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Florida Hunting and Fishing Retention and Recruitment

License Data Analysis and Marketing Suggestions

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Executive Summary and Recommendations

The following report provides a detailed analysis of FWC's customers based on their 2011-2017 fishing and hunting license purchases. Customers were examined from a variety of perspectives including demographic trends, R3 dimensions (retention, recruitment and reactivation), geography and lifestyles. The focus throughout is to provide insights to further inform FWC's marketing efforts.

With a broad mission to identify trends and facts that could enhance future marketing efforts, this report presents a large volume of information. As a result, the reader can quickly become "lost in the weeds" of the detailed analysis. In this discussion, we focus on the larger trends that could reasonably become part of future, broader-based marketing efforts. We realize, for example, that county-level marketing efforts are not likely feasible nor profitable. Therefore, while the report does present county and even neighborhood level details, we focus on recommendations that are at least regional, if not state-wide in nature.

Overall, license sales have been growing in the state of Florida. In some cases, the increases are in line with Florida's growing population. In specific instances or areas, we see increases in license sales that exceed overall population growth, indicating a growing popularity for fishing and hunting. Drilling deeper into the data uncovers specific strengths and opportunities for FWC marketing efforts, such as increasing popularity for fishing and hunting among younger residents under the age of 35, growing interest in the Hispanic community (especially for saltwater fishing), renewed hunting and fishing interest in more urbanized areas, and more. Promoting sales in a positive growth environment is easier than pushing sales in a declining sales environment. By identifying the external forces that affect participation in fishing and hunting, the FWC can develop marketing programs to encourage greater license sales growth.

Overall Trends in Fishing and Hunting

Florida has seen growth in the total number of hunters and anglers over the past six years. This is especially true among non-residents, whose participation has grown faster than residents (Table E1). Considering the greater revenue per license compared to residents, this represents an opportunity for the FWC. Increases in hunting participation have lagged slightly behind Florida's overall population growth, representing a long-term threat to continued public support for hunting.

Table E1. License Holders & Participation Rate by Activity – 2011 to 2017

	License Holders in 2017	License Holders Avg. Annual % Change	Participation Rate Avg. Annual % Change*
Residents			
Saltwater Fishing	1,006,527	1.7%	0.7%
Freshwater Fishing	504,707	2.5%	1.5%
Hunting	176,910	0.9%	-0.1%
Non-residents			
Saltwater Fishing	487,563	4.8%	N/A
Freshwater Fishing	114,654	3.9%	N/A
Hunting	11,016	4.5%	N/A

* This reports the percentage of the state population that buys a license.

Strengths:

- Recent increases in license sales indicate growing interest in the outdoors in Florida.
- Florida offers extensive opportunities for fishing. As a result, and owing to its warm-weather climate, it has the largest number of non-resident anglers of any state in the U.S. and the second largest number of resident anglers:
    - Over three times more non-resident anglers visit Florida versus second-ranked Michigan (USFWS 2011).
    - Florida ranks among the top 10 states for the percent of total anglers who are non-residents (USFWS 2011).
    - Approximately one-third of non-resident hunters and anglers were retained in FY 2017.
- A new study confirms that FWC's recent implementation of an auto-renewal option for selected licenses is having a positive effect on the number of licenses sold and is likely contributing to reduced churn rates (Southwick Associates 2017).

Weaknesses:

- Declining numbers of saltwater anglers across lower central Florida (Tampa Bay to Ft. Myers across to the east coast, Figure 10), possibly related in part to recent excessive freshwater discharges and other factors, have depressed the FWC's overall license growth rates.
- The number of freshwater anglers in the Big Bend region, where freshwater fishing has traditionally been very strong, is declining (Figure 11).
- Places in Florida that have traditionally had some of the state's highest participation rates among the general population are now experiencing flat or declining participation rates, especially in rural areas:

    - The highest participation rates for *saltwater* fishing are in the Big Bend region, but that region is experiencing flat or declining participation rates (Figure 16 and Figure 17.
    - The highest participation rates for *freshwater* fishing are in north Florida and the panhandle but that region is experiencing flat or declining participation rates (Figure 18 and Figure 19).
    - The highest participation rates for *hunting* are in central Florida, but that region is experiencing flat or declining participation rates (Figure 20 and Figure 21).
- Minority groups, outside of the Hispanic community, have very low participation rates and have shown little improvement in recent years.

