

Angler Segmentation:

Looking at Licensed Anglers by Lifestyle



American Sportfishing Association
Leading the Way for Sportfishing's Future

Report four of six in a series
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Regardless of the contributions of many, Southwick Associates remains responsible for the content within.

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Executive Summary

Lifestyle segmentation analyses is based on the premise that people with similar lifestyles, attitudes, and interests consume similar types of goods and services and, by extension, typically live in neighborhoods populated by similar people. By using information about where people live, it is possible to gain insights into the types of lifestyles they lead. As a result, by understanding the types of people who prefer a specific activity or product such as fishing, it is possible to reach clusters of people with high levels of interest, thus generating greater returns for those promoting that activity or product.

Using fishing license sales data and specialized segmentation software, this report has identified the types of neighborhoods, or lifestyles, common to anglers, whether beginners or experienced, high-end or otherwise. By accurately categorizing and understanding the many sub-sets of the diverse U.S. angler population, future recruitment, retention and re-engagement efforts can provide greater results per dollar spent, plus manufacturers and retailers can identify growth opportunities and better target their advertising and marketing strategies such as in-store promotions and locating new retail operations.”

This effort was based on complete fishing license sales records from 12 state fisheries agencies combined with ESRI’s Address Coder™ and Tapestry™ lifestyle segmentation software and data. The ESRI software separates the U.S. into 68 defined neighborhood types based on common lifestyle choices of residents. These 68 segments are grouped into 14 broader LifeMode categories that also share characteristics common to different stages of life (single, family, empty-nester, retired, etc.). Highlights of the results include:

- Older residents who shop at discount stores, own their own homes and vehicles, and are less likely to use computers are some of the characteristics shared by the four most common LifeModes within the current angler population. Residents of Cozy Country Living, Rustic Outposts, GenXurban, and Family Landscapes account for 62 percent of all licensed anglers. Cozy Country Living is the LifeMode with the highest rate of fishing participation—its residents are more than two times as likely to fish as the rest of the U.S. population.
- The four most common segments within the more-detailed Tapestry™ categories for sportfishing participation are Green Acres, Southern Satellites, Middleburg, and Salt of the Earth, all characterized by self-reliance, a love of outdoor recreation, and country living (although Middleburg residents live on the borders of suburbs and rural areas). Residents of these communities tend to be oriented around family life, though some have grown children and others are young professionals with children at home. They are twice as likely to fish as the rest of the U.S. population.
- While the stereotypical angler is an older white male, looking at the angling population’s top Tapestry™ segments shows significant diversity even within that broad grouping. For example, it includes educated and active empty nesters who choose to work longer to afford a vacation home (The Great Outdoors); semi-retirees who’ve paid off their mortgages, have no desire to leave their communities, and savor a slower pace of life (Heartland Communities); and well educated suburbanites who love good food and wine, cultural events, home remodeling, and gardening (Savvy Suburbanites).

- Soccer Moms and Up and Coming Families, both within the Top 10 Tapestry™ segments, include busy young professionals with families who value their time together. The latter, one of the fastest growing markets in the country, is younger with smaller children and is more ethnically diverse. Savvy Suburbanites, also in the Top 10, show similarities, though they tend to be older. In Style residents, in the Top 20, tend to be single households or couples without children who are urban dwellers and have more time to focus on their interests. Another growing and more urbanized market in the Top 20, Bright Young Professionals, is primarily located on the outskirts of large metropolitan areas, and is home to a more diverse group of young, educated, working professionals.
- Residents of the Green Acres and Southern Satellites Tapestry™ segments are good targets for angler retention efforts, but are expected to experience the slowest population growth in coming years. Meanwhile, the Ethnic Enclaves and Next Wave LifeModes (suburban and urban communities with ethnically diverse populations, particularly Hispanics) currently have low rates of fishing participation but are predicted to experience the largest population growth in the future, making them better targets for angler recruitment efforts. This is the focus of the Recreational Boating & Fishing Foundation's Hispanic Education and Outreach Campaign.
- The Rural Resort Dwellers, The Great Outdoors, and Prairie Living Tapestry™ segments account for a relatively small portion of the U.S. population but their distribution among anglers is up to four times greater than their share of the U.S. population, suggesting fishing is a significant part of their culture. While their love of the outdoors is a commonality, these segments show differences in their types of employment, income level, and home ownership. Rural Resort Dwellers and Prairie Living residents tend to live in the Midwest and along the Appalachians, while The Great Outdoors residents are spread out in pastoral settings across the country.
- The most common Tapestry™ segment across all participation categories (retained, recruited, and reactivated anglers) is Green Acres, accounting for about 7 percent of the angler population. These residents are avid do-it-yourselfers, with all the necessary tools and equipment for home improvement and care of their land, including gardening, and they enjoy a range of other outdoor pursuits. They tend to be older married couples, most with no children, living in rural enclaves in metropolitan areas. Southern Satellites is the second largest segment for all participation categories, accounting for about 6 percent of all anglers. Although these residents live in more rural areas, they have much in common with Green Acres, though a significant difference is their median household income and home values tend to be below average.
- Tapestry™ segments with the lowest rate of "churn," meaning the fewest number of anglers leave the sport each year, are Prairie Living, Rural Resort Dwellers, and Rooted Rural. This includes the most rural markets of all, with agricultural and forestry communities along the Appalachians and second-home-owners in resort areas of the Midwest, where fishing and other outdoor activities are an important part of the way of life.
- Tapestry™ segments with the highest rate of churn are High Rise Renters, City Strivers, and Military Proximity. These communities are primarily urban and include young professionals who tend to move a lot, people with lower incomes, and ethnic minorities. More than 60 percent of these anglers will not renew their fishing license from one year to the next.

Introduction

Market segmentation applies the premise that people with similar lifestyles, attitudes, and interests consume similar types of goods and services and, by extension, typically live in neighborhoods populated by similar people. By using information about where people live, it is possible to gain insights into the types of lifestyles they lead. The reverse is true, too. By understanding a person's interests, preferences and lifestyles, it is possible to identify the specific neighborhoods where others with similar profiles can be found. As a result, by understanding the types of people who prefer a specific activity or product such as fishing or tackle, it is possible to reach clusters of people with high levels of interest, thus generating greater returns for those promoting that activity or product. Using fishing license sales data and segmentation data from ESRI, this report has identified the types of neighborhoods, or lifestyles, common to anglers, whether beginners or experienced, high-end or otherwise. By accurately categorizing and understanding the many sub-sets of the diverse U.S. angler population, future recruitment, retention and re-engagement efforts can provide greater results per dollar spent, while companies can identify growth opportunities and marketing strategies that generate greater results.

Approach

As the fourth in a series of reports, this report focuses on exploring lifestyle segmentation for the collective licensed angler population in twelve states across four regions of the country. License sales data provided by the twelve participating states are harmonized into one comprehensive file, containing all customers and fishing privileges sold from 2004 to 2013.¹ The total angler pool was limited to those who were at least age 18 and no older than 65 in the license year and to resident anglers only. This group is referred to as "licensed anglers" in the remainder of the report. And, results in this report are focused on a time frame of five years (2009-2013).

The resulting database allowed us to identify trends in license sales and fishing participation, the types of people more likely to fish and more. Specifically, we examine segments of the licensed angler population both collectively across all states and across three sub-topic areas: regular or new license holders, churn rates, and geographic regions.² The measure of churn reflects the turnover among fishing license holders from one year to the next.

Market segmentation harnesses the idea that people's preferences are likely to vary based on income, age, urban/rural lifestyle, where they are in life (single, family, empty-nest, retired, etc.) and more. However, this type of information is not available from the typical statistics provided by a state's electronic license data base. To gain a better understanding of who is more likely to buy or not buy a license, Address Coder™ and Tapestry™ lifestyle segmentation data provided by ESRI of Arlington, Virginia is used.

¹ The twelve states providing complete records are Colorado, Florida, Georgia, Maine, Michigan, Minnesota, Mississippi, Montana, New Hampshire, New York, Utah, and Wisconsin.

² Results by age category and gender were also analyzed. Those findings are consistent with the aggregated findings presented in this report and offer no additional insights.

