

WHERE IS DEMAND FOR SPORTFISHING THE GREATEST?

TEXAS' 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, 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
- **Houston 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

Texas 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 and commuting areas. Almost 3/4th 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 by R3 Category			
Urban-Rural*	Percent of Angling Population (10-year average)	Angler Percent Change (2015 – 2024)	Angler Percent Change (2019 – 2024)
Metropolitan core	57.9%	1.0%	0.8%
Metropolitan commuting	16.4%	3.2%	2.0%
Micropolitan/Small cities/Suburbs	12.2%	-2.8%	-2.0%
Small Town	3.9%	-5.5%	-4.8%
Rural	9.5%	-4.6%	-3.3%

**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 are found in Houston and San Antonio, twice the proportion of anglers than the next largest in Austin (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 these current top ten cities based on the overall fishing license holder population did show growth (column B) but slower than population growth within each city (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)**
Houston	5.4%	3.3%	5.7%	10.3%	5.7%
San Antonio	5.1%	9.7%	3.3%	6.0%	11.4%
Austin	2.3%	9.3%	3.6%	3.7%	13.6%
Fort Worth	1.9%	16.6%	6.7%	3.2%	15.7%
Corpus Christi	1.8%	2.4%	2.4%	1.0%	0.7%
Dallas	1.6%	13.2%	10.8%	4.4%	3.8%
Spring	1.2%	7.0%	2.7%	1.4%	22.5%
Katy	0.9%	14.9%	8.6%	1.3%	40.4%
Lubbock	0.8%	18.1%	7.8%	0.9%	9.3%
Conroe	0.8%	21.8%	13.8%	0.7%	44.0%

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.

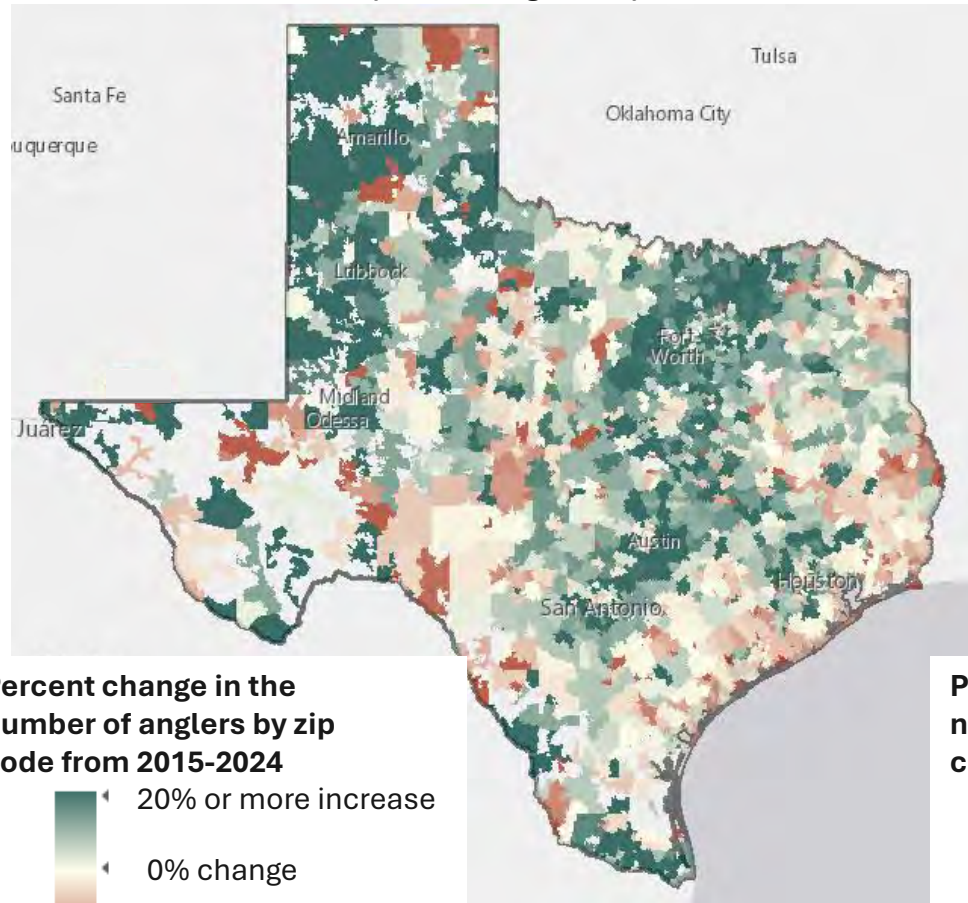
*Represents the top ten cities across the angling population in the state.

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

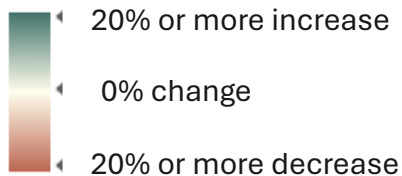
RESULTS: ANGLER CHANGE BY CITY

These two maps broaden the geographical scope and reflect percent change in the angler population by zip code. The growth of the licensed angler population over the last 5 and 10 years in the larger cities with larger populations (Dallas/Forth Worth, Houston, San Antonio) reflected in the table earlier are echoed in the maps below (right and left, respectively).

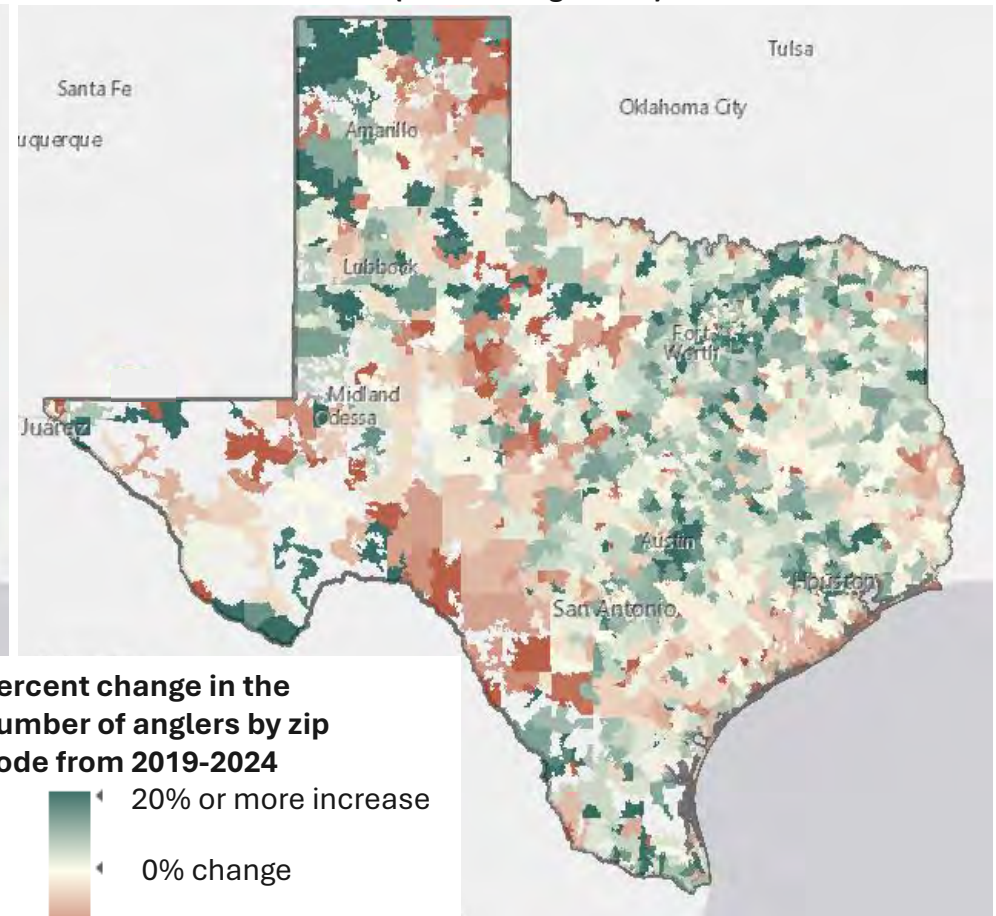
**Ten-year timeframe
(2015 through 2024)**