Opportunities:

- Saltwater license sales are experiencing significant growth rates in many interior counties, with a greater percentage of inland residents buying these licenses (Figure 10).
- Interestingly, while the growth rate of saltwater license purchases is greatest in the interior counties, freshwater license sales are growing faster in the more urbanized coastal counties (Figure 11). This is occurring well outside of freshwater fishing's bastion of north Florida (Figure 18) where the highest participation rates are found.
- Hunting license sales are growing in the western panhandle and South Florida. Moderate growth is seen in north central Florida, too. The percentage of the overall population buying hunting licenses in some areas is increasing, especially South Florida (Figure 12 and Figure 21).
- Non-resident fishing and hunting license sales are increasing faster than resident license sales (Figure 4). Considering the greater revenue per license compared to residents, this represents opportunity for the FWC. Efforts to encourage more sportsmen and women to visit Florida to fish or hunt, or to try these sports while on vacation, may be worthwhile
- A growing Hispanic population is showing signs of increasing participation rates in fishing (Figure 29 and Figure 30).
- Over half of the annual non-resident hunters and anglers in Florida can be considered first-time customers, not having purchased a license in the previous five years (Figure 24). Efforts to encourage their return might provide some benefit.
- Women's share of fishing and hunting license sales has increased (Figure 26). Female participation rates remain lower than males, but are increasing (Figure 27). Similarly, churn rates among female license buyers remain higher than males, but are also improving (Figure 28). Continued efforts to encourage female participation in these sports may prove worthwhile.
- Churn rates have declined across the board among residents:
    - Men, women, whites and Hispanics have all shown reduced churn rates for both hunting and fishing (Figure 28 and Figure 31).
    - Determining which factors are causing the reduction in churn rates could help future efforts to address churn in areas where participation rates are declining.

Threats:

- Baby Boomers, who constitute a significant proportion of license buyers, are crossing the threshold for free licenses.
- The state's Hispanic population is increasing. Recognizing Hispanics' lower hunting and fishing participation rates compared to most license buyers, efforts are needed to ensure that Hispanics' recent increases in license buying habits will continue.
- Declining license sales in rural areas threatens future revenues, as these areas have traditionally been a steady, reliable source of license sales.

Discussion and marketing implications

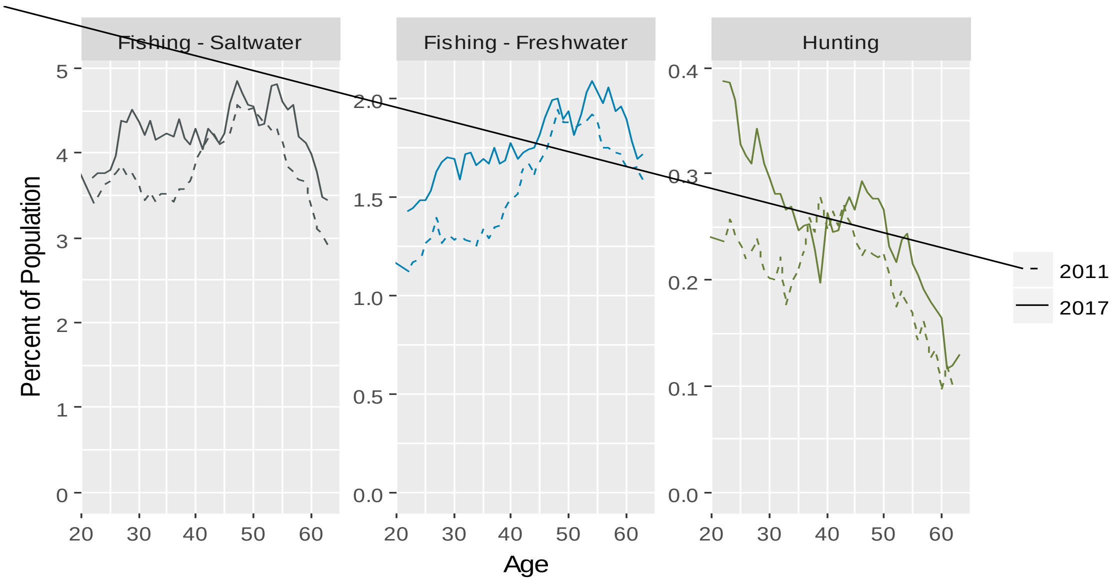
Below, we discuss specific topics and associated recommendations for marketing efforts. This discussion draws on the very large volume of detailed analysis that is presented in later sections of this report. For all marketing suggestions presented in this report, an overarching recommendation is to conduct focus groups, followed by surveys whenever possible, to learn if the suggestion has merit.

