

WHERE IS DEMAND FOR SPORTFISHING THE GREATEST?

MINNESOTA'S REPORT



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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, reactivate lapsed anglers, identify convenient access points, and initiate marketing campaigns that focus on those areas and type of anglers.

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 customer 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 study's 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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APPROACH: ANGLER LICENSE DATA & R3 CATEOGRY

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
- **Twin Cities 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

Nearly three-quarters of Minnesota anglers live in a city or suburb, which aligns closely with recent population trend data. Given over 3 million people live in the seven-county Twin Cities metro area and there have been slight increases in sales, these areas are ideal for R3 activities. The areas in and around Duluth and Rochester are also focus areas because of their proximity to lakes, rivers, and streams. The FiN program, urban ice fishing, and the No Child Left Inside grants all position Minnesota as a potential leader in angler recruitment, retention, and reactivation.

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	44.3%	-2.1%	-1.4%
Metropolitan commuting	17.7%	4.6%	2.3%
Micropolitan/Small cities/Suburbs	15.4%	0.6%	1.0%
Small Town	4.3%	2.6%	1.5%
Rural	18.2%	-0.1%	0.0%

Source: Fishing in the Neighborhood



Source: No Child Left Inside



**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 by far are found in the twin cities (column A). Naturally the case given these cities also hold more of the state's population (column D).

Over the last decade, angler numbers in almost all of these current top ten cities based on the overall fishing license holder population are declining (column B), despite population growth within each (column E).

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)**
Minneapolis	10.2%	-14.8%	-8.9%	19.5%	6.8%
Saint Paul	9.1%	-8.4%	-4.2%	14.1%	4.9%
Duluth	2.2%	-9.9%	-6.8%	2.0%	2.0%
Rochester	1.7%	-5.1%	0.1%	2.3%	10.9%
Saint Cloud	1.2%	-6.4%	-2.6%	1.4%	5.5%
Anoka	1.1%	-4.5%	-2.5%	0.9%	11.6%
Andover	1.1%	-0.9%	-1.5%	0.9%	5.0%
Elk River	1.1%	1.3%	0.6%	0.8%	22.4%
Mankato	0.9%	-3.7%	-1.3%	1.2%	8.7%
Brainerd	0.9%	-5.9%	-5.9%	0.6%	8.5%

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.

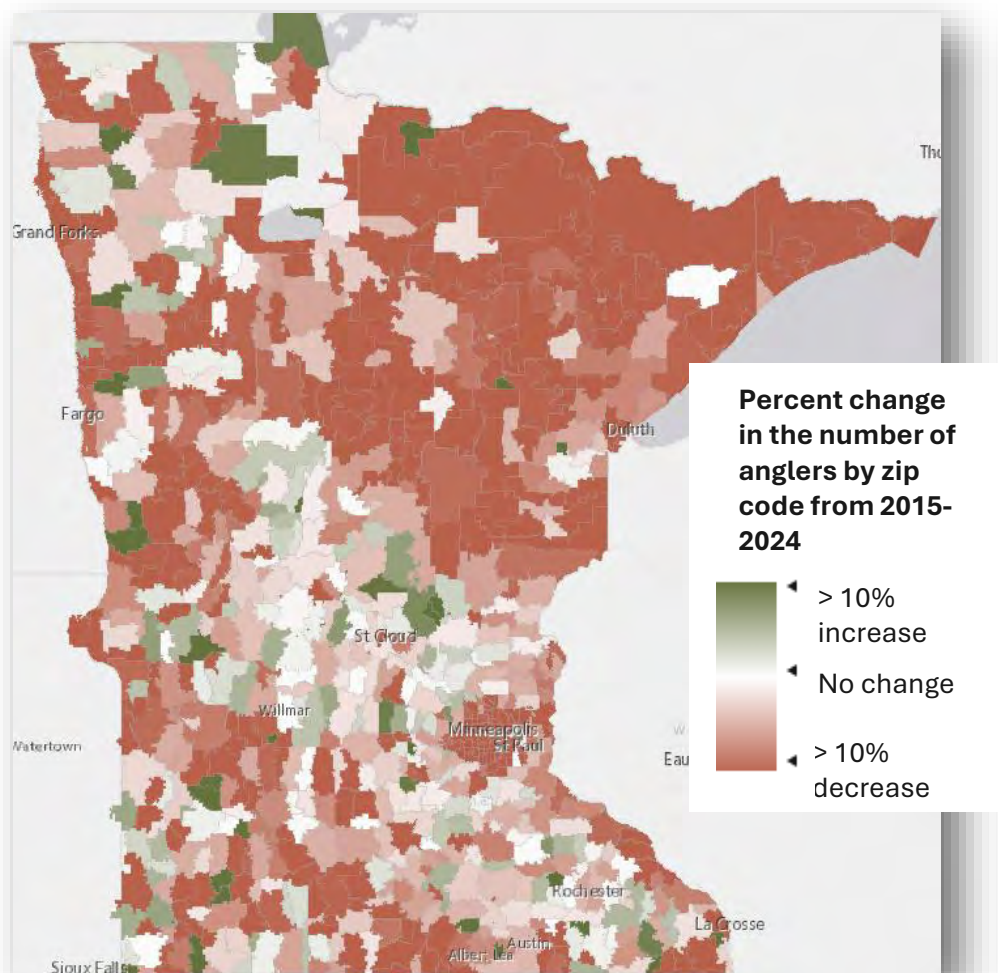
*Represents the top ten cities across the angling population in the state.

