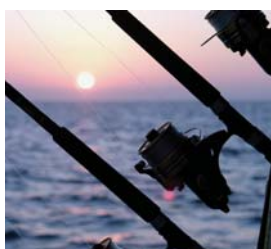




ON THE FENCE About Fishing

A Study of Why Anglers Do and Don't Fish
and What Will Get Them on the Water





The Benefits of **RECREATIONAL FISHING**

RECREATIONAL FISHING is one of the most popular outdoor activities in the United States. According to the U.S. Fish and Wildlife Service, 42 million youth and adults—13 percent of the U.S. population—go fishing every year. However, the actual number of anglers in this country is, in fact, much higher. A 2007 examination of state fishing license sales conducted on behalf of the American Sportfishing Association and the Association of Fish and Wildlife Agencies found less than 15 percent of Americans who had fished in the previous five years had fished every one of those years. The angler who goes fishing every year is a rare breed.

The results of that study begged the question: Why don't anglers fish every year, and what do they do instead of fishing?

The benefits of fishing go well beyond simply the thrill of the catch. Fishing still provides food for the table, as well as fun, relaxation and quality time with family and friends. In these sedentary times, it's proven that activities—such as fishing—that get us out of the house and into the outdoors are crucial to our physical and mental health. As an added

benefit, fishing brings adults and youth alike “up close and personal” with nature engendering an appreciation for our natural resources.

In addition, one of the most powerful arguments for sustaining America's fishing tradition involves the economics of conservation. Anglers buy fishing licenses and pay special excise taxes on every purchase of fishing tackle and boat fuel. These tax revenues account for the largest source of conservation dollars used to fund habitat enhancement, protection and management of game fish—efforts that also benefit nongame species. These funds also provide public access to recreational waters for anglers and non-anglers alike. According to the U.S. Fish and Wildlife Service, each year more than \$1 billion is generated by anglers for fisheries conservation and habitat restoration.

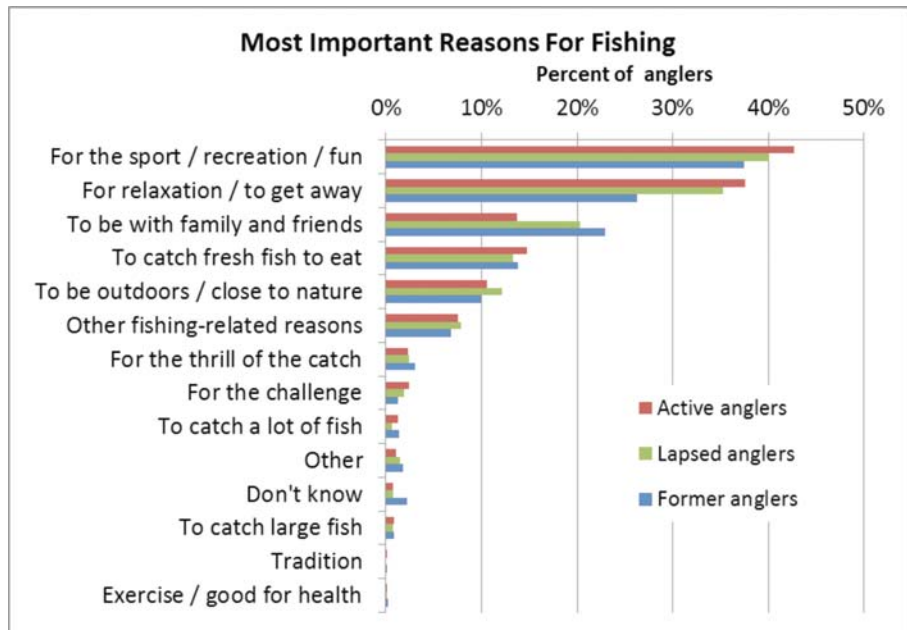
To learn more about why some anglers fish some years but not others or drop out of fishing altogether, a study was commissioned by the American Sportfishing Association (ASA) and conducted by Southwick Associates and Responsive Management.

The study used a combination of fishing license data analysis, focus groups and a telephone survey conducted in eight states representing a broad geographic spread and areas experiencing increasing and decreasing fishing license sales. The study also divided anglers into three groups—active anglers who still regularly fish, lapsed anglers who have not fished in recent years and former anglers who no longer fish.