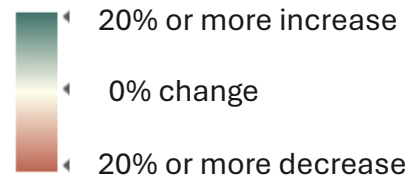
**Percent change in the
number of anglers by zip
code from 2015-2024**



**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.

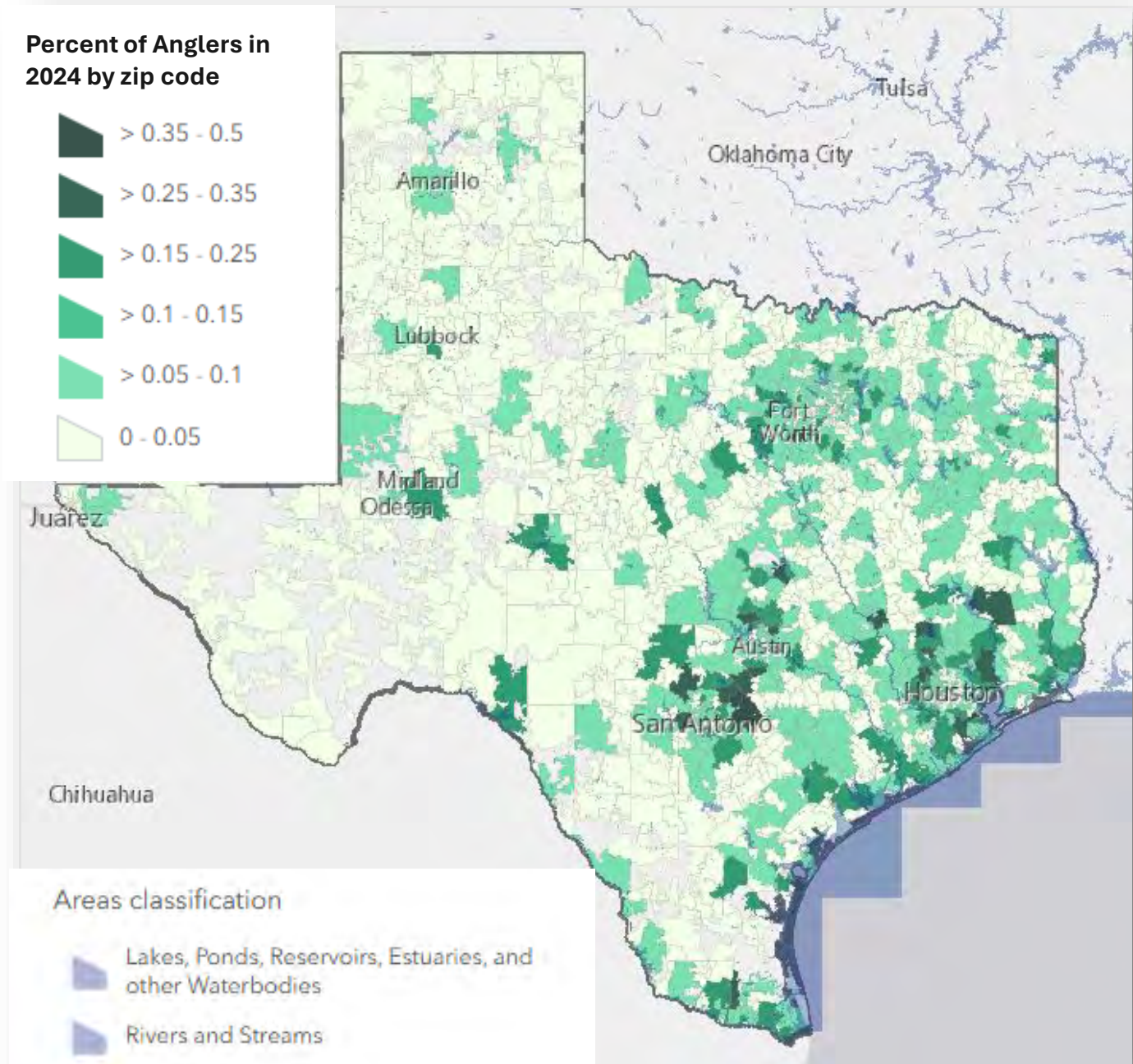
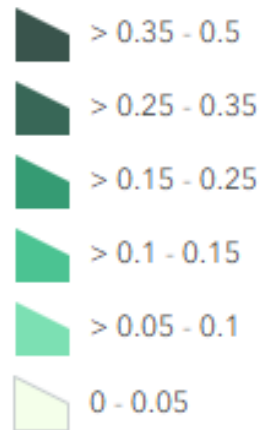
RESULTS: ANGLERS & FISHING OPPORTUNITY

Decision drivers to try or return to fishing may not be the presence of opportunity. They may instead be access, awareness, crowding, or the perceived ease of trying something new.

While many anglers reside in coastal areas where fishing access is abundant, many also reside in urban areas where fishing access is not always abundant.