Demographic trends

Gender:

Women represent an opportunity to expand fishing and hunting in Florida. Although women represent a minority group of participants (especially in hunting), their total numbers and participation rates have been expanding in recent years (Figure E1). This trend is true for women overall, and particularly for younger women (and perhaps even for minors that we cannot observe in this analysis). Participation rates for women are much higher in fishing than hunting, even though the percentage of women who hunt is increasing. For example, freshwater fishing rates for women in their twenties have increased from about 1.05% to 1.45% since 2011, while hunting participation rates for women in their twenties essentially doubled to a high of nearly 0.4%.

Figure E1. Resident Participation Rates for Women by Age - 2011 vs 2017



Based on recent American Sportfishing Association and National Shooting Sports Foundation research, motivations to hunt and fish vary somewhat between women and men. However, many of the main motivations such as social interaction, sourcing food locally and spending time outdoors, are consistent. For Millennials, it is commonly said they have high rates of wanting to gain new experiences. All these points should be considered when developing a marketing campaign.

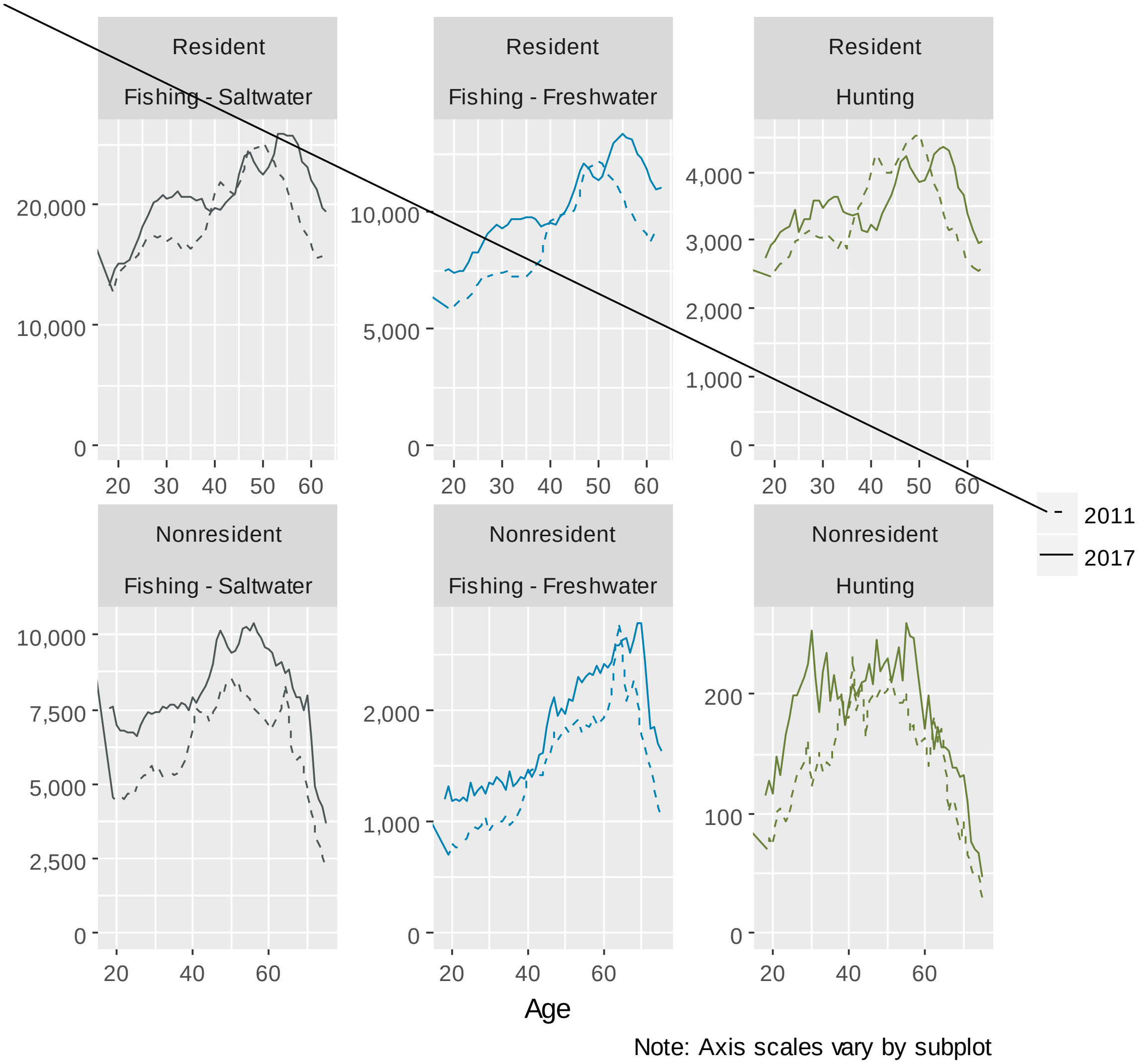
<u>Recommendations:</u>

- If not already in place, consider partnering with state and county tourism offices to promote youth and young adult fishing experiences as part of a Florida vacation.
- Developing a campaign specific to women is not always necessary. Programs that focus on Millennials (especially in more urbanized areas) and their motivations will likely resonate just as well with women as with men and allow the FWC to reach a larger audience.
- Team more frequently with resorts such as Disney, who already offer fishing experiences, to help promote fishing to families while visiting the Fishing Capital of the World.

<u>Age:</u>

