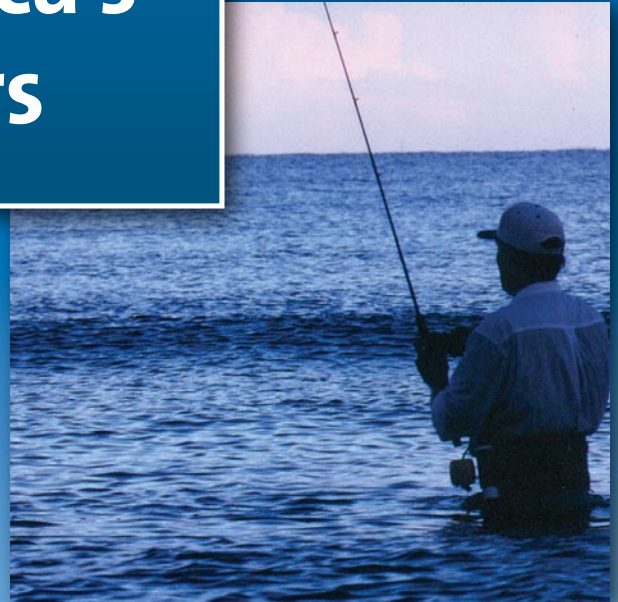




Lifestyles and License Buying Habits of America's Anglers



A Five-Year Examination of U.S. License Buyers



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Minnesota is widely considered an “extreme fishing” state. Even non-anglers know that the state fish is the walleye and the annual season opener for that species is akin to a state holiday. Automobile license plates proclaim Minnesota to be the “Land of 10,000 Lakes,” a motto acknowledging the importance of water-based recreation. Minnesota also boasts the headwaters of the Mississippi River as well as dozens of water sources in the Twin Cities (Minneapolis/St. Paul) area that support a diverse fishery.

But all is not well in this fishing paradise. Fishing participation is down. Despite abundant opportunity, Twin Cities residents were the least likely to buy a fishing license. This fast-growing and very diverse part of Minnesota’s population is simply finding other ways to spend their recreational hours. But what about the loyal anglers? Most of them do not buy licenses on an annual basis. In a state with an abundance of angling resources, many segments of Minnesota’s population are dropping out of fishing at alarming rates.

Unfortunately, Minnesota has plenty of company. Most states have similar problems with many segments of their populations showing much greater rates of attrition than others.

Declines in fishing participation pose significant threats to conservation efforts in the U.S. With fewer people fishing, the public becomes further disconnected with nature and less likely to support new conservation policies and actions. In addition, funding for fisheries conservation depends on license sales and excise taxes from fishing tackle sales. Fewer anglers means fewer dollars for conservation. More efforts to recruit and retain anglers are necessary if fishery resources are to be conserved.

A 2006 study conducted by the American Sportfishing Association (ASA) and the Association of Fish and Wildlife Agencies (AFWA) has identified groups of people who are more likely to respond to fishing promotions and who will not. Research began with the premise that traditional methods of classifying anglers by similar age or gender groups are not working. Advertising and public relations firms have long known that in order for messaging to be effective it has to reflect the differences in people’s lifestyles. Fishing recruitment and retention efforts need to start making the same distinctions.

To separate anglers based on their lifestyle and consumption differences, state fishing license data were first combined with Tapestry™ lifestyle data. Tapestry™ provided by the California-based company ESRI and built from U.S. Census Bureau data and other sources, provides detailed demographic

information for all neighborhoods in the United States. Tapestry™ has classified the lifestyles of America’s neighborhoods down to the block level. By matching license holder addresses with Tapestry™ data, and tracking the license buying history for individual customers over a period of years, researchers developed an in-depth look at fishing license buyers:

- What type of individual is more likely to drop out of fishing?
- Who is more likely to become a new angler?
- Are anglers likely to have children?
- Are anglers single or married?
- Do anglers embrace city life or want to escape to rural retreats?
- Do anglers purchase luxury products?
- What media outlets do anglers use?

This data can be used by state and federal agencies—as well as their partners in the sportfishing industry—to target recruitment and retention efforts and begin to reverse the trend of declining fishing license sales.