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

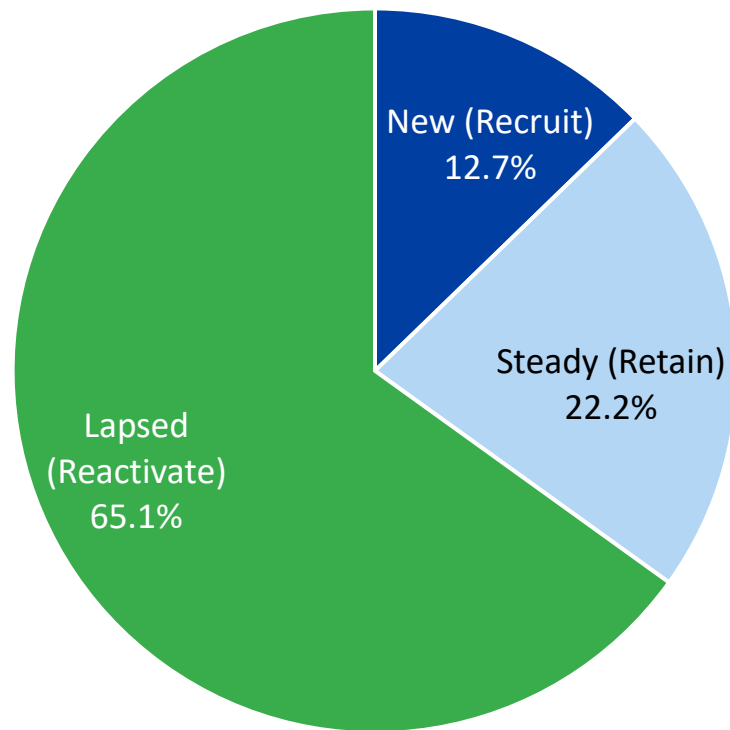


Areas classification



RESULTS: ANGLER R3 CATEGORY

A total of 4.9 million anglers were classified into one of the R3 three categories. Over half of Texas' 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.

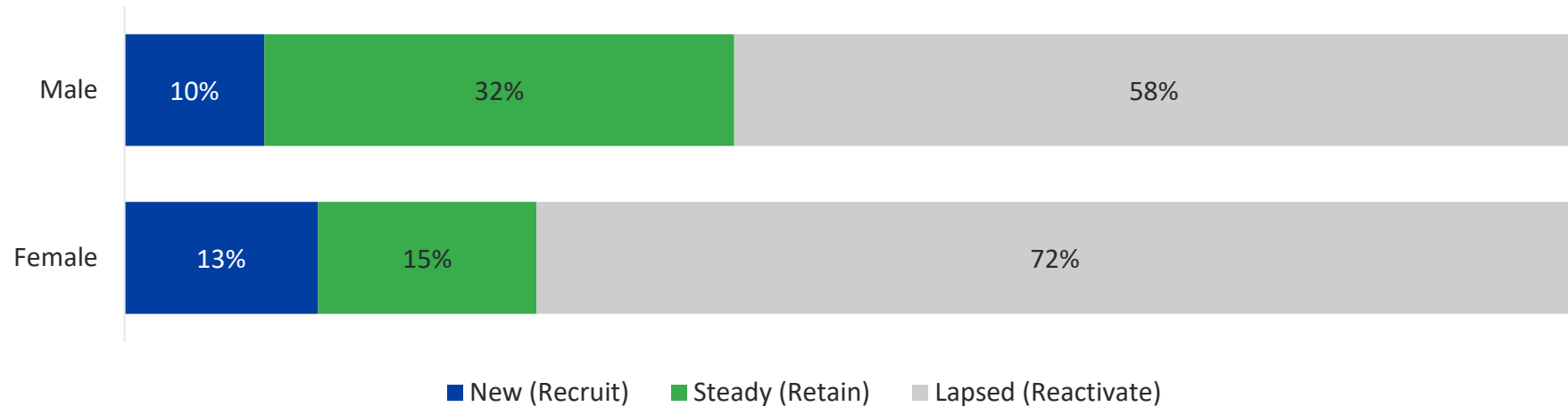


RESULTS: GENDER BY ANGLER R3 CATEGORY

Like many other states Texas' angler population over the last decade is predominantly male, with male anglers comprising roughly three times as many anglers than female. Female anglers are significantly more likely to be lapsed compared to their male counterparts. However, in recent years female anglers are slightly more likely to be new anglers than males.

This pattern presents a R3 opportunity for Texas. 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 improve retention outcomes and keep women on the water.

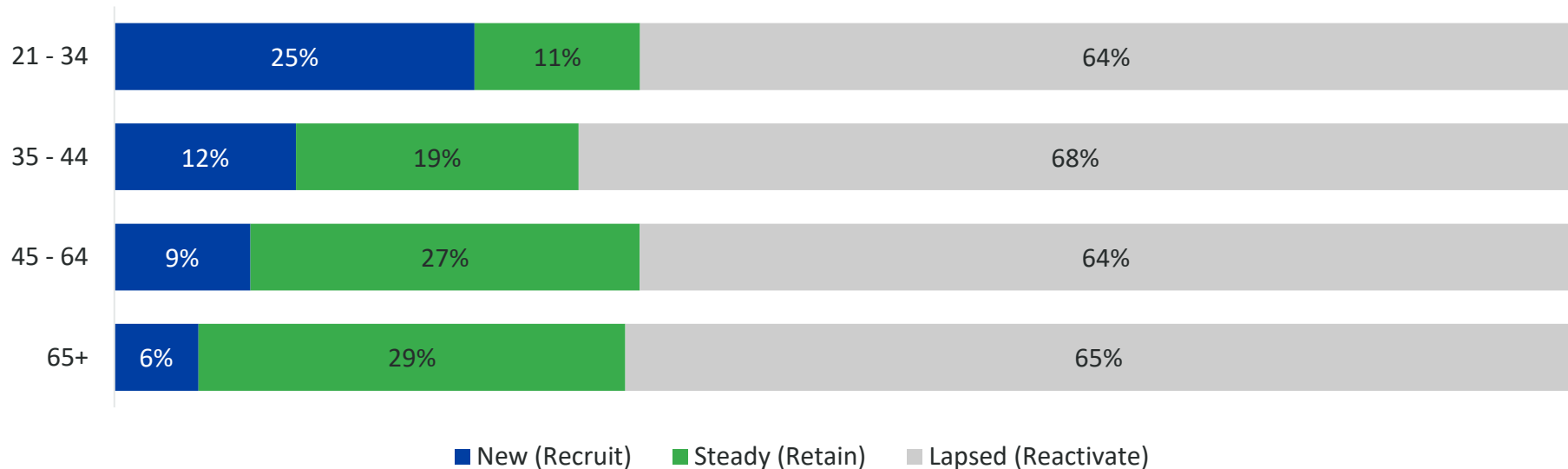
Gender by Angler Category



RESULTS: AGE BY ANGLER R3 CATEGORY

Most steady anglers are in the 45-65+ age range; likely, this is because adults in this age range are no longer caretaking young children and/or retired so they have more time available for recreation. The highest share of lapsed anglers is among the 25-34 years old (71%) followed closely by the anglers aged 35-44 years old. This highlights that R3 efforts should focus on keeping new young anglers steady and reactivating lapsed young anglers, among all lapsed age groups.

