

# Will Millennials Sustain Sportfishing?



**American Sportfishing Association**  
*Leading the Way for Sportfishing's Future*

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Regardless of the contributions of many, Southwick Associates remains responsible for the content within.

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## Executive Summary

While the proportion of people between the ages of 18 and 34 in the overall U.S. population—about 80 million people—has remained roughly the same over the last few decades, the proportion who fishes has declined by 16 percent, from 29 to 13 percent of the fishing population, from 1980-2011. This and other insights into today's 18 to 34 year anglers, known as the millennial generation, are explained in this fifth report in a series that sheds new light on anglers' fishing habits and loyalty to the sport.

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 (Survey)* 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>.

## Major Findings

The characteristics of the millennial generation of anglers—those between the ages of 18 and 34 who purchased fishing licenses—is compared with all other licensed anglers from older age groups. It also explores crossover among anglers and hunters and how that might influence fishing license renewal rates. Finally, the report forecasts the future composition of the angler population based on three scenarios of projected change to the U.S. population.

The main findings about millennial anglers are gender and churn-related, which refers to the percentage of anglers who leave the sport from one year to the next. While there is a higher proportion of female millennial anglers compared to older age groups, they also have a considerably higher churn rate compared to older age groups—as do male millennials.

Other highlights include:

- The proportion of millennials within the angler population decreased from 29 percent to 13 percent from 1980-2011. Without direct interaction via concerted marketing efforts by the sportfishing community, this trend might continue downward.
- The number of female anglers is 5 percent higher among millennials than older age groups.
- Millennial anglers have an average churn rate of 50 percent—notably higher than the average churn rate of 39 percent for older age groups. Female millennials' churn rate is 15 percent higher than male millennials' (61 percent vs. 46 percent).

- Millennials are far more likely to buy a fishing license alone than individual fishing and hunting licenses or fishing/hunting combination licenses. Two-thirds of millennial anglers purchased only a fishing license. This is similar to older age groups.
- Churn rates among those who only fish, regardless of age, are higher than those who fish and hunt. For millennials who only fish, the churn rate is 60 percent, while it's considerably less—49 percent—for older anglers who only fish. For millennials, close to a third of those who bought both individual fishing and hunting licenses or combination licenses will not renew. For older anglers, it's about a quarter.
- The urban/suburban/rural makeup of millennial anglers is similar to older age groups, with millennials only slightly more likely to reside in urban communities.
- The proportion of millennials within the top 20 Tapestry™ lifestyle segments are also very similar to older age groups.

Organizations and individuals interested or involved in boosting sportfishing participation are encouraged to read the remainder of this report to better understand the trends. We encourage the reader to think of the results and draw your own trend about future sportfishing participation and its implications on conservation funding and social interaction with our outdoor resources. With better information, better strategic and marketing decisions will be made.

## Introduction

One might ask, if members of the baby boom generation are becoming anglers of the past, who will become the anglers of the future? Without question, baby boom generation anglers have been a significant part of the angling population, providing the highest levels of participation within this population, relative to other generations, over the last 20 years.<sup>1</sup> But, as these anglers age and face obstacles which prevent them from going fishing, members of the millennial generation are the younger face of the angler population and represent its future.

In this fifth report in a series, we examine ways in which the millennial generation differs from older generations and if they will be in position to sustain fishing participation at the rates experienced today. We investigate whether there are key characteristics, other than age, that can help national and state-level angler outreach efforts, and if participation in multiple outdoor activities, mainly hunting, encourage higher fishing license renewal rates. Sustainability and even growth of the angler population will require recruitment, retention and reactivation of existing and potential anglers from within this large and diverse population, whose tastes and preferences are framed by backgrounds different than their predecessors.

## Approach

Our exploration of anglers from a generational perspective pulls from multiple data sources. Before looking forward at *tomorrow's* angler, we look back at historical rates of participation reported through the U.S. Fish and Wildlife Service's National Surveys of Fishing, Hunting and Wildlife-Associated Recreation (Survey). With these data, we can determine trends in fishing participation rates over time among the 16 to 34 years of age cohort.

We also investigate the projected changes to the U.S. population and how those shifts might transform the future fishing population. Using historical and forecasted U.S. Census total population data by age for people over the age of 15 years old in conjunction with results from the Survey, we present two scenarios for the changing angler population based on current and extrapolated historical trends of participation in fishing among the general population. The two scenarios developed are:

"Steady rate" scenario: This scenario assumes that current sportfishing participation rates, that is, the percentage of Americans who fish, will remain steady. This approach estimates the number of anglers in 2031 by applying the 2011 participation rates among the general population to the projected 2031 U.S. population per U.S. Census Bureau data. Using those estimates of the angler population, we develop a future distribution by age within the angler population.

