

# First-Time and Repeat Angler Analysis: Key Findings & Next Steps

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# RESEARCH OVERVIEW

## Purpose

- To identify and characterize first-time anglers' preferences and motivations to inform future marketing efforts

## Process

- Fishing license sales analysis
- Focus groups
- Online survey



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# FIRST-TIME VS REPEAT ANGLER ANALYSIS



# LICENSE ASSESSMENT

- Examined license data from 36 states
- Identified first-time anglers as:  
“Looking at data from 2008 to 2012, those having purchased a license only in 2012.”



# LICENSE ASSESSMENT

- Analyzed key angler lifestyle, income & license data
  - Tapestry & LifeMode segments
  - Last license purchased & amount spent
  - Income
  - Urbanization group
  - Age
  - Gender



# KEY FINDINGS



First-time anglers are **2x more likely** to lapse than repeat anglers

# RENEWAL RATES

**31%**

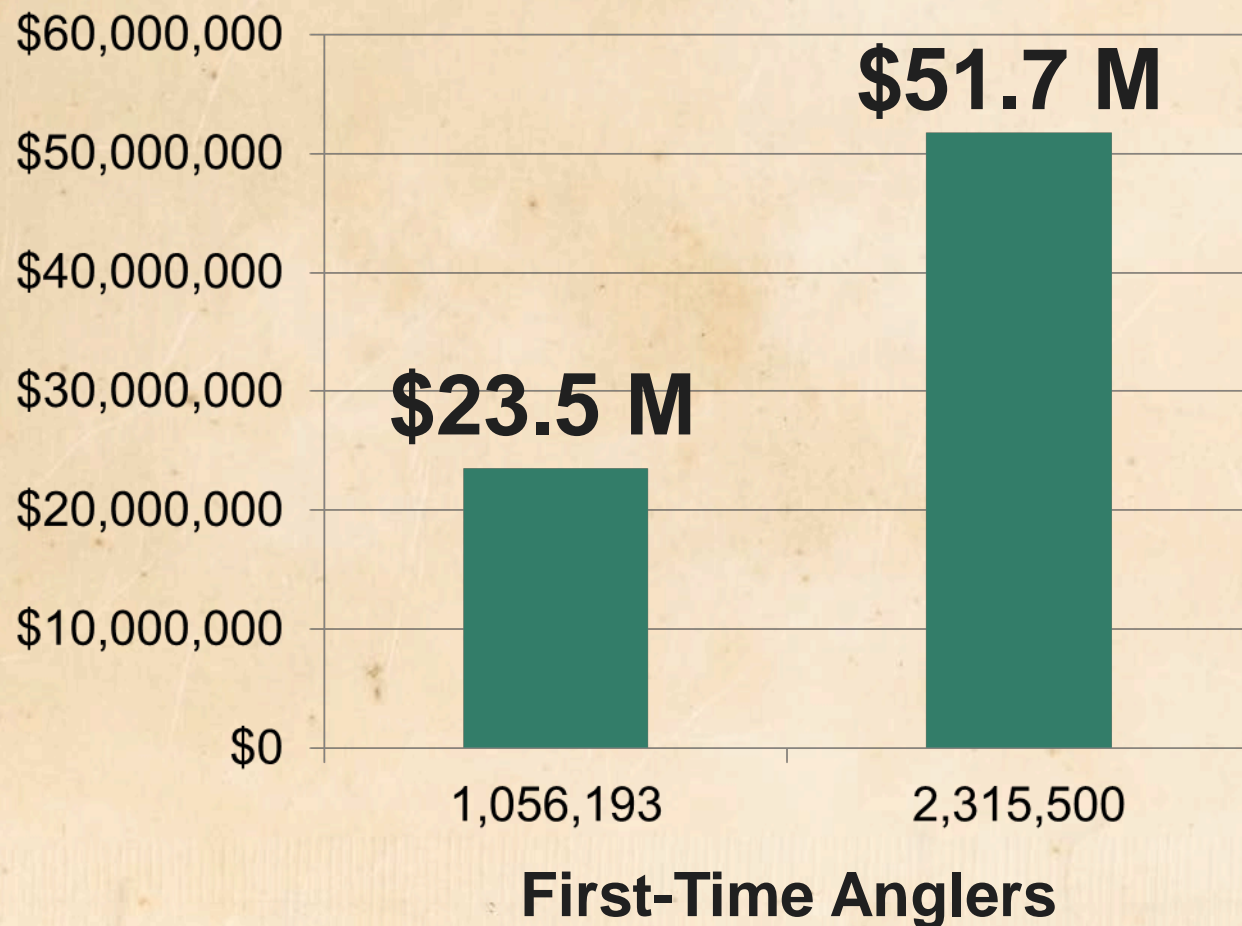
for first-time anglers

vs.

**68%**

for repeat anglers

# FIRST-TIME ANGLER REVENUE PROJECTIONS





# KEY FINDINGS



Repeat anglers spend **47%** more than first-time anglers on fishing licenses, tags & permits.

# KEY FINDINGS



First-time anglers are more likely to be  
**younger, female, urban, Hispanic**

# KEY FINDINGS

A white motorboat with two anglers is on the water. One angler is standing and holding a fishing rod, while the other is sitting. A large fish is visible underwater in the foreground. The background shows a clear blue sky and some trees on the right.

Nearly **80%** of first-time anglers purchased an annual fishing license

# FOCUS GROUP RESEARCH



# FOCUS GROUPS

- **Purpose: to gain insights and help inform the survey**
- **Result are not quantitative; only provide insights**
- **Conducted by Responsive Management, with Southwick Associates assisting**
- **Held in Richmond, VA and Denver, CO**



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# FOCUS GROUP INSIGHTS



# WHO DO YOU FISH WITH?

## A wide variety of people

- **Richmond:** kids, parents, friends and their kids
- **Denver:** kids, parents, spouse, alone



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# MOTIVATIONS FOR FISHING

