

WHERE IS DEMAND FOR SPORTFISHING THE GREATEST?

INDIANA'S REPORT



This Project was funded by a Multistate Conservation Grant (F25AP00181-00) from U.S. Fish and Wildlife Service and jointly administered with the Association of Fish and Wildlife Agencies.



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In a continuous cycle, some people take up fishing while others quit. Simultaneously, people move from place to place, transforming communities in the process. As these changes occur, demand for sportfishing access also shifts across communities. Insight from this research will provide state R3 programs and their partners a valuable tool to find potential new anglers, identify convenient access points, and initiate marketing campaigns that focus on those areas.

Identifying areas where **unmet fishing demand is currently greatest** and **access points are most needed**, while also **characterizing communities** where anglers live to provide geographically specific marketing strategies uses three key approaches:

- **Resident angler license purchase data:** Fishing license sales of any type from 2015 through 2024 were provided and explored in two ways. The first, through a 10-year and 5-year look-back period. The second, through an R3-based purchase/demographic profile, with additional details provided on the next slide. All customers who met the studies age requirement, holding any type of licenses, from one-day to annual, were considered.
- **Mapping and Tapestry™ lifestyle data:** To gain a spatial perspective about purchase profiles, the address data from a representative sample of the license records were mapped using ArcGIS tools available through ESRI and each address was assigned a Tapestry™ lifestyle segment. ESRI's Tapestry Segmentation identifies 67 distinctive markets in the US based on socioeconomic and demographic characteristics to provide an accurate, comprehensive profile of communities.
- **Waterbody locations and access:** To explore what angler access and fishing opportunities exist within the state, another layer of information was added to the maps: mapped waterbodies from the U.S. Geological Survey. By using this data in combination with the state's fish & wildlife agency's fishing information, it was possible to investigate how fishing opportunity might align with angler population density.



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ANGLER LICENSE DATA & R3 CATEGORY

The ten-year purchase history data enabled an exploration of the angling population within the state beyond a simple license holder distribution. Each license holder was categorized in a way that aligned with R3 efforts and placed into one of three categories based on their license purchase history during the last decade. Results specific to R3 categories are reflective of a random sample of 120,000 anglers, split evenly amongst the three categories.

Angler R3 Categories	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
New (Recruit)	No purchases								At least 1 purchase	
Steady (Retain)	At least 2 purchases					At least 1 purchase			At least 1 purchase	
Lapsed (Reactivate)	No purchases			No more than 2 purchases					No purchases	
	At least 5 purchases								No purchases	

Notes:

- Categories were designed to be mutually exclusive and conceptualized to develop actionable recommendations for state fish and wildlife agencies. As such, some anglers did not fall within a category, including many one-time license purchasers or anglers not requiring the purchase of a license due age restrictions (e.g., youth or seniors). Age restrictions were applied to ensure accurate classification: anglers in “New” category must be 21 or older to exclude first-time youth license buyers, while “Steady” and “Lapsed” anglers must be at least 25 years or older.
- The license data used for this study was collected from states, cleaned and processed so that the remaining data sample consisted of resident anglers who had purchased at least one fishing license during the 10-year timeframe. Missing data fields for personal identifying information resulted in a license holder being removed from the final sample.

Results are organized into three sections in this report:

- **Anglers by city:** License holder population distribution across the state
- **Anglers by R3 category:** Categorized license holder population distribution and characteristics by age, gender, urbanization, and Tapestry segment
- **Fort Wayne Case Study:** License holder population distribution in the focal area and R3 category by Tapestry segment

A companion workbook with detailed tables is also provided separately.

RESULTS: ANGLERS BY CITY

Indiana has experienced geographical shifts in its angler population along the urban-rural continuum over the past decade, with an increasing share of licensed anglers residing in metropolitan core areas. Overall, about 2/3rds of anglers live in metropolitan core and commuting areas. Therefore, increasing access and awareness of fishing opportunities in urban areas could have an outsized effect on angler participation.

Urban-Rural Classification of Resident License Holder Address			
Urban-Rural	Percent of Angling Population (10-year average)	Angler Percent Change (2015 – 2024)	Angler Percent Change (2019 – 2024)
Metropolitan core	45.6%	-0.3%	1.5%
Metropolitan commuting	18.5%	-1.5%	-2.0%
Micropolitan/Small cities/Suburbs	19.9%	-0.2%	-0.3%
Small Town	5.3%	0.1%	-2.0%
Rural	10.4%	4.1%	-1.4%

**To designate a location as metropolitan, micropolitan, and small town/rural, the latest processed census data from 2020 was leveraged and aggregated from ten categories to five for reporting purposes, Rural-Urban Commuting Area Codes - Documentation | Economic Research Service.*

RESULTS: ANGLERS BY CITY

Reflected in the table are the top ten cities with the largest proportion of licensed anglers in 2024 . The highest percentage of anglers in the state are found in Indianapolis, with at least twice the angler population of Fort Wayne or Evansville (column A). Naturally, these cities also hold more of the state's population generally (column D).

Across the decade from 2015 to 2024, the angler population in these top ten cities declined or held steady, even in areas where overall population showed growth (Column B & E). From 2019 through 2024, the angler population saw growth in many areas across the state (Column C).

City Name*	A Percent of all anglers in 2024	B Angler Percent Change (2015 - 2024)	C Angler Percent Change (2019 - 2024)	D Percent of Total Population (2024)	E Total Population Percent Change (2015-2024)**
Indianapolis	7.7%	1.6%	11.0%	14.2%	5.4%
Fort Wayne	3.7%	1.2%	6.5%	4.9%	8.2%
Evansville	2.0%	-16.7%	-6.0%	2.7%	-0.7%
Kokomo	1.4%	-6.4%	7.0%	1.1%	0.0%
Bloomington	1.4%	-10.4%	-0.1%	1.9%	-0.4%
Lafayette	1.4%	2.3%	6.8%	1.5%	4.6%
South Bend	1.3%	-8.2%	10.3%	2.2%	2.2%
Muncie	1.3%	-3.4%	5.6%	1.3%	-5.2%
Anderson	1.2%	-11.1%	-0.4%	1.1%	1.8%
Elkhart	1.2%	-2.3%	9.0%	1.4%	1.9%

Note: To a certain extent the percent change in license holders reflects a variability in license records due to incomplete data for Personally Identifiable Information (PII) in earlier years. Additionally, percent changes may be exaggerated in cities with small angler populations, where even minor changes can produce large percentage shifts. Interpret results alongside each cities' overall share of anglers.

*Represents the top ten cities across the angling population in the state.

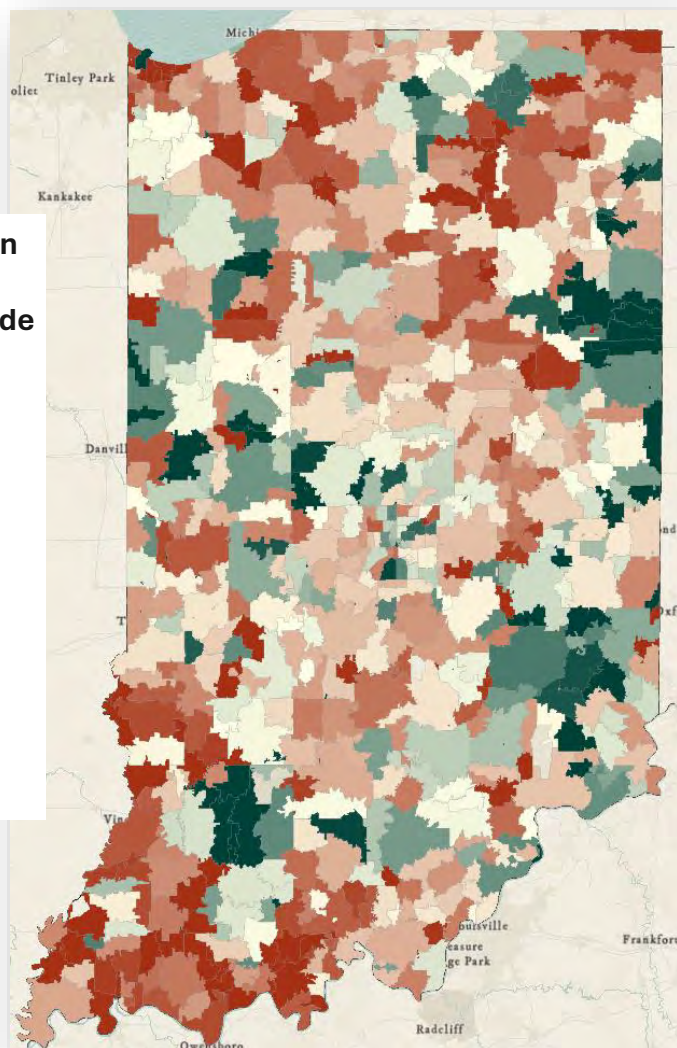
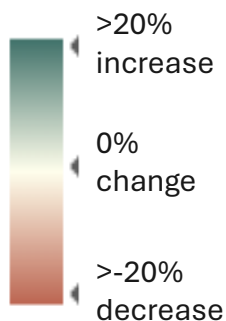
**Population data provided by the Census American Community Survey (ACS).

RESULTS: ANGLER CHANGE BY CITY

These two maps broaden the geographical scope. In the last 5 years, many areas experienced growth in angler numbers. Over the last 10 years, however, the areas with the increase in anglers are larger cities and larger populations (Lafayette and Richmond areas) while many others experienced declining angler populations. Readers who would like to open interactive versions of any maps in this report can do so with this state-specific story map ([IN StoryMap](#)).