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

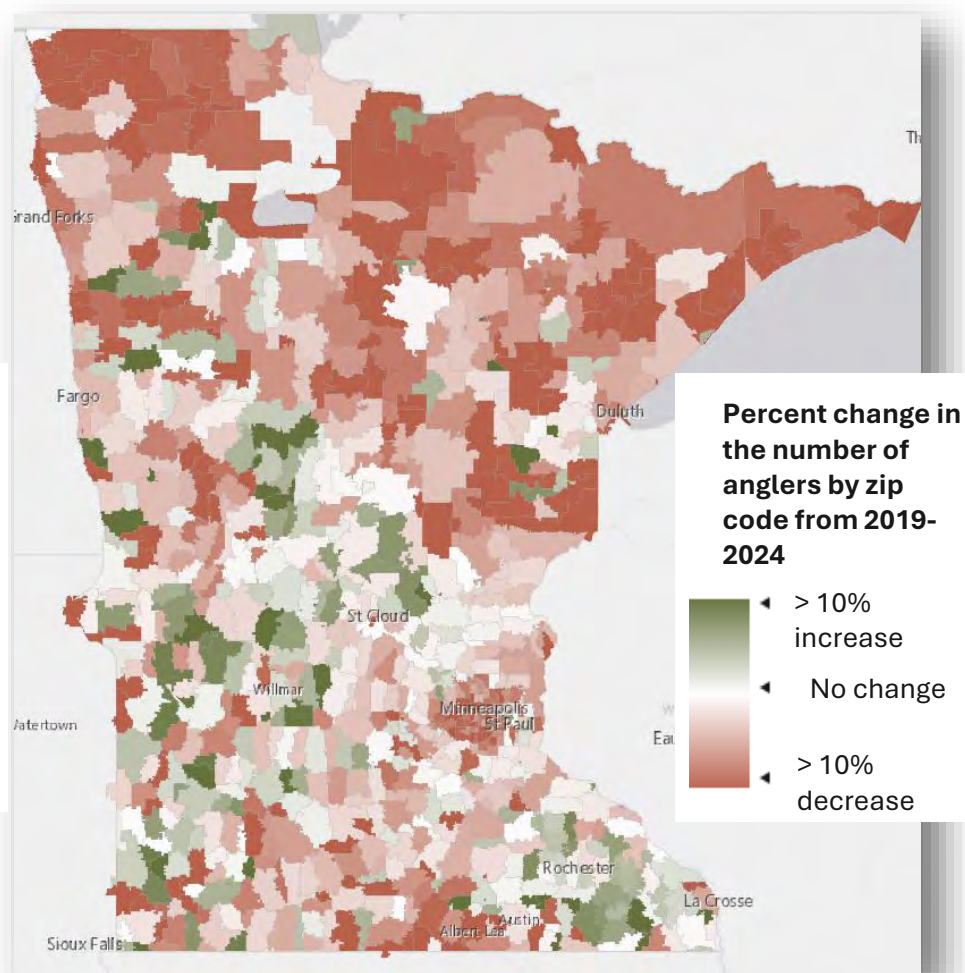
RESULTS: ANGLER CHANGE BY CITY

These two maps broaden the geographical scope. In the last 5 years (map on the right), angler growth was concentrated over much of the lower two thirds of the state. Particularly noted along the Interstate 94 from the St. Cloud region westward up to the Fargo area, west of Willmar and the Rochester area. The contraction of the licensed angler population over the last 10 years in the urban Twin Cities area reflected in the table earlier is echoed in the maps below (left). In addition to dispersed rural areas all across the state, the areas with the greatest percent increase in anglers are again the St. Cloud and Rochester areas.

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



**Five-year timeframe
(2019 through 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.



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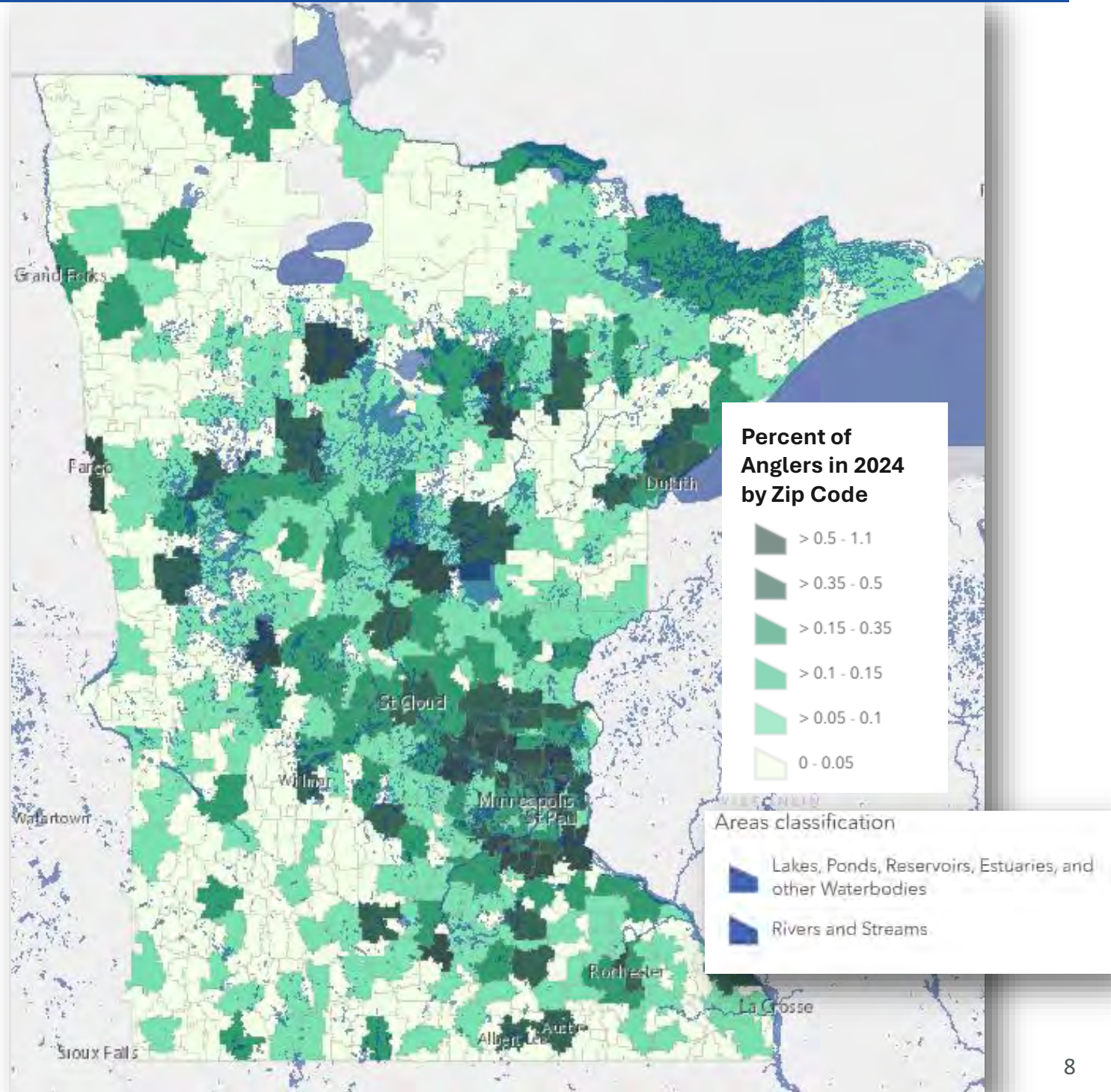


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RESULTS: ANGLERS & FISHING OPPORTUNITY

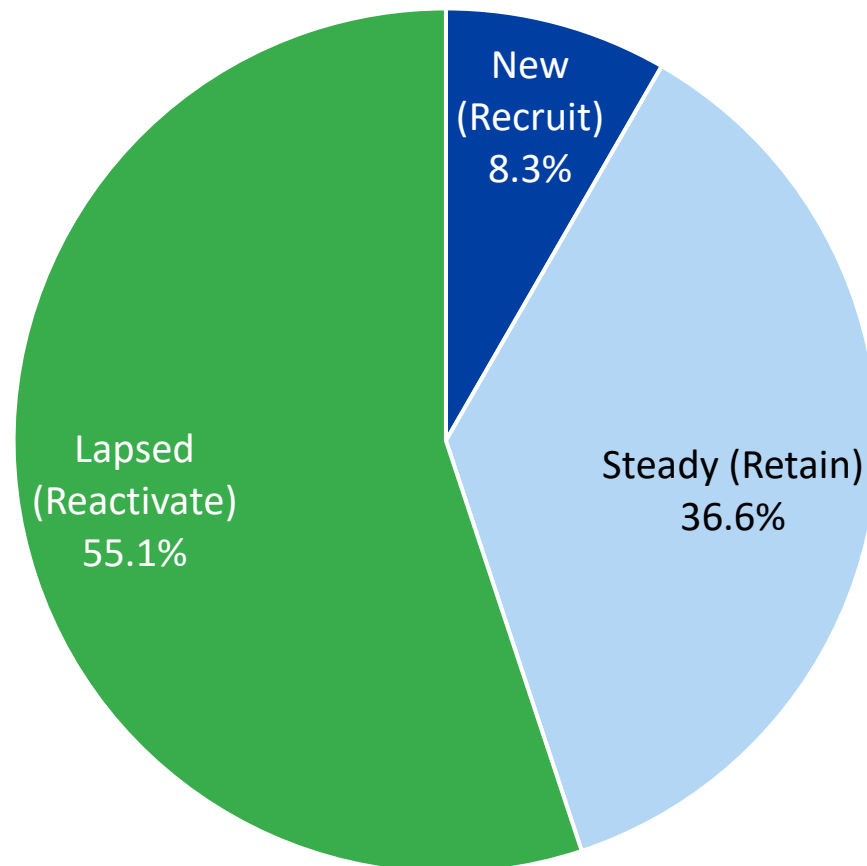
As the Land of 10,000 Lakes, Minnesota provides abundant fishing opportunities statewide. Decisions to try or return to fishing are not for lack of opportunity. They may instead be access, species available, awareness, crowding, or the perceived ease of trying something new.