The results of this study augment and confirm previous research and marketing recommendations originally produced by the Recreational Boating & Fishing Foundation (RBFF). This report was intended to delve further into the reasons why many anglers do not buy a license every year and identify the activities anglers do choose in their time away from fishing.

For additional recreational fishing market research and methods, visit www.RBFF.org. The detailed findings

associated with this report are presented in a technical document available free of charge under Facts and Figures on www.ASAfishing.org.



ACTIVITIES that Compete for ANGLERS' TIME

THE AMOUNT OF TIME devoted to recreation is the same among all anglers, with active, lapsed, and former anglers each averaging slightly more than 3 hours per workday and 6.5 hours per weekend day. This slice of time can be devoted to any combination of activities, indoors or outdoors. So how do they choose to spend that time?

Reasons for choosing specific indoor and outdoor recreational activities are essentially the same for all people. Each of us seeks fun, relaxation and quality time with family and friends. People fish for the same reasons. Any activity that offers these benefits competes with sportfishing.

When asked what were the most common outdoor and indoor activities they had participated in over the past two

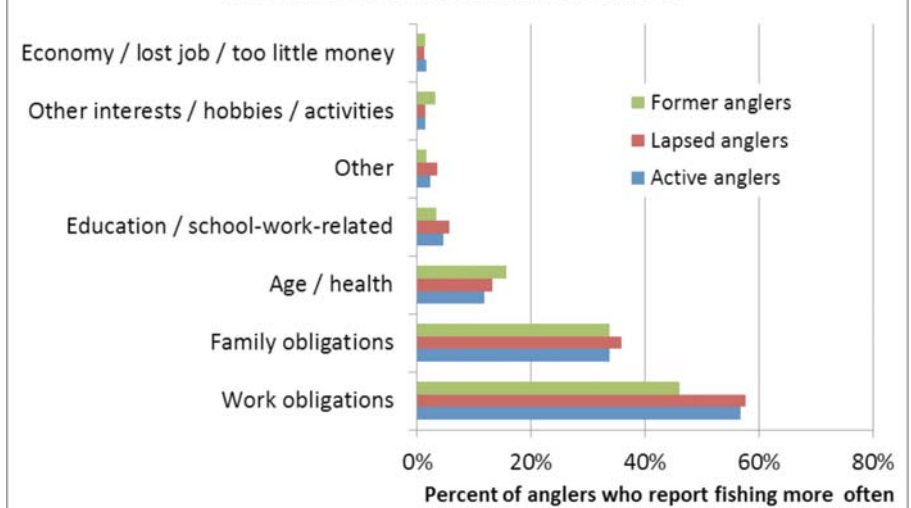


Percent of Anglers Participating in Various Outdoor and Indoor Recreational Activities, by Type of Angler *(Selected from a list of 75 common activities)*

| Active angler | | Lapsed angler | | Former Angler | |
|---------------------------------|-----|--------------------------------------|-----|--------------------------------------|-----|
| Recreational freshwater fishing | 42% | Relaxing / watching TV | 29% | Relaxing / watching TV | 26% |
| Relaxing / watching TV | 26% | Hiking | 18% | Big game hunting | 16% |
| Big game hunting | 23% | Camping | 16% | Gardening | 14% |
| Camping | 17% | Recreational freshwater fishing | 15% | Camping | 13% |
| Recreational saltwater fishing | 15% | Gardening | 12% | Hiking | 12% |
| Hiking | 11% | Big game hunting | 12% | Reading | 12% |
| Golfing | 10% | Reading | 11% | Trail running or walking for fitness | 10% |
| Gardening | 9% | Golfing | 10% | Golfing | 9% |
| Reading | 9% | Trail running or walking for fitness | 10% | Cooking | 6% |
| Small game hunting | 8% | Cooking | 9% | Bicycling (not mountain biking) | 6% |

