Recent Trends in Sport Fishing License Sales

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California Department of Fish and Wildlife

Recruit | Retain | Reactivate

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CALIFORNIA DEPARTMENT OF FISH & WILDLIFE

Recruit | Retain | Reactivate

What is R3?

Recruit.

Retain.

Reactivate.

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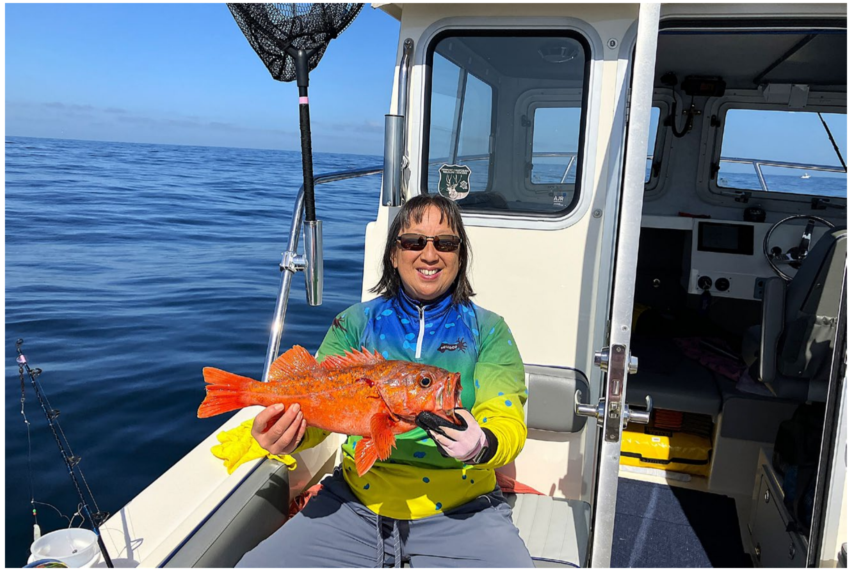
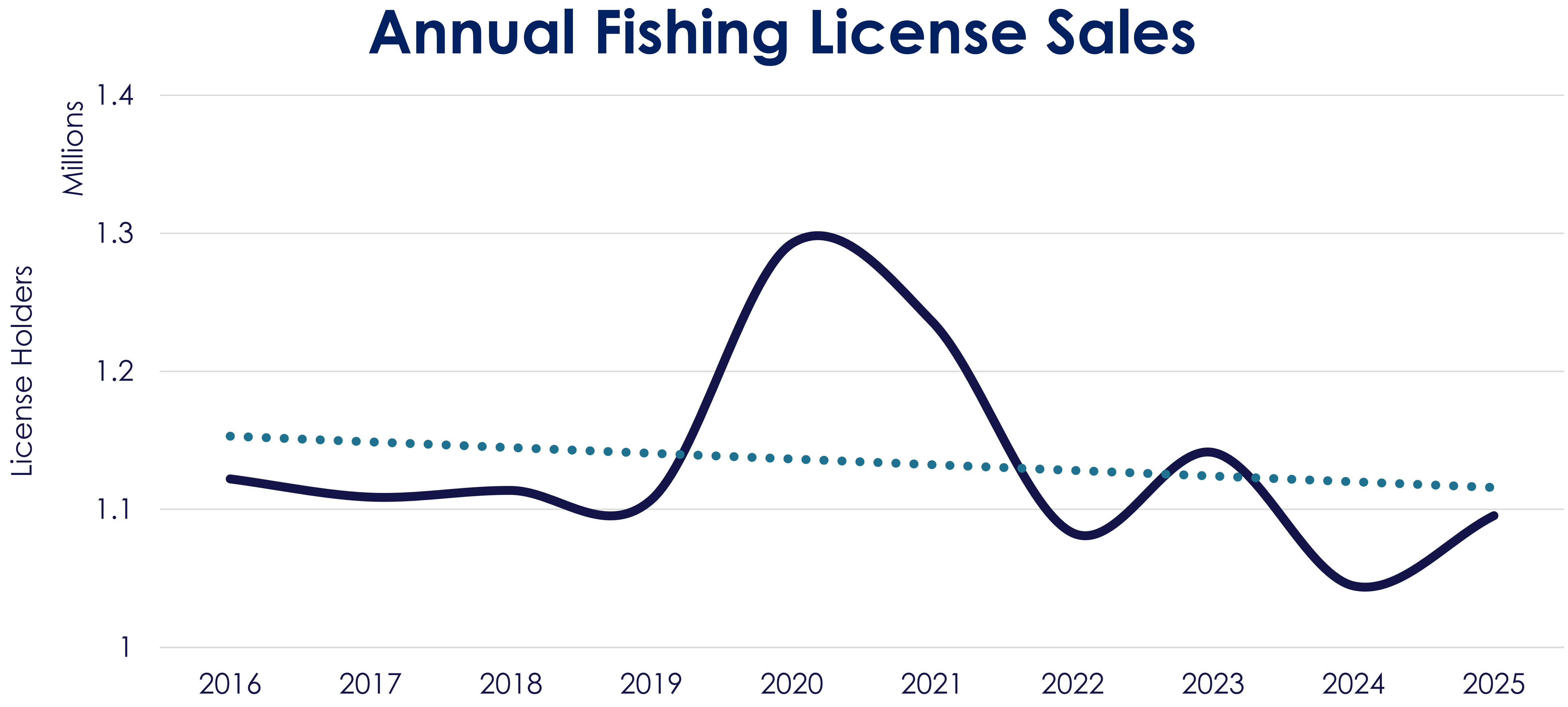
CDFW's R3 Initiative aims to increase statewide participation in hunting, fishing, foraging and shooting sports by transforming barriers into opportunities.