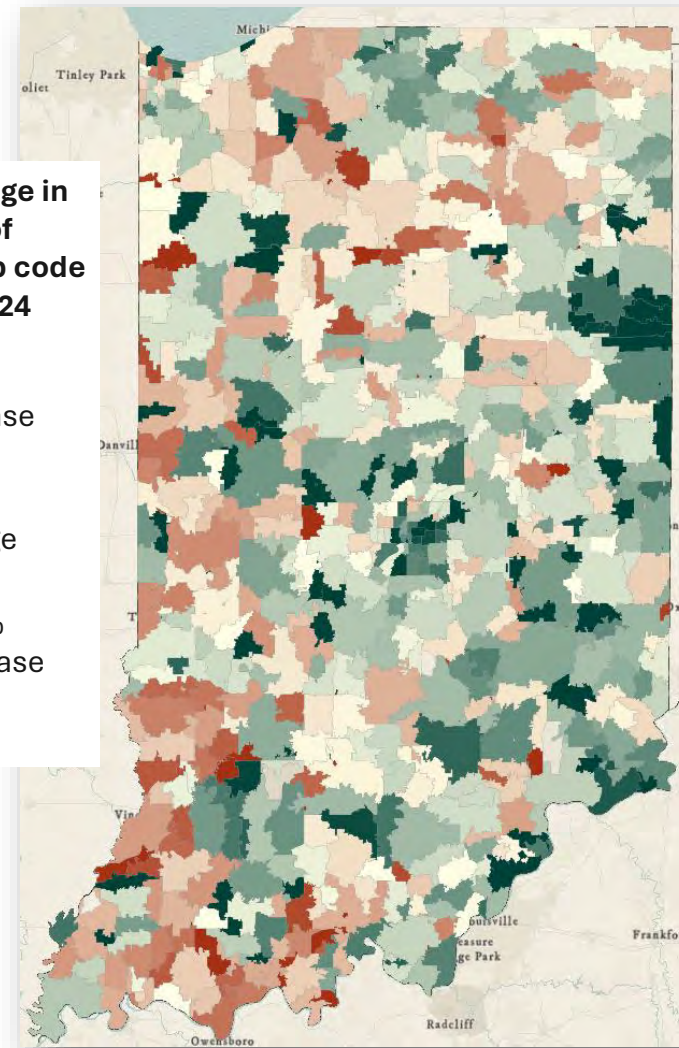
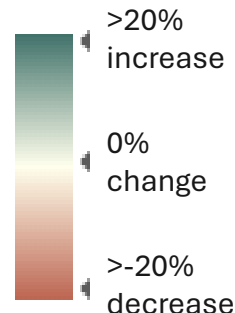
**Ten-year timeframe
(2015 through 2024)**

Percent change in
the number of
anglers by zip code
from 2015-2024



**Five-year timeframe
(2019 through 2024)**

Percent change in
the number of
anglers by zip code
from 2019-2024



Note: To a certain extent the percent change in license holders reflects a variability in license records due to incomplete data for Personally Identifiable Information (PII) in earlier years.

RESULTS: ANGLERS & FISHING OPPORTUNITY

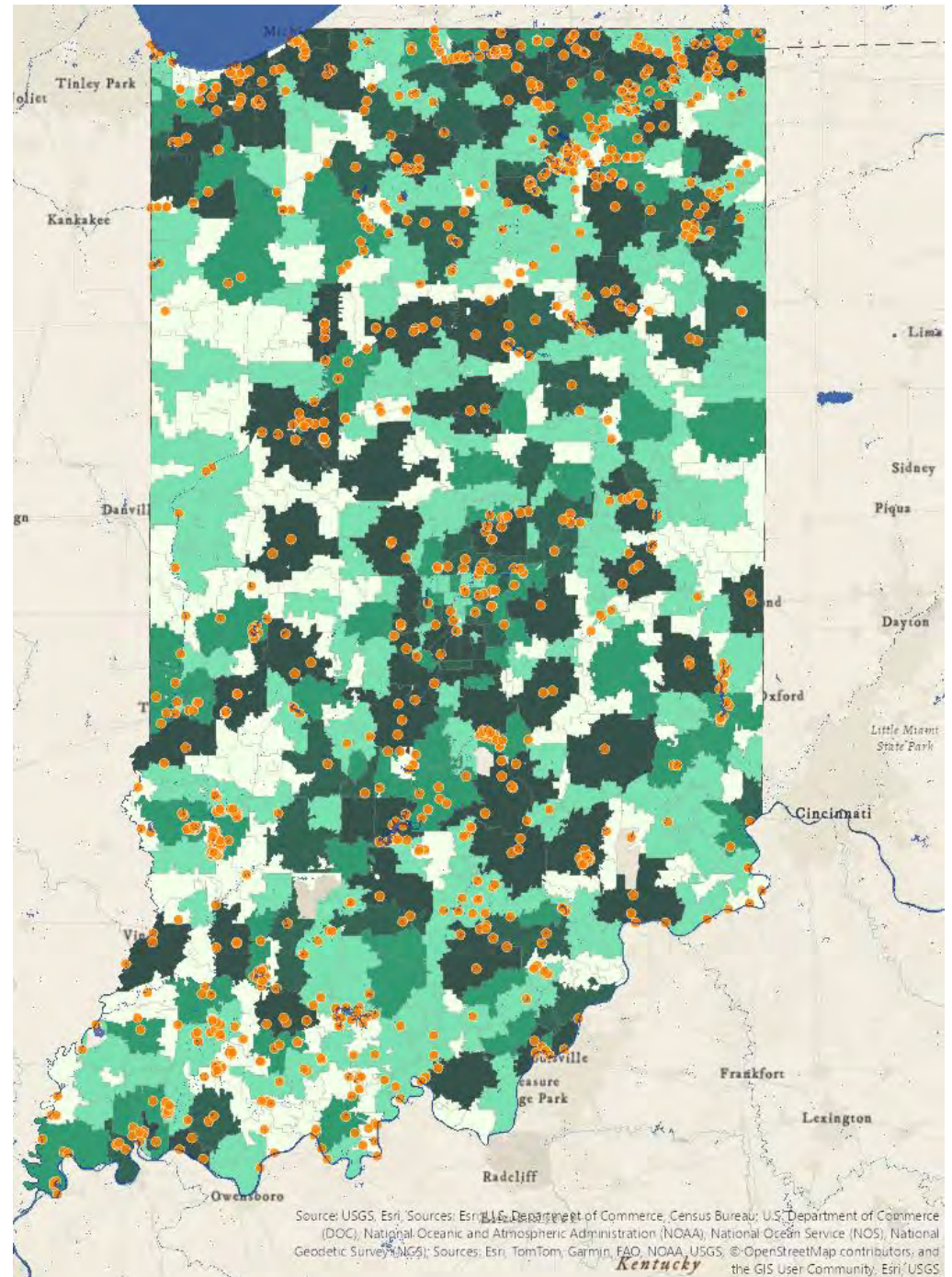
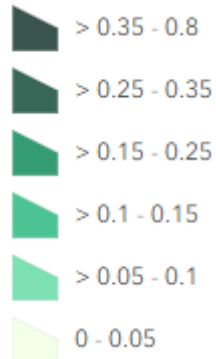
The decision to try or return to fishing may not be driven by the presence of opportunity. Decision drivers may instead be access, awareness, crowding, or the perceived ease of trying something new. Each orange dot indicates the location of a waterbody access point identified by DNR on its 'Where to Fish' webpage.

Indiana's angler population correlates with population centers (Indianapolis, Fort Wayne, South Bend). Particularly in the northern part of the state, many opportunities exist in populous areas. Improving access to and awareness of local fishing opportunities, particularly in urban areas, can help to support the existing angling community, and the initial learning phases someone needs to try fishing.

Percent of Anglers in 2024 by Zip Code

Areas classification

-  Lakes, Ponds, Reservoirs, Estuaries, and other Waterbodies
-  Rivers and Streams



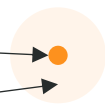
Source: USGS, Esri, Sources: Esri, U.S. Department of Commerce, Census Bureau, U.S. Department of Commerce (DOC), National Oceanic and Atmospheric Administration (NOAA), National Ocean Service (NOS), National Geodetic Survey (NGS); Sources: Esri, TomTom, Garmin, FAD, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Esri, USGS

RESULTS: ANGLERS & FISHING OPPORTUNITY (ACCESS)

Many outdoor activities compete for limited recreational time. Travel distance to outdoor recreational activities influences the chosen activity. In Indiana, almost 2/3 of its resident anglers have more than 15 fishing access sites within 15 miles of their home location.