## Motivations often shift with age

*“I think when I was a kid it was more about ... taking the fish home and showing everyone what I caught... now that I’m 45, it’s really irrelevant if I catch anything at all. I just like spending time with the person I’m with.” —Richmond*



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# REASONS FOR FISHING

Vary by person

*“It can be just as exciting as it is relaxing...”*

—Richmond

*“When you’re with people, the time you spend reminiscing and catching up with everyone.”*

—Denver



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# REASONS FOR FISHING

## Vary by person

*“I do a lot of catch and release but it’s about the joy of catching something. Catching your own food.”*

—Denver

*“For me, it’s the solitude; hearing the water, the wildlife. The relaxation.”* —Denver



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# WHAT THEY ENJOY LEAST

## Negatives also vary widely

*“Mosquitoes.”* —Richmond

*“Coming back empty-handed is a little disappointing.”*  
—Richmond

*“Finding garbage in the lakes.”* —Denver



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# PURCHASING EXPERIENCES

## Process isn't a roadblock but could be smoother

*“Purchasing online was easy. I know people go to bait shops to buy them and it takes them forever to hand write everything... I did it right online.” —Richmond*

*“It was just horrible at Walmart. The lady just didn't know what was going on... the salesperson was a little flustered and my kids were agitated and I kept telling them to be calm.” —Denver*



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# SOURCES OF INFORMATION

Anglers named retailers, friends, family and state agencies as license information sources

*“Someone told me [I needed a fishing license]. Just someone that I knew who went fishing. And I had no idea I needed a license until I was told.”* —Richmond

*“I always go to the Department of Wildlife.”* —Denver

*“Probably any retailer of fishing equipment [would be able to provide information].”* —Denver



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# ATTITUDES TOWARDS CONSERVATION FUNDING

Knowing where dollars go has minimal effect on buying another license

*“I think it goes for a good cause, to help keep the programs going. I didn’t know it was dollar for dollar matching... So at least I’m kind of helping the state maybe get more funding... It doesn’t make me more likely [to buy a license].”*