What We'll Cover

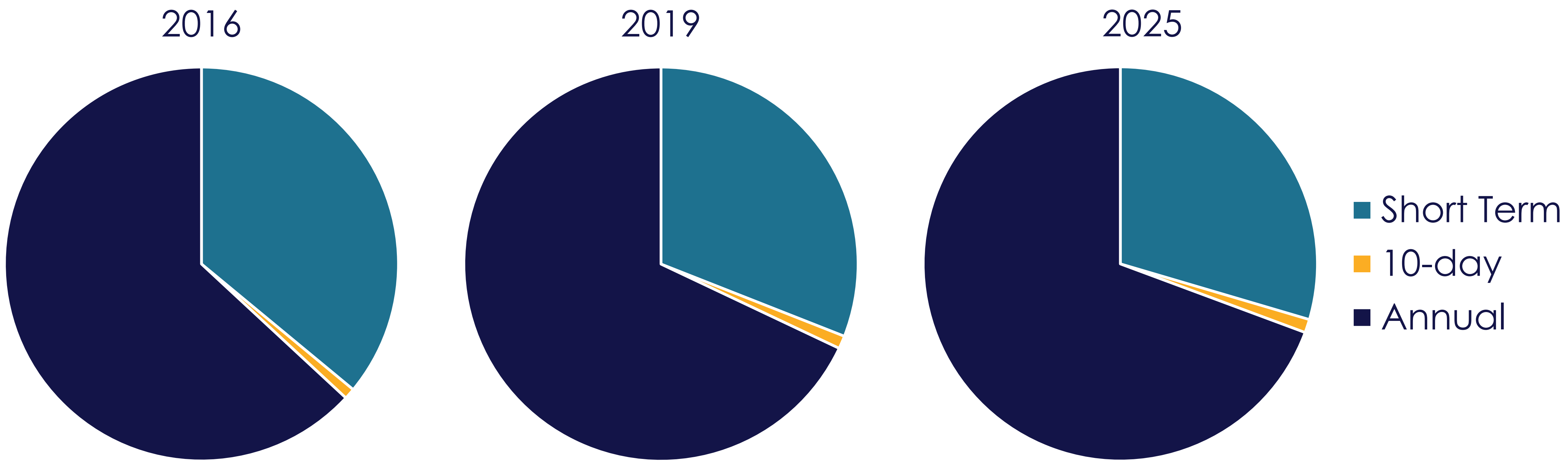
- Multi-year license sales trends
- Regional participation patterns
- Cost trends
- R3 metrics
- Auto-renewal
- Marine participation indicators
- Pier & jetty fishing
- National context