"Historical trend" scenario: This scenario assumes participation rates are dynamic, and that recent downward trends in fishing participation will remain in place. Specifically, we estimate the number of anglers in 2031 by using historical rates of participation from 1991 through 2011 and extend this trend to 2031. We apply this rate to the projected 2031 U.S. population

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<sup>1</sup> U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

estimates from U.S. Census to derive estimates of the 2031 angler population by age category.

The goal is to speculate on how the composition of the angler population of the future might shift as the U.S. population changes. The reader can decide which of the scenarios is more likely and can act accordingly.

We also draw from license sales data provided by twelve participating states.<sup>2</sup> These license datasets are harmonized into two comprehensive files, containing an individual's fishing or hunting privileges purchased from 2004 to 2013. The total angler pool was then restricted to include those who were at least age 18 and resident anglers only. Analysis and discussion in this report focuses on two particular groups of anglers:

Millennial generation group: Anglers between the age of 18 and 34 years old and who purchased a fishing license in 2013.

Other generation group: Anglers over the age of 34 years old and who purchased a license in 2013. This group includes both generation X and the baby boom generation.

The license data allow us to examine the level of participation and churn between these two target groups. In addition, we look at the distribution of anglers based on gender, their tendency to cross-over into hunting, and market segmentation.

Considering state fish and wildlife agencies are interested in both fishing and hunting participation, and that many customers purchase both fishing and hunting privileges, we also examine cross-over rates between the two activities and the types of customer who participate in only fishing, and those anglers who also hunt. We focus the analysis on three license type groupings.<sup>3</sup> The groupings were based solely on the type of privileges conveyed through their purchased licenses. No distinction is made to separate based on the duration of the license (short term vs long term licenses).

Fishing license only: individuals who purchase a license that conveys only a fishing privilege.

Both fishing and hunting licenses: individuals who purchase two licenses, one that conveys fishing privileges and one that conveys hunting privileges.

Combination license: individuals who purchase one combination license that conveys both fishing and hunting privileges to the holder.

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.

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<sup>2</sup> The twelve states providing complete records are Colorado, Florida, Georgia, Maine, Michigan, Minnesota, Mississippi, Montana, New Hampshire, New York, Utah, and Wisconsin. The twelve-state collection of license sales records were proportionally weighted to accurately represent a "collective" result.

<sup>3</sup> Findings from the Survey are reported based on two groupings, those who fish and those who both fish and hunt (or "cross-over"). Given the detail within the license database, we are able to dissect the cross-over group into two sub-groupings, those who elect to purchase two separate licenses and those who purchase one combination license. The types of license available and their prices inform the buyers purchase decision and the offerings vary between the states.

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, we bridge the data gap by linking anglers' zip code with Address Coder™ to Tapestry™ lifestyle segmentation data provided by ESRI of Arlington, VA.

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 US Census, ESRI identifies a total of 14 LifeMode groups and 67 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.

Over the course of the previous reports, our focus has been on studying the angler population based on a person's license purchase behavior and the proportion of the annual fisher population that is retained the next year relative to the portion that is replaced by new or occasional anglers. It is important to note that we do not draw that distinction in this report. In other words, each generational group is comprised of anglers whose experiences range from those who regularly engage in the sport to those who are first-time anglers.

## **Historical Rates Of Participation By Generation**

Fishing has significantly fallen in popularity among the 16-34 years of age bracket, bringing long-term concerns regarding the future of fishing (Figure 1). In fact, participation among this population was estimated to be 12.9% in 2011, compared to 14.3% of older Americans (35+ years of age).<sup>4</sup> This is significant as it defines the group of millennial anglers. In 1996, 19.1% of people of the same age bracket (16-34 years of age) fished, and were largely within the group known as generation X. Now, alarmingly, 29.1% of people in the baby boomer generation and of the same age bracket (16-34 years of age) fished.

The millennial generation, currently totaling more than 80 million people in the U.S., is said to be the largest cohort in history.<sup>5</sup> They are currently at an age when they are transitioning through many life stages such as secondary schooling, new career, marriage, and children. While the demands of these stages compete for an individual's limited time and resources, these transitions present opportunities for tradition and family history within the sport of fishing.