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. This is especially important given Minnesota's ethnically diverse urban/suburban communities.



RESULTS: ANGLER R3 CATEGORY

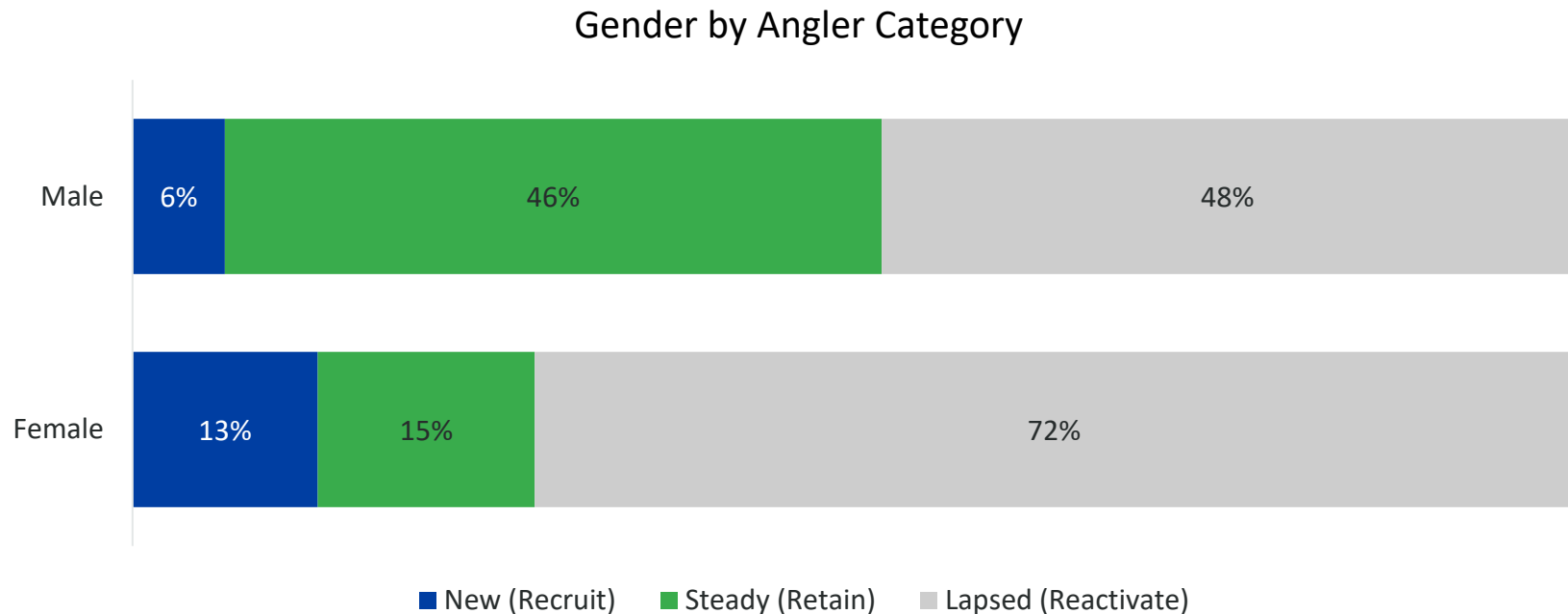
A total of 1.56 million anglers were classified into one of the R3 three categories. Almost half of Minnesota's angler population is lapsed, meaning they didn't purchase a license in 2023 or 2024 despite having purchased in previous years. This represents a significant opportunity to re-engage with the 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, Minnesota's angler population over the last decade is predominantly male, with men comprising roughly 2.5 times as many anglers as women. Female anglers are significantly more likely than males to lapse and male anglers are far more likely to be steady. In recent years females are entering fishing at a higher rate than males, accounting for a larger share of new anglers.

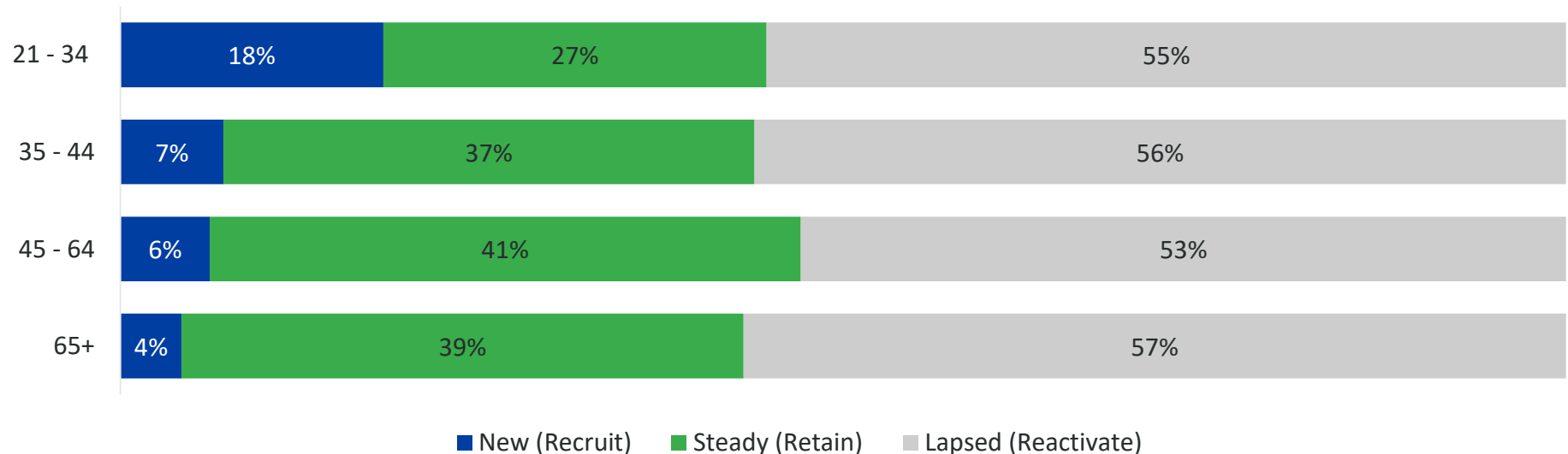
This pattern presents a R3 opportunity for Minnesota. While recruitment of female anglers is gaining momentum, retention remains a critical challenge. Targeted strategies that reduce barriers and support early experiences, such as women-focused fishing programs and mentorship opportunities could help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



RESULTS: AGE BY ANGLER R3 CATEGORY

In Minnesota, steady participation increases with age, peaking among anglers aged 45-64 and remaining high among those 65+. This is likely because adults in this age range are no longer caretaking young children and/or retired, hence they have more time available for recreation. Younger adults aged 18-25 are more likely to be new anglers, while anglers aged 25 – 34 have the highest proportion of lapsed anglers. R3 efforts should focus on early retention strategies for younger anglers and overall broad reactivation campaigns across all age groups.