Fishing License Sales

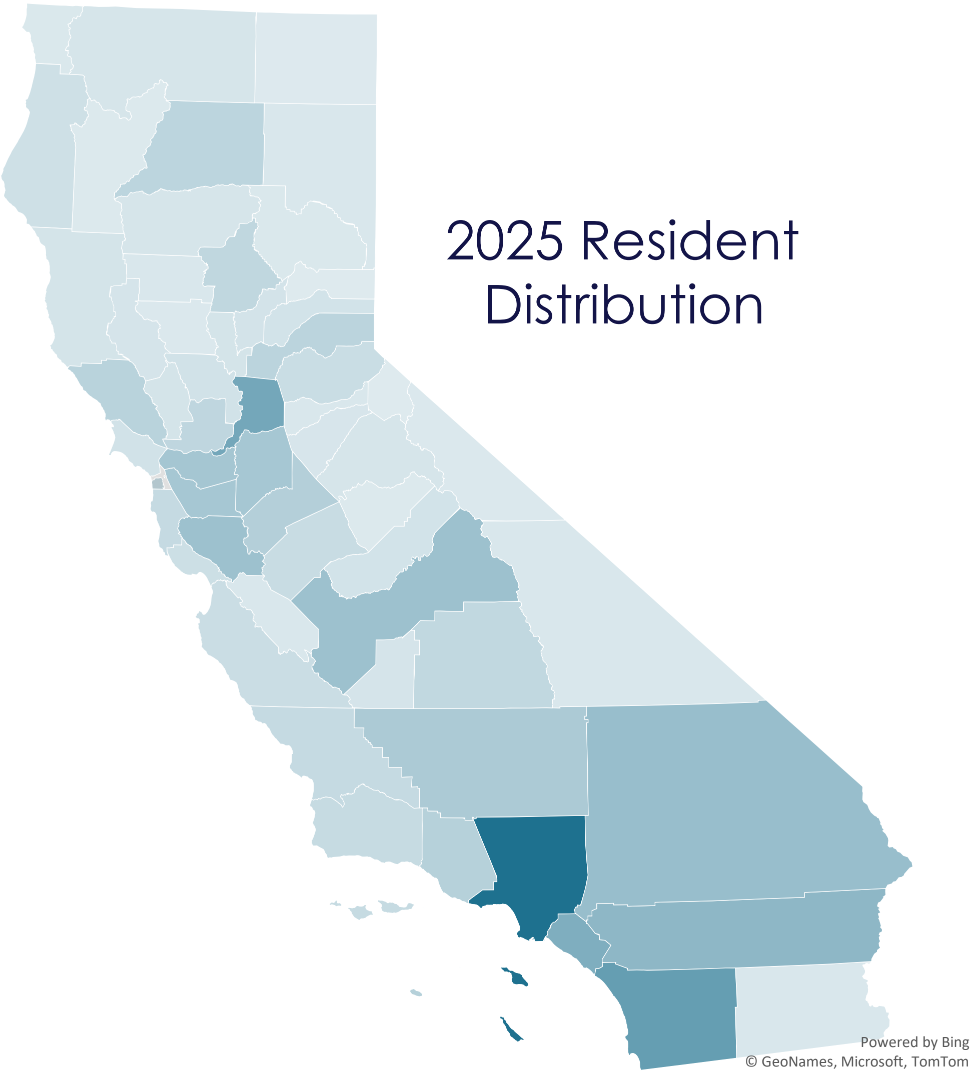


Annual vs. Short-Term



- The **introduction of 365-day licenses** brought a **3% increase** in annual sales in 2023, compared to 2019 (pre-pandemic).
- Approximately **one third of all short-term license purchasers** are nonresidents.

Annual License Distribution



- Over the last 10 years, an average of **2.2% of annual sport fishing license** purchasers **were non-residents**.
- There has been a **~4% increase** in **Southern California anglers** since 2016.

Sport Fishing License Cost Trends

Annual Licenses

- Annual Resident License:
  - $43.50 in 2016 → $58.25 in 2025 (+34%)
- Annual Non-Resident License:
  - $117 in 2016 → $157.25 in 2025 (+34%)