Age by Angler Category

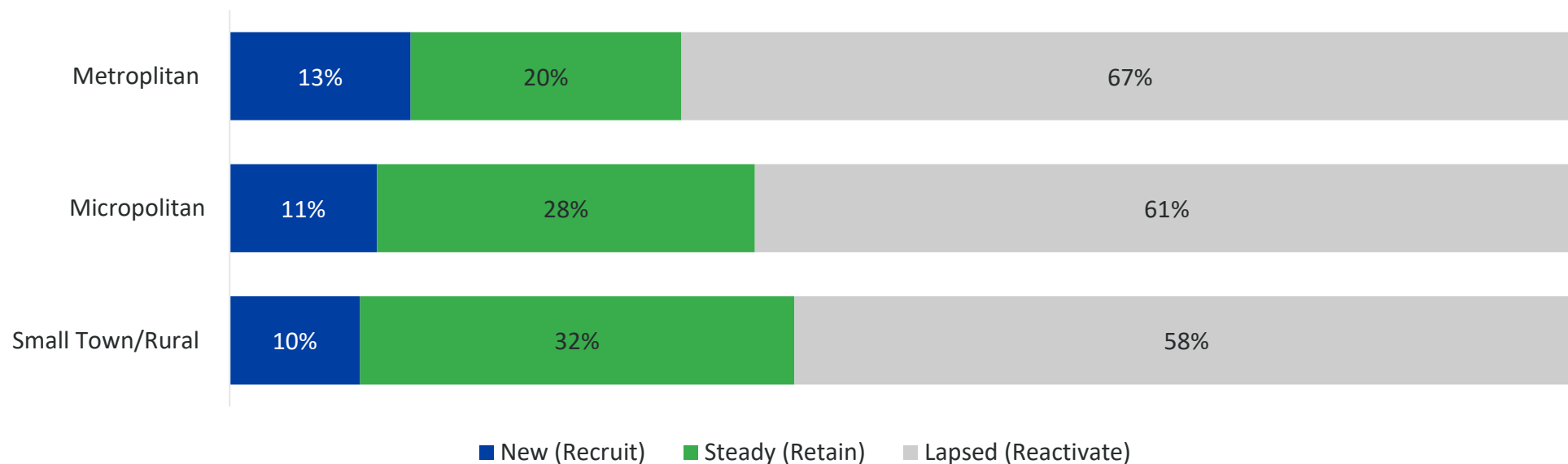


Note: The R3 category system applies age restrictions to ensure multi-year behavior is captured. For example, anglers categorized as “New” in 2025 must be at least 21, which helps exclude individuals who were previously fishing but only recently required a license due to the minimum age requirement of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

RESULTS: URBANIZATION BY ANGLER R3 CATEGORY

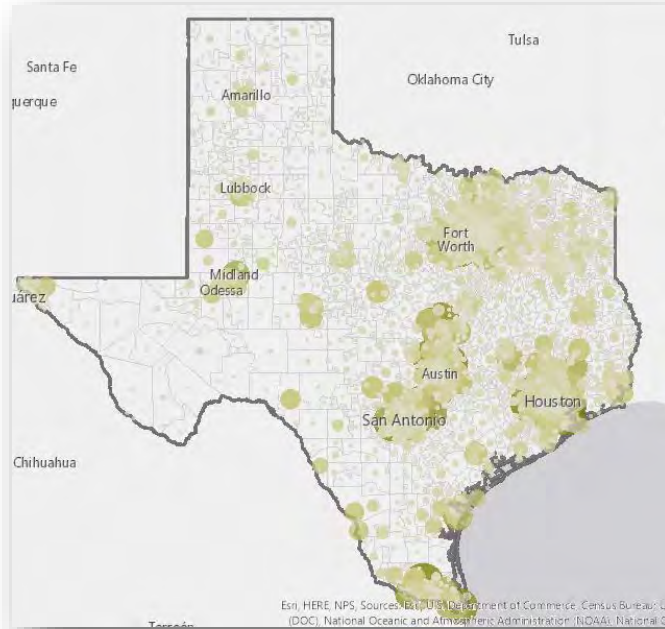
Anglers living in small town and rural areas are more likely to be steady participants (32%), while those residing in metropolitan areas make up a larger share of both new (13%) and lapsed (67%) anglers. This pattern suggests that urban residents are entering fishing but are less likely to continue participation. 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 CATEGORY BY ZIP CODE

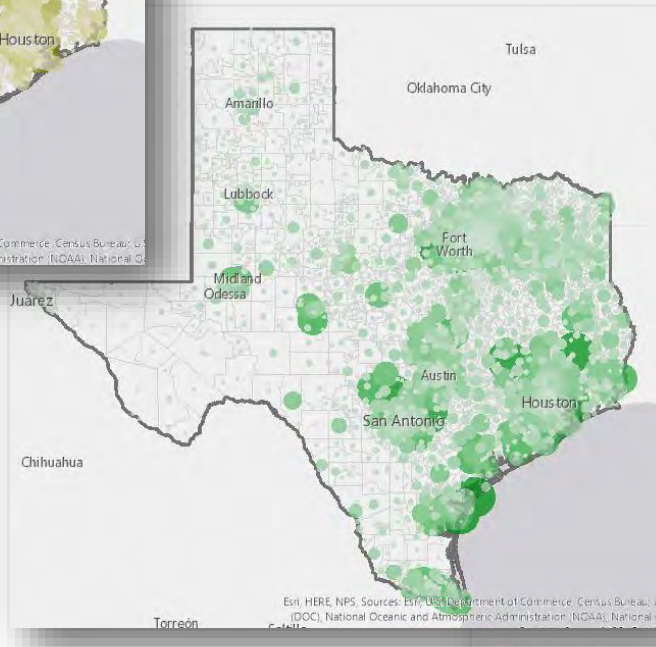
**New anglers
(Recruit)**



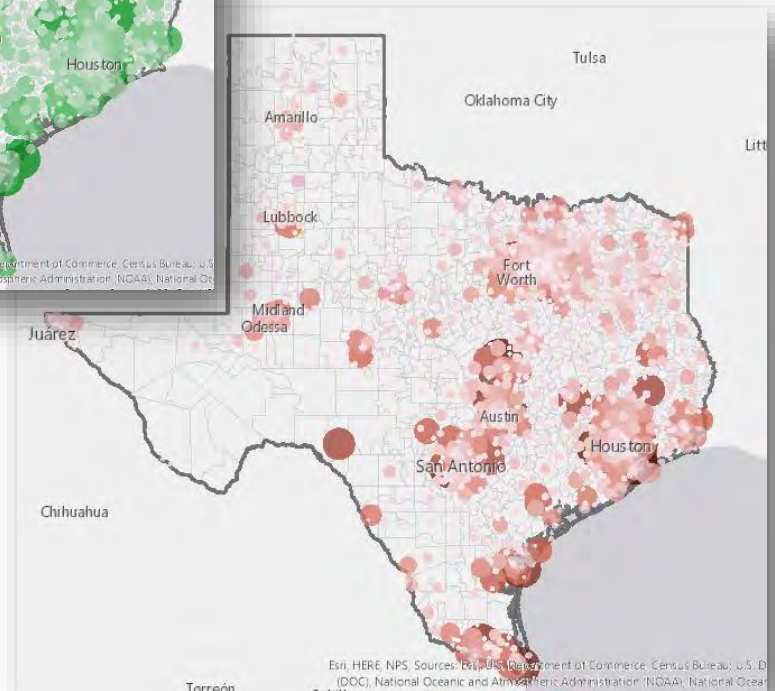
Generally, anglers residing in rural areas are slightly more likely to be steady. New and lapsed anglers are more likely found along the coast and in major cities.