Age by Angler Category



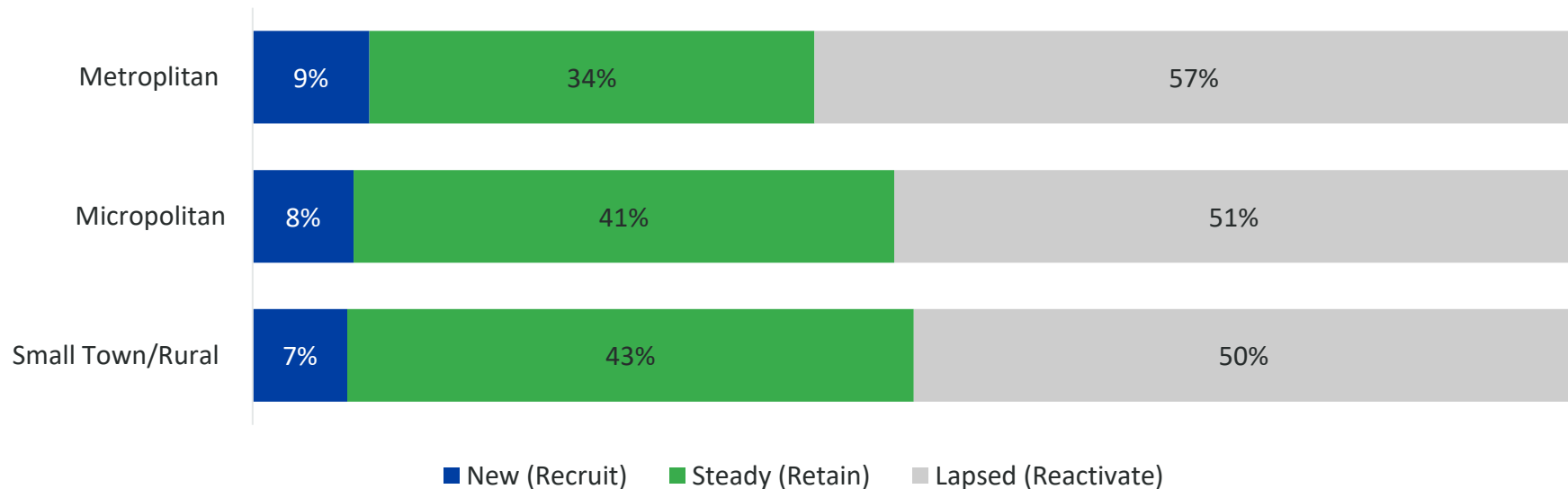
Note: The R3 category system applies age restrictions to ensure multi-year behavior is captured. For example, anglers categorized as “New” in 2025 must be at least 21, which helps exclude individuals who were previously fishing but only recently required a license due to the minimum age requirement of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

RESULTS: URBANIZATION BY ANGLER R3 CATEGORY

We already know most anglers live around urban/suburban communities. Therefore, increasing access and awareness of fishing opportunities in these areas could have an outsized effect on angler participation.

Although steady anglers are more likely to reside in rural areas and small towns, they should not be overlooked when designing R3 programs. Especially as seen prior the rural/town areas have been seeing growth in anglers over the last decade while urban areas have been predominantly declining.

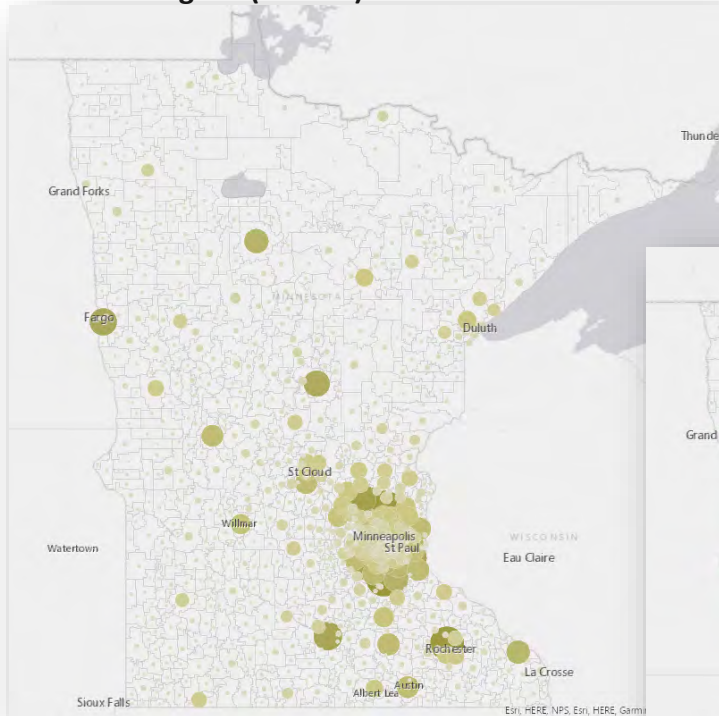
Urban-Rural Classification of Resident License Holder Address by R3 Category



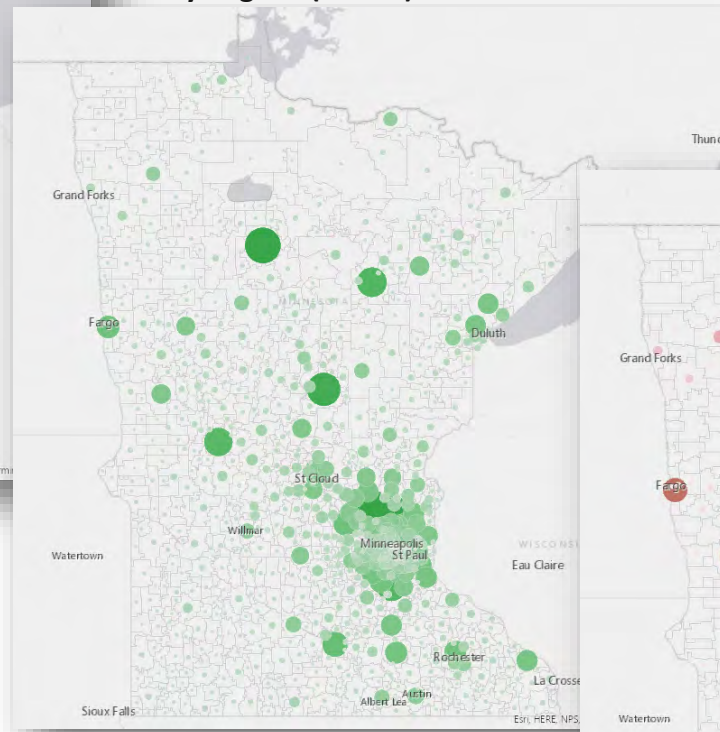
RESULTS: ANGLER CATEGORY BY ZIP CODE

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 in rural areas anglers are slightly more likely to be steady angler, while new and lapsed anglers are more likely found in and around major cities.