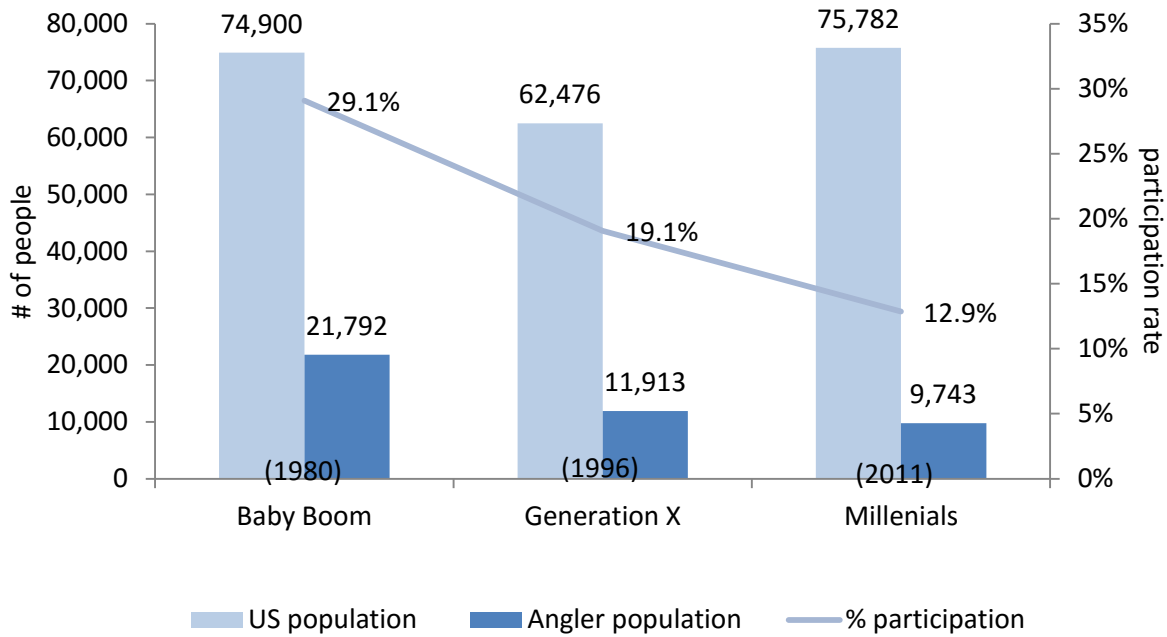
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<sup>4</sup> U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

<sup>5</sup> National Chamber Foundation. 2012. The Millennial Generation Research Review.



**Figure 1. Fishing participation rates among 16-34 year olds by generation**



## License Database Analysis & Results

State-level license purchase databases are optimized to capture a handful of key measures from people purchasing a fishing license. The limited measures do allow for comparison of the millennial and other generations groups from a narrow perspective. The next four tables compare millennial and other anglers across four characteristics: gender, license type cross-over, urban/rural residency, and Tapestry segmentation.

We also report the level of churn for each group across each characteristic, where the measure of churn reflects the turnover among people who fish. Specifically, the measure reflects the proportion of licensed anglers who purchased a license in 2012 but did not purchase again in 2013. Collectively, millennial generation anglers have an average churn rate of 50% which is notably higher than the average churn rate among other generation anglers of 39%.

The proportion of women in the millennial generation fisher population is larger than the proportion of women in the other generations group (Table 1). This indicates that the millennial generation group of anglers is more diverse with respect to gender, relative to the other generations group. This is the good news. However, female anglers have a higher turn-over or churn rate, relative to male anglers.

**Table 1. Gender diversity based on license sales data in 2013**

	Millennial generation		Other generations	
	License holders %	Annual churn %	License holders %	Annual churn %
Male	73%	46%	78%	36%
Female	27%	61%	22%	51%
Total	100%	n/a	100%	n/a

Analysis of the privileges purchased reveals that both generational groups are most likely to buy a license that allows them to only fish (Table 2). Retention rates among millennials are also the lowest, relative to the group of cross-over license holders, as revealed by the higher churn rates of 60% and 49%.—Approximately one third of the population in each group purchases a license that allows both fishing and hunting. Not surprisingly, sportsmen and women who both hunt and fish are more committed to the outdoor lifestyle and more likely to continue renewing their licenses each year. If efforts can be successfully introduced that increase hunting rates among anglers, and vice versa, state agencies may experience higher annual revenues.

**Table 2. Activity cross-over based on license type purchases in 2013**

	Millennial generation		Other generations	
	License holders %	Annual churn %	License holders %	Annual churn %
Fish only	66%	60%	62%	49%
Fish and hunt license	10%	32%	9%	27%
Combination license	24%	29%	29%	21%
Total	100%	n/a	100%	n/a

Within the licensed angler population, we find that the millennial generation anglers are only slightly more likely to reside in urban neighborhoods, relative to anglers in other generations (Table 3). And, in fact, the top twenty segments, which account for roughly 70% of each angler population, are almost identical for each group (Table 4). This indicates that, recognizing a majority of Millennials live in suburban and urban areas, the location of residence probably has a greater impact on the likelihood of someone fishing compared to age.