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

**Steady anglers
(Retain)**



**Lapsed anglers
(Reactivate)**

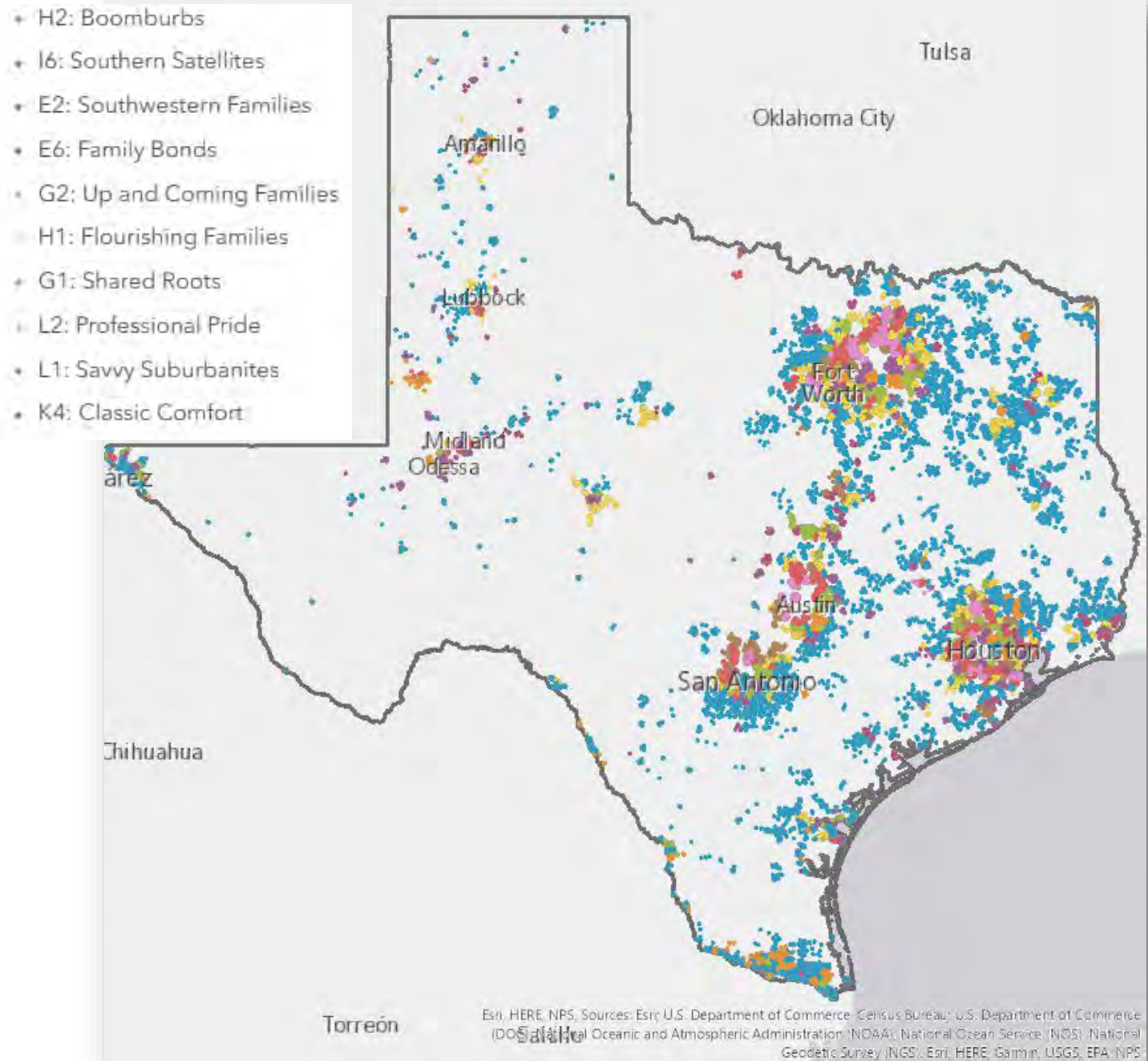


Maps developed using a representative sample of all license holders.

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 Texas has a rich mix of communities.



RESULTS: TOP ANGLER TAPESTRY SEGMENTS

The Southern Satellites segment made up the highest percentage of anglers in 2024, followed closely by Boomburbs, Southwestern Families, and Family Bonds segments. However, there is a decreasing participation from Southern Satellites while the others are increasing in participation. Given the significant growth from Up and Coming families, targeted messaging to the segments experiencing organic growth could support the continued increase in participation. The next page shares more about the Up and Coming Families segment.

Tapestry Code	Name*	Percent of Anglers in 2024***	Angler Percent Change (2015 -2024)***	Angler Percent Change (2019 – 2024)***	Percent of Total Population (2025)
I6	Southern Satellites**	9.7%	-11.1%	-12.7%	4.6%
H2	Boomburbs**	9.1%	12.3%	7.2%	7.9%
E2	Southwestern Families	7.4%	6.8%	8.2%	6.4%
E6	Family Bonds	6.8%	15.2%	15.6%	6.5%
G2	Up and Coming Families	6.7%	22.5%	18.8%	7.5%
H1	Flourishing Families	5.5%	-5.7%	-6.6%	4.8%
G1	Shared Roots	4.4%	45.4%	40.3%	5.3%
L2	Professional Pride**	3.9%	0.8%	1.8%	4.5%
L1	Savvy Suburbanites**	3.7%	-7.4%	-7.4%	3.7%
I4	Rooted Rural	3.5%	-18.6%	-17.9%	1.5%

**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: UP AND COMING FAMILIES 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 G2 Up and Coming Families	6.7% of TX anglers* 7.5% of TX population
• Large, young families that tend to live in suburban neighborhoods • Variety of household structure: married couples, both with and without children, make up about half of the households, with significant numbers of single-parent households, cohabiting couples with kids, and multigenerational families • Use coupons for cleaning products, toiletries, and cosmetics, often carrying credit card balances • Tend to spend money on their children, pets, and homes; often visit movie theaters, zoos, aquariums, and theme parks • Often install the latest technology, including smart home devices, TVs, and video game systems • Many first-time homebuyers		