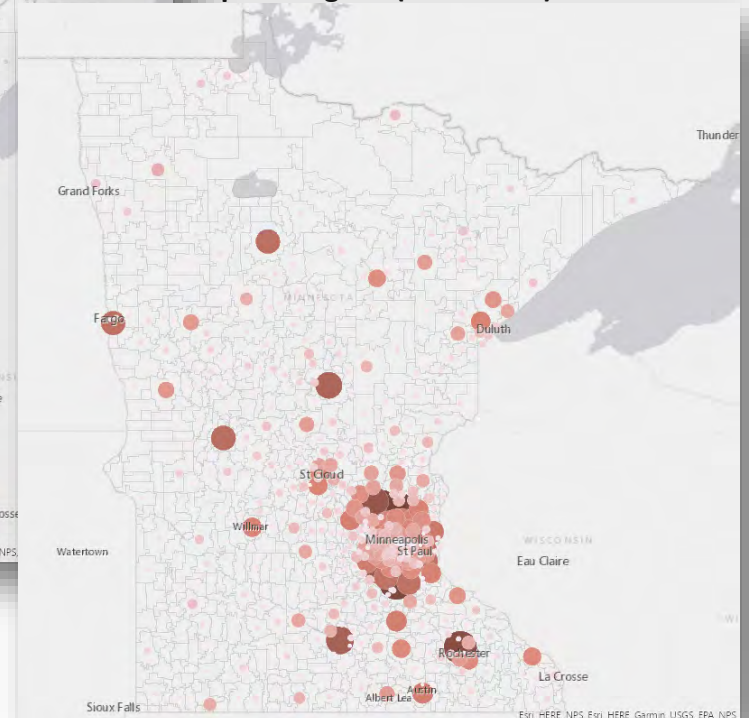
New anglers (Recruit)



Steady anglers (Retain)



Lapsed anglers (Reactivate)



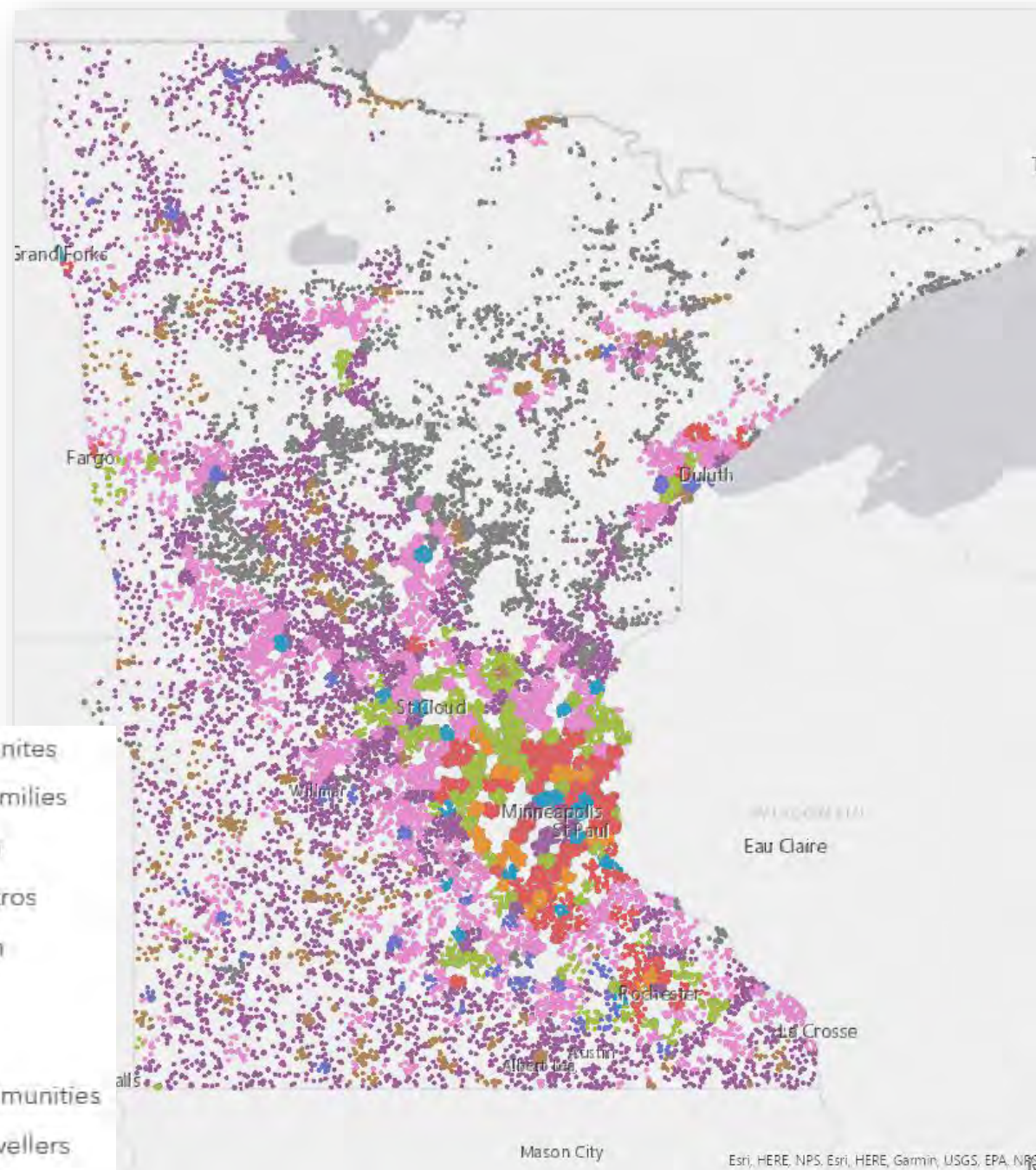
Dots are sized according to total number of anglers in the indicated angler category in that zip code.

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 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 Minnesota has a rich diversity of communities in urban/suburban areas and less so outstate.

- L1: Savvy Suburbanites
- H1: Flourishing Families
- I7: Country Charm
- C6: Moderate Metros
- K7: Room to Roam
- K6: City Greens
- H2: Boomburbs
- I3: Heartland Communities
- I5: Rural Resort Dwellers
- K2: Middle Ground



Esri, HERE, NPS, Esri, HERE, Garmin, USGS, EPA, NPS

Map developed using a representative sample of all license holders.



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RESULTS: TOP TAPESTRY SEGMENTS BY CITY

The Savvy Suburbanites made up the highest percentage of anglers in 2024, followed by Country Charm, Flourishing Families, and the Room to Roam segments. While this segment is generally stable, there is a decreasing participation among other important segments. Targeted messaging to the segments may be different due to the nature of their lifestyles. Suburbanites may be more persuaded by messages that focus on ease of access and taking their children fishing using social media channels. The Country Charm segment is older and more rural, so messaging can focus on the importance of fishing to the rural lifestyle.

The next two pages go into a little more detail about the Savvy Suburbanite and Country Charm segments.