ESRI's lifestyle segmentation is built from Census Bureau data and other sources. Using analytical techniques such as cluster analysis in conjunction with geodemographic data from the U.S. Census, ESRI has identified a total of 14 LifeMode groups that contain the entire U.S. population. These groups are then divided further into 68 Tapestry lifestyle segments. The overarching goal is to identify distinct groupings that maximize the similarities within a segment while at the same time maximizing the diversity between groups. The reader is encouraged to review Appendix A for complete descriptions of each group and segment.

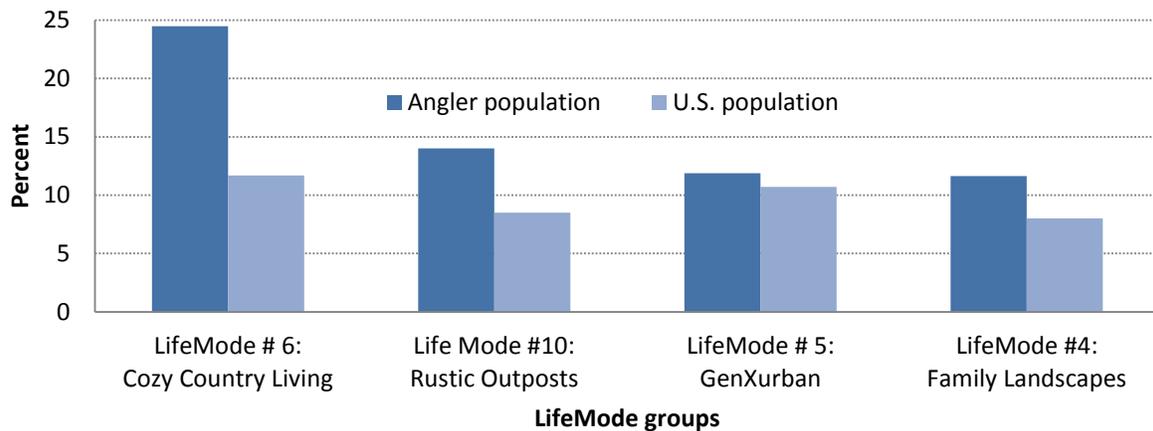
Given the focus of the timeframe for this analysis (2009 to 2013), we assume that the geodemographic structure of an area is relatively constant over the five year period and that the current Tapestry segments are reflective of the individuals within that area. We recognize that regions are in a constant state of evolution with neighborhood compositions changing over time, at times slow and other times rapid. We selected the five-year time frame to incorporate a measure of churn within the analysis while limiting the effect of change within the neighborhoods under study.

The Tapestry™ data allow us to learn more about the lifestyles of people who purchase fishing licenses and to gain a better understanding of who does and does not buy fishing licenses. The results allow state agencies and private businesses to become more focused and cost-effective in their marketing, recruitment and communication efforts.

LifeMode and Tapestry Segmentation

The 14 LifeMode groups developed by ESRI reflect groupings within the Tapestry segments that share characteristics common to different stages of life. They provide broad aggregations of the fishing population. The top four LifeMode groups within the licensed angler population are shown in Figure 1 (dark blue bars) and brief descriptions of each group are included at the end of this report. These four groups account for 62% of licensed anglers, but only 39% of the U.S. population, meaning people within these communities are 59% more likely to fish than everyone else in the U.S. Cozy Country Living has the highest rate of fishing participation, with its members 2.1 times more likely to fish than the rest of the U.S. population. In general, Cozy Country Living is defined as older, empty-nest country-living folks who tend to be outdoor oriented, white, and politically conservative. See Appendix for a more complete definition of this group.

Figure 1. Top four LifeMode groups within the angler population (2013)



The ten year trend among all LifeMode groups reveals that the share of Cozy Country Living and Rustic Outposts among the fishing population has contracted by 2% and 8%, respectively (Table 1). Yet despite the slight contraction, these two groups remain the core group of anglers, accounting for more than one third of the fishing population. Over the same period, other LifeMode groups experienced expansion (Family Landscapes, and Affluent Estates, and Ethnic Enclaves, for example). Considering the largest groups for anglers are contracting, each of these other LifeMode groups warrants further investigation to identify key segments for expanded fishing outreach efforts.³

Table 1. Ten year change in LifeMode group distributions (2004 and 2013)

LifeMode groups	% of licensed anglers in		Ten year change
	2004	2013	
6 Cozy Country Living	24.8	24.4	-2%
10 Rustic Outposts	14.9	13.7	-8%
5 GenXurban	11.9	11.7	-2%
4 Family Landscapes	11.2	11.6	4%
1 Affluent Estates	8.6	9.1	6%
8 Middle Ground	7.3	7.5	3%
7 Ethnic Enclaves	5.1	5.8	13%
9 Senior Styles	5.4	5.0	-6%
12 Hometown	4.0	3.8	-5%
11 Midtown Singles	2.9	2.9	2%
2 Upscale Avenues	1.8	1.9	5%
14 Scholars and Patriots	1.1	1.3	20%
13 Next Wave	0.6	0.7	11%
3 Uptown Individuals	0.5	0.7	27%
Total	100	100	

³ Please note that past marketing efforts have shown that just because a group has a high participation rate in fishing, it does not mean that the group will respond to any marketing effort directed its way. Learning which messages, mode of communication, frequency of contact, and more is critical if marketing efforts are to succeed.

Figure 2. Top ten tapestry segments among licensed anglers

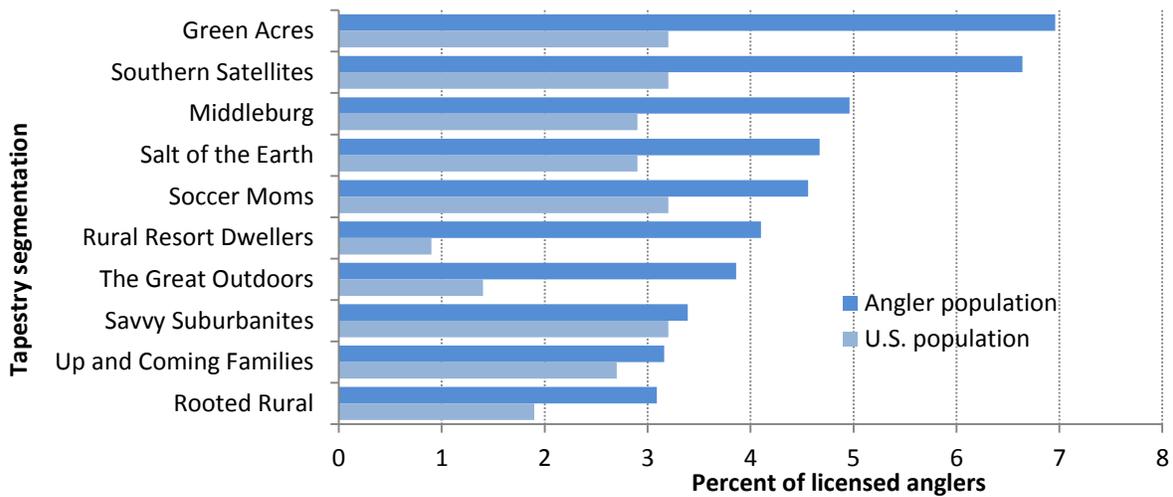


Figure 2 and Table 2 show the top ten and twenty Tapestry segments, respectively, within the angler population relative to the portion of the U.S. population they describe. The Green Acres, Southern Satellites, Middleburg, and Salt of the Earth tapestry segments are the three most common segments identified within the collective license angler population (Figure 2). Outdoor recreation, Caucasian and self-reliance characterize these segments. Green Acres, Southern Satellites, and Salt of the Earth are older groups rooted in country living, the Middleburg segment is a younger group on the boundary between country living and suburbia. As is the case with the LifeMode groups, the proportional size of these segments within the angler population is approximately two times the size of those groups within the U.S. population.

Table 2 shows the top twenty segments among anglers, which account for 69.5% of anglers. Descriptions of each segment are listed in the appendix. The top ten (of 68) Tapestry segments, shown in Figure 2, account for nearly half, or 45.4%, of anglers, though these communities only provide 25.5% of the U.S. population. People living in these ten types of communities are nearly twice as likely to fish as people from other neighborhoods, and represent top targets for angler recruitment and promotion efforts. In fact, rural country lifestyles that provide access to a variety of recreational activities for outdoor enthusiasts over multiple seasons describe those market segments most likely to include individuals who are likely to fish. Readers are encouraged to read the segments’ detailed definitions in Appendix A.