A detailed, national technical report, as well as 15 state reports, is available on the Association of Fish and Wildlife Agencies’ Web site, www.fishwildlife.org, and the American Sportfishing Association’s Web site at www.asafishing.org.

Part I: Baseline Information

Research began by taking the traditional approach of classifying anglers. Tables 1 through 3 give us that perspective. According to the traditional approach, the typical angler is a male between the ages of 30 and 60 who purchased a fishing license in his state of residence.¹ From 2001 to 2003, the overall number of license buyers declined over 5 percent, rebounded for a year, then declined again in 2005. The number of license buyers actually increased in the Southeast by 1.4 percent, but were down in all other regions.

Tables 1, 2 and 3 provide baseline information about anglers. However, more research is needed regarding the type of person who is fishing—and who is not—if results from future outreach efforts are to be maximized.

¹ Senior citizens and youth (16 and under), are exempt from purchasing a fishing license. Therefore, some difference exists between the total number of anglers and those who actually purchased a license.

Table 1. Licenses Sold by Gender—2005

Region	Sex	Resident	Non-Resident
U.S.	Female	20.2%	13.9%
	Male	79.8%	86.1%
Midwest	Female	19.7%	14.7%
	Male	80.3%	85.3%
Northeast	Female	13.5%	10.7%
	Male	86.5%	89.3%
Southeast	Female	21.2%	13.4%
	Male	78.8%	86.6%
West	Female	22.6%	17.7%
	Male	77.4%	82.3%

Table 2. Age of License Buyers at Time of Purchase—2005²

Region	Age	All License Buyers	Resident	Non-Resident
U.S.	16 and under	1.2%	1.7%	1.0%
	17 to 19	4.4%	4.8%	3.3%
	20 to 29	16.8%	17.9%	14.3%
	30 to 39	19.7%	20.1%	18.3%
	40 to 49	23.4%	22.7%	24.3%
	50 to 59	18.3%	17.1%	20.4%
	60 to 69	11.1%	10.4%	12.8%
	70 and older	5.0%	5.3%	5.6%
		100.0%	100.0%	100.0%

² Regional details are available in the national technical report available at www.asafishing.org or www.fishwildlife.org.

Table 3. License Sale Trends

Year	U.S.		Midwest		Northeast		Southeast		West	
	Total # of License Buyers	% Change in Number of License Buyers	Total # of License Buyers	% Change in Number of License Buyers	Total # of License Buyers	% Change in Number of License Buyers	Total # of License Buyers	% Change in Number of License Buyers	Total # of License Buyers	% Change in Number of License Buyers
2001	29,452,379	N/A	10,142,953	N/A	4,577,515	N/A	11,110,903	N/A	10,238,969	N/A
2002	28,859,584	-2.0%	9,793,825	-3.4%	4,530,994	-1.0%	11,010,543	-0.9%	9,900,337	-3.3%
2003	27,908,272	-3.3%	9,534,152	-2.7%	4,289,328	-5.3%	10,697,943	-2.8%	9,579,515	-3.2%
2004	28,499,206	2.1%	9,523,737	-0.1%	4,358,418	1.6%	11,341,095	6.0%	9,738,702	1.7%
2005	28,199,068	-1.1%	9,444,280	-0.8%	4,231,831	-2.9%	11,266,983	-0.7%	9,574,318	-1.7%

Who Buys Licenses... and Who Does Not

According to Tapestry,TM the person most likely to buy a fishing license lives in a rural area or small town, holds a blue-collar job and earns an average or below average income (Table 4). However, one surprising finding was the relatively high license purchasing activity among upper-income households. The two wealthiest LifeMode categories presented in Table 4, “Upscale Avenues” and “High Society,” show a greater-than-average rate of

purchasing licenses and represent nearly one quarter of all U.S. fishing license customers. For marketers who typically employ golf or other recreational activities to capture high-end customers, fishing may be a viable alternative. For state agencies, this shows that license marketing opportunities exist in places not traditionally considered major sources of license customers. Combined with the retirees found in the “Senior Styles” category, this accounts for 70 percent of America’s fishing license customers.

In contrast, looking at the last five categories presented in Table 4, the people least likely to purchase a license tend to be young (generally under 30), have below average incomes, live in or near a city and are more likely to come from ethnically diverse backgrounds. Compared to the 19.0 percent of the U.S. population they represent, their share of the license-buying pie (12.7 percent) is quite low.