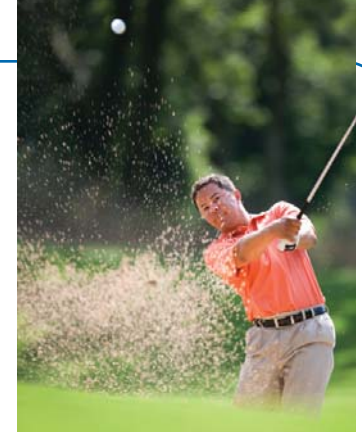
years (see the accompanying tables), active anglers cited fishing. Lapsed anglers didn't show a strong preference, but rather enjoyed a wide variety of pursuits. Some former anglers stopped engaging in outdoor activities altogether, most likely due to health or age concerns, while many enjoyed hunting and other outdoor hobbies. Relaxing by watching television was the leading indoor activity cited by all groups and presents the greatest competition for recreational sportfishing since it's the most convenient diversion available. Despite this popularity, active anglers reported spending over two hours outdoors for every single hour engaged in indoor activities. It's clear from the range of activities they've participated in that all groups of anglers prefer outdoor to indoor activities. Fishing delivers the fun

Reasons for a Decrease in Recreational Time



and relaxation of the outdoors, but when it fails to deliver those benefits as much as other pursuits, anglers will engage in other outdoor activities.





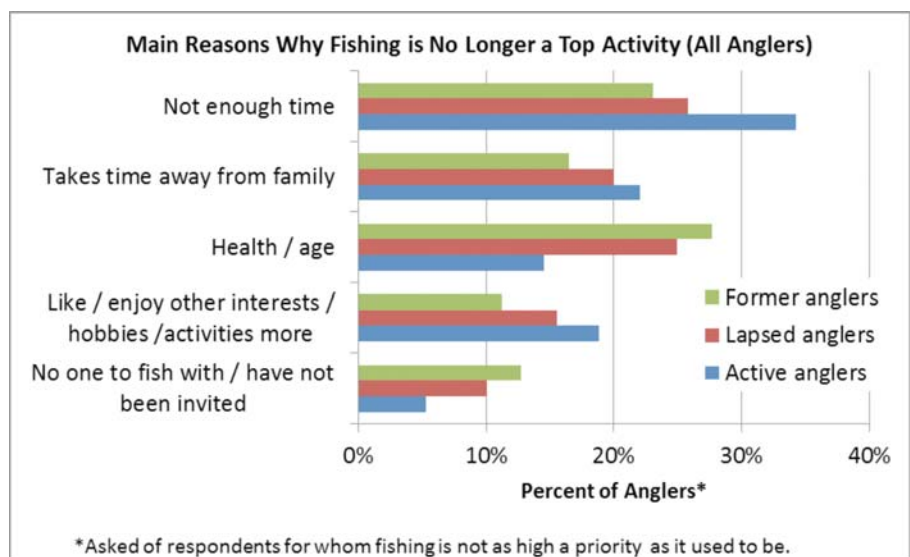
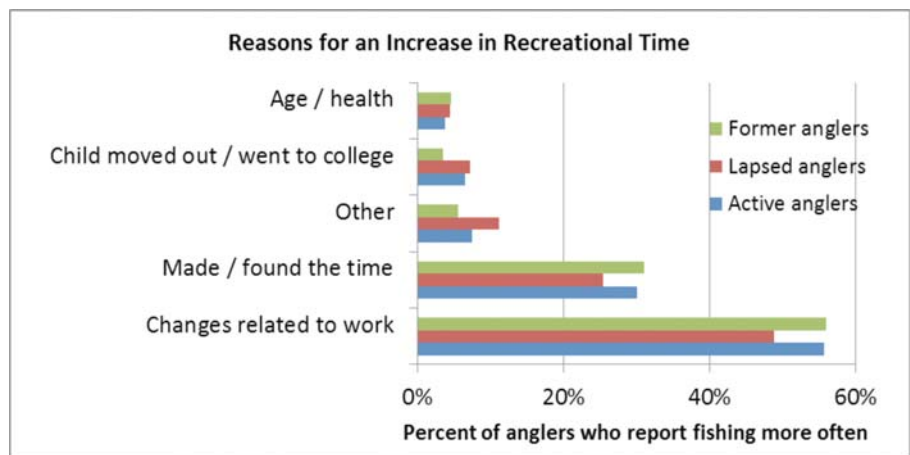
Why People FISH LESS

“NOT ENOUGH TIME” is frequently cited as the primary reason for fishing less or not at all; however, the truth, more often than not, is that people are simply choosing other ways to spend their time.