Short-Term Licenses

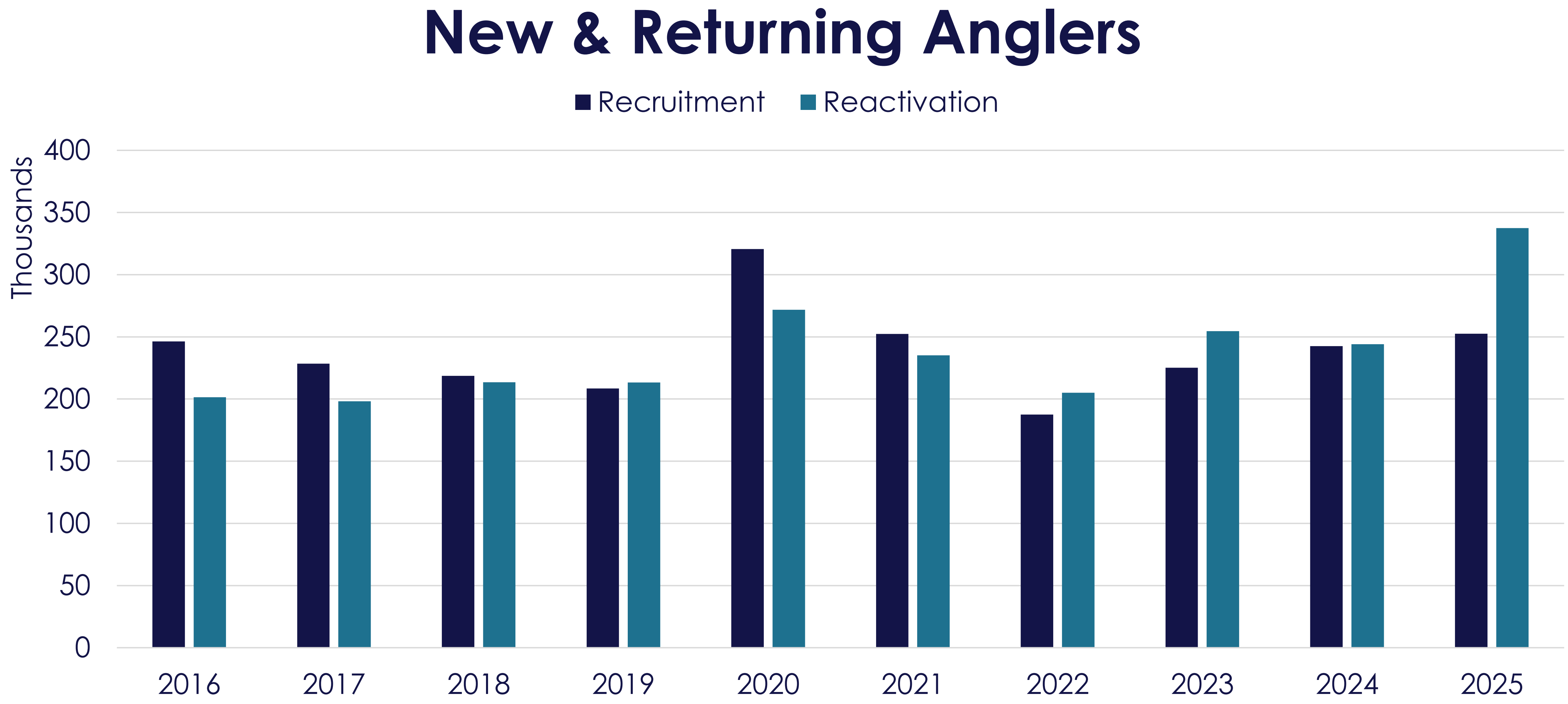
- 1-Day:
  - $14 in 2016 → $19 in 2025 (+36%)
- 2-Day:
  - $21.75 in 2016 → $29.25 in 2025 (+34%)

Are Licenses More Expensive?

- From 2016-2025 **license prices increased ~34%,** across resident, non-resident and short-term license types.
- Over the same period, **California's cost-of-living** and **inflation increased by 38%.**