Table 4. License Customers Sorted by Tapestry’s “LifeMode” Categories, U.S.

LifeMode Group	% of U.S. Population	% of Resident Fishing License Buyers	Cumulative %	Description (per Tapestry TM)
Factories and Farms	13.8%	18.3%	18.3%	Small towns often in America’s breadbasket states, lower income, married, employed in ag & manufacturing
American Quilt	11.3%	14.7%	33.0%	Small towns/rural, modest income, blue-collar or rural nearing retirement, modest or mobile homes
Upscale Avenues	12.9%	13.8%	46.8%	Above average income
Senior Styles	15.3%	13.1%	59.9%	Retirees, average income, depend Soc. Sec. & pensions
High Society	10.7%	11.0%	70.9%	Fastest growing group, highest income, married
Traditional Living	10.7%	9.9%	80.8%	Hard working, modest income families, older towns losing younger generations to newer cities and growth areas
Family Portrait	6.4%	6.5%	87.3%	Generally younger families, homeowners
High Hopes	5.1%	4.4%	91.7%	Young, college educated, single or married w/out kids
Solo Acts	4.5%	2.9%	94.5%	Young, educated, city life
Metropolis	4.5%	2.2%	96.8%	City families, row houses & public transportation
Global Roots	3.3%	2.1%	98.9%	Ethnically diverse, recent immigrants, want to improve
Scholars & Patriots	1.6%	1.1%	100.0%	Youthful, lower income, in college or military

The “Churn” Issue

The study also examined the rate of anglers entering and dropping out of the customer base, which is known as the “churn” rate. As Table 5 illustrates, slightly less than 15 percent of anglers bought a license in each of the past five years.

Perhaps even more significant is that well over 40 percent of anglers bought a license only once during that same time frame. Regionally, the Northeast is showing the worst churn rate, with over half of all anglers having bought a license only once in the past five years. This information contradicts the long-held belief that most of America’s anglers are loyal license buyers. In fact, a majority of anglers are finding other ways to spend their free time in most years. Sportfishing is losing anglers to other competing recreations.

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Table 5. **Percent of Anglers Buying a License Between 2001 and 2005**

	U.S.	Midwest	Northeast	Southeast	West
1 of 5 years:	43.9%	43.4%	52.9%	49.4%	41.0%
2 of 5 years:	19.1%	19.3%	16.0%	20.5%	19.7%
3 of 5 years:	12.1%	12.2%	11.6%	12.4%	12.8%
4 of 5 years:	9.9%	10.0%	8.3%	8.9%	10.4%
5 of 5 years:	14.9%	15.0%	10.4%	8.8%	16.1%



Courtesy Florida Sportsman



Courtesy In-Fisherman

Part II: Interpreting the Data

While there are many fascinating aspects to this research, only a few of which are presented in this summary report, the “churn” or attrition issue may be of greatest value.

If an angler buys a license one year, the assumption was he or she would buy every year. Matt Hogan, executive director, AFWA, said, “when we first became aware of the churn factor, it surprised us. I think a lot of us operate under the assumption that our core customer was coming back every year and that’s simply not the case. I think there are a lot of factors at work here: competition from other recreations, access issues and perhaps even the expense of going fishing. There are a lot of possibilities.”

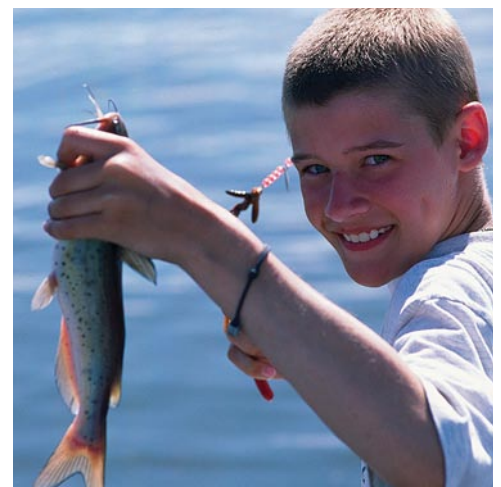
Mike Nussman, ASA president and CEO agrees. “There is a core group of anglers who will always go fishing,” he notes. “But our challenge is; what can we do to ensure that anglers return each year? What can we do to entice lapsed or occasional anglers to increase their days on the water? We need to find ways to keep fishing a ‘top of mind’ activity despite tremendous competition.”

