



Lifestyles of Today's Angler: Tapestry Segmentation of Licensed Anglers

Report four of six in a series

Executive Summary

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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.

These findings are based on a comprehensive examination of state fishing license data covering a 10-year period, from 2004-2013, and a five-year period, from 2009- 2013, for 12 states (CO, FL, GA, ME, MI, MN, MS, MT, NH, NY, UT, and WI) to provide a regionally and nationally representative portrait of anglers. Some additional data comes from the U.S. Fish and Wildlife Service’s *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation* from 2001-2011. More information on ESRI’s Tapestry™ segmentation, also used in compiling this report, is provided in this report and available at <http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm>.