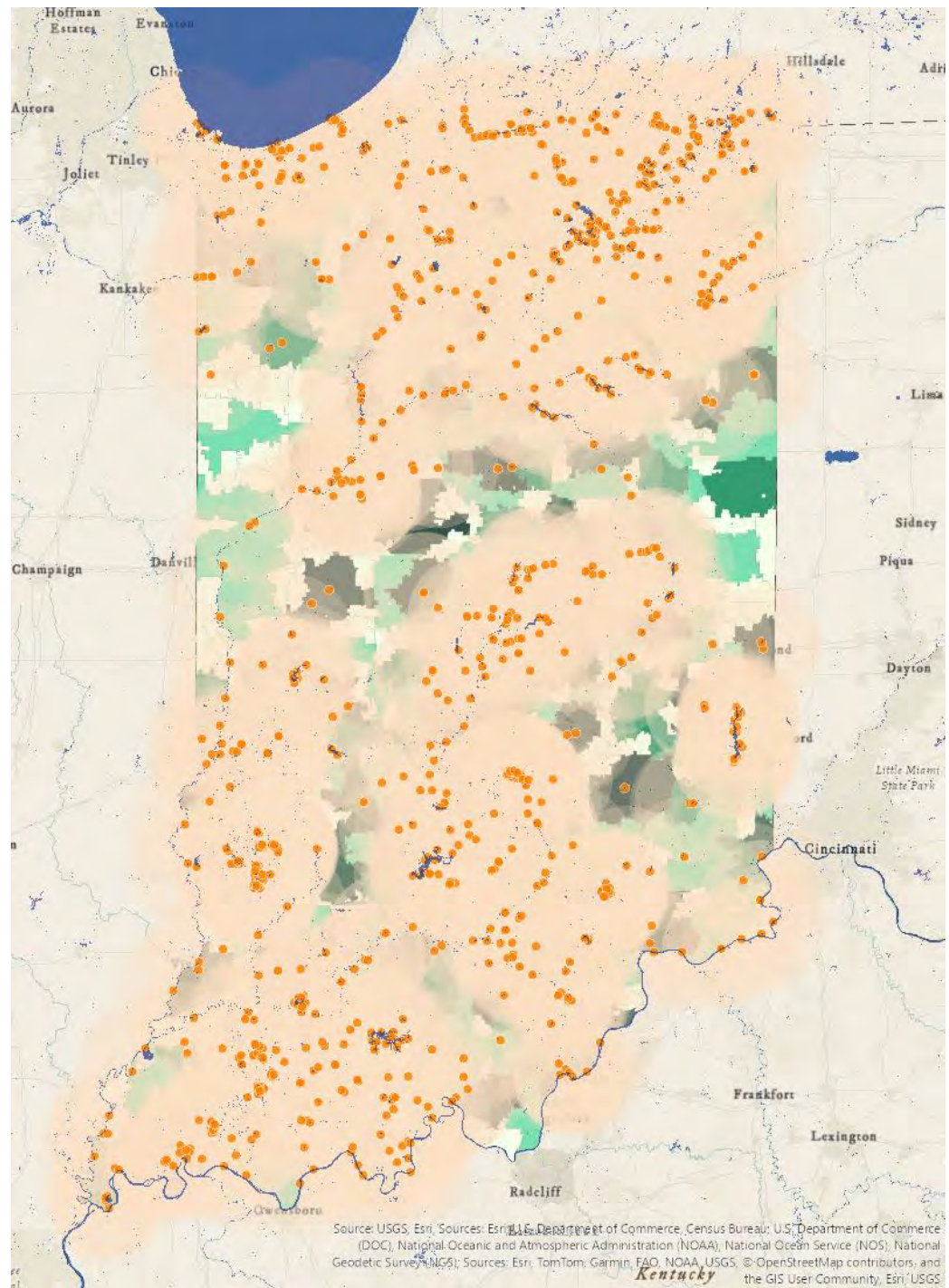
Access point

15-mile straight line buffer



Number of Public Access Sites Within 15 miles of Angler	Percent of Anglers
None	0.5%
1 to 5	10.5%
6 to 10	11.9%
11 to 15	15.1%
More than 15	62.0%

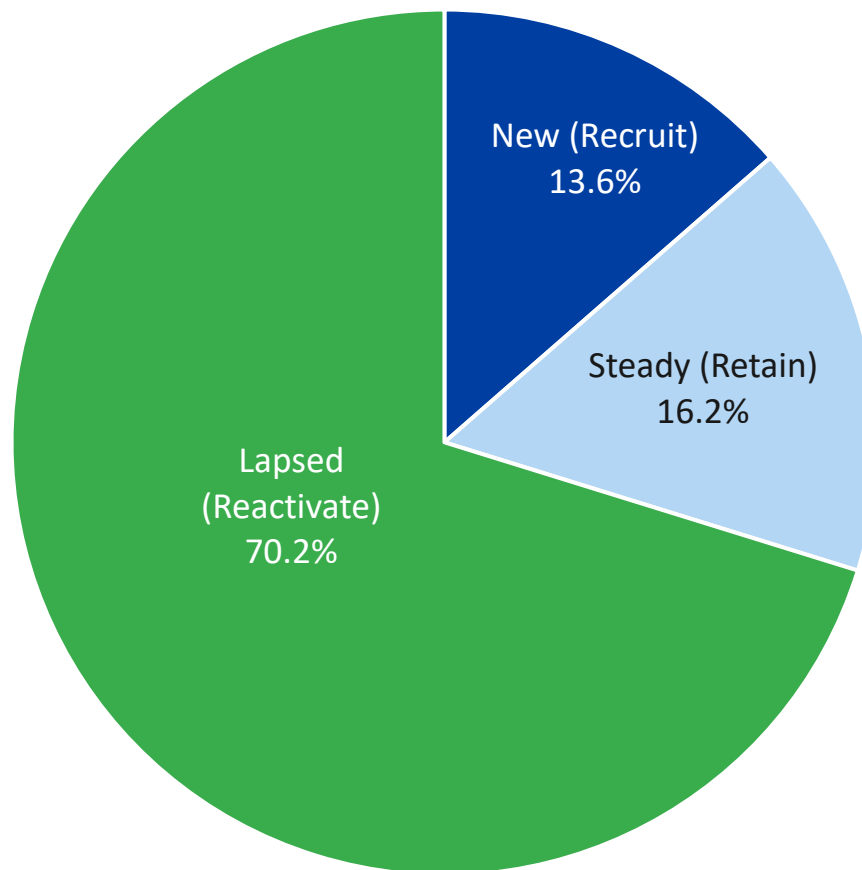
Wherever possible, efforts to create fishing access in areas with no current access would likely increase the interest of residents, thereby recruiting more anglers.



Source: USGS, Esri, Sources: Esri, U.S. Department of Commerce, Census Bureau, U.S. Department of Commerce (DOC), National Oceanic and Atmospheric Administration (NOAA), National Ocean Service (NOS), National Geodetic Survey (NGS), Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Esri, USGS

RESULTS: ANGLER R3 CATEGORY

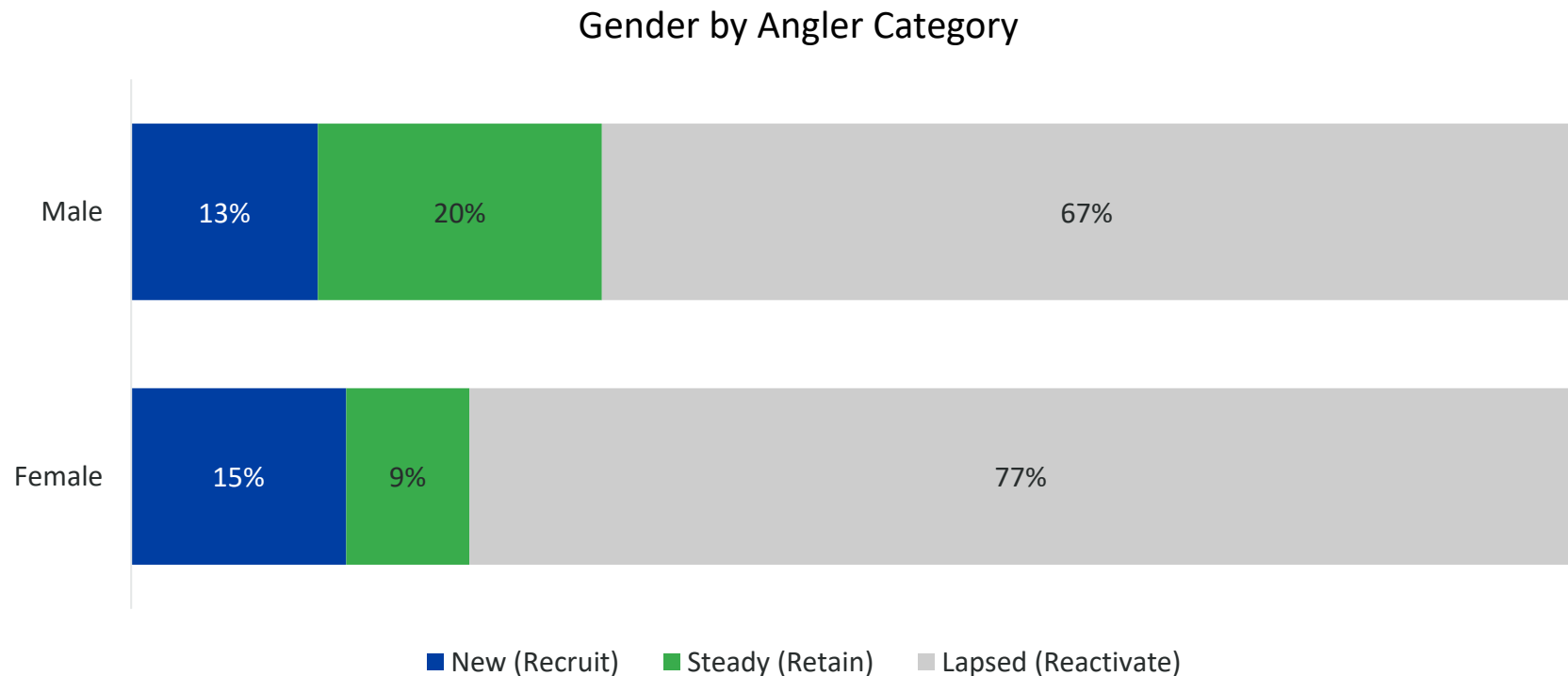
A total of 1.1 million anglers were classified into one of the R3 three categories. Almost $\frac{3}{4}$ of Indiana's angler population is lapsed, meaning they didn't purchase a license in 2023 or 2024 despite having purchased in previous years. This represents a significant opportunity to re-engage with the angling population in the state. In the next pages, we'll explore the gender, age, urban-rural, and geographic specifics of these angler categories.