The aging of the general license buying population has been a major motivation for many fish and game agencies to improve their marketing efforts. Due partly to Baby Boomers reaching an age where they no longer need to purchase licenses, we see the emergence of the Millennial generation as a substitute, both for residents and non-residents (Figure E2). This trend will likely continue in the future, but efforts to encourage this trend are advised. In addition to providing a “bump” in the overall age distribution of license buyers, participation rates by people in the 20s and 30s are higher today than six years ago (Figure 33).

Figure E2. Total License Holders by Age* - 2011 vs 2017



Recommendations:

- Nothing can stop the march of time and the Baby Boomers will ultimately age out of hunting and fishing. Until they do, consider a focused effort to keep them involved as mentors, or ways for them to continue contributing to conservation. Since they already receive a free license after age 64, creation of a special type of recognition with additional benefits may be a way to motivate their continued purchases.

- Build on the volume of research that shows Millennials have a high propensity to try a variety of activities. Combine new angler and hunter programs with other outdoor activities as a "Florida Outdoors" experience package.

Race/Ethnicity:

Hispanics represent an emerging group of license buyers, particularly for saltwater fishing, and to some extent for hunting. The overall age distribution of the Hispanic community is younger than the rest of Florida and their numbers are growing across all age groups (Figure E3). Additionally, their participation in fishing is growing substantially - especially saltwater fishing – and thus they are becoming an increasingly important group of FWC license purchasers (Figure E4). While the Hispanic population has lower participation rates than other segments of the population (the participation rate in saltwater fishing among Florida's white population is 11.6%), their increasing participation in recent years should continue to be encouraged.