**Table 3. Urban/rural distribution of anglers based on license sales data in 2013**

	Millennial generation		Other generations	
	License holders %	Annual churn %	License holders %	Annual churn %
Urban	17%	56%	13%	45%
Suburban	38%	52%	40%	41%
Rural	45%	45%	47%	36%
Total	100%	n/a	100%	n/a

**Table 4. Top twenty Tapestry segments based on license sales data in 2013**

	Millennial generation			Other generations	
	License holders %	Annual churn %		License holders %	Annual churn %
Southern Satellites	7%	44%	Southern Satellites	6%	35%
Green Acres	7%	44%	Green Acres	7%	34%
Middleburg	5%	47%	Middleburg	5%	40%
Salt of the Earth	5%	50%	Salt of the Earth	5%	32%
Soccer Moms	4%	50%	Soccer Moms	5%	40%
The Great Outdoors	4%	44%	The Great Outdoors	4%	37%

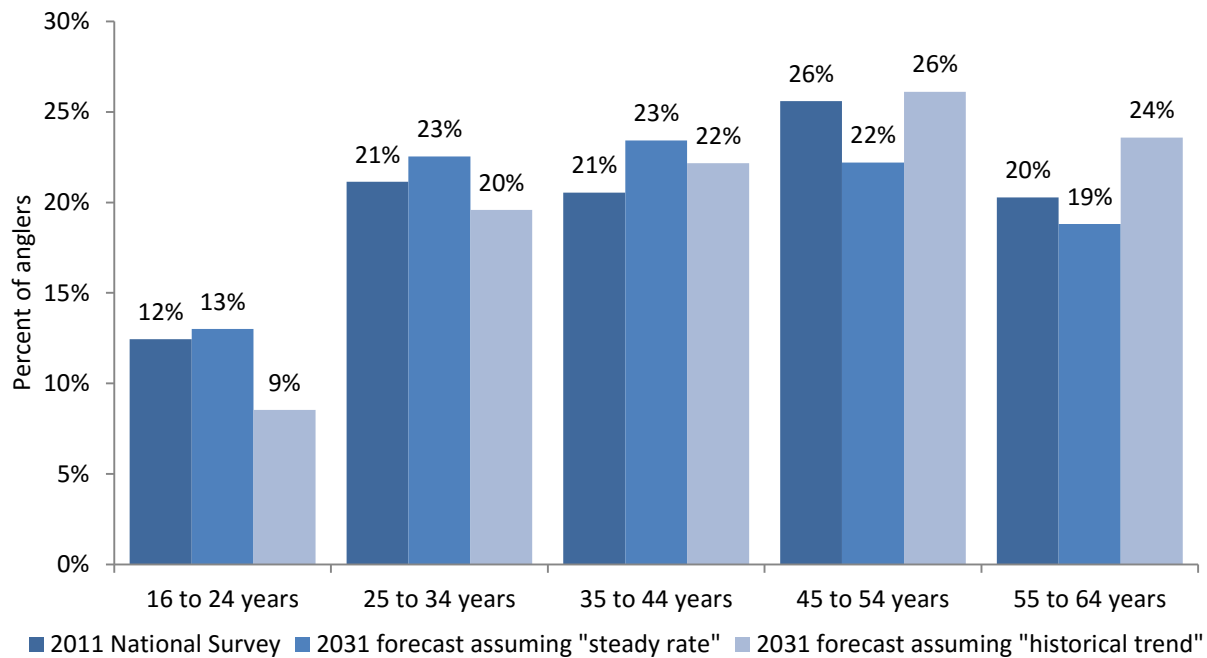
Rural Resort Dwellers	3%	41%	Rural Resort Dwellers	4%	33%
Up and Coming Families	3%	51%	Up and Coming Families	3%	43%
Savvy Suburbanites	3%	51%	Savvy Suburbanites	4%	37%
Rooted Rural	3%	45%	Rooted Rural	3%	36%
Comfortable Empty Nesters	3%	48%	Comfortable Empty Nesters	3%	39%
Prairie Living	3%	39%	Prairie Living	3%	27%
Rural Bypasses	3%	54%	Rural Bypasses	3%	39%
Midlife Constants	3%	50%	Midlife Constants	3%	41%
Rustbelt Traditions	2%	50%	Rustbelt Traditions	2%	42%
Old and Newcomers	2%	53%	Old and Newcomers	2%	41%
Heartland Communities	2%	45%	Heartland Communities	2%	40%
In Style	2%	52%	In Style	2%	42%
Home Improvement	2%	55%	Home Improvement	2%	42%
Bright Young Professionals	2%	53%	Exurbanites	2%	40%
Sub-total	68%	range: 39%-55%	Sub-total	70%	range: 27%-43%
All other tapestry segments	32%	range: 46%-92%	All other tapestry segments	30%	range: 36%-92%
Total	100%	n/a	Total	100%	n/a