*—Richmond*



# MOTIVATIONS FOR FUTURE PARTICIPATION

An invitation from a friend or family member

*“[Being invited] makes it easier for someone like me because I don’t have any equipment. So if you invited me, I’d go!...” —Richmond*

*“Who says no to going fishing?” —Richmond*

*“The fact that someone else initiates it—it wasn’t you that came up with the idea—makes it more of a priority. Sometimes peer pressure is a good thing.” —Denver*

# MOTIVATIONS FOR FUTURE PARTICIPATION

## License renewal reminder

*“I may need a reminder, just to embed it in the back of my mind... like, “I need to go fishing, back out to the water.” That’s just me.” —Richmond*

*“What would really be cool is if you pay with your credit card, you could sign up for auto-renewal, where you would just automatically have your license renewed...”  
—Denver*



# MOTIVATIONS FOR FUTURE PARTICIPATION

## If a child asked to be taken

*“I would. If you think about it, you know how you feel when you catch a fish, imagine how a three year old feels when they catch a fish. It’s exciting when they catch it to see the smile on their face.” —Richmond*

## More specific tips

*“It’s more about the person who’s going to teach you. Most people don’t pick up a book like “Fishing for Dummies.” You learn from people.” —Denver*

# MOTIVATIONS FOR FUTURE PARTICIPATION

## Information on local fishing opportunities

*“Depending on where you are, are you going to be able to have a signal to even get the app? I like the brochure best. You can lay in bed in read it, you can take it on a boat... It’s easier, old fashioned.”*

—Richmond

*“Maybe if that was included in the purchase of a license. I know stuff is available but just having it handed to you, you’re more willing and likely to look at it...”* —Denver