The Tapestry™ data also says that while many people try their hand at fishing, the sport clearly hasn’t “hooked” them. For example, what prevents an individual living in an urban area who purchased a license at one time from purchasing a license again? Is it the lack of access, money, time and/or interest?

“...a lot of us operate under the assumption that our core customer was coming back every year and that’s simply not the case.”



What about regional differences in license-buying frequency among anglers living in the same state? “We know, for example, that Las Vegas residents represent an entirely different demographic than people living in the rest of the state,” says Lynn Foster, marketing director for the Nevada Department of Wildlife. “We want to learn how to use data like this in order to understand how best to sell all outdoor activities to people living there. And I don’t think we’re different from most states in that we need to get better at doing that.”



Part III: Stemming the Tide

States are starting to use the results to become more effective in their angler recruitment and retention practices and are adopting many of the marketing practices used in the private sector. For example, the Tennessee Wildlife Resources Agency (TWRA) has hired a marketing professional to assist the agency in “selling” the outdoor experience—and the licenses required to participate—to state residents. Tennessee has done something that until recently was very rare for a state agency: they have applied a marketing model to an activity that has long been viewed as a guaranteed attraction.

“If we’ve learned anything from the business world, it’s that you have to ask [customers] for a sale, and if they don’t respond, you just keep asking,” says Jay Langston, marketing director, TWRA. “We do this through advertising, just as any business would. You have to understand your customers through license and Tapestry™ data. The people living in east Tennessee may respond to something differently than residents in the western part of the state. So you have to use a variety of advertising methods to appeal to them. We’ve advertised on talk radio, put reminder cards in electric bills and bought ads on network and cable tele-

vision. We even used on-line reminders. Anything to encourage license buying is a priority. If you can get a guy who buys a license two or three times in six years to buy it just one more year, it has a huge economic impact.”

The information in this report is a general overview of the new research now available. For more details, specific state and regional data, and updated facts and figures, please reference the free, in-depth technical report available at the AFWA and ASA web sites—www.fishwildlife.org and www.asafishing.com.

Table 6. **Rural vs Urban: Where Do Anglers Reside?**

While many anglers live in rural areas, the largest number of anglers can be found in suburban and urban fringe areas. However, we are losing anglers from these fast growing communities at alarming rates. The table below presents the different types of communities and the percentage of fishing license buyers residing in each for the U.S. and regionally.

	U.S.			Midwest		Northeast		Southeast		West	
	Market Share of U.S. License Sales	Approx. 5 Year Change in Market Share	5-Year Trend in U.S. Pop. per Category	Market Share of Regional License Sales	Approx. 5 Year Change in Regional Market Share	Market Share of Regional License Sales	Approx. 5 Year Change in Regional Market Share	Market Share of Regional License Sales	Approx. 5 Year Change in Regional Market Share	Market Share of Regional License Sales	Approx. 5 Year Change in Regional Market Share
Rural	36.4%	0.8%	20.7%	35.5%	0.7%	27.6%	0.3%	41.5%	0.8%	35.8%	0.3%
Suburban Periphery	27.5%	0.2%	35.2%	26.7%	0.2%	38.5%	0.3%	25.9%	-0.1%	27.4%	0.5%
Urban Outskirts	14.3%	-0.3%	18.0%	16.2%	-0.3%	13.1%	-0.3%	10.9%	-0.3%	13.6%	0.1%
Small Towns	7.7%	0.3%	4.2%	7.3%	0.1%	2.3%	0.0%	9.0%	0.6%	7.1%	-0.2%
Metro Cities	12.8%	-1.1%	19.8%	13.2%	-0.7%	16.3%	-0.2%	11.3%	-1.4%	14.4%	-0.5%
Principal Urban Centers	1.3%	-3.2%	0.6%	1.2%	-0.4%	2.3%	0.0%	1.4%	-6.5%	1.6%	-0.2%

A detailed, national technical report, as well as 15 state reports, is available on the Association of Fish and Wildlife Agencies' Web site, www.fishwildlife.org, and the American Sportfishing Association's Web site at www.asafishing.org.



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