RESULTS: GENDER BY ANGLER R3 CATEGORY

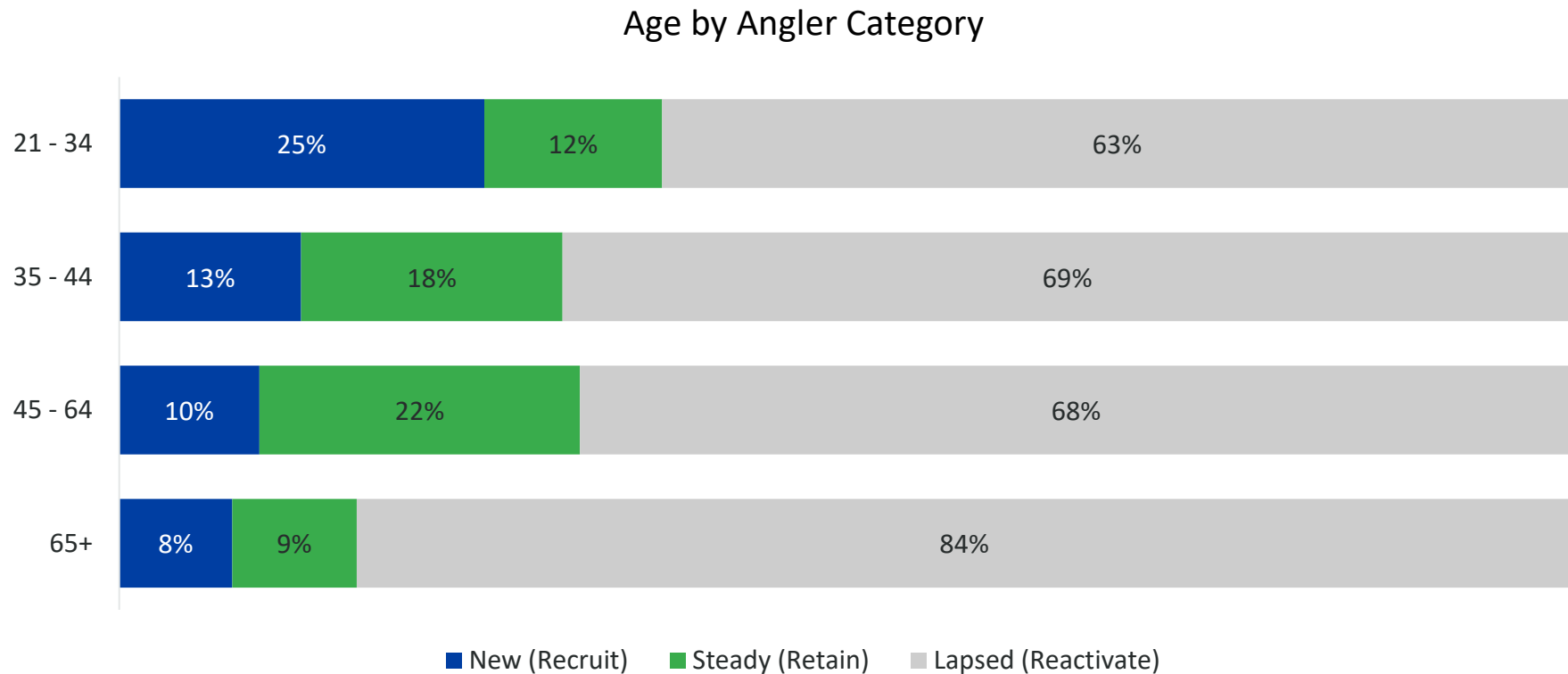
Like many states, Indiana's angler population over the last decade is predominantly male, with men comprising roughly 2.25 times as many anglers as women over the entire time span. Proportionally, female anglers are more likely than males to lapse. At the same time, in recent years females are entering fishing at a slightly higher proportional rate than males, accounting for a larger share of new anglers.

This pattern presents an R3 opportunity for Indiana. While recruitment of female anglers is gaining momentum, retention remains a challenge. Targeted strategies that reduce barriers and support early experiences, such as women-focused fishing programs and mentorship opportunities, could improve retention outcomes and help keep women on the water.



RESULTS: AGE BY ANGLER R3 CATEGORY

Indiana's age patterns show that participation is most at risk early and stabilizes over time, creating clear R3 leverage points. While recruitment remains relatively strong among early-career anglers (e.g., 25% new among ages 21–34), lapse rates also rise quickly, indicating that many anglers are not converting initial interest into sustained participation. Retention improves among more established anglers, yet roughly two-thirds still lapse, representing a meaningful reactivation opportunity. The most actionable R3 focus for Indiana is to prioritize early retention for recently recruited anglers and targeted reactivation for mid-career anglers, rather than relying on continued recruitment alone.

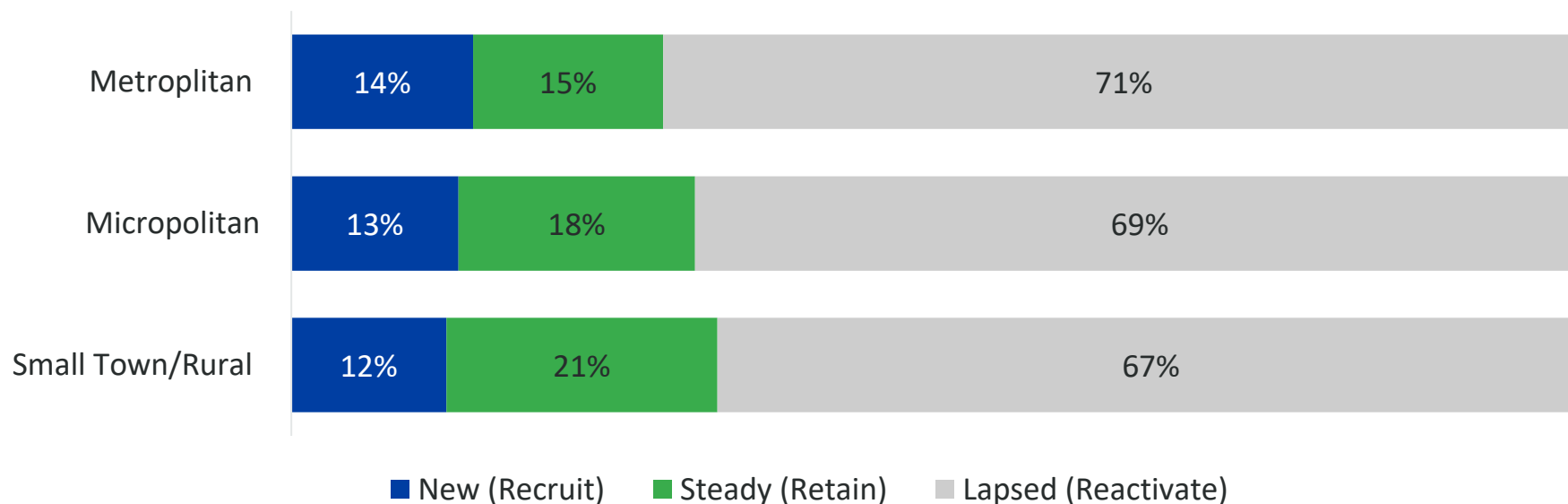


Note: The R3 category system applies age restrictions to ensure multi-year behavior is captured. For example, anglers categorized as “New” in 2025 must be at least 21, which helps exclude individuals who were previously fishing but only recently required a license due to the minimum age requirement of 16.