The Rural Resort Dwellers, The Great Outdoors, and Prairie Living are segments that account for a relatively small portion of the U.S. population but their distribution among anglers is four times greater than their share of the general U.S. population, which suggests fishing is a significant part of their culture.

Table 2. Top twenty tapestry segments among licensed U.S. anglers

LifeMode	Tapestry segments	% of licensed anglers	% of U.S. population	Ratio*
6	Green Acres	7.0	3.2	2.2
10	Southern Satellites	6.6	3.2	2.1
4	Middleburg	5.0	2.9	1.7
6	Salt of the Earth	4.7	2.9	1.6
4	Soccer Moms	4.6	3.2	1.4
6	Rural Resort Dwellers	4.1	0.9	4.6
6	The Great Outdoors	3.9	1.4	2.8
1	Savvy Suburbanites	3.4	3.2	1.1
7	Up and Coming Families	3.2	2.7	1.2
10	Rooted Rural	3.1	1.9	1.6
5	Comfortable Empty Nesters	3.0	2.4	1.3
6	Prairie Living	2.7	1.1	2.5
10	Rural Bypasses	2.7	1.4	1.9
5	Midlife Constants	2.7	2.3	1.2
5	In Style	2.3	2.0	1.2
5	Rustbelt Traditions	2.3	2.1	1.1
4	Home Improvement	2.2	1.9	1.2
6	Heartland Communities	2.2	2.2	1.0
8	Old and Newcomers	2.1	1.9	1.1
8	Bright Young Professionals	1.9	2.0	1.0
Total		69.5	44.8	

*Ratio is calculated as the % licensed anglers/% of U.S. population

In contrast, Table 3 shows the twenty tapestry segments that contribute the smallest proportions to the fishing population. They account for only 5.3% of anglers, yet they comprise just under one fifth of the U.S. population. Individuals living in these neighborhoods are much more likely to be urban or from an ethnic community. Typically, these represent market segments where promotion and recruitment efforts would result in lower rates of returns without making substantial efforts to package fishing to better meet their lifestyles and demands. These lifestyles and demands can be substantially different than those seen within segments more attuned to fishing.

Table 3. Bottom twenty tapestry segments among licensed U.S. anglers

LifeMode	Tapestry segments	% of licensed anglers	% of U.S. population	Ratio*
13	High Rise Renters	0.05	0.5	0.1
11	City Strivers	0.08	0.8	0.1
13	Las Casas	0.10	1.2	0.1
2	Pacific Heights	0.11	0.7	0.2
3	Trendsetters	0.13	0.9	0.1
13	International Marketplace	0.14	1.4	0.1
3	Laptops and Lattes	0.14	0.8	0.2
7	Valley Growers	0.15	0.4	0.4
13	Fresh Ambitions	0.18	0.8	0.2
14	Dorms to Diplomas	0.21	0.8	0.3
8	City Lights	0.24	1.4	0.2
9	Social Security Set	0.26	0.6	0.4
13	NeWest Residents	0.30	1.0	0.3
3	Metro Renters	0.39	1.0	0.4
14	Military Proximity	0.42	0.3	1.4
7	Urban Villages	0.42	1.5	0.3
11	City Commons	0.43	0.9	0.5
2	Enterprising Professionals	0.46	1.3	0.4
7	Barrios Urbanos	0.47	1.4	0.3
10	Diners & Miners	0.47	0.7	0.7
	Total	5.25	18.4	

*Ratio is calculated as the % licensed anglers/% of U.S. population

However, there are two noteworthy LifeModes groups overarching these tapestry segments: Ethnic Enclaves (#7) and Next Wave (#13). These communities are described as suburban or urban with ethnically diverse populations, particularly where Hispanics represent a majority. While these communities currently show low rates of participation in recreational fishing, they are the communities where ESRI predicts the largest population growth.⁴ In fact, the ethnic and racial diversity of neighborhoods across the U.S. (both rural and urban) is increasing. As a result, the future growth of the fishing population will be dependent, at least in part, on engaging these ethnically diverse communities in fishing. Organizations like the Recreational Boating and Fishing Foundation are engaged in such efforts and should be referred to for more insights and experience.

⁴ ESRI. 2012. *Minority Population Growth-The New Boom: An Analysis of America's Changing Demographics*.

Segmentation by R3 Categories

In this next section, we explore Tapestry segmentation across the “R3” categories: retained, reactivated, and recruited anglers. For this study, anglers who purchase a license in consecutive years are retained anglers. Anglers who purchase a license in at least one of the last five years but lapse before purchasing one in the current year are considered reactivated anglers. Finally, anglers who purchase a license in the current year but had not purchased a license in any of the five preceding years are considered new, or recruited anglers.

Previous research of the fishing license sales database finds that anglers in each of the three groups of license holders show some common tendencies. For example, anglers aged 55 – 64 years show a higher level of loyalty to the sport and are most likely categorized as retained anglers. Anglers aged 18 – 24 years old are most likely to be categorized as recruited anglers. Female anglers are more apt to be identified as recruited anglers while male anglers are more likely to be identified as retained anglers. And, anglers who reside in rural neighborhoods are more likely to purchase a license over consecutive years while the largest proportion of recruited anglers resides in urban neighborhoods.

Given many of the Tapestry segments also frequently align along age, rural/suburban and other traits that define angler loyalty tendencies, and given anglers are more likely to come from specific Tapestry segments, it is not a surprise that newly recruited, retained and re-engaged anglers also come from the same segments. Figure 3 shows the top ten Tapestry segments for each R3 category and the high degree of commonality across the segments. Anglers fitting the definition of Green Acres is the most common segment across all categories, accounting for approximately six to seven percent of participants. Southern Satellites is the second largest segment for all categories accounting for approximately five to seven percent of anglers.

Figure 3. Top ten tapestry segments by R3 category

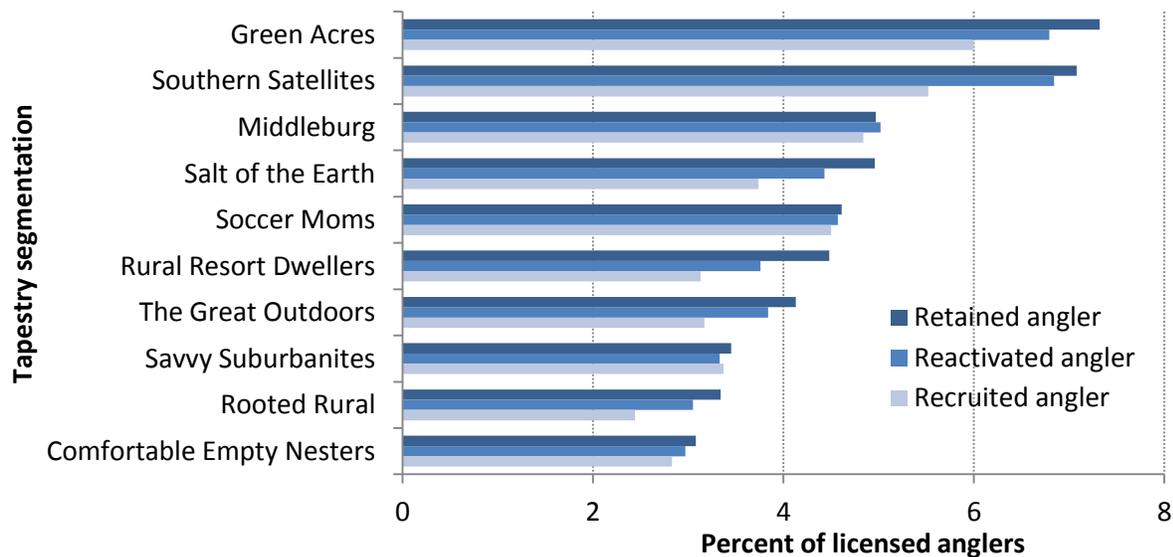


Table 4 shows the top twenty Tapestry segments for each R3 category. This sub-set of segments accounts for two thirds or more of each R3 license holder category. While the overall trend does show commonalities, dissimilarities are seen between the groups with the detailed results. However, the differences are only slight and do not merit detailed consideration.