Figure E3. Florida's Hispanic Population by Age - 2011 to 2017

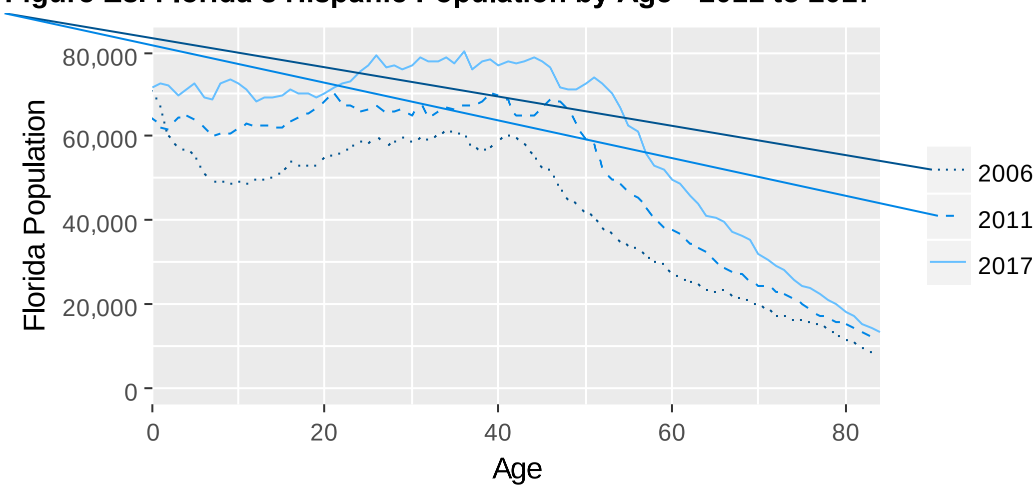
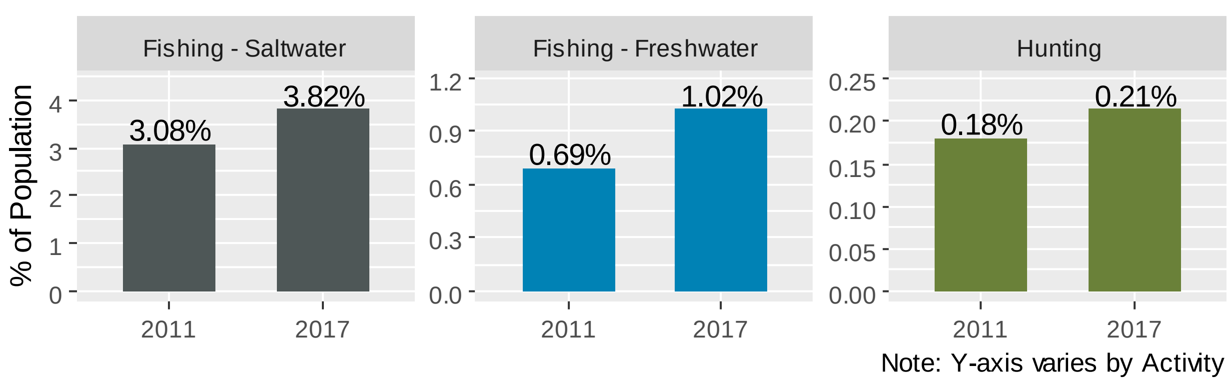


Figure E4. Participation Rates for All Resident Hispanics – 2011 vs 2017



Recommendations:

- Consider organizing additional family fishing events around fishable urban ponds. Keep these events convenient to the Hispanic communities, at locations with amenities available for all family members. Keep the events focused on teaching new anglers how they can fish on their own. Measure the events' effectiveness in helping attendees become independent anglers. In this author's opinion, based on years of FWC and RBFF involvement, too many of these events create new anglers that are dependent on future events to continue fishing.

The geography of fishing and hunting

Despite the rural nature of fishing and hunting, the majority of sportsmen are found in urban counties (Figure 35). This is especially true for saltwater anglers, but that is unsurprising since most of Florida's major metropolitan areas are coastal. Although it is somewhat counterintuitive to suggest that 70% of hunters live in urban areas, it is important to note that counties are large enough to contain a variety of neighborhoods, some urban, some rural. Even though the rural population is more likely to hunt than those in urban areas, this difference in participation rates is not large enough to change the fact that most sportsmen are found where most of the population lives – in urban and suburban areas. This map of all sportsmen doesn't look much different whether we look at saltwater anglers, freshwater anglers or hunters (Figure E5).