RESULTS: URBANIZATION BY R3 CATEGORY

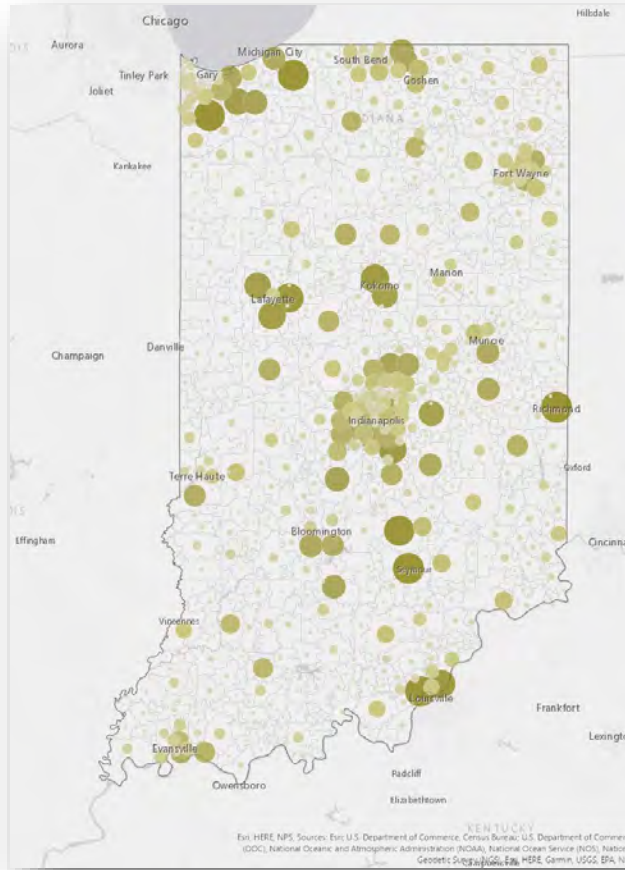
Anglers living in small town and rural areas are more likely to be steady participants (21%), while those residing in metropolitan areas are proportionally more likely to be either new (14%) and lapsed (71%) anglers. This pattern suggests that urban residents are entering fishing but are less likely to continue participation. From an R3 perspective, urban areas represent the greatest opportunity: targeted efforts that support early experiences and reduce barriers for metropolitan anglers could improve retention, while reactivation campaigns in cities could recover a substantial share of lapsed anglers.

Urban-Rural Classification of Resident License Holder Address by R3 Category



RESULTS: ANGLER R3 CATEGORY BY ZIP CODE

Ultimately, this project is meant to help guide state efforts to find potential new anglers, identify areas where demand for access might be growing, initiate marketing campaigns that focus on those areas, and inform the location of new sportfishing access. Mapping license holders within each R3 category reinforces the finding that new or lapsed anglers are proportionally less likely to reside inside Indiana's more rural areas.



New anglers (Recruit)



Steady anglers (Retain)



Lapsed anglers (Reactivate)

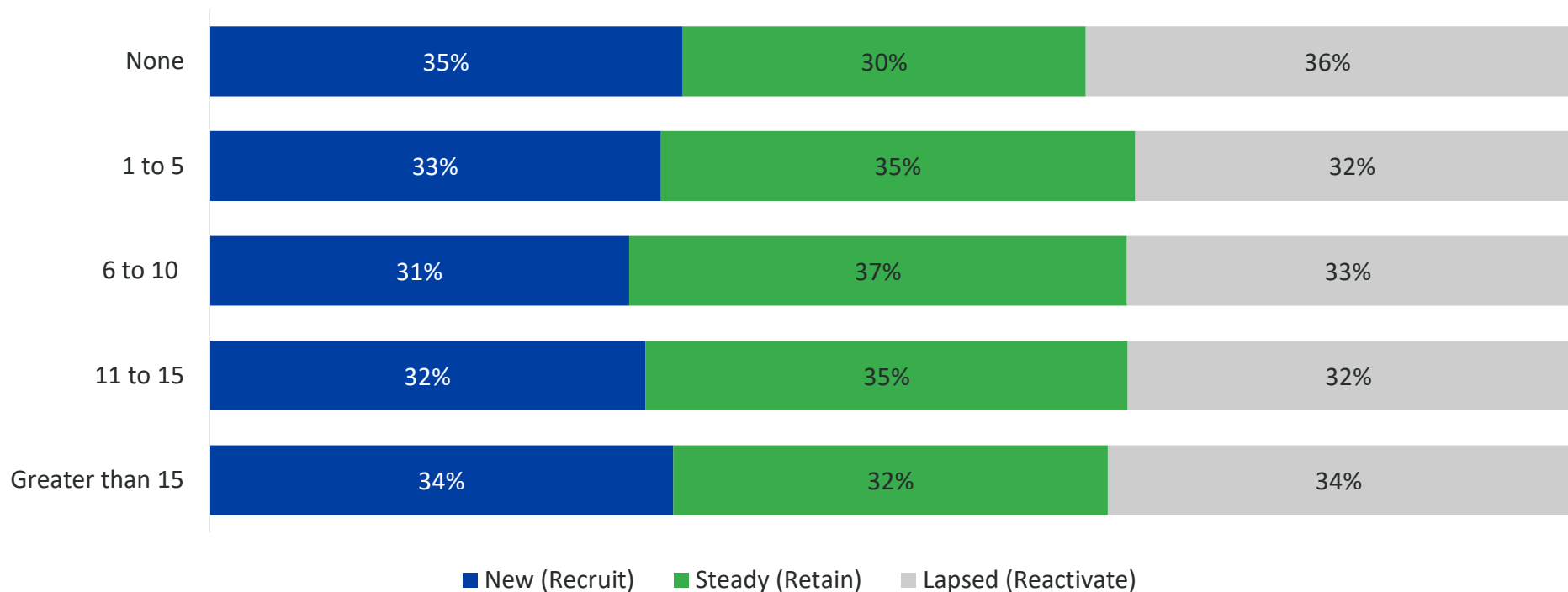
Dots are sized according to total number of anglers in the indicated angler category in that zip code.

Maps developed using a representative sample of all license holders.

RESULTS: ANGLER R3 CATEGORY & ACCESS POINTS

The quantity of access points seems to have a limited effect on R3 categories. Decision drivers to try or return to fishing may not be the presence of opportunity. They may instead be awareness or even crowding. Quality of the access point and the fish and wildlife habitat at the site cannot be measured through these data but surely are part of the decision to fish at a site or not.

Number of Available Access Points within 15 mile buffer by Angler Category



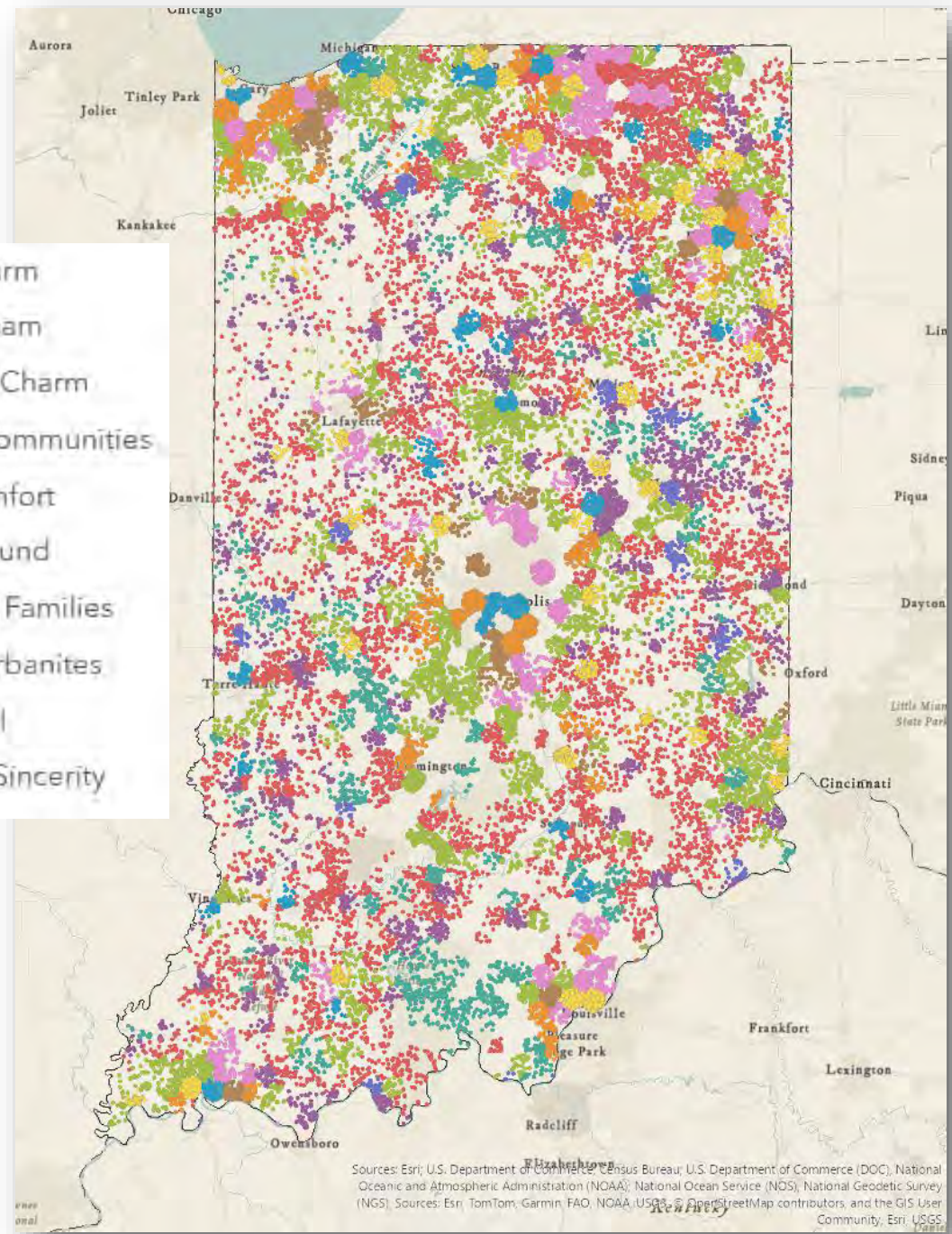
RESULTS: TOP ANGLER TAPESTRY SEGMENTS

Significant lifestyle differences can exist between two people of the same age, gender and income. Lifestyle analyses help describe a state's angler population, including their current stages in life, their recreational and hobby preferences, financial status, purchasing, entertainment preferences, and more.