Table 4. Top twenty tapestry segments by R3 category

Tapestry segments	R3 category (percent)		
	Retained anglers	Reactivated anglers	Recruited anglers
Green Acres	7.3	6.8	6.0
Southern Satellites	7.1	6.8	5.5
Middleburg	5.0	5.0	4.8
Salt of the Earth	5.0	4.4	3.7
Soccer Moms	4.6	4.6	4.5
Rural Resort Dwellers	4.5	3.8	3.1
The Great Outdoors	4.1	3.8	3.2
Savvy Suburbanites	3.5	3.3	3.4
Rooted Rural	3.3	3.1	2.4
Comfortable Empty Nesters	3.1	3.0	2.8
Up and Coming Families	3.1	3.2	3.4
Rural Bypasses	3.0	3.3	2.5
Prairie Living	2.8	2.6	2.6
Midlife Constants	2.6	2.7	2.7
In Style	2.3	2.3	2.4
Rustbelt Traditions	2.3	2.4	2.4
Heartland Communities	2.2	2.2	2.0
Home Improvement	2.2	2.3	2.2
Exurbanites	2.0	1.8	1.9
Old and Newcomers	2.0	2.1	2.4
Total	71.9	69.5	64.1

Segmentation by Churn Rate

The “churn” rate reflects the turnover among residents who fish. In other words, it measures the portion of the angling population who purchased a license in two consecutive years and the portion who chose to let their license lapse. Figure 4 shows two groups of Tapestry segments: those with the lowest churn rate (dark blue) and those with the highest churn rate (light blue). Lower levels of churn equate to higher rates of renewal from year to year and vice versa.

Many of the ten segments with the lowest levels of churn (Prairie Living through Comfortable Empty Nesters) are also consistent with the segments making up the largest portion of the licensed angler population. Fishing is an important part of the culture, or lifestyle, in these neighborhoods. These particular segments among the reactivated and recruited angler categories are potential target sectors for retention marketing efforts as they are surrounded by support networks that make it easier to engage in fishing. Those segments with the highest churn rates (NeWest Residents through High Rise Renters) account for a very small portion of the overall angler population, less than 2.5%, and likely will be the least responsive to retention efforts. It is interesting to note that the segments with the highest churn rates (otherwise seen as the lowest retention rates) are very different than the segments with the highest retention rates. Urban, minority, and low income represent many of the high churn anglers along with young, professional, mobile, urban and often non-married neighborhoods. This contrasts with the suburban and rural families, white and rooted communities that are more frequently seen fishing. If the U.S. evolves more towards the segments with low rates of fishing participation and low rates of angler retention, then the future of fishing will depend on making fishing attractive and convenient to these segments of the population.

Figure 4. Tapestry segments with highest and lowest churn rates

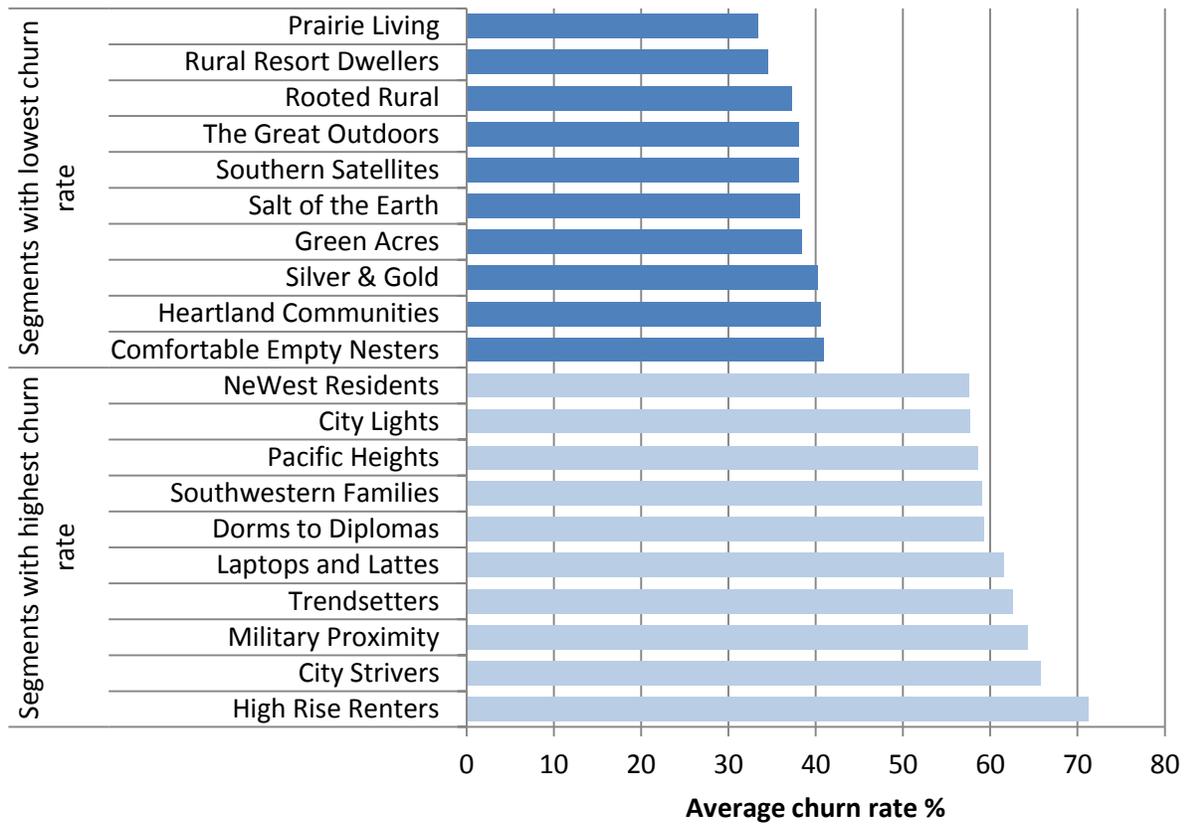


Table 5 expands the groups shown above to include the twenty segments with the highest and lowest churn rates. It also shows the average number of years an angler in that segment purchased a license. These results are based on a sub-set of license holders that includes only anglers who purchased a license in 2009, and their subsequent behavior over the next four years (2010-2013).

Table 5 also includes the twenty segments with the highest and lowest license purchase frequencies. Note that these are average rates and include retained, reactivated, and recruited anglers. Prior research shows that retained anglers are slightly older relative to recruited anglers. Yet, they do not always purchase year after year. As a result, retention efforts might also benefit by including retained anglers within the segments with high purchasing frequencies as a means to increase license purchase frequency.

Table 5. Twenty tapestry segments with lowest and highest churn rates

Tapestry segments	Highest loyalty levels/Lowest churn rates (%)	Avg. years purchasing a license over a five year period(#)	Tapestry segments	Lowest loyalty/Highest avg. churn rate (%)	Avg. years purchasing a license over a five year period (#)
Prairie Living	33.3	3.4	High Rise Renters	71.2	2.3
Rural Resort Dwellers	34.5	3.3	City Strivers	65.7	2.6
Rooted Rural	37.2	3.2	Military Proximity	64.3	2.2
The Great Outdoors	38.1	3.3	Trendsetters	62.5	2.7
Southern Satellites	38.1	3.3	Laptops and Lattes	61.6	2.5
Salt of the Earth	38.1	3.3	Dorms to Diplomas	59.3	2.5
Green Acres	38.4	3.3	Southwestern Families	59.0	2.4
Silver & Gold	40.2	3.1	Pacific Heights	58.6	3.0
Heartland Communities	40.6	3.2	City Lights	57.6	2.6
Comfortable Empty Nesters	40.9	3.2	NeWest Residents	57.6	2.4
Savvy Suburbanites	41.0	3.2	Metro Renters	57.3	2.4
Senior Escapes	41.1	3.1	Urban Villages	56.9	2.4
Middleburg	41.2	3.1	International Marketplace	56.3	2.6
Soccer Moms	41.9	3.1	Modest Income Homes	56.2	2.7
Exurbanites	41.9	3.1	Young and Restless	54.6	2.7
Rustbelt Traditions	42.8	3.1	Las Casas	54.5	2.8
Midlife Constants	42.9	3.1	Social Security Set	54.4	2.7
In Style	43.1	3.1	Metro Fusion	53.6	2.7
Small Town Simplicity	43.3	3.0	City Commons	53.3	2.8
Professional Pride	43.3	3.1	Valley Growers	51.8	2.6

Segmentation by Regional Breakout

The distribution of Tapestry segments can and do vary across the nation. For example, some segments are reflective of their location. Prairie Living, Heartland Communities, and Southern Satellites are associated more commonly with the Midwest and South. In light of this, we explore regional breakouts to show the top twenty segments based on results from the twelve-state collective and how the proportion of each segment varies from region to region (Table 6).