Tapestry Code	Name*	Percent of Anglers in 2024***	Angler Percent Change (2015 -2024)***	Angler Percent Change (2019 – 2024)***	Percent of Total Population (2025)
L1	Savvy Suburbanites**	12.9%	1.8%	0.6%	9.8%
I7	Country Charm	9.7%	-6.1%	-6.6%	6.4%
H1	Flourishing Families	8.8%	2.0%	-0.8%	7.4%
K7	Room to Roam**	8.0%	-9.2%	-11.0%	6.8%
C6	Moderate Metros	7.4%	4.8%	7.6%	4.3%
H2	Boomburbs**	6.1%	4.9%	6.7%	3.9%
K6	City Greens**	5.7%	7.7%	13.7%	5.9%
I3	Heartland Communities**	4.9%	-3.4%	-3.5%	3.0%
I5	Rural Resort Dwellers	4.8%	-17.6%	-16.8%	2.5%
K2	Middle Ground**	3.9%	2.3%	0.8%	2.5%

**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: SAVVY SUBURBANITES 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 L1 Savvy Suburbanites	12.9% of MN anglers* 9.8% of MN population
• Some have children who have grown up and left and around one-quarter still have kids at home • Gravitate toward suburban communities, which includes both newly developed and well-established areas, within major metropolitan areas • Combined wages of both spouses position these families solidly in the middle to upper income tiers • Tend to invest a significant resources on home improvement and landscaping • Tend to have access to cell phones and the internet to stay connected • Vacation destinations often include beaches and national parks		

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

- Identify fishing as a way for **families to connect** their children with fishing
- Highlighting the **abundance of fishing areas** in urban and suburban areas.
- The abundance of **fishing opportunities at their vacation destinations**, which are often cabins in the north country.

*Estimates reflect the 2024 population

Data provided by ESRI's Segment Infographics Dashboard.

RESULTS: COUNTRY 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 I7 Country Charm

9.7% of MN anglers*
6.4% of MN population

- Evenly distributed across metropolitan, micropolitan, and nonmetropolitan areas
- Most residents live outside defined towns or cities in very low-density regions
- Agriculture is at the heart of these communities, with many residents self-employed on their own farms or working for neighboring farms
- Tend to be older, with more married couples than singles; however, there is a higher-than-average presence of children under 18
- Shop for essentials in person, often using coupons, and they turn to online platforms for greater variety and better deals
- Create and repair things themselves, from home improvement and woodworking to gardening and crafting; often purchase tools and equipment for maintaining their cars, lawns, and gardens

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
- Highlighting the connection of rural Minnesota with family and the outdoors
- Remind people that **great fishing exists** outside of deer, duck, and pheasant seasons

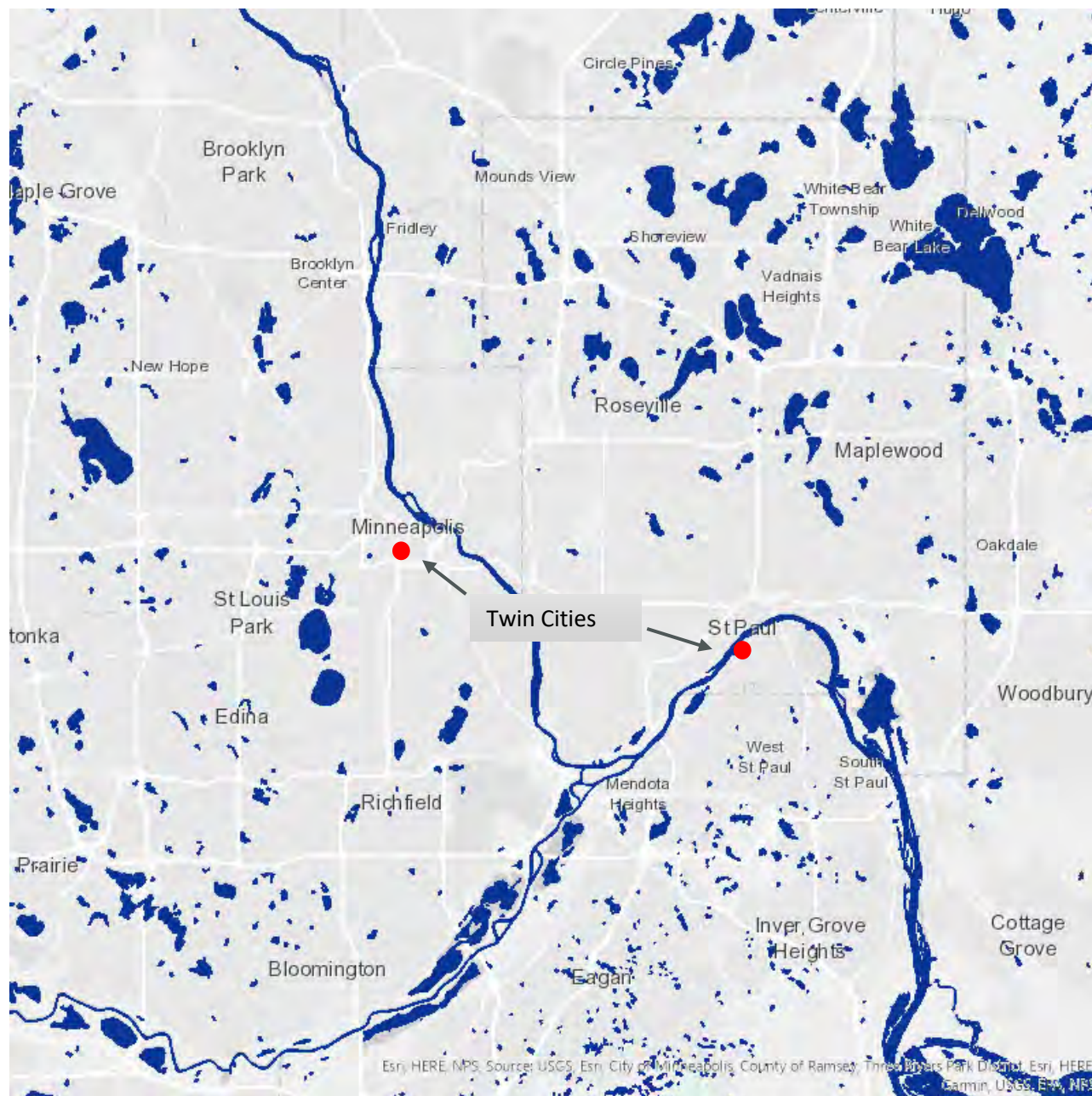
*Estimates reflect the 2024 population

Data provided by ESRI's Segment Infographics Dashboard.

CASE STUDY: TWIN CITIES

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 the Twin Cities and surrounding area as a case study.



