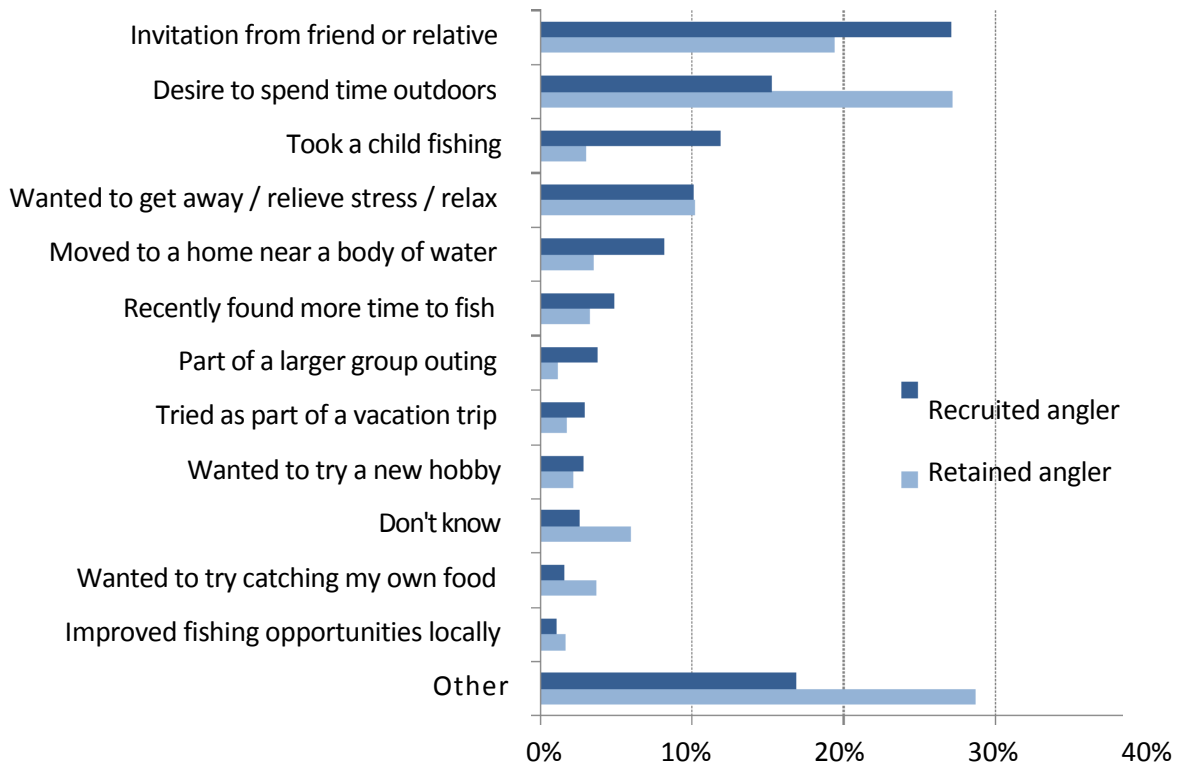
Eighty-one percent of recruited anglers report that 2013 was not the first time they had ever gone fishing. Among those who had gone fishing in the past, more than a third tried the sport when they were five years old or younger (Figure 7). And, 18% were exposed to fishing when they were over the age of 15 years old. More than half of anglers who fish year after year say they first started fishing when they were five years old or younger. Only 3% of retained anglers began fishing when they were older than 15 years of age. This does suggest that the age of introduction may play a factor in a person's participation level in the sport; however, it does not preclude recruited anglers in 2013 who first went fishing at an older age from transitioning to a more consistent, retained angler.