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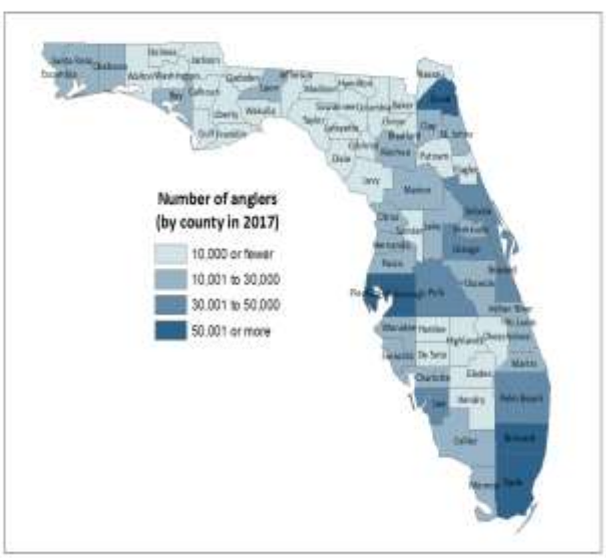
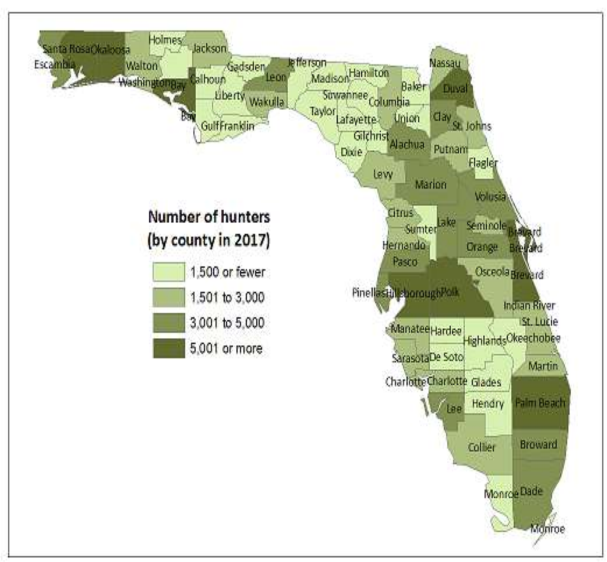




However, the picture changes substantially when we look at where numbers of different types of license buyers are growing or declining. Oddly, we see greater growth rates in saltwater license purchases in non-coastal counties (Figure 10), while the greatest growth rates for freshwater licenses are in coastal counties (Figure 11). The greatest growth in the numbers of hunters has occurred in south Florida and the western panhandle (Figure 12). The reasons for these trends are not clear from the available data. Much of this growth could be attributed to overall population growth in these areas, but increasing interest among Millennials and women may be fueling growth, too. However, we also see some troubling regional trends. Participation rates for fishing and hunting are declining in regions that traditionally have had high participation rates (Figures 16 through 21).

The strong numbers of hunting license sales and the growth in the percentage of residents buying hunting licenses in south Florida is very interesting. We assume a large percentage of these residents must hunt in central or northern Florida, given access limitations in south Florida.

Recommendations:

- Consider promoting freshwater fishing as a convenient, underrated and close-to-home fishing opportunity. Highlight convenient access, places to go (especially in new communities comprised largely of newcomers), fishing with friends and other social aspects of being on the water after work, etc.
- Then, promote saltwater fishing as the experience to take when more time is available – all day, weekends, etc.
- Encourage interior residents to buy combo licenses by promoting the complete angler as capable in both types of water, enjoying each for their own merits.
- Talk with interior residents who have bought both fresh and saltwater privileges to identify the most pertinent sales points for fresh and saltwater fishing.
    - Not knowing if saltwater anglers are taking up freshwater fishing, or if freshwater license sales are being driven by new housing development in the interior portions of coastal counties, focus groups and surveys would shed light on the marketing methods that would be most effective in encouraging more license sales.
- Consider teaming with major land holders in other parts of Florida (Rayonier, Plum Creek, etc.) to promote annual and per-hunt leases to south Florida license holders may prove worthwhile in retaining and possibly increasing hunting license buyers in south Florida.

Lifestyle

There are many different types of people who fish and hunt. License customers are frequently segmented based on demographics. However, people do not decide to fish or hunt based on their appearance. Their internal motivations and needs drive them to undertake one recreational activity versus another. Often, to better understand customers' motivations to fish, they can be segmented based on their lifestyles and consumer habits. Using customers' street addresses, these segments can be mapped, showing where marketing efforts can be concentrated or special in-person events could be held to maximize returns on marketing dollars. By knowing where certain segments of license buyers are located, their preferred media outlets and where they stand in life (rural blue-collar families versus urban young professionals, for example), campaign messaging and local promotions can better communicate with targeted audiences. We used ESRI's Community Coder/Tapestry service to assign all of Florida's license customers to specific lifestyle segments. Definitions for each Tapestry segment is provided in this report's appendix.