The top ten angler Tapestry segments among the three R3 groups are mapped here. Areas without a Tapestry segment displayed signify the presence of Tapestry communities with smaller populations within the angler community and/or the overall state population.

The results show Indiana has a rich mix of communities.

- I7: Country Charm
- K7: Room to Roam
- E3: Hometown Charm
- I3: Heartland Communities
- K4: Classic Comfort
- K2: Middle Ground
- H1: Flourishing Families
- L1: Savvy Suburbanites
- J4: Rooted Rural
- I1: Small Town Sincerity



Map developed using a representative sample of all license holders.

RESULTS: TOP TAPESTRY SEGMENTS BY CITY

The Country Charm segment made up the highest percentage of anglers in 2024, followed closely by Room to Roam, Heartland Communities, and Hometown Charm segments. During the last decade however, there is declining participation from the three largest segments while participation within the Hometown Charm segment is increasing. Targeted messaging to the segments experiencing organic growth could support the continued increase in participation from these groups, especially considering the significant growth from Hometown Charm and even Middle Ground. The next page shares more about the Hometown Charm segment.

Tapestry Code	Name*	Percent of Anglers in 2024***	Angler Percent Change (2015 -2024)***	Angler Percent Change (2019 – 2024)***	Percent of Total Population (2025)
I7	Country Charm	14.1%	-11.0%	-13.1%	9.4%
K7	Room to Roam**	10.9%	-9.5%	-9.5%	9.3%
I3	Heartland Communities**	10.1%	-2.7%	-4.3%	5.8%
E3	Hometown Charm	9.9%	12.6%	16.7%	6.5%
K4	Classic Comfort	8.8%	1.5%	4.5%	7.1%
K2	Middle Ground**	8.5%	6.6%	7.0%	6.9%
H1	Flourishing Families	7.%	-1.7%	-2.5%	6.2%
L1	Savvy Suburbanites**	3.2%	2.2%	6.0%	4.3%
I4	Rooted Rural	3.1%	-10.5%	-12.8%	2.2%
I6	Southern Satellites**	2.4%	-8.4%	-9.8%	2.0%

**Tapestry Segmentation information can be found in the state companion workbook and via ESRI's Segment Infographics Dashboard.*

*** = segment enjoys outdoor activities*

****Tables developed using a representative sample of all license holders.*

RESULTS: HOMETOWN CHARM TAPESTRY SEGMENT

The Tapestry segmentation process paints a picture of the type of community an angler lives in and identifies their most likely habits and preferences. For example:



Tapestry Segment E3

Hometown Charm

9.9% of IN anglers*

6.5% of IN population

- Characterized by young families with children under 18
- 1/3 of households are nonfamily households and marriage rates are lower than the national average
- Typically shop online and order products such as pet supplies from large retail establishments
- Tend to buy tools for garden maintenance and purchase used vehicles
- Almost all adults have access to smartphones, typically with discount prepaid services, which they use for social media and entertainment

With these insights, R3 messaging topics that would best resonate are:

- Identify fishing as a way for all generations to **spend time outdoors** as a family, especially with grandchildren
- Highlight the **affordability** of a local family fishing trip
- Facilitate fishing **trip planning**, as women are often keeping family schedules

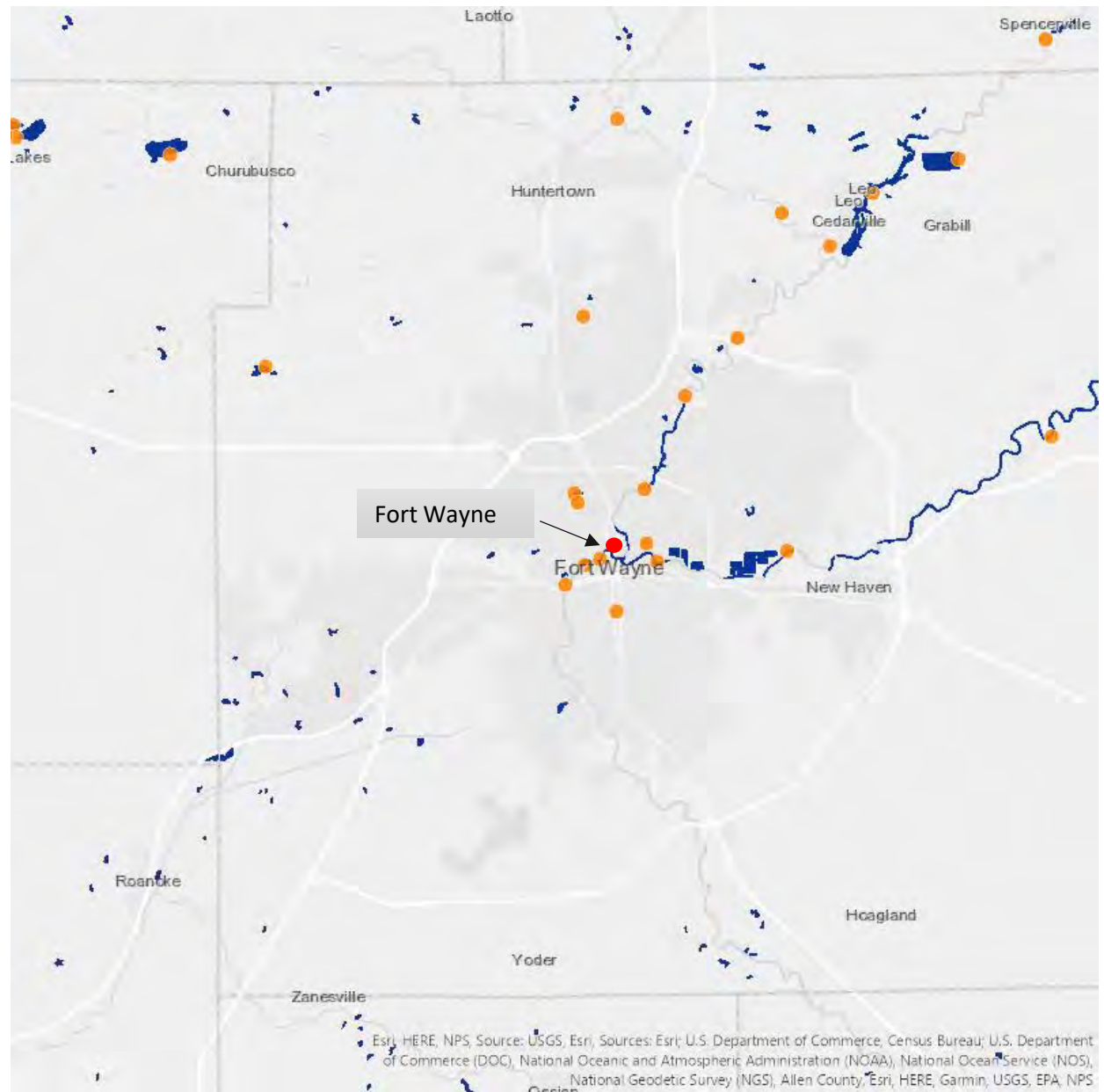
*Estimates reflect the 2024 population

Data provided by ESRI's Segment Infographics Dashboard.

CASE STUDY: FORT WAYNE

Agencies frequently reach out to their angler population to encourage license renewals. However, fishing as an outdoor recreational activity competes with a host of other outdoor activities. The results presented in this section can be used to identify the ideal mix of communication strategies which could be used to recruit, retain, and reactivate anglers within the state or targeted areas.

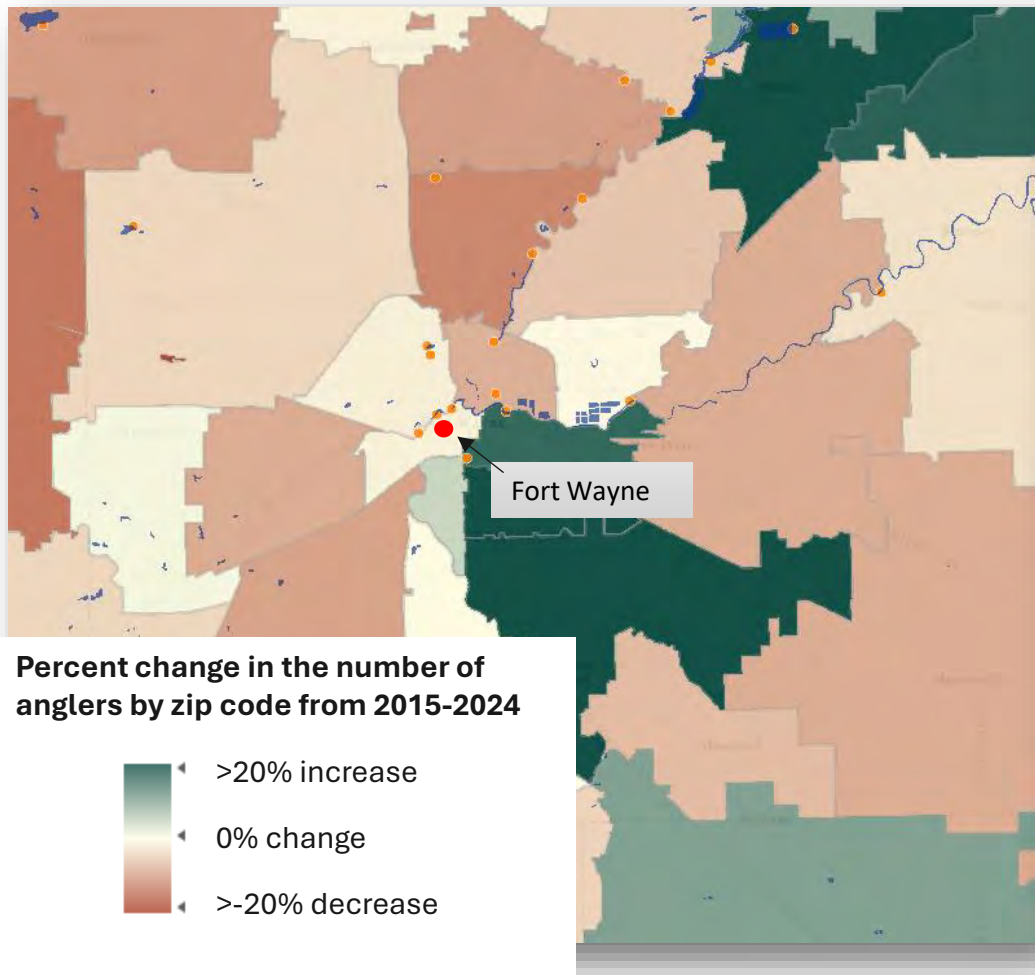
We are using Fort Wayne and the surrounding area as a case study. As a reminder, each light orange dot indicates a state agency identified access point.