## Tomorrow's Angler Population

From 1991 to 2011, the United States' population over the age of 15 grew by 26%, or 49.3 million people. The angler population did not experience similar growth. Instead, it experienced a contraction of 3%. Looking forward to 2031, the U.S. Census Bureau estimates future growth in the population over the age of 15 years old by 21%, equaling 290 million people.

Based on the simplified steady rate projection by age, one would expect only slight changes to the general distribution within anglers based on age cohorts (Figure 2). On the other hand, the simplified historical trend projection by age suggests relative declines in the angler population under the age of 35 years old and increases among the group between the ages of 55 and 64 years. While our future angler population projections suggest the potential for the composition of the angler population base to shift, these projects rely on the assumption that participation is largely a function of age. In other words, in 30 years, many millennial anglers will belong to the 55 to 64 year old age cohort. We then assume that this age cohort will exhibit the similar levels of participation as prior generations, upon which the trends are based.

**Figure 2. Forecasted composition of angler population by age categories**



Demographic changes are only one of many factors correlated with the license purchase decision making it difficult to determine with any level of certainty how or if the distributions across the license activity types will change given the projected growth of the U.S. population. In addition, it is unclear whether millennial generation angler participation rates will grow to mirror the current rates of baby boom generation anglers. Nevertheless, we offer simple insights about potential changes within the customer base founded on forecasting but urge the reader to draw from additional resources and research, as more accurate insights would require further analysis.

## Discussion

While currently a large part of the fishing population, anglers of the baby boom generation will be transitioning away from the sport in the future. Through this report, we pose the question; does the millennial angler population share common characteristics with the baby boom angler population? If not, what are its unique features with regards to demographic and market segmentation characteristics and will the millennials be able to replace the anglers being lost to older age?

With the exception of gender and participation rates, other demographic and geographic characteristics are found to be similar between Millennials and older generations. This suggests that on some levels, anglers are comparable across generational divides. This only relates to who they are, not what they buy or types of fishing activities they prefer, which could be significantly different. Relating to gender, we see higher participation rates among women in the millennial generation compared to older generations. This may be a factor unique to the millennial generation, but could also have occurred in

previous generations. Additional research would be needed to confirm this. We do know that women anglers, Millennials or others, are dropping out at rates faster than men, meaning more efforts are needed to keep them engaged and satisfied with their fishing experiences.

The biggest and most alarming insight about the millennial generation relates to their overall interest in fishing. Compared to twenty years ago, interest in fishing among people aged 18-34 has dropped remarkably. In 1996, almost 20 percent of Americans in this age bracket fished at least once. Currently, only 12.8% are fishing, per data from the U.S. Fish and Wildlife Service. Whether this drop relates to the greater amount of recreational choices available now, the rise of internet-oriented activities, or a lower cultural interest in the outdoors is virtually unknown. Other demographic factors are likely more useful when determining if a person fishes, such as where they live, and more. Recognize we are not going to advocate a shift among Millennials to move to rural locations more convenient for fishing; it is important that the sport fishing community adapts fishing opportunities to meet the demands for convenience, social, and other related demands held by younger people. Any efforts that successfully encourage anglers to hunt may also help stabilize fishing participation and license sales.

To ensure future conservation efforts are funded, and to maintain recreational fishing as a popular U.S. activity, it is important for the sport fishing community to continue working together through programs such the Recreational Boating and Fishing Foundation, Keep America Fishing and other efforts. The results of this report, along with the preceding reports in the series, are meant to provide insights and suggestions into possible new or enhanced approaches. Many of the findings may require additional investigation, while others confirm previous research or speculation. We encourage the reader to review all results, and use the insights to help secure a better future for sport fishing and its broader economic and conservation benefits provided to the U.S. as a whole.



## Appendix: Selected Tapestry segment descriptions

Included below are short summary descriptions for the top twenty Tapestry segments among the collective group of licensed anglers. 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

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.

**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.