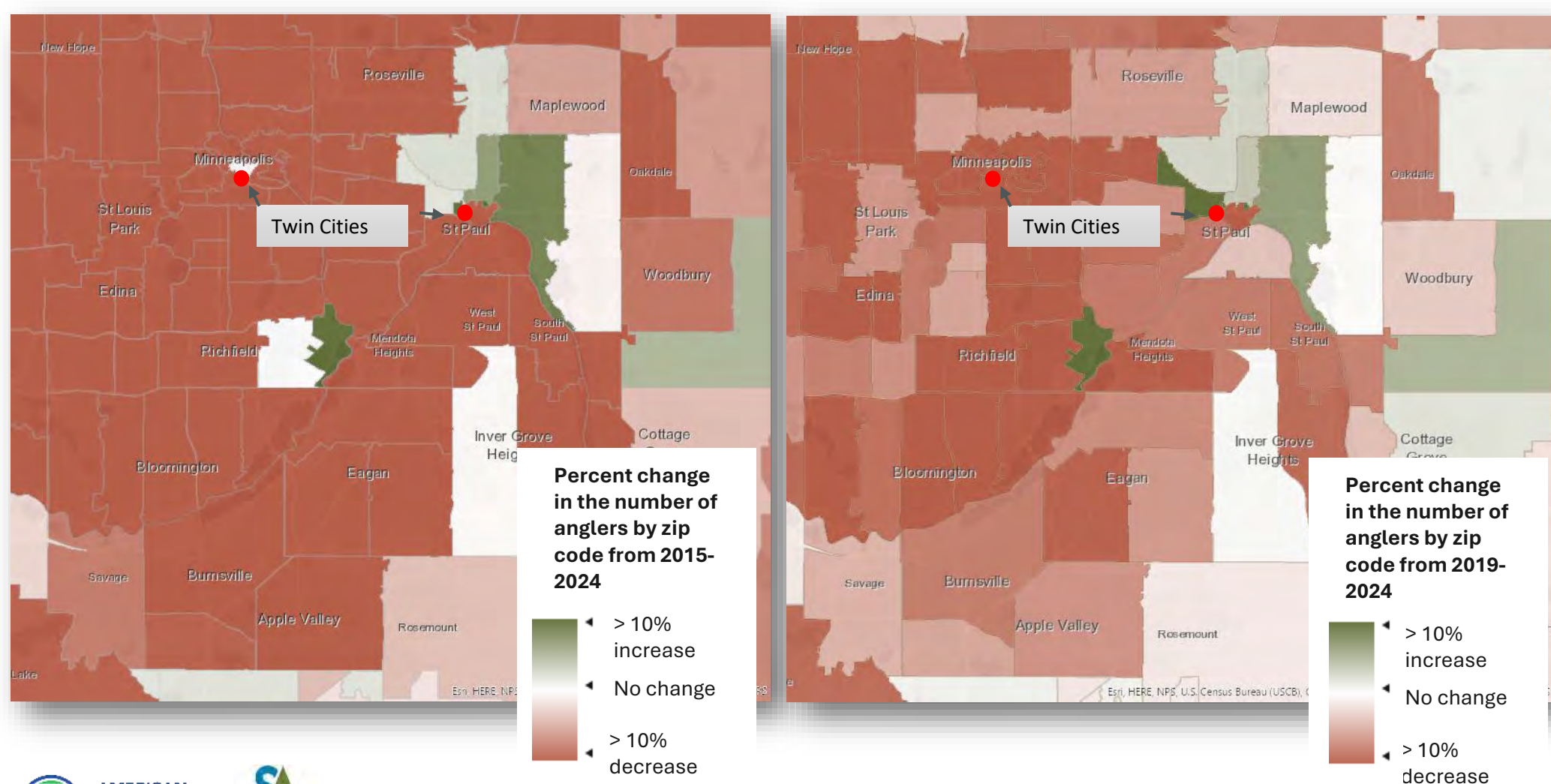
Esri, HERE, NPS, Source: USGS, Esri, City of Minneapolis, County of Ramsey, Three Rivers Park District, Esri, HERE, Garmin, USGS, EPA, NPS

CASE STUDY: TWIN CITIES ANGLER CHANGE

Despite being rich in year-round fishing, the Twin Cities metro area experienced declines in angler numbers during the last ten years, nearly across the board. The only exception being the suburbs to the east.

Ten-year timeframe

Five-year timeframe



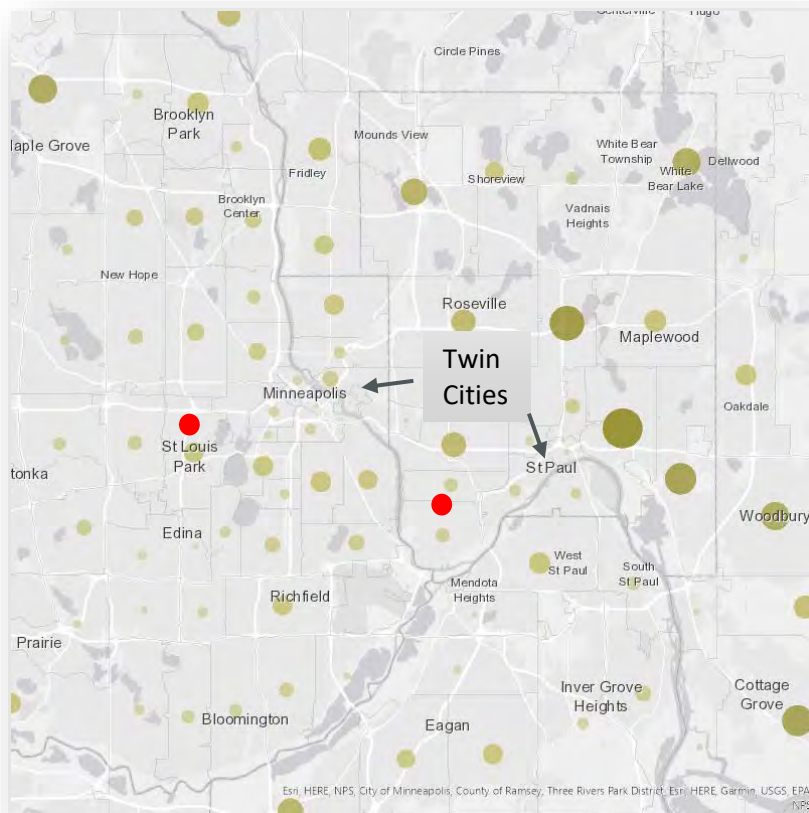
Note: To a certain extent the percent change in license holders reflects a variability in license records due to incomplete data for Personally Identifiable Information (PII) in earlier years.

CASE STUDY: ANGLERS BY R3 CATEGORY

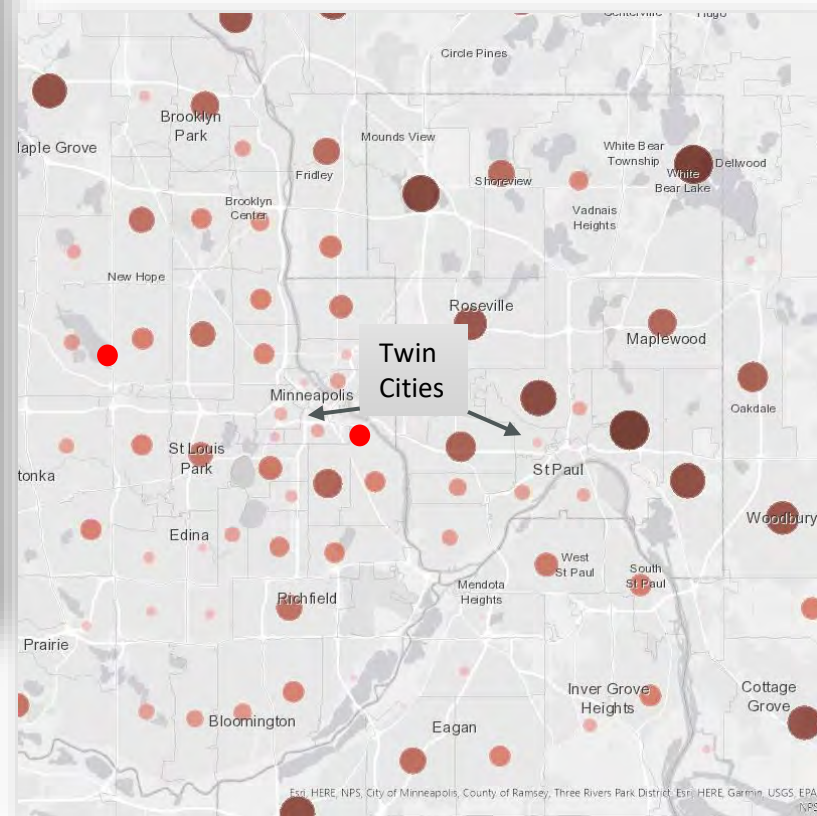
Although the metro has a strong population of steady anglers, we see there are opportunities with other populations. By zooming in closer, we see there are large numbers of new and lapsed anglers in and around Minneapolis/St. Paul. These anglers were in the same geographic areas, notably outside the Twin cities and into the surrounding suburban communities.