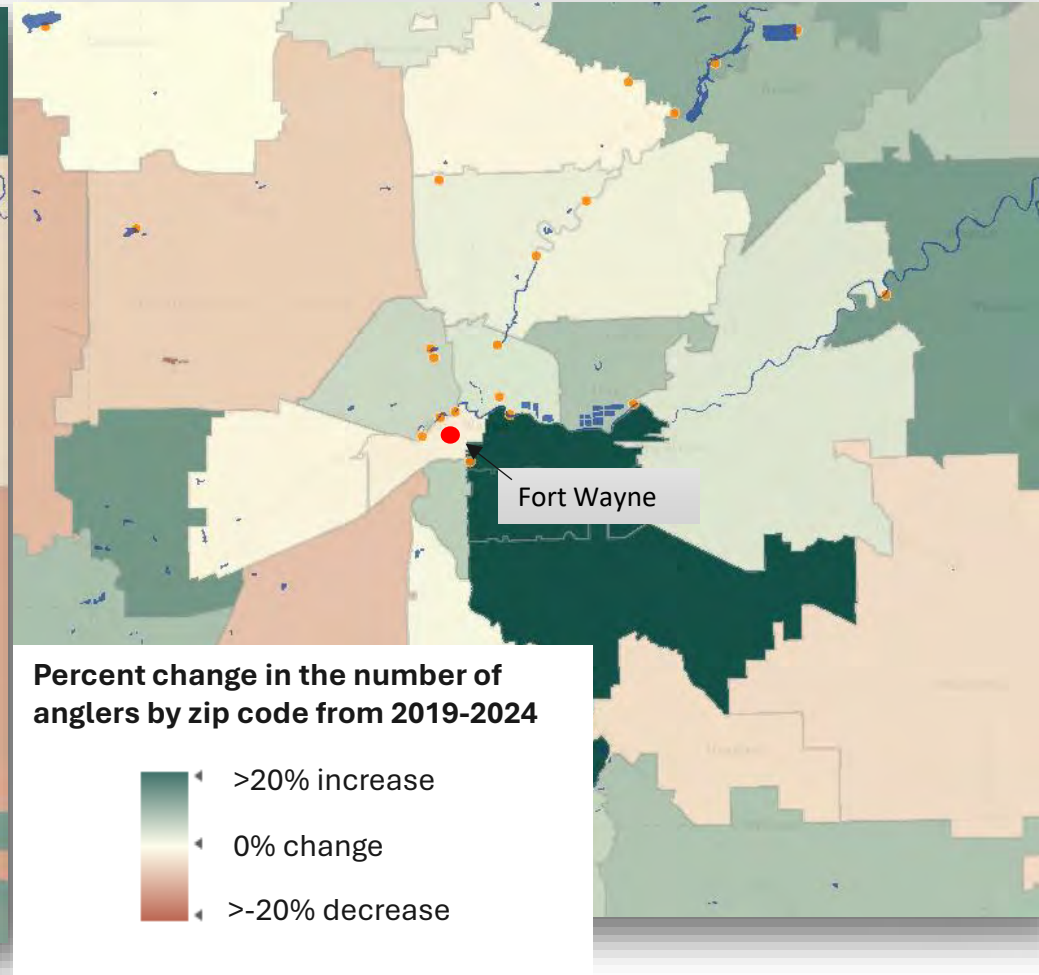
CASE STUDY: FORT WAYNE ANGLER CHANGE

Fort Wayne over the last decade has seen stagnant growth while a majority of the surrounding areas have declined. While in the last five years, Fort Wayne and most of the surrounding area experienced growth in angler participation, potentially driven by sustained participation from the COVID-19 pandemic. Fort Wayne has strong fishing opportunities along the St. Marys, St. Joseph, and Maumee Rivers along with freshwater spots like the Hurshtown Reservoir.

Ten-year timeframe



Five-year timeframe

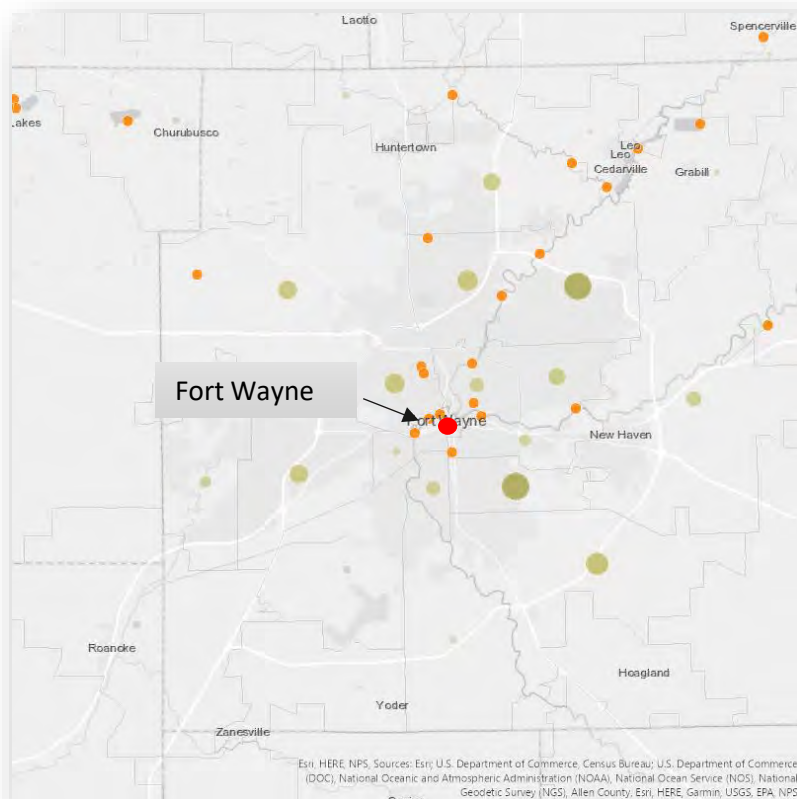


CASE STUDY: ANGLERS BY R3 CATEGORY

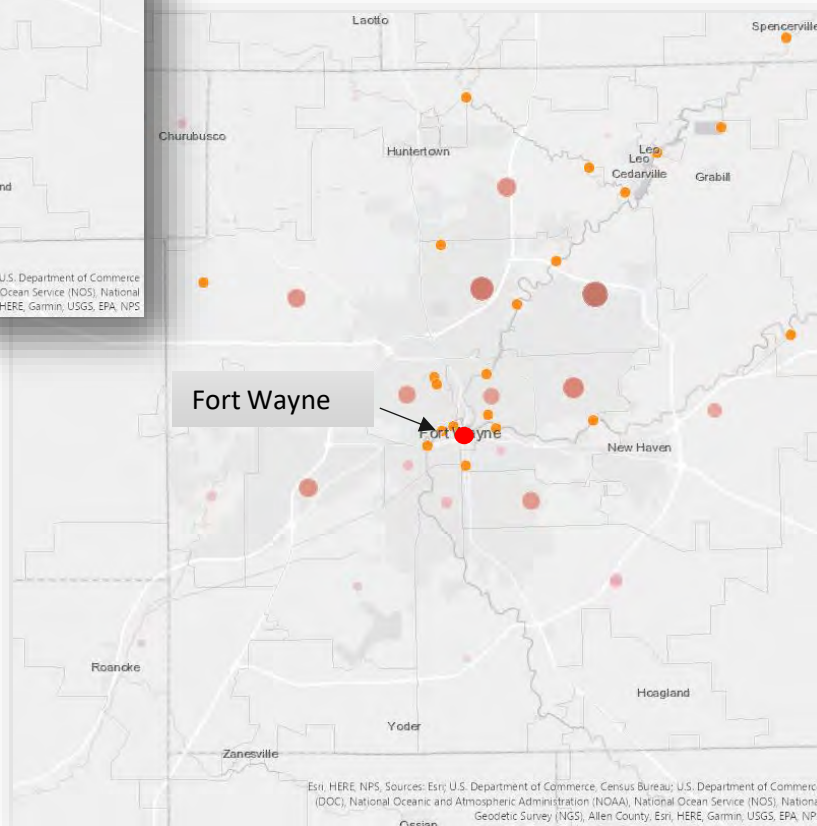
Although Fort Wayne has a strong population of steady anglers, we see there are opportunities with other populations.