Green Acres is the most common segment within the collective angler population. But, from a regional perspective, this segment is much more prevalent in the Midwest region, relative to the Northeast, Southeast and West. Similarly, Southern Satellites is more prevalent in the Southeast region, relative to the Northeast, Midwest, and West. These distinctions may aid state- and regional-level retention efforts by providing a better understanding of their target audience.

Table 6. Distribution of the top twenty tapestry segments across regions

Tapestry Segment	All states	Regional breakouts			
		Northeast	Midwest	Southeast	West
Green Acres	7.0	7.8	13.4	3.7	6.0
Southern Satellites	6.6	6.3	2.0	12.3	2.0
Middleburg	5.0	1.5	4.1	6.2	5.4
Salt of the Earth	4.7	8.8	12.0	1.7	0.8
Soccer Moms	4.6	2.0	5.3	3.4	7.1
Rural Resort Dwellers	4.1	4.6	6.4	1.4	6.1
The Great Outdoors	3.9	10.3	1.2	2.5	5.4
Savvy Suburbanites	3.4	4.0	3.5	2.1	5.0
Up and Coming Families	3.2	0.1	1.0	2.7	6.4
Rooted Rural	3.1	3.7	2.4	4.9	0.6
Comfortable Empty Nesters	3.0	4.7	3.0	2.9	2.3
Prairie Living	2.7	0.6	5.5	0.2	5.1
Rural Bypasses	2.7	0.1	0.2	6.0	0.0
Midlife Constants	2.7	4.1	2.3	3.1	1.6
In Style	2.3	3.3	2.2	1.7	3.0
Rustbelt Traditions	2.3	3.6	3.9	2.0	0.7
Home Improvement	2.2	0.9	1.3	2.1	4.4
Heartland Communities	2.2	4.6	4.9	0.9	0.6
Old and Newcomers	2.1	1.9	2.0	1.7	2.8
Bright Young Professionals	1.9	0.5	1.6	1.8	3.2
Total	69.5	73.2	78.1	63.2	68.4

Discussion

Lifestyle segmentation is a rigorous way to structure and describe a market by key characteristics within a population and can be used to improve targeted outreach efforts. The segmentation approach we used centers around the location of an individual's primary residence and the assumption that "birds of a feather flock together".

In this fourth report in the series of angler investigations, we focus on identifying those segments that reflect the majority of the fishing population. We also analyze the distribution of segments in three focus areas (Recruitment/retention/reactivation, renewal rates, and regional breakouts) to explore cases where prominent segments might differ. While we do find some shifting of prominent segments, the differences are only slight. Characterized by gravitation toward outdoor recreation, self-reliance and country living, four segments account for approximately one-quarter of the fishing population: Green Acres, Southern Satellites, Middleburg, and Salt of the Earth (Table 2). People in these communities are twice as likely to fish as the rest of the U.S. population and therefore represent ideal targets for promotions and angler retention efforts. These segments have very low rates of racial and ethnic diversity, and also are expected to experience the slowest growth rates in population in upcoming years, which does not bode well for future fishing participation if other segments of the population are not engaged.

We note that communities with rapid growth rates among the U.S. population have low rates of fishing participation. Specifically, they are ethnically diverse neighborhoods located in suburban and urban areas across the U.S. These communities are important targets for recruitment efforts and have need of places with convenient fishing opportunities if fishing is to remain politically and financially relevant in the future.

The power of this type of analysis is the ability to add a level of richness or depth to a license record database. The sales record is designed as a tool to capture simple demographic information (age, gender, ZIP code, and occasionally ethnicity), and much can be learned about an individual's fishing patterns or the locations where the fishing population resides. However, when a street address is combined with segmentation data, it is possible to develop a deeper understanding of the fishing population and more effectively manage outreach efforts to reach the target audience. The results can be used by private companies to learn about the lifestyles of their customers and to compare the results to the findings within this report to learn about the niches they do not serve as a means of identifying expansion opportunities. In addition, the primary purpose of this analysis is to help fishing marketers better understand and connect with current, lapsing and potential future anglers to help ensure the future of fishing and fisheries conservation.

Appendix: LifeMode and Tapestry Segment Descriptions

Esri's **Tapestry Segmentation** identifies 68 distinctive markets in the US based on socioeconomic and demographic characteristics to provide an accurate, comprehensive profile of US consumers.

A website with all the long descriptions can be found at the following link:
<http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>

Tapestry Segments are classified into 14 LifeMode Groups and 68 Segments:

LifeMode 1 Affluent Estates

1A Top Tier The residents of the wealthiest Tapestry market, *Top Tier*, earn more than three times the US household income. They have the purchasing power to indulge any choice, but what do their hearts' desire? Aside from the obvious expense for the upkeep of their lavish homes, consumers select upscale salons, spas, and fitness centers for their personal well-being and shop at high-end retailers for their personal effects. [Link](#) to PDF summary.

1B Professional Pride These consumers are well-educated career professionals that have prospered through the Great Recession. They are financially savvy; they invest wisely and benefit from interest and dividend income. So far, these established families have accumulated an average of 1.5 million dollars in net worth, and their annual household income runs at more than twice the US level. [Link](#) to PDF summary.

1C Boomburbs This is the new growth market, with a profile similar to the original: young professionals with families that have opted to trade up to the newest housing in the suburbs. The original *Boomburbs* began growing in the 1990s and continued through the peak of the housing boom. Most of those neighborhoods are fully developed now. This is an affluent market, but with a higher proportion of mortgages. Rapid growth still distinguishes the *Boomburbs*, although the boom is more subdued now than it was 10 years ago. [Link](#) to PDF summary.

1D Savvy Suburbanites These residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. [Link](#) to PDF summary.

1E Exurbanites Ten years later, *Exurbanites* residents are now approaching retirement but showing few signs of slowing down. They are active in their communities, generous in their donations, and seasoned travelers. They take advantage of their proximity to large metropolitan centers to support the arts, but prefer a more expansive home style in less crowded neighborhoods. They have cultivated a lifestyle that is both affluent and urbane. [Link](#) to PDF summary.

LifeMode 2 Upscale Avenues

2A Urban Chic These residents are professionals that live a sophisticated, exclusive lifestyle. Half of all households are occupied by married-couple families and about 30% are singles. These are busy, well-

connected, and well-educated consumers - avid readers and moviegoers, environmentally active, and financially stable. [Link](#) to PDF summary.

2B Pleasantville Prosperous domesticity best describes the settled denizens of *Pleasantville*. Situated principally in older housing in suburban areas in the Northeast (especially in New York and New Jersey) and secondarily in the West (especially in California), these slightly older couples move less than any other market. [Link](#) to PDF summary.

2C Pacific Heights One of the smaller markets (with less than 1 percent of households), comprised of upscale neighborhoods in the urban periphery of metropolitan areas, along the Pacific Coast in California, in Hawaii, and in the Northeast. This market includes the highest percentage of Asian and multi-racial populations; many of them born outside the US. [Link](#) to PDF summary.

2D Enterprising Professionals This segment is well educated and climbing the ladder in STEM (Science, Technology, Engineering and Mathematical) occupations. They change jobs often and therefore choose to live in condos, townhomes, or apartments; many still rent their homes. The market is fast-growing, located in lower density neighborhoods of large metro areas. [Link](#) to PDF summary.