Figure 7. Age when angler first went fishing



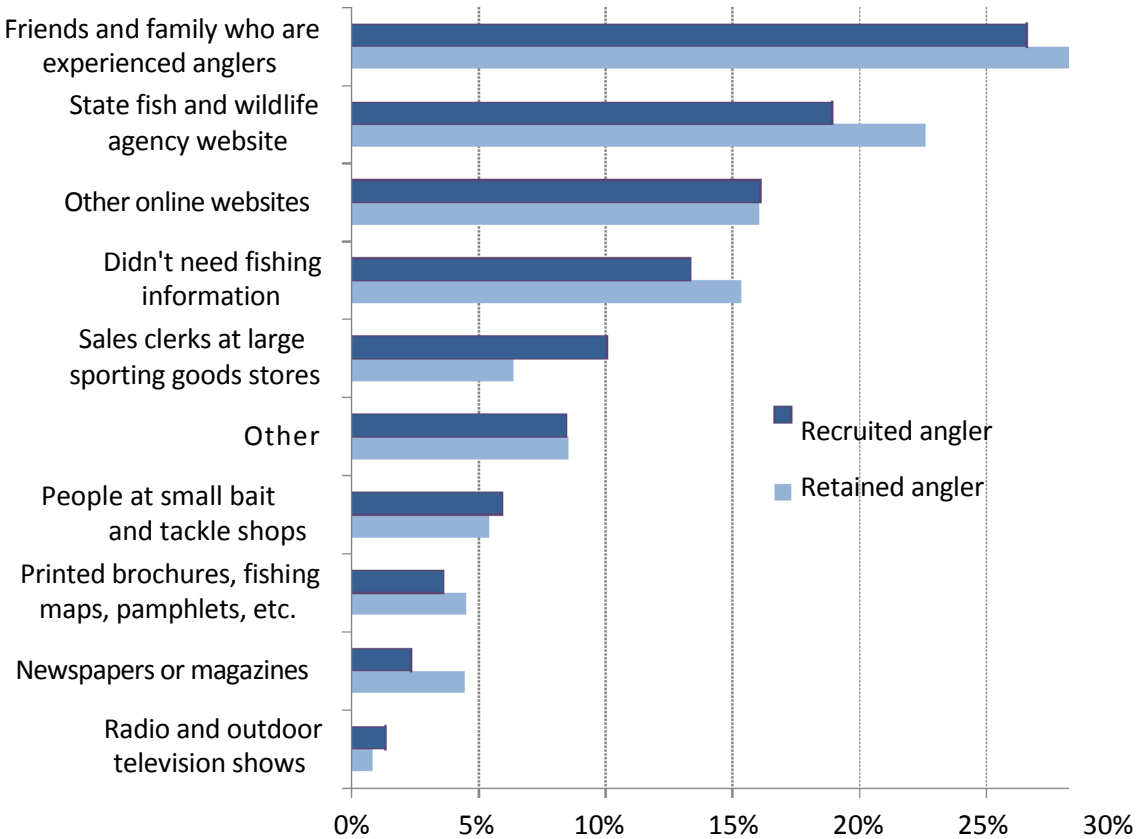
When asked about the person or people who had the most influence on their interest in fishing and who taught them the most about fishing, the majority of both retained and recruited anglers said it was their parents. In 2013, an invitation from a friend or relative sparked or re-kindled the desire to go fishing for recruited anglers (Figure 8), confirming previous ASA and Recreational Boating and Fishing Foundation (RBFF) research. Many anglers cited “other” factors outside of those listed. The most common theme is the purchase of new equipment or a boat.

Figure 8. What prompted you to go fishing in 2013?



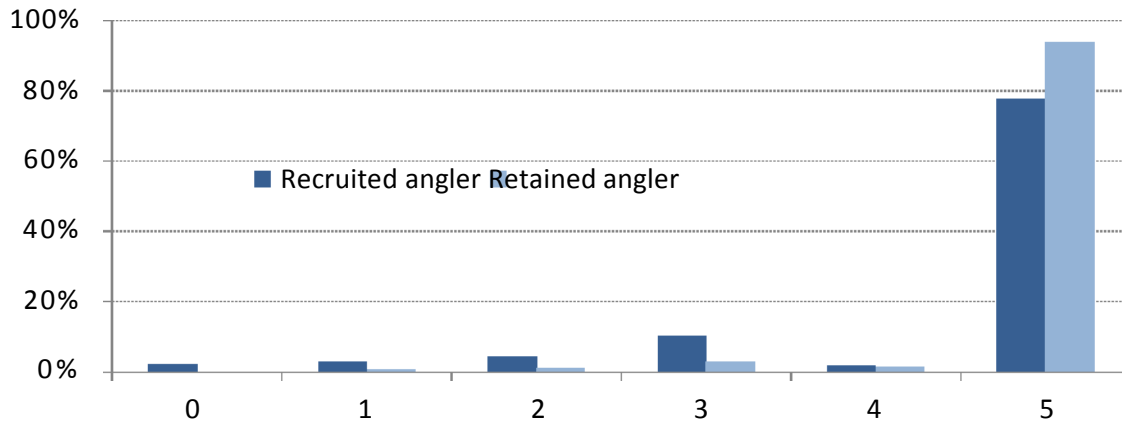
In an age heavily influenced by data and technology, both recruited and retained anglers are savvy consumers of information. There are a multitude of avenues anglers can use to obtain information about the best places and techniques for fishing. But, where do they turn the most? Both recruited and retained anglers turn to friends and family who are experienced anglers (Figure 9). They also turn online to state fish & wildlife agency and other websites. Communication with others outside of the family and other traditional means of communication (i.e. brochures, magazines, TV shows) are not as heavily relied upon as information sources.

Figure 9. What are your sources of fishing information?