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

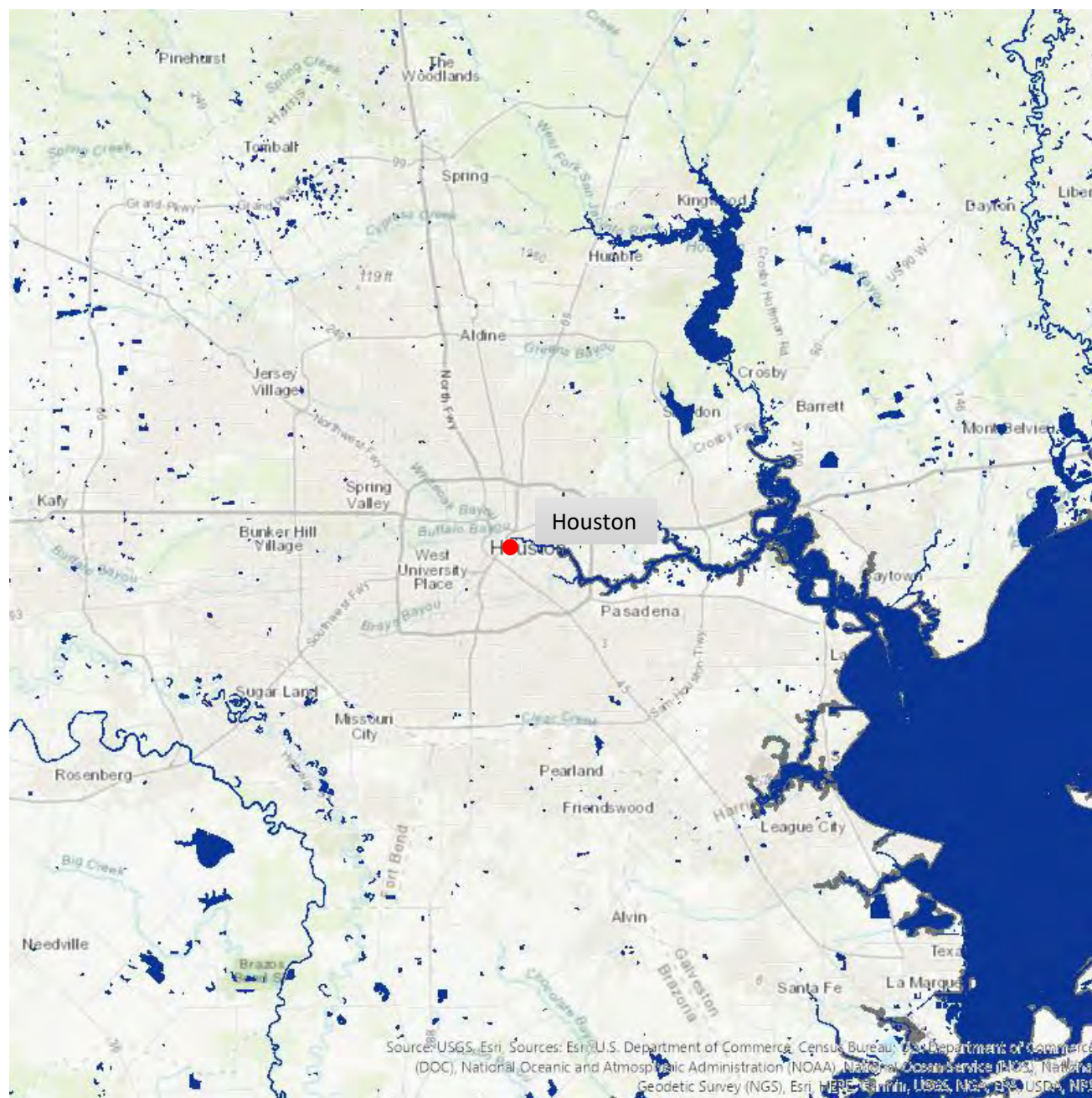
- Fishing as a way to **spend time with children**. Research has shown that people take their kids fishing at a young age because their parents did the same.
- Highlighting the **affordability of a local family** fishing trip
- Highlighting the **abundance of fishing areas** in urban and suburban areas.

*Estimates reflect the 2024 population
Data provided by ESRI's Segment Infographics Dashboard.

CASE STUDY: HOUSTON

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 Houston and surrounding area as a case study.

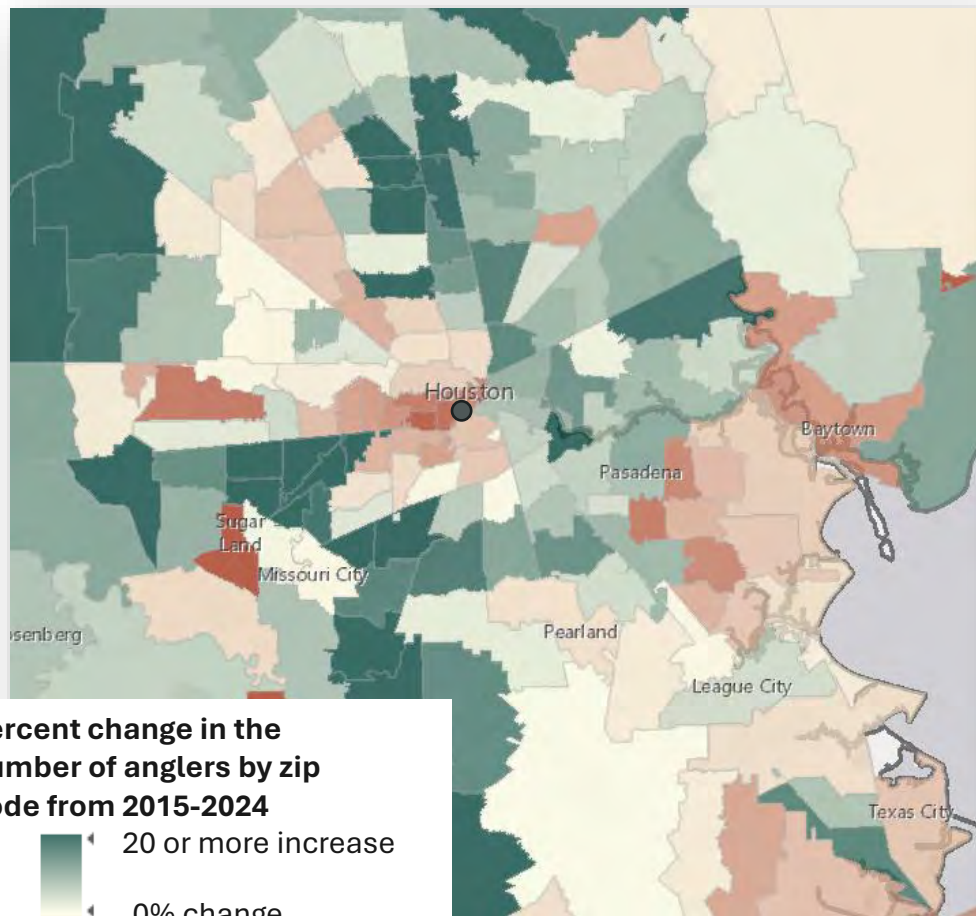


Source: USGS, Esri, Sources: Esri, U.S. Department of Commerce, Census Bureau, U.S. Department of Commerce (DOC), National Oceanic and Atmospheric Administration (NOAA), National Ocean Service (NOS), National Geodetic Survey (NGS), Esri, HERE, Garmin, USGS, NSA, NPS, USDO, NPS

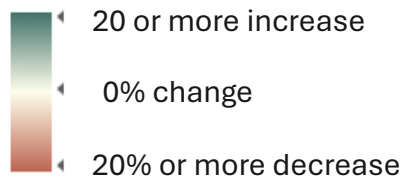
CASE STUDY: HOUSTON AREA ANGLER CHANGE

Over the last decade, Houston's suburbs experienced growth in angler participation, this trend also occurred over the five-year period. In comparison, the licensed angler population in areas east and south of Houston remain stagnant or decline over the two time periods despite being rich in fishing opportunities.