LifeMode 3 Uptown Individuals

3A Laptops and Lattes Predominantly single, well-educated professionals in business, finance, legal, computer, and entertainment occupations, *Laptops and Lattes* are affluent and partial to city living - and its amenities. Neighborhoods are densely-populated, primarily located in the cities of large metropolitan areas. Many residents walk, bike, or use public transportation to get to work; a number work from home. [Link](#) to PDF summary.

3B Metro Renters Residents in this highly mobile and educated market live alone or with a roommate in older apartment buildings and condos located in the urban core of the city. This is one of the fastest growing segments; the popularity of urban life continues to increase for consumers in their late twenties and thirties. *Metro Renters'* income is close to the US average, but they spend a large portion of their wages on rent, clothes and the latest technology. [Link](#) to PDF summary.

3C Trendsetters Armed with the motto "you're only young once", *Trendsetters* live life to its full potential. These educated young singles aren't ready to settle down; they do not own homes or vehicles and choose to spend their disposable income on upscale city living and entertainment. Dressed head to toe in the most current fashions, their weeknights and weekends are filled discovering local art and culture, dining out or exploring new hobbies. Their vacations are often spontaneous, packed with new experiences and chronicled on their Facebook pages. [Link](#) to PDF summary.

LifeMode 4 Family Landscapes

4A Soccer Moms An affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city, but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits. [Link](#) to PDF summary.

4B Home Improvement Married-couple families occupy well over half of these suburban households. Most *Home Improvement* residences are single-family homes that are owner occupied, with only one fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects. [Link](#) to PDF summary.

4C Middleburg This segment transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty, but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch, and pride themselves on their expertise. They prefer to buy, and travel, American. This market is younger, but growing in size and asset. [Link](#) to PDF summary.

LifeMode 5 GenXurban

5A Comfortable Empty Nesters Residents in this large, growing segment are older, with more than half of all householders aged 55 or older; many still live in the suburbs where they grew up. Most are professionals working in government, health care, or manufacturing. These Baby Boomers are earning a comfortable living and benefitting from years of prudent investing and saving. Their net worth is well above average (Index 363). Many are enjoying the transition from child-rearing to retirement. They value their health and financial well-being. [Link](#) to PDF summary.

5B In Style These denizens embrace an urbane lifestyle that includes support of the arts, travel and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older, and already planning for their retirement. [Link](#) to PDF summary.

5C Parks and Rec These practical suburbanites have achieved the dream of home ownership. They have purchased homes that are within their means. Their homes are older, and townhomes and duplexes are not uncommon. Many of these families are two-income married couples approaching retirement age; they are comfortable in their jobs and their homes, budget wisely, but do not plan on retiring anytime soon or moving. Neighborhoods are well established, as are the amenities and programs that supported their now independent children through school and college. [Link](#) to PDF summary.

5D Rustbelt Traditions The backbone of older industrial cities in states surrounding the Great Lakes, *Rustbelt Traditions* are a mix of married-couple families and singles living in older developments of single-family homes. While varied, the workforce is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade and health care. *Rustbelt Traditions* represent a large market of stable, hard-working consumers with modest incomes, but above average net worth (Index 111). Family-oriented, they value time spent at home. Most have lived, worked, and played in the same area for years. [Link](#) to PDF summary.

5E Midlife Constants With below average labor force participation and above average net worth, *Midlife Constants* are seniors, at or approaching retirement. Although located in predominantly metropolitan

areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts. [Link](#) to PDF summary.

LifeMode 6 Cozy Country Living

6A Green Acres This segment features country living and self reliance. *Green Acres* are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports, hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of *Green Acres* remain pessimistic about the near future, yet heavily invested in it. [Link](#) to PDF summary.

6B Salt of the Earth These residents are entrenched in their traditional, rural lifestyles. Citizens here are older, and many have grown children that have moved away. They still cherish family time, but couples value time spent tending to their vegetable gardens and preparing home-made meals. Residents embrace the outdoors; most of their free time is spent preparing for their next fishing, boating or camping trip. The majority has at least a high school diploma or some college education; many have expanded their skill set during their years of employment in the manufacturing and related industries. [Link](#) to PDF summary.

6C The Great Outdoors These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active, but modest lifestyle. Their focus is the land: They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to home-grown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level. [Link](#) to PDF summary.

6D Prairie Living The most rural market, comprising about 1 percent of households. *Prairie Living* is located mainly in the Midwest, with a predominance of self-employed farmers. These agricultural communities are not diverse, dominated by married-couple families that own single-family dwellings and many vehicles. Median household income is similar to the US, and labor force participation is slightly higher. Faith is important to this hard-working market. When they find time to relax, they favor outdoor activities. [Link](#) to PDF summary.

6E Rural Resort Dwellers Although the Great Recession forced many second home owners to sell, *Rural Resort Dwellers* remain an active market, just a bit smaller. These communities are centered on resort areas, many in the Midwest, where the change in seasons supports a variety of outdoor activities. Retirement looms for many of these blue-collar, older householders, but workers are postponing retirement or returning to work to maintain their current lifestyles. Workers are traveling further to maintain employment. They are passionate about their hobbies, like fresh-water fishing and hunting, but otherwise have very simple tastes. [Link](#) to PDF summary.

6F Heartland Communities Well settled and close-knit, *Heartland Communities* are semi-rural and semi-retired. These older households are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here, but actively participate in outdoor activities and

community events. Traditional and patriotic residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips. [Link](#) to PDF summary.

LifeMode 7 Ethnic Enclaves

7A Up and Coming Families This segment is a market in transition - younger, more ethnically diverse and mobile than the previous generation. *Up and Coming Families* are ambitious, working hard to get ahead, willing to take some risks to achieve their goals. The recession has impacted their financial well-being, but they are optimistic. Their homes are new; their families are young. And this is one of the fastest-growing markets in the country. [Link](#) to PDF summary.

7B Urban Villages Trendy and fashion conscious, *Urban Villages* are multicultural, multigenerational, and multilingual and are risk takers. However, these consumers retain their focus on their children and maintain gardens. They are well connected with their smartphones, but more likely to shop in person or via the Home Shopping Network. Their favorite stores are as diverse as they are, Costco or Whole Foods, Target or Nordstrom. [Link](#) to PDF summary.

7C American Dreamers Located throughout the South and West, most *American Dreamers* own their own homes, primarily single-family housing - farther out of the city, where housing is more affordable. Median household income is slightly below average (Index 94). The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. [Link](#) to PDF summary.

7D Barrios Urbanos Family is central within these diverse communities. Hispanics make up more than 70% of the residents, and more than one in four are foreign born, bringing rich cultural traditions to these neighborhoods in the urban outskirts. Dominating this market are younger families with children or single-parent households with multiple generations living under the same roof. These households balance their budgets carefully, but also indulge in the latest trends and purchase with an eye to brands. [Link](#) to PDF summary.

7E Valley Growers This small, but distinctive market, is located almost entirely in the West (primarily in California and Washington). *Valley Growers'* neighborhoods are home to young, Hispanic families with children and, frequently, multiple generations living in single family homes. Most residents are Hispanic (mostly of Mexican origin). A third is foreign born; 30% of households are linguistically isolated. This market is all about spending time with family, taking care of family and home, and following the Hispanic heritage. More homes are rented than owned, located in semirural areas where agriculture dominates. [Link](#) to PDF summary.

7F Southwestern Families Residents in these neighborhoods are young families that form the foundation of Hispanic life in the Southwest. Children are the center of households that are composed mainly of married couples with children and single-parent families. Grandparents are caregivers in some of these households. Recent arrivals and older generations are language-isolated. Much of the working-age population is employed in blue collar occupations, specializing in skilled work, as well as building maintenance and service jobs. [Link](#) to PDF summary.

LifeMode 8 Middle Ground

8A City Lights This densely populated urban market, is the epitome of equality. The wide-ranging demographic characteristics of residents here mirror their passion for social welfare and equal opportunity. *City Lights* Household types range from single person to married-couple families, with and without children. A blend of owners and renters, single-family homes and townhomes, midrise and high-rise apartments, these neighborhoods are both racially and ethnically diverse. Many residents have completed some college or a degree, and they earn a good income in professional and service occupations. [Link](#) to PDF summary.