Of the 68 distinctive Tapestry segments that every U.S. household can be assigned to, the top ten for each major type of resident license, in terms of numbers of Florida licenses purchased (resident and non-resident) are listed here (Figure E6). These segments contain half of all license purchasers.

Figure E6. Top ten Tapestry segments for fishing and hunting.

Freshwater Anglers		Saltwater Anglers:		Hunters:	
Rank:	Segment:	Rank:	Segment:	Rank:	Segment:
1	Southern Satellites	1	Southern Satellites	1	Southern Satellites
2	Senior Escapes	2	Middleburg	2	Senior Escapes
3	Middleburg	3	Senior Escapes	3	Middleburg
4	American Dreamers	4	American Dreamers	4	Midlife Constants
5	Midlife Constants	5	Midlife Constants	5	Rooted Rural
6	The Elders	6	Silver & Gold	6	American Dreamers
7	Up and Coming Families	7	Soccer Moms	7	Down the Road
8	Rooted Rural	8	Up and Coming	8	The Elders
9	Silver & Gold	9	Rustbelt Traditions	9	Silver & Gold
10	Soccer Moms	10	The Elders	10	Comfortable empty nesters

Interestingly, the lifestyle segments above, comprising half of Florida's resident license customers, are basically the same whether the customer is a hunter or angler. The same segments that contain the most saltwater anglers also contain the most hunters and freshwater anglers. This indicates that messaging and marketing approaches do not need to vary much across these three major types of activities. Some differences are noticed when looking at the lower ranked segments, but these represent a minority of license customers.

As seen in the maps below, and in reviewing the descriptions of each segment provided in the Appendix, the neighborhoods with the greatest likelihood of hunting or fishing tend to be rural in nature. However, more and more licenses are being sold in suburban and urban neighborhoods. Some of these key segments are affluent, such as Silver and Gold and Soccer

Moms, or ethnically diverse such as American Dreamers and Up and Coming Families. By concentrating recruitment promotions and in-person events in communities showing greater interest in fishing and hunting, a greater number of potential new customers can be reached.

Figure E7. Top five Tapestry segments among anglers

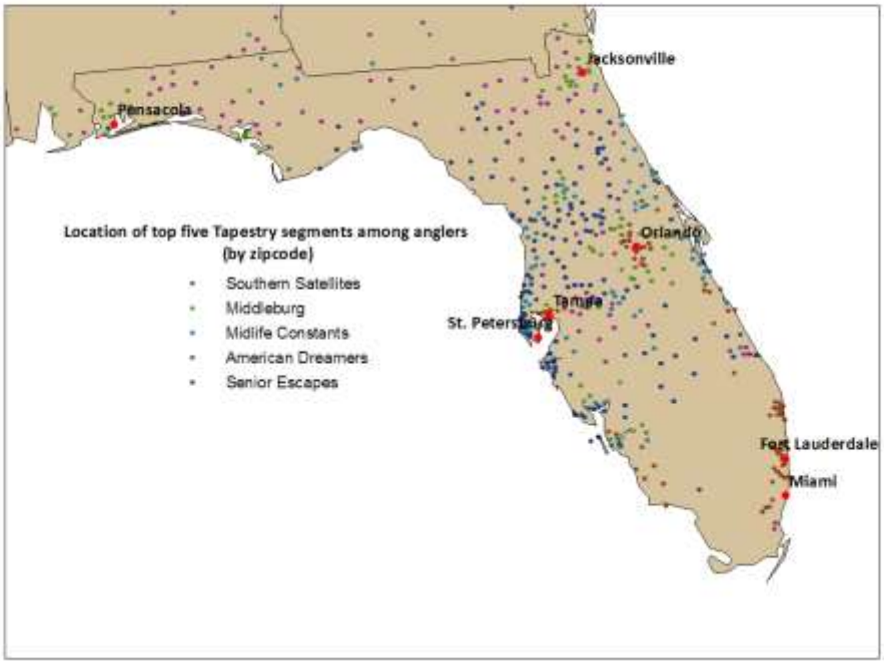