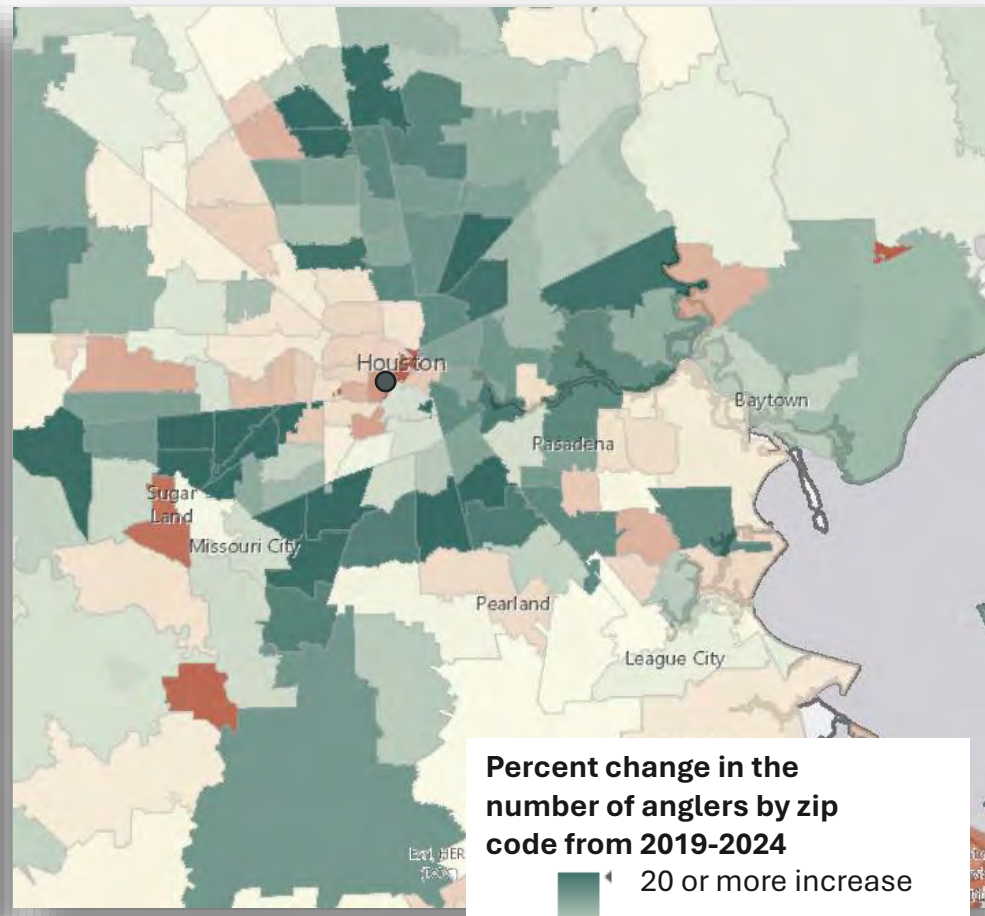
Ten-year timeframe



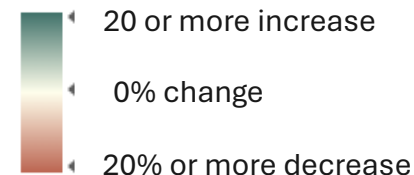
Percent change in the number of anglers by zip code from 2015-2024



Five-year timeframe



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.



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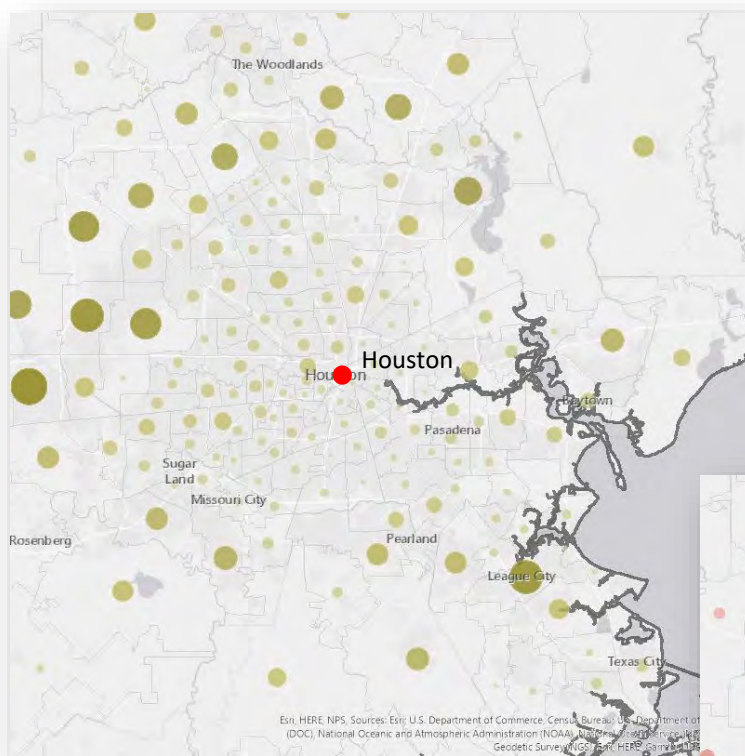
CASE STUDY: ANGLERS BY R3 CATEGORY

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

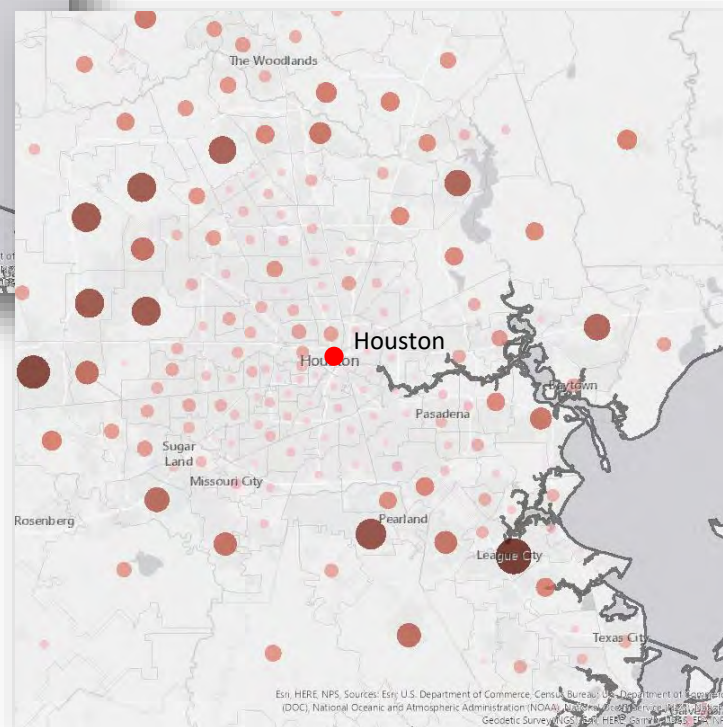
By zooming in closer, we see there are large numbers of new and lapsed anglers in and around Houston.