Fun at age 20 looks a lot different than fun at 40. Or 50. Or 60. Activities that were once high priorities may tumble down the list as other activities are perceived as better ways to achieve the fun, relaxation or social benefits we desire from our free time. Thus, “not enough time” is not necessarily the actual cause for not fishing; it merely can be a way of saying other activities provide greater perceived benefits or deliver desired benefits with greater convenience. Some people really do have less time as a result of family, work or school obligations. Yet most of these people still engage in recreational activities. To overcome the “not enough time” argument, the sportfishing community must promote angling’s easy accessibility in today’s time-pressed, convenience-driven and electronically oriented world. We need to ensure that fishing is always associated with fun and relaxation, with convenient opportunities available.

Family and other relationships play a big part in many anglers’ “not enough time” dilemma. An angler might limit his or her time or quit fishing altogether, not because they no longer enjoy fishing, but because those close to them prefer doing

other activities. To spend time with family and friends, many anglers simply find it more convenient to engage in their companions’ preferred activities. Conversely, should a family



member or friend invite a lapsed or former angler to join them fishing, in many cases, those people will be willing to return to the water. Families as a unit may also prioritize other activities over fishing, such as organized sports for the children. In these cases, fishing takes a back seat to those activities. It is up to the sportfishing community to promote fishing as a family activity, and provide convenient family-friendly fishing opportunities. Ultimately, whether perceived or actual, when anglers feel they are short on free time, time will be given to activities that are the most convenient or that allows them to share limited time with friends and family.

Other issues were cited in the surveys. Poor health or

aging is a common reason for declining participation in fishing. Clearly, recreational participation will change as people age, since older people tend to participate in more convenient, less strenuous activities. Issues associated directly with fishing were a minor cause for fishing less often. High license costs, costs associated with boating such as fuel, costs of buying and maintaining equipment, no one to fish with, complicated fishing and/or license requirements and not catching enough fish are all issues to be aware of, yet are minor when compared to concerns associated with time and convenience when it comes to cutting back on or quitting angling.



How to Increase **PARTICIPATION** in Fishing

THERE ARE MANY WAYS to increase fishing participation, however, the top three approaches recommended by this study are the following:

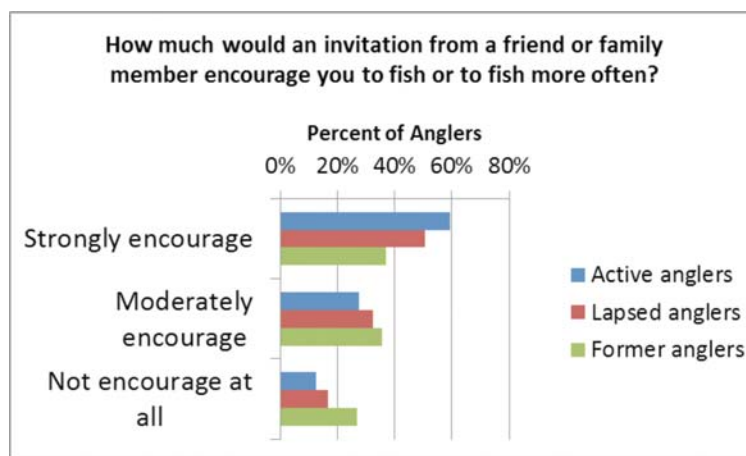
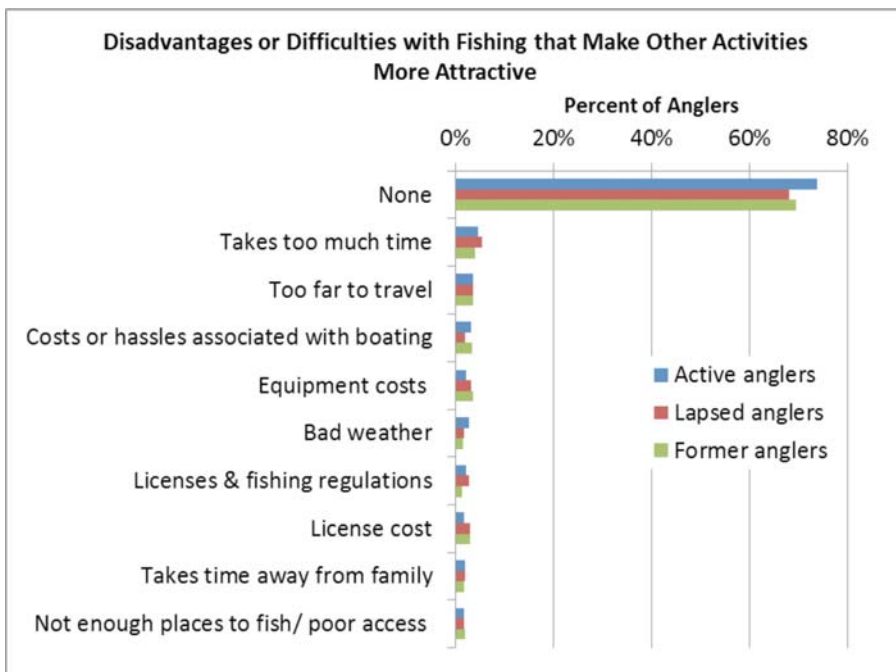
Emphasize Fun, Relaxation, Family and Friends