8B Emerald City This segment lives in lower density neighborhoods of urban areas throughout the country. Young and mobile, they are more likely to rent. *Emerald City's* denizens are well-educated and well-employed: half have a college degree and a professional occupation. Incomes close to the US median come primarily from wages and self-employment. This group is highly connected, using the Internet for entertainment and making environmentally friendly purchases. Long hours on the Internet are balanced with time at the gym. Many embrace the 'foodie' culture and enjoy cooking adventurous meals using local and organic foods. [Link](#) to PDF summary.

8C Bright Young Professionals This large market is primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. One out of three householders is under the age of 35. *Bright Young Professionals* are slightly more diverse and couples dominate this market, with more renters than homeowners. Over two-fifths of households are single-family dwellings; over a third reside in 5+ unit buildings. Labor force participation is high, generally white collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value and average rent are close to the US values. [Link](#) to PDF summary.

8D Downtown Melting Pot This segment is a smaller, diverse, settled market, comprised of much older neighborhoods located in cities in the Middle Atlantic (mainly New York) or on the Pacific Coast. *Downtown Melting Pot* is a mix of races and ethnicities, with strong concentrations of Asians, particularly Chinese (highest concentration of any segment) reside here. Close to half of the residents are foreign-born, and 30% of households have members who do not speak English. These neighborhoods are dominated by married-couple families in apartment rentals. Residents are employed in professional, service (especially food and personal service), sales, and administrative occupations; many work outside the county they live in. [Link](#) to PDF summary.

8E Front Porches This group blends household types, with more young families with children or single households than average. *Front Porches* is also more diverse than the US. Half of householders are renters, and many of the homes are older townhomes or duplexes. Friends and family are central to Front Porches and help to influence household buying decisions. Residents enjoy their automobiles and like cars that are fun to drive. Income and net worth are well below the US average, and many families have taken out loans to make ends meet. [Link](#) to PDF summary.

8F Old and Newcomers This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. *Old and Newcomers* are neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college;

some are taking adult education classes. They support environmental causes and Starbucks. Age is not always obvious from their choices. [Link](#) to PDF summary.

8G Hardscrabble Road This market is struggling to get by. *Hardscrabble Road* neighborhoods are in urbanized areas within central cities, with older housing, located chiefly in the Midwest and South. This slightly smaller market is primarily a family market, married couples (with and without children) and single parents. Younger, highly diverse (with higher proportions of black, multiracial and Hispanic populations), and less educated, they work mainly in service, manufacturing, and retail trade industries. Unemployment is high (almost twice the US rate), and median household income is half the US median. Almost 1 in 3 households have income below the poverty level. Approximately 60% of householders are renters, living primarily in single-family homes, with a higher proportion of dwellings in 2-4 unit buildings. [Link](#) to PDF summary.

LifeMode 9 Senior Styles

9A Silver & Gold Almost the oldest senior market (second to *The Elders*), the difference of 10 years in median age reveals a socioeconomic difference: This is the most affluent senior market, and still growing. The affluence of *Silver and Gold* has afforded the opportunity to retire to sunnier climates that feature exclusive communities and vacation homes. These consumers have the free time, stamina and resources to enjoy the good life. [Link](#) to PDF summary.

9B Golden Years Independent, active seniors nearing the end of their careers or already in retirement best describes *Golden Years*. This market is primarily singles living alone or empty nesters. Those still active in the labor force are employed in professional occupations; however, these consumers are actively pursuing a variety of leisure interests—travel, sports, dining out, museums and concerts. They are involved, focused on physical fitness and enjoying their lives. This market is smaller, but growing, and financially secure. [Link](#) to PDF summary.

9C The Elders With a median age of 71.8 years, this is Tapestry's oldest market. *The Elders* favor communities designed for senior or assisted living, primarily in warmer climates with seasonal populations. Most of these householders are home owners, although their housing varies from mobile homes to single-family residences to high-rise apartments. These seniors are informed, independent and involved. [Link](#) to PDF summary.

9D Senior Escapes The residents that make up *Senior Escapes* are heavily concentrated in the warmer states of Florida, California, and Arizona. These areas are highly seasonal, yet owner occupied. Many homes began as seasonal getaways and now serve as primary residences. Forty percent are mobile homes; half are single-family dwellings. About half are in unincorporated and more rural areas. Over a quarter of the population are 65-74 years old. Most are white and fairly conservative in their political and religious views. [Link](#) to PDF summary.

9E Retirement Communities This segment is evenly distributed across the country. *Retirement Communities* combine single-family homes and independent living with apartments, assisted living and continuous care nursing facilities. Over half the housing units are in multiunit structures, and the majority of residents have a lease. This group enjoys watching cable TV and stays up to date with newspapers and magazines. Residents take pride in fiscal responsibility and keep a close eye on their

finances. Although income and net worth are well below national averages, residents enjoy going to the theatre, golfing and taking vacations. [Link](#) to PDF summary.

9F Social Security Set Over one third of householders in this segment are aged 65 or older and dependent on low, fixed incomes, primarily Social Security. *Social Security Set* is an older market located in metropolitan cities across the country. In the aftermath of the Great Recession, early retirement is now a dream for many approaching the retirement age; wage and salary income in this market is still robust. Residents live alone in low-rent, high rise buildings, located in or close to business districts that attract heavy daytime traffic. But they enjoy the hustle and bustle of life in the heart of the city, with the added benefit of access to hospitals, community centers and public transportation. [Link](#) to PDF summary.

LifeMode 10 Rustic Outposts

10A Southern Satellites Residents in this group enjoy country living, preferring outdoor activities and DIY home projects. *Southern Satellites* is the second largest market - in rural settlements, but within metropolitan areas located primarily in the South. This market is typically non-diverse, slightly older, settled married-couple families, who own their homes. Almost two-thirds of the homes are single-family structures; a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. [Link](#) to PDF summary.

10B Rooted Rural The residents that make up this group are heavily concentrated in the Appalachian mountain range as well as in Texas and Arkansas. Employment in the forestry industry is common, and *Rooted Rural* residents live in many of the heavily forested regions of the country. Nearly nine of ten residents are non-Hispanic whites. This group enjoys time spent outdoors, hunting, fishing or working in their gardens. Indoors, they enjoy watching television with a spouse and spending time with their pets. When shopping, they look for American-made and generic products. [Link](#) to PDF summary.

10C Diners & Miners Close to one in five employed residents work in mining, oil and gas extraction, or quarrying industries. *Diners and Miners* are a very rural, primarily Southern market. Married-couple families reside in over half of the households, and over a quarter of householders live in mobile homes. This socially conservative group earns a living working with their hands. In addition to mining, construction and agriculture are common industries for employment. They take pride in the appearance of their homes and their vehicles. [Link](#) to PDF summary.

10D Down the Road This is a mix of low density semirural neighborhoods in large metropolitan areas; half are located in the South, with the rest chiefly in the West and Midwest. Almost half of *Down the Road* householders live in mobile homes; approximately two-fifths live in single-family homes. These are younger, diverse communities, with the highest proportion of American Indians of any segment. These family-oriented consumers value their traditions. Workers are in service, retail trade, manufacturing, and construction industries, with higher proportions in agriculture and mining, compared to the US. [Link](#) to PDF summary.

10E Rural Bypasses Open space, undeveloped land, and farmland characterize *Rural Bypasses*. These families live within small towns along country back roads and enjoy the open air in these sparsely

populated neighborhoods. Their lifestyle is country, focused on the outdoors, gardening, hunting and fishing. They are more likely to own a satellite dish than a home computer. Although a majority of households do have a connection to the Internet, their use is very limited. Those who are not yet retired work in blue collar jobs in the agriculture or manufacturing industries. [Link](#) to PDF summary.

LifeMode 11 Midtown Singles

11A City Strivers These high density city neighborhoods are characterized by a relatively young foreign born population who have embraced the American lifestyle, yet retained their cultural integrity. In order to support their lifestyle, *City Strivers* commute long distances to find work in the service or retail industry. Their hard-earned wage and salary income goes toward relatively high rents in older multiunit buildings, but they've chosen these neighborhoods to maintain ties to their culture. Single parents are often the recipients of Supplemental Security income and public assistance, but their close-knit community provides the invaluable support needed while they work. [Link](#) to PDF summary.