# MOTIVATIONS FOR FUTURE PARTICIPATION

## Educational “how to” videos

*“You can find everything on YouTube.” —Denver*

## Educational event hosted by the state agency

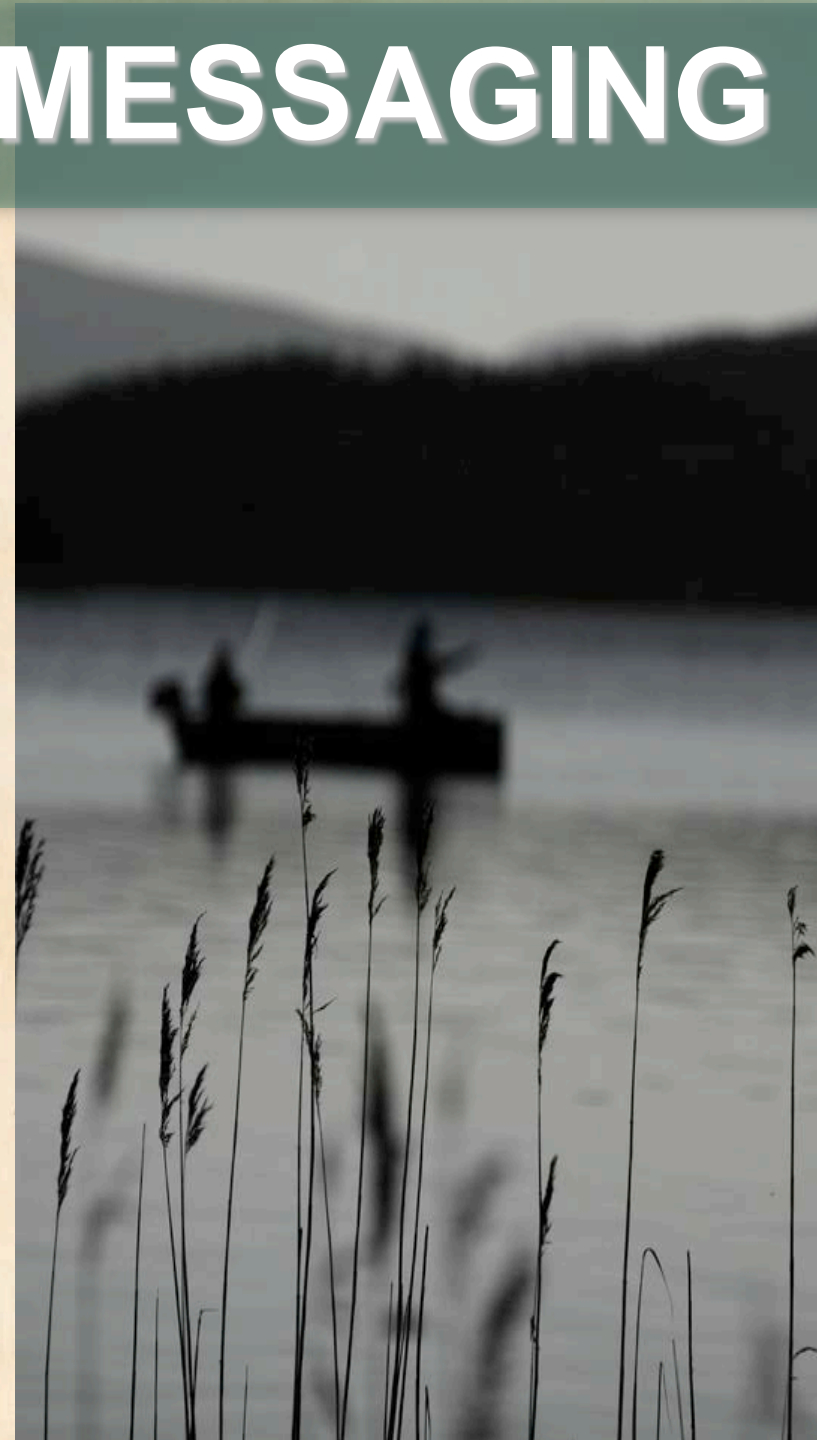
*“It would help me fish, but I don’t have time for that. I don’t have much time off, I wouldn’t want to take a Saturday.” —Richmond*

*“Well, the downside to that is the location: where is it, where do you have to go? In today’s age, everything is broadcast or televised or put on YouTube.” —Denver*

# REACTIONS TO MESSAGING

Fishing is important for conservation

*“...I think it’s compassion fatigue. To a certain extent you can get bombarded with the politically correct [messaging]. I would find it more offensive than incentive.” —Richmond*



# REACTIONS TO MESSAGING

## Fishing connects people with nature

*“The picture I get in my head is not plugging in [to nature], but disconnecting from the rest of it [outside of nature].” —Richmond*

*“People sit in their cubicles and get that email [with the connection to nature message] and say, “Oh—I’d rather be there than here.” It’s a reminder.” —Denver*



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# REACTIONS TO MESSAGING

## Fishing helps people relax

*“The thing that everyone keeps talking about is the relaxation factor... Very peaceful. I strive toward simplicity in life, and trying to keep it the least complicated, and fishing is the same. Fishing is simplicity.” —Richmond*

*“I think people get tired of inching along the highways in their metal coffins, bumper to bumper, with idiots who can't drive—I think it's appealing for people to think about getting away from it.” —Denver*

# OVERVIEW

- Results are qualitative, not quantitative
- Reasons for fishing vary – as do the negatives. Therefore...
- ...the license renewal messages may vary



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# NATIONAL ONLINE SURVEY





# QUANTITATIVE SURVEY

- Purpose: “Identify the greater truths”
- Both First-timers & Tier 8\* anglers
  - \* Tier 8 are essentially first-timers who lapsed -- are their motivations similar to the other first-timers?
- Will use state license lists from participating states



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# TIMELINE

- **Survey to be run first half of January 2014**
- **Results provided by March (North American Conference)**



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# NEXT STEPS



# APPLYING THE RESULTS

- **Release national report**
- **Create messaging**
- **Develop retention pilot program**



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# Thank You