New anglers (Recruit)

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



Lapsed anglers (Reactivate)



Maps developed using a representative sample of all license holders.



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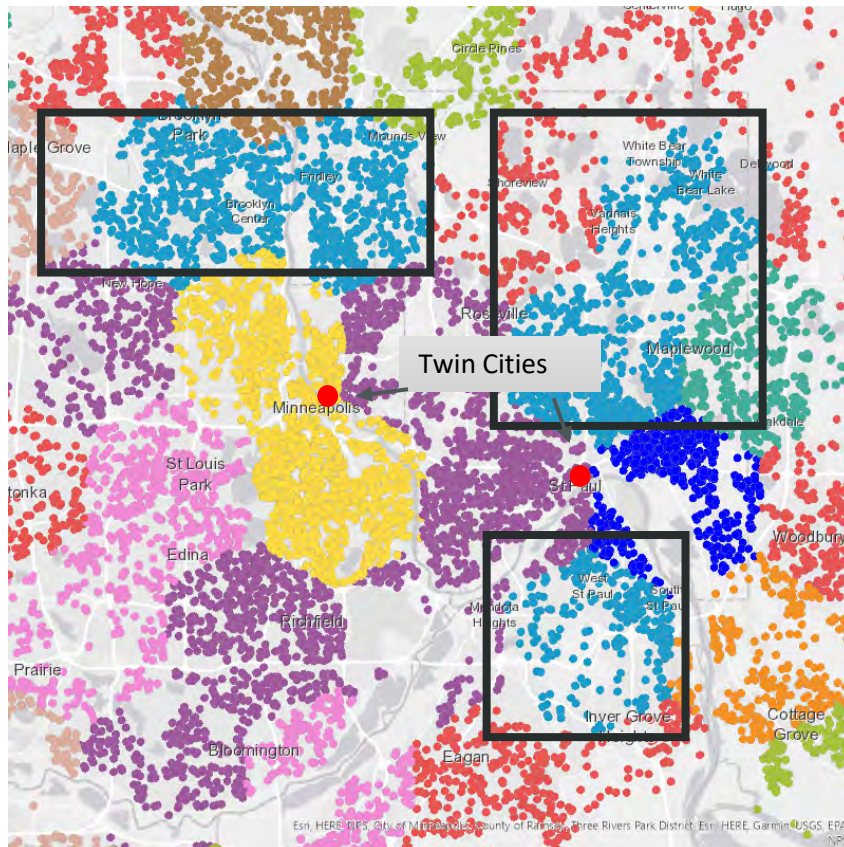
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CASE STUDY: ANGLER TAPESTRY SEGMENTS

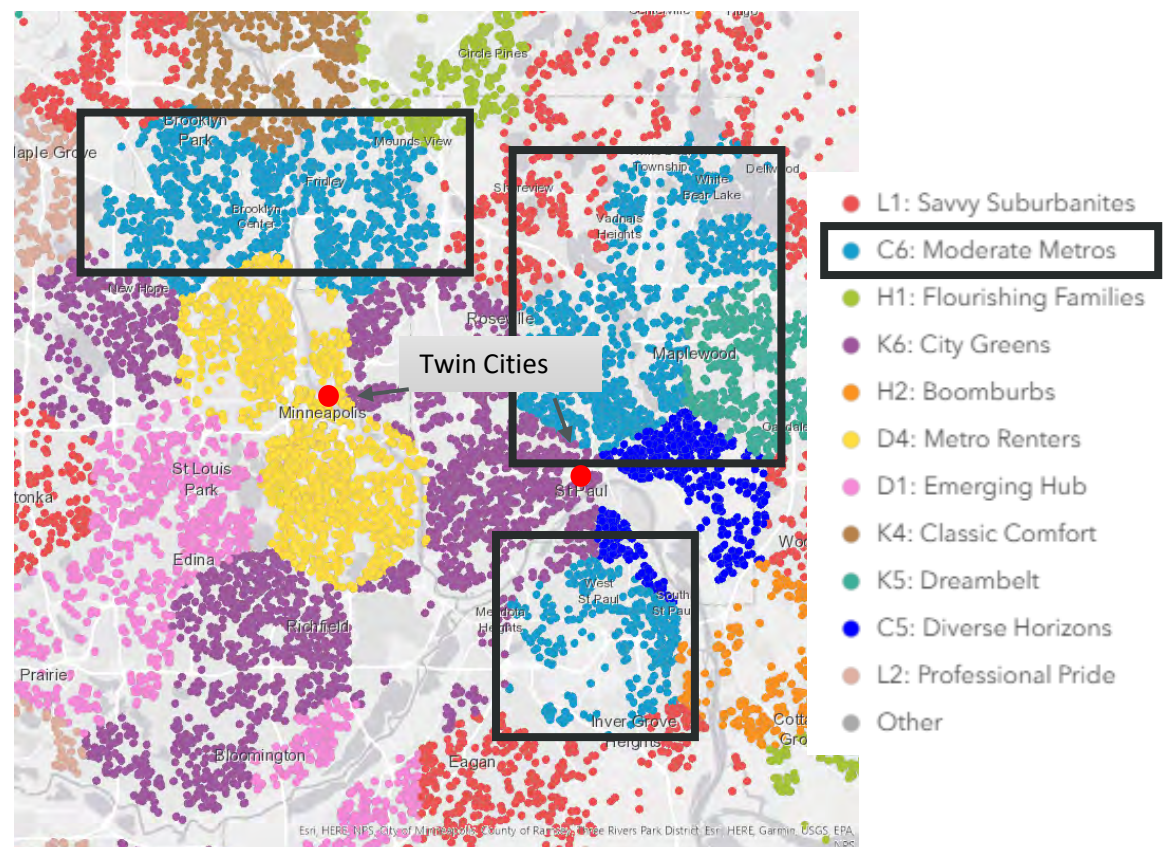
Tapestry segments for both new and lapsed anglers have a high degree of similarities.

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, many of the suburbs around Minneapolis and St. Paul fit the 'Moderate Metros' segment.



New angler tapestries (Recruit)



Lapsed angler tapestries (Reactivate)

Maps developed using a representative sample of all license holders.

CASE STUDY: MODERATE METROS SEGMENT

Typical communities that fit the Moderate Metros Tapestry Segment and are described as:



Tapestry Segment C6 **Moderate Metros**

7.4% of MN anglers*
4.3% of MN population

- Young, growing and usually located in suburbs and peripheries of metropolitan areas
- 1/3 are single-person households, followed by married, cohabitating, or single persons with children
- Above-average presence of preschool-age children
- Tend to shop online and purchase primarily clothing, groceries, and electronics
- Radio and online music services are common sources of entertainment
- Tend to vote in local, state, and national elections; recycling is a routine practice

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

- Fishing as a way to **spend time with children**. Research has shown that people take their kids fishing at a young age because their parents did the same.
- Emphasize **other opportunities that exist near fishing areas** – parks, playgrounds, kid-friendly restaurants.
- Specifically promoting the FiN program and the abundant opportunities that exist in the area.
- **Continue outreach to Communities of Color** using all available resources and channels, both internally and externally.

*Estimates reflect the 2024 population

Data provided by ESRI's Segment Infographics Dashboard.



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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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