11B Young and Restless Gen Y comes of age: Well-educated young workers, some of whom are still completing their education, employed in professional/technical occupations, as well as sales and office/administrative support roles. These residents are not established yet, but striving to get ahead and improve themselves. This market ranks in the top 5 for renters, movers, college enrollment, and labor force participation rate. Almost 1 in 5 residents move each year. Close to half of all householders are under the age of 35, the majority living alone or in shared nonfamily dwellings. Median household income is still below the US. Smart phones are a way of life, and they use the Internet extensively. *Young and Restless* consumers are diverse, favoring densely-populated neighborhoods in large metropolitan areas; over 50% are located in the South (almost a fifth in Texas), with the rest chiefly in the West and Midwest. [Link](#) to PDF summary.

11C Metro Fusion This is a young, diverse market. Many residents do not speak English fluently and have moved into their homes recently. *Metro Fusion* residents are highly mobile and over three quarters of households are occupied by renters. Many households have young children; a quarter are single-parent families. The majority of residents live in midsize apartment buildings. Metro Fusion is a hard working market dedicated to climbing the ladders of their professional and social lives. This is particularly difficult for the single parents due to median incomes that are 35% lower than the US level. [Link](#) to PDF summary.

11D Set to Impress This segment is depicted by medium to large multi-unit apartments with lower than average rents. These apartments are often nestled into neighborhoods with other businesses or single-family housing. Nearly one in three residents is 20 to 34 years old, and over half of the homes are nonfamily households. Although many residents live alone, they preserve close connections with their family. Income levels are low; many work in food service while they are attending college. This group is always looking for a deal. They are very conscious of their image and seek to bolster their status with the latest fashion. *Set to Impress* is tapped into popular culture and the local music scene. [Link](#) to PDF summary.

11E City Commons This segment is one of Tapestry's youngest and largest markets, primarily comprised of single-parent and single-person households living within large, metro cities. While more than a third have a college degree or spent some time in college, nearly a third have not finished high school, which

has a profound effect on their economic circumstance. However, that has not dampened their aspiration to strive for the best for themselves and their children. [Link](#) to PDF summary.

LifeMode 12 Hometown

12A Family Foundations Family and faith are the cornerstones of life in these communities. Older children, still living at home, working towards financial independence, are common within these households. Neighborhoods are stable: little household growth has occurred for more than a decade. Many *Family Foundations'* residents work in the healthcare industry or public administration across all levels of government. Style is important to these consumers, who spend on clothing for themselves and their children, as well as on smartphones. [Link](#) to PDF summary.

12B Traditional Living Residents in this segment live primarily in low-density, settled neighborhoods in the Midwest. The households are a mix of married-couple families and singles. Many families encompass two generations who have lived and worked in the community; their children are likely to follow suit. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. *Traditional Living* is a younger market - beginning householders are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun. [Link](#) to PDF summary.

12C Small Town Simplicity This group includes young families and senior householders that are bound by community ties. The *Small Town Simplicity* lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Pursuits include online computer games, scrapbooking, and rural activities like hunting and fishing. Since almost 1 in 4 households is below poverty level, residents also keep their finances simple - paying bills in person and avoiding debt. [Link](#) to PDF summary.

12D Modest Income Homes Families in this urban segment may be non-traditional; however, their religious faith and family values guide their modest lifestyles. Many residents are primary caregivers to their elderly family members. Jobs are not always easy to come by, but wage and salary income is still the main source of income for most households. Reliance on Social Security and public assistance income is necessary to support single-parent and multigenerational families. High poverty rates in this market make it difficult to make ends meet. Nonetheless, rents are relatively low (Index 73), public transportation is available, and Medicaid can assist families in need. [Link](#) to PDF summary.

LifeMode 13 Next Wave

13A International Marketplace The neighborhoods that make up the *International Marketplace* segment are a rich blend of cultures, found in densely-populated urban and suburban areas, almost entirely in the Middle Atlantic (especially in New York and New Jersey), or in California. Almost 40% of residents are foreign born; 1 in 4 households are linguistically isolated. Young, Hispanic families, renting apartments in older buildings dominate this market; about two-fifths of households have children. Over a fifth of households have no vehicle, typically those living in the city. Median household income is lower, but home values are higher, reflecting the metropolitan areas in which they live. Consumers are attentive to personal style; purchases reflect their youth and their children. True to their culture,

residents visit Spanish language websites, watch programs on Spanish TV networks, and listen to Hispanic music. [Link](#) to PDF summary.

13B Las Casas Cultural differences depict *Las Casas*, a family-oriented market distinguished by multigenerational households. Their spending reflects their children - baby food and furniture or children's apparel - and convenience - fast food and family restaurants. Consumer choices also focus on personal style, as well as the latest trends and fashions. Although young and predominantly renters, this market is stable, affected more by immigration from abroad than local moves. [Link](#) to PDF summary.

13C NeWest Residents For this young Hispanic market, life has taken many turns recently. They are new to America and new to their careers, with new, young families. Many are new to the English language; more than a third of the households are linguistically isolated. *NeWest Residents* are ambitious and dream of a better life. They aren't ready to fully adopt the American way of life, but are willing to take risks for the benefit of their families. As the breadwinners, the men of the house work long hours in blue collar jobs, primarily in the service industry. Skilled workers steer toward construction and manufacturing sectors. [Link](#) to PDF summary.

13D Fresh Ambitions These young families, many of whom are recent immigrants, focus their life and work around their children. *Fresh Ambitions* are not highly educated, but many have overcome the language barrier and earned a high school diploma. They work overtime in service, in skilled and unskilled occupations, and spend what little they can save on their children. Multigenerational families and close ties to their culture support many families living in poverty; income is often supplemented with public assistance and Social Security. Residents spend more than a third of their income on rent, though they can only afford to live in older row houses or multi-unit buildings. [Link](#) to PDF summary.

13E High Rise Renters This market tops the chart for density, diversity, presence of adult children, linguistic isolation and foreign born population. *High-Rise Renters* are located predominantly in the Northeast, especially in New York City. They travel far for employment, usually in service jobs, and depend upon public transportation. These residents are young and struggling to make ends meet; a large portion of their income goes towards rent demanded by their dense central city locations. High-Rise Renters are compassionate people; young or old, near or far, they are devoted to their families. The younger generation is equally passionate about music, television and fashion. [Link](#) to PDF summary.

LifeMode 14 Scholars and Patriots

14A Military Proximity One of the youngest markets, residents are married-couple families just beginning parenthood, with an average household size of 3.34. The Armed Forces is the common bond for these consumers. Most of the labor force are on active duty or have civilian jobs on military bases. The labor force participation rate, with the Armed Forces, is close to 80%, highest among Tapestry markets. Moving is routine to *Military Proximity* householders; 40% have recently lived elsewhere. Consumers live a young, active lifestyle with a focus on their families. These communities are located throughout the United States, but mainly in the South and West. [Link](#) to PDF summary.

14B College Towns About half the residents are enrolled in college, while the rest work for a college or the services that support it. Students have busy schedules, but make time for socializing and sports, between studying and part-time jobs. Students that are new to managing their own finances tend to

make impulse buys and splurge on the latest fashions. This digitally engaged group uses computers and cell phones for all aspects of life including shopping, school work, news, social media and entertainment. *College Towns* are all about new experiences, and residents seek out variety and adventure in their lives. [Link](#) to PDF summary.

14C Dorms to Diplomas On their own for the first time, *Dorms to Diplomas* are just learning about finance and cooking. Frozen dinners and fast-food are common options. Shopping trips are sporadic, and preferences for products are still being established. Many carry a balance on their credit card so that they can buy what they want now. Although school and part-time work take up many hours of the day, the remainder is usually filled with socializing and having fun with friends. They are looking to learn life lessons inside and outside of the classroom. This is the first online generation, having had lifelong use of computers, the Internet, cell phones, and MP3 players. [Link](#) to PDF summary.

LifeMode 15 Unclassified

Unclassified includes both unpopulated areas-parks, golf courses or undeveloped land-and areas with insufficient data for classification, such as institutional group quarters or sparsely populated areas.

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