People fish because it is fun, because they want to relax and because they want to spend quality time with family and friends. Fishing promotions and messaging must emphasize these aspects. Messages and advertising

designed to recruit or retain anglers should not make fishing look complicated. It should instead emphasize how simple and fun it is to catch fish, how relaxing a day on the water can be and the opportunities fishing provides to experience the outdoors with others. Show people from all walks of life, across all ages, gender and ethnic background fishing. Do not focus on complex, costly or extreme types of fishing. Once people begin fishing, many will grow into those areas naturally.

Inside the NUMBERS

- Anglers enjoy an average total of 16 hours of leisure time during the work week and 13 hours on the weekend.
- Forty-two percent of active anglers selected fishing as the outdoor activity they participated in most often.
- Eighteen percent of lapsed anglers selected hiking as their favorite outdoor activity.
- Eighteen percent of former anglers said they no longer participate in any outdoor activities.
- Thirty-five percent of all survey respondents said they do not participate in any indoor recreational activities such as cooking for enjoyment or video games, compared to only seven percent who said they do not participate in any outdoor recreational activities.
- Anglers spend two hours participating in outdoor activities for every hour spent on indoor activities.



Increase Convenience

Recreational time is scarce and in decline. Fishing must be convenient. Most anglers do not live in rural areas, so fishing opportunities and access in urban and suburban areas must be provided, promoted and protected. The promotion of affordable, guided trips where anglers can show up with minimal equipment or preparation and enjoy a fun fishing experience is another important tactic. Local programs designed to allow anglers to borrow or rent gear and receive easy, affordable instruction can also help.

Invite Others to Go Fishing

The best way to create a new angler is for a family

member or friend to take him or her fishing. The study revealed interest in fishing remains high, even among lapsed and former anglers and that many would fish again, or fish more often, if only an active angler would invite them to come along. This approach looks at current anglers as a potential “sales” force. The Recreational Boating & Fishing Foundation’s Anglers’ Legacy program has already adopted this approach and welcomes involvement from others in the sportfishing community to increase the program’s success. This has the potential to be the best approach to increasing the ranks of anglers, as well as one of the most cost-effective and practical ones—and resources for marketing should reflect this.

The American Sportfishing Association (ASA) is the sportfishing industry's trade association, committed to looking out for the interests of the entire sportfishing community. ASA gives the industry a unified voice speaking out when emerging laws and policies could significantly affect sportfishing business or sportfishing itself. ASA invests in long-term ventures to ensure the industry will remain strong and prosperous as well as safeguard and promote the enduring economic and conservation values of sportfishing in America. ASA also gives America's 60 million anglers a voice in policy decisions that affect their ability to sustainably fish on our nation's waterways through KeepAmericaFishing™, the association's angler advocacy campaign. America's anglers generate more than \$45 billion in retail sales with a \$125 billion impact on the nation's economy creating employment for more than one million people.

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To see the technical report presenting full details, visit www.ASAfishing.org.