- Licenses are not outpacing the cost of living. Adjusted for inflation, **they cost about the same** or **slightly less than in 2016**.
- For less than the price of a tank of gas or trip to the grocery store, anglers can get a *full year* of fishing access and contribute to conservation.

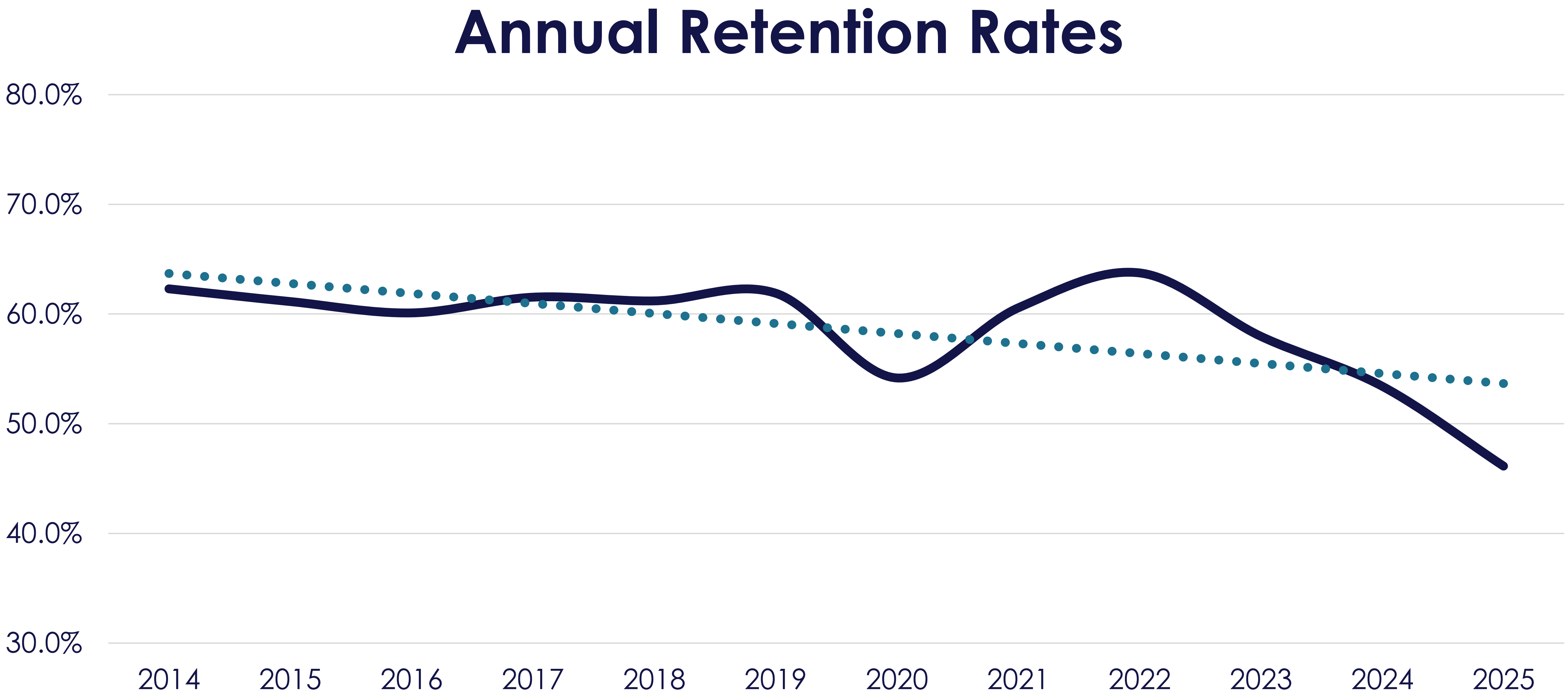
Source: California Consumer Price Index, California Department of Industrial Relations (DIR), Research Unit. "California Consumer Price Index 1955–2025 (All Urban Consumers)."