These anglers were in the same geographic areas, notably outside the city.

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



New anglers (Recruit)



Lapsed anglers (Reactivate)

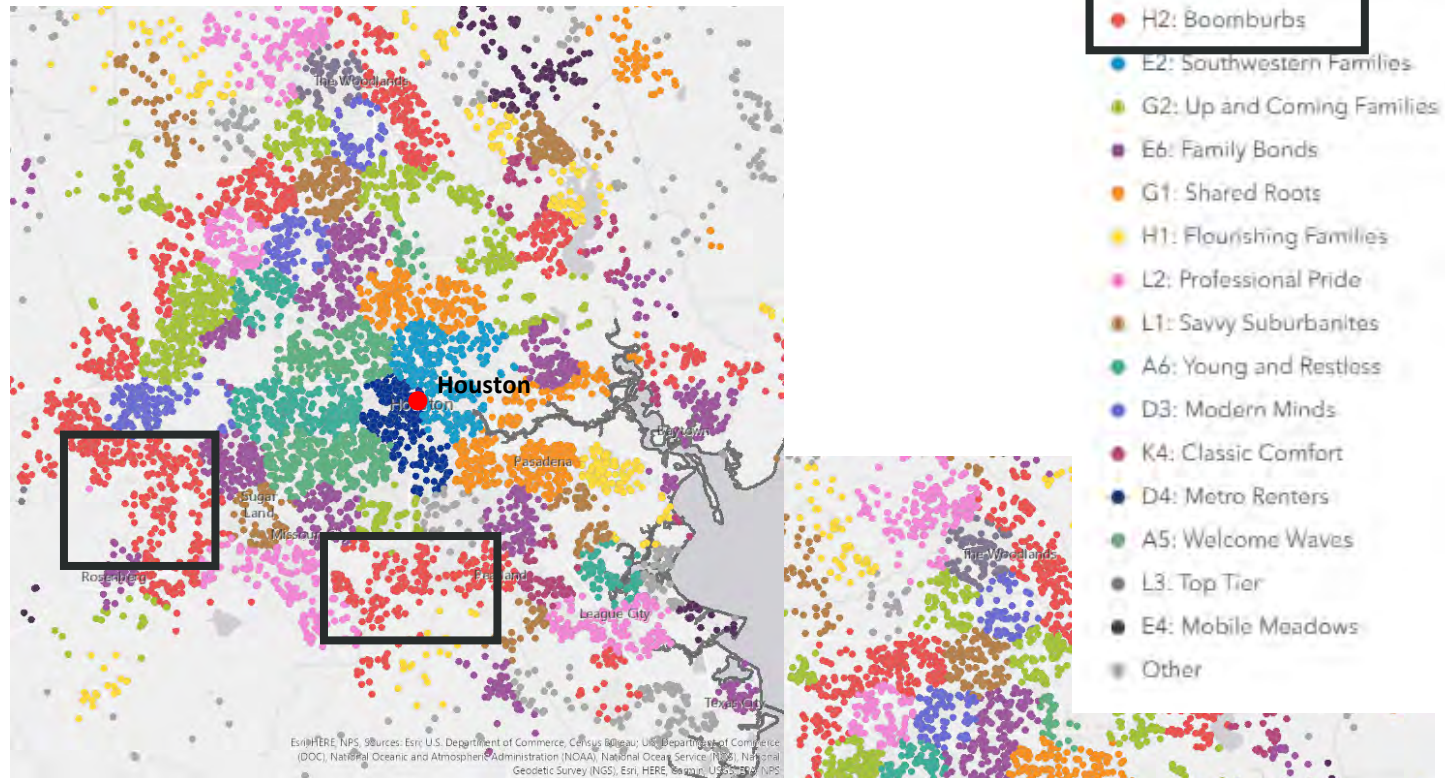
Maps developed using a representative sample of all license holders.

CASE STUDY: ANGLER TAPESTRY SEGMENTS

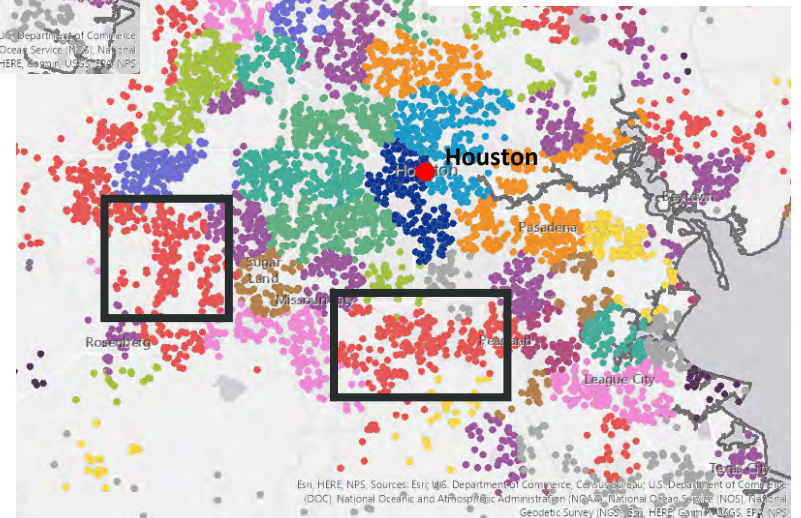
Tapestry segments for both new and lapsed anglers have a high degree of similarities.

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, suburban communities surrounding the Houston metro area fit the 'Boomburbs' profile.



New angler tapestries (Recruit)



Lapsed angler tapestries (Reactivate)

Maps developed using a representative sample of all license holders.

CASE STUDY: BOOMBURBS SEGMENT

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

	Tapestry Segment H2 Boomburbs	9.1% of TX anglers* 7.9% of TX population
• Suburbs of metropolitan areas with most members between 25 and 54 years old; nearly 1/3 are under the age of 18 • Married couples with or without children are prevalent • Tend to shop at club stores and make purchases using online platform • Spending centers around children, including clothing, medicine, toys, and entertainment. Residents pay for garden maintenance, home cleaning, and pet care services. • Purchase internet-connectable televisions, all-in-one printers, home security systems, smart thermostats, and lighting systems • Engage in regular exercise, eat organic foods, and spend time hiking and reading; travel frequently, both domestically and internationally.		

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.
- Opportunities for **social connection** since most are living alone or with no kids
- The **abundance of fishing opportunities** as vacation destinations

*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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