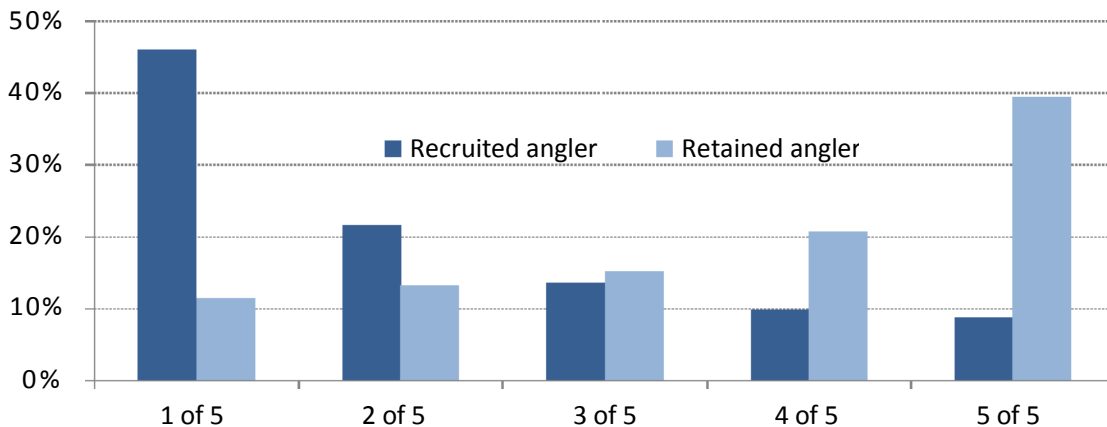
The majority of recruited anglers remain engaged in fishing beyond 2013. Sixty-three percent of recruited anglers report purchasing a fishing license again in 2014. And, on a scale of 0 (not at all interested) and 10 (extremely interested), 63% of recruited anglers report their level of interest ranging from 5 to 8. Slightly fewer retained anglers (61%) place themselves within the same range. This group is more than twice as likely to identify themselves as extremely interested in fishing. Over the next five years, 78% of recruited anglers think they will go fishing each year (Figure 10). And, 84% of them anticipate going fishing sometime in 2015. However, a person's stated intentions frequently do not turn into action.

Figure 10. Number of years anglers anticipate going fishing in the next five years.



By exploring the number of years a recruited and retained angler purchased a license over a five year period from 2009 through 2013, it becomes clear that this is in direct contrast to actual behavior. Less than 50% of recruited anglers actually make a license purchase during one of five years (Figure 11). And, less than one tenth purchase each of the five years. While 40% of retained anglers, on the other hand, purchase each of the five years. Based on license records in 2013, 32% of anglers who were identified as recruited in 2012 renewed their license again the next year. This is less than half of anglers identified as retained, 73% of whom renewed the next year.

Figure 11. Number of years recruited and retained anglers actually purchased a license over a five year period (2009-2013)



Discussion

More than 60% of the licensed angler population can be considered stable, renewing their license from one year to the next. However, the remaining third can be considered dynamic, with many not electing to renew their license for any number of reasons. This loss of anglers is balanced, in part, by new anglers. This group - the recruited angler - is the focus of this third report in a series that explores angler participation rates and lifestyles.

The results of this report confirm earlier findings on angler churn rates. Younger, female, urban dwellers are more likely to be among the ranks of the newly recruited anglers compared to retained anglers who are much more likely to be male, rural and over 35 years old. Yet, over the long term, there has been little significant shift in the overall angler population towards younger, urban and female demographics. The reason is largely due to the higher churn – or drop-out - rates among young, female and urban dwellers. While people within these demographic groups appear more willing to try fishing, they are also more likely to lapse or drop out altogether. The challenge for marketers is to develop strategies to maintain the interest and participation of new anglers after they have tried the sport.

Many of this report's findings back up earlier information produced by the Recreational Boating and Fishing Foundation (RBFF).³ Of anglers who were identified as new recruits in 2012, only 32% elected to purchase a license again the next year. This is less than half of anglers identified as retained, 73% of whom purchased in both 2012 and 2013. Readers are encouraged to review RBFF research that further examines renewal rates among newly recruited anglers and is actively testing methods to boost their license renewal rates.

Recruited anglers, who are defined as not having been recorded as purchasing a license in the five most recent years, are frequently prompted to fish by friends and family who also serve as important sources for fishing information and instruction. Over 80 percent of recruited anglers reported having fished previously in their lives, typically as a youth, but discontinued for a long period of time. This highlights the need for youth fishing programs to help encourage adults later in life to take up fishing again.

Based on self-reporting, nearly 80 percent of newly recruited anglers intend to fish in each of the next five years. However, by exploring state fishing license databases, it is revealed that over two-thirds of newly recruited anglers will purchase a license in only one or two of the next five years. As time passes, their interest in sportfishing is apparently being challenged by other potential uses of their free time. More insights into sportfishing's competition are available from previous American Sportfishing Association (ASA) research.⁴ Finding methods to channel new anglers' interest into continued fishing participation is the primary challenge for the recreational fishing community.

³ "2014 Insights into First-Time Fishing License Buyers Report." Recreational Boating and Fishing Foundation. <http://takemefishing.org/general/about-rbff/research-and-evaluations/>.

⁴ "On the Fence About Fishing." American Sportfishing Association. <http://asafishing.org/facts-figures/studies-and-surveys/on-the-fence-about-fishing/>.