R3 Metrics

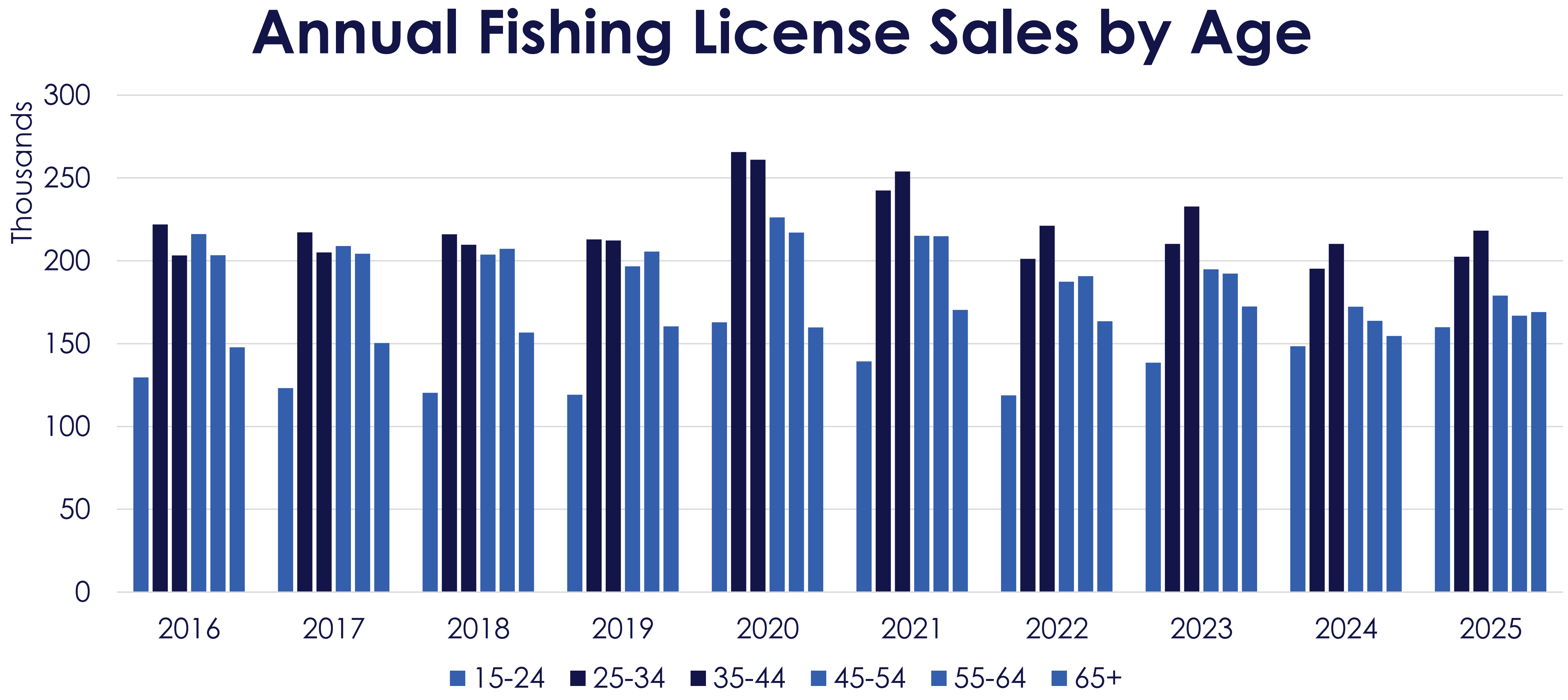


Data based off annual license sales

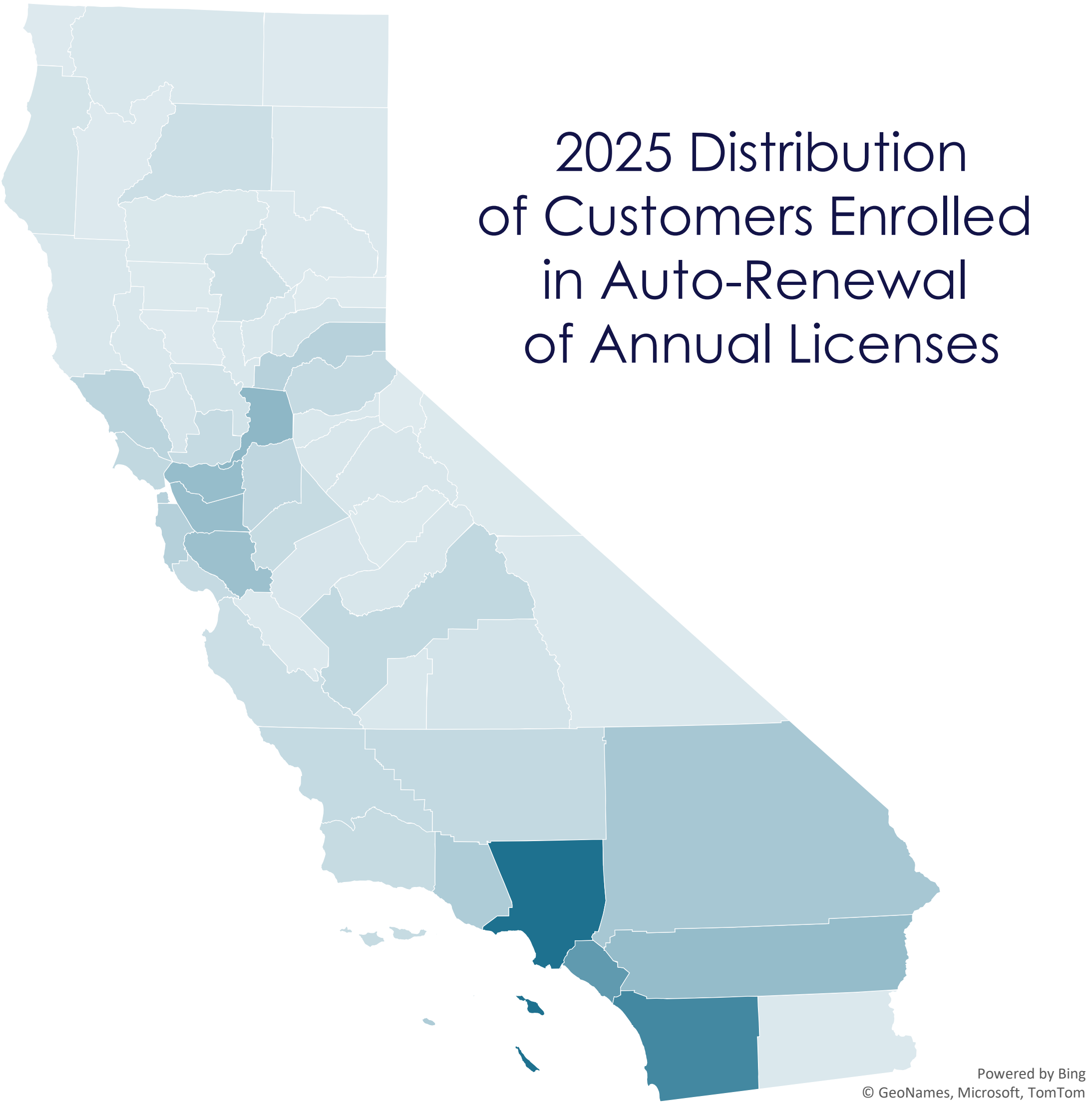
R3 Metrics


Annual Retention Rates
80.0%
70.0%
60.0%
50.0%
40.0%
30.0%
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025

R3 Metrics


Annual Fishing License Sales by Age
Thousands
300
250
200
150
100
50
0
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
15-24
25-34
35-44
45-54
55-64
65+