By zooming in closer, we see there are large numbers of new and lapsed anglers in and around Fort Wayne.

Dots are sized according to total number of anglers in the indicated angler category in that zip code.



New anglers (Recruit)



Lapsed anglers (Reactivate)

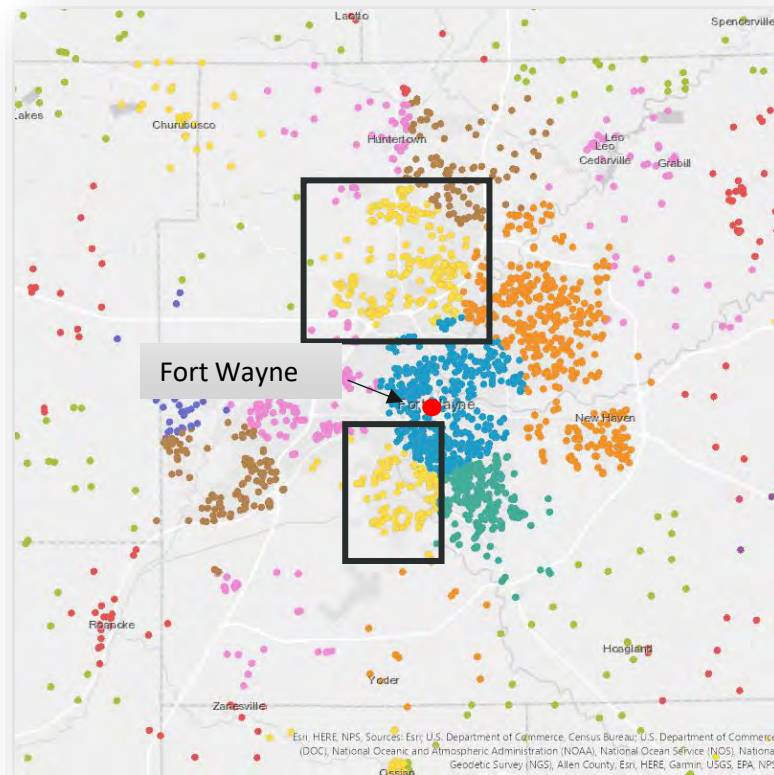
Maps developed using a representative sample of all license holders.

CASE STUDY: ANGLER TAPESTRY SEGMENTS

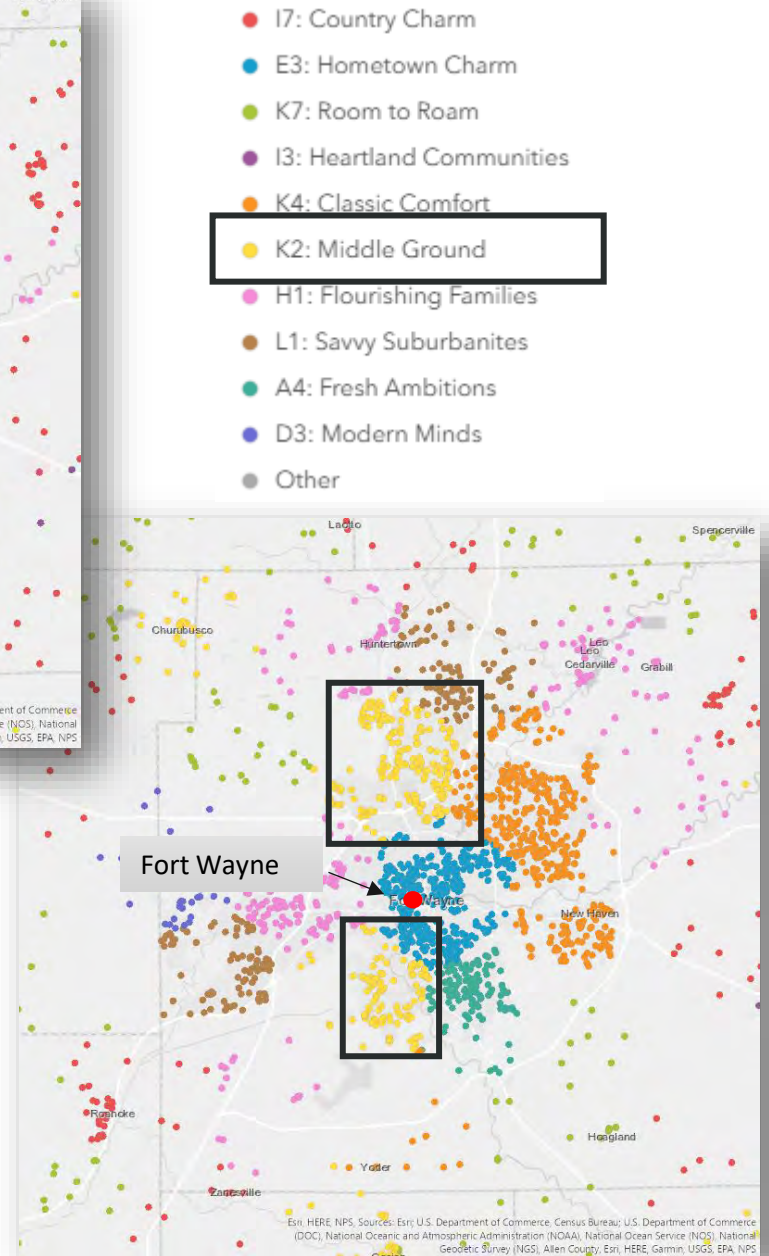
Tapestry segments for both new and lapsed anglers have a high degree of similarities.

This can be advantageous for marketing efforts because common themes to reengage or spur interest in fishing can be employed across both groups.

For example, communities north and south of the Fort Wayne area fit the 'Middle Ground' profile. The description of their profile is included on the next page.



New angler tapestries (Recruit)



Lapsed angler tapestries (Reactivate)

CASE STUDY: MIDDLE GROUND SEGMENT

Typical communities that fit the Middle Ground Tapestry Segment and are described as:



Tapestry Segment K2 Middle Ground

8.5% of IN anglers*
6.9% of IN population

- Suburban neighborhoods that are slightly younger than U.S. average
- Tend to consist of married couples, cohabitating couples, and single-person households
- Tend to shop at discount grocery chains and frequent fast-food restaurants
- Use social media as well as newspapers and magazines
- Recreational interests often include professional and college sports, fishing, and gardening
- Vacations are typically taken to nearby states, especially those offering beaches or sightseeing opportunities

With these insights, R3 messaging topics that would best resonate are:

- Emphasize the affordability of fishing as a way to **source ingredients for home-cooked meals**.
- Facilitate opportunities for **social connection** with friends and other couples.
- Highlight **local, close-to-home fishing opportunities** that do not require extensive travel, planning, or specialized equipment.

*Estimates reflect the 2024 population

Data provided by ESRI's Segment Infographics Dashboard.

RECOMMENDATIONS TO ENGAGE ANGLERS

Even if fishing is someone's preferred outdoor activity, it faces stiff competition. Other activities perceived to be easier compete for our time. Outlined below are key recommendations and supporting research to help agencies position fishing as a preferred choice among anglers balancing competing demands on their time.

- **Fishing information should be in one easy to find place.** More than anything, anglers go to the agency website for information. Easy to understand regulations, area fishing maps and nearby fishing opportunities should be readily available. Include boat launches, shore fishing opportunities, and nearby available services, like parks and restaurants.
- **Make fishing trip planning easy.** Helping anglers with planning can recapture lapsed anglers and facilitate participation for new and steady anglers. Pairing fishing with other activities (especially with kids or grandkids) is a great marketing strategy.
- **Put educational material on the state agency website.** New anglers come back when they catch fish. But, they may lack or feel intimidated by the specialized knowledge and equipment required. Prior research has shown state agency websites are the preferred media platform to locate instructional materials ([ASA and Southwick Associates 2025](#)). Agencies should also be active on YouTube.
- **Focus on anglers where they live with marketing materials that truly resonate.** By using Tapestry™ data, marketing and communications teams can identify exactly who they're talking to and the best media channel for people in that area.
- **Additional research resources include:**
 - American Sportfishing Association and Southwick Associates (2025). *Why Anglers Quit and How Can We Improve Retention Rates*. Funded by Multi-State Conservation Grant F24AP00087 as part of the Wildlife and Sport Fish Restoration Programs of the U.S. Fish and Wildlife Service.
 - Recreational Boating and Fishing Foundation and Ipsos (2024). *Psychology of Churn: Understanding Fishing & Boating Attrition*. Funded by the U.S. Fish and Wildlife Service F23AC00806 as part of the Wildlife and Sport Fish Restoration Programs of the U.S. Fish and Wildlife Service.
 - American Sportfishing Association and Southwick Associates (2020). *Angler Personas: Understanding Anglers' Motivations*. Funded by Multi-State Conservation Grant F19AP00114 as part of the Wildlife and Sport Fish Restoration Programs of the U.S. Fish and Wildlife Service.
 - Recreational Boating & Fishing Foundation and Responsive Management (2019). *Actionable Strategies for Angler Recruitment, Retention, and Reactivation*. Funded by Multi-State Conservation Grant F18AP00165 as part of the Wildlife and Sport Fish Restoration Programs of the U.S. Fish and Wildlife Service.



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