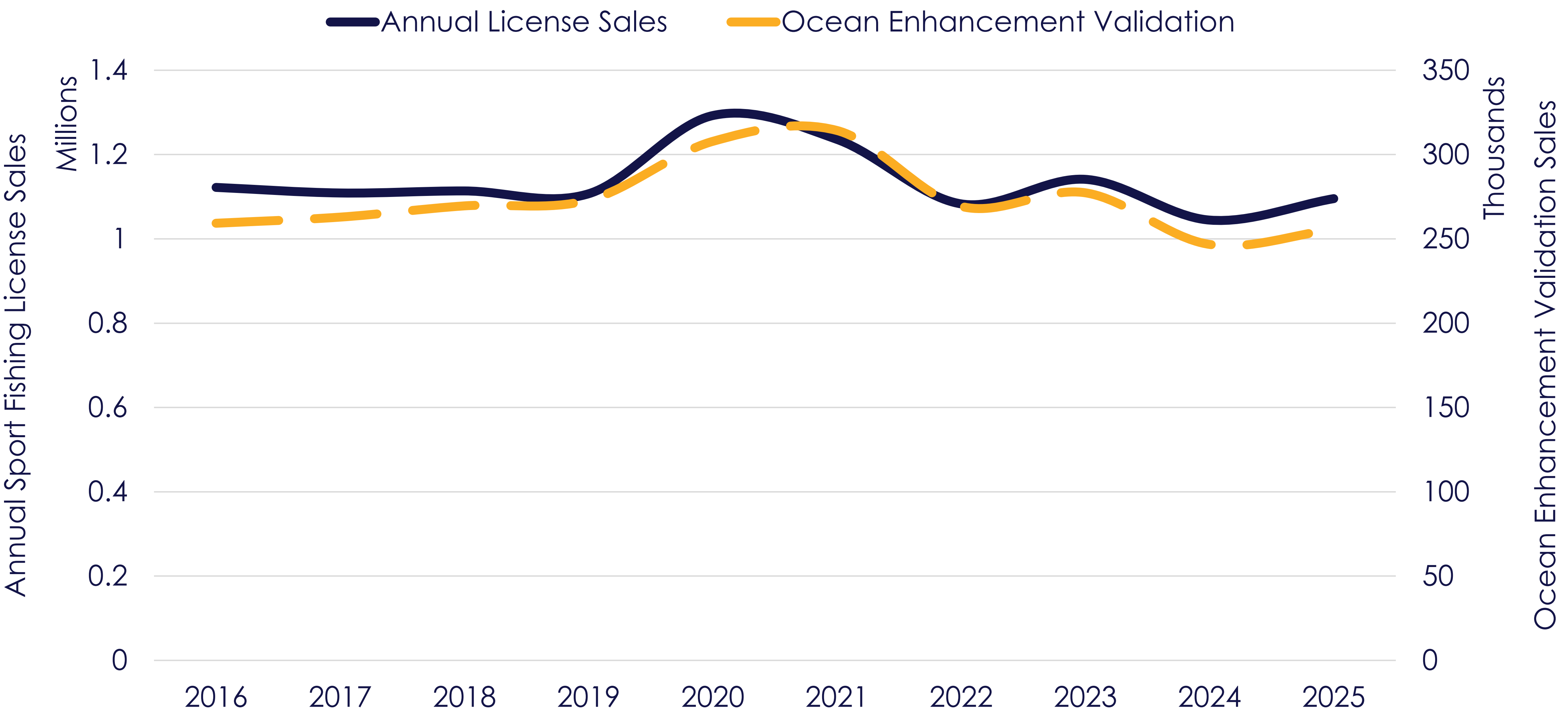
Auto-renewal Density Map



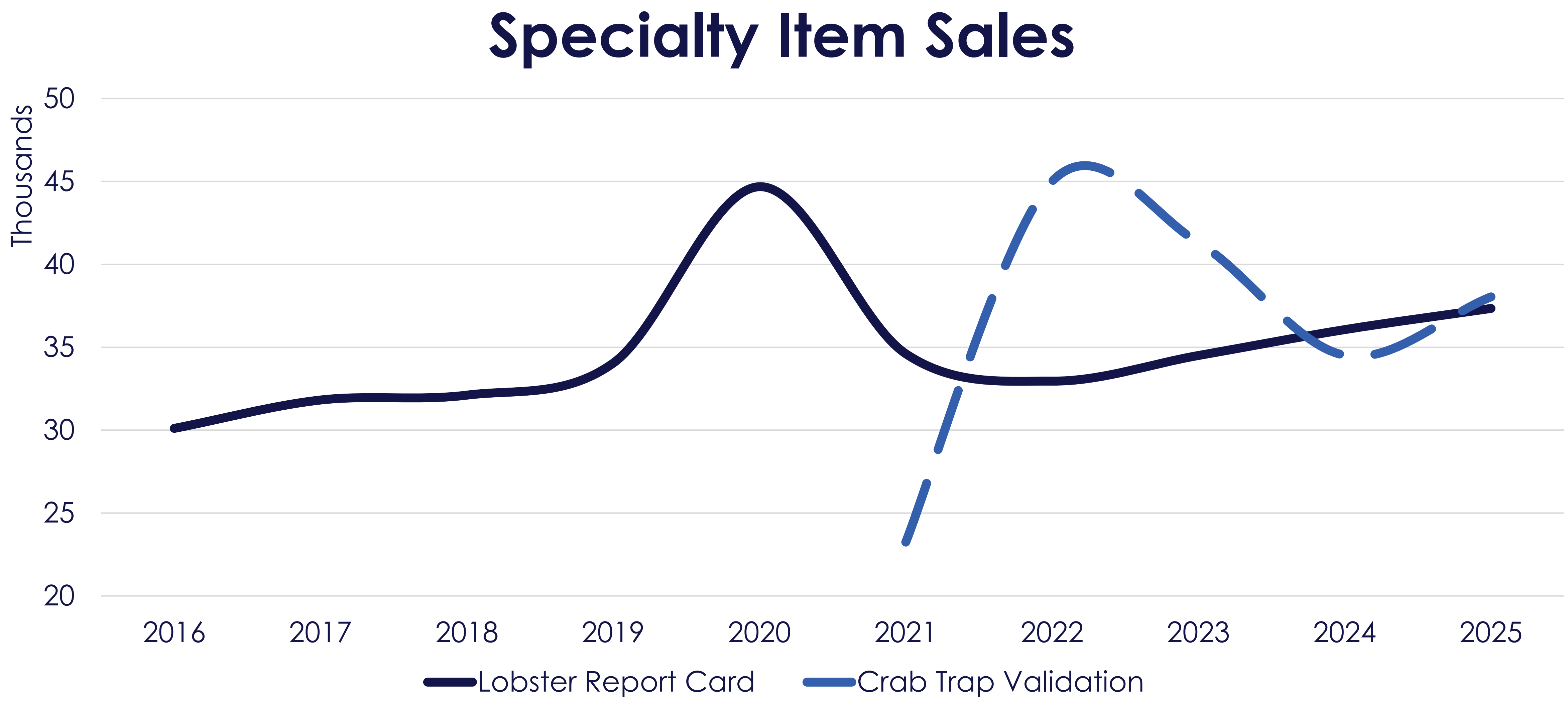
2025 Distribution of Customers Enrolled in Auto-Renewal of Annual Licenses

- Various licenses, report cards and validations can be set up for auto-renewal.
- Only ~6% of annual sport fishing license holders are enrolled in auto-renewal.

Marine Participation Indicators



Marine Participation Indicators



Pier & Jetty Fishing

What we know:

- **24% of U.S. anglers** claim they **fish from piers/jetties**, underlining non-licensed pier use is a major national activity.
- Piers can **attract R3-priority audiences**: families and social groups, newcomers (low-cost access), casual/low-frequency anglers.

What we don't know:

- California is unique in **providing free fishing opportunities** from designated piers and jetties at no cost. Unfortunately, participation cannot be measured through license sales due to design.

Source: "2025 Special Report on Fishing." American Sportfish Association, Recreational Boating and Fishing Foundation.

National Trends Reinforce California Participation

- **Fishing participation** nationally reached **57.9M people** in 2024, the **highest on record**, showing sustained interest in the activity (despite economic variability).
- U.S. **angler churn remains high**, with **16.9M new/returning anglers** and **16.6M leaving**.
- **First-time participation** is growing nationally: **5.1M new anglers** in 2024 (up from 4.2M in 2023), aligning with CA's adult-onset recruitment.
- Top motivators for new anglers – family time, nature, relaxation – align with California's R3 focus areas.

Source: "2025 Special Report on Fishing." American Sportfish Association, Recreational Boating and Fishing Foundation.

Summary

- License sales are declining at a slow rate, and the impacts of switching to 365-day licenses are still largely unknown.
  - The largest decline seen in the last decade is in short-term license sales.
  - Annual license purchasers make up a majority of all license purchasers.
- License prices have risen *slower* than inflation, adjusted for cost-of-living increases, the cost of a fishing license has remained stable in the last decade.
- R3 Metrics:
  - California has seen a surge in reactivated anglers in recent years.
  - Retention rates are down after the introduction of 365-day licenses.
  - 25–44-year-olds are the largest cohort of license purchasers.
- Ocean specific participation is following similar trends as annual licensing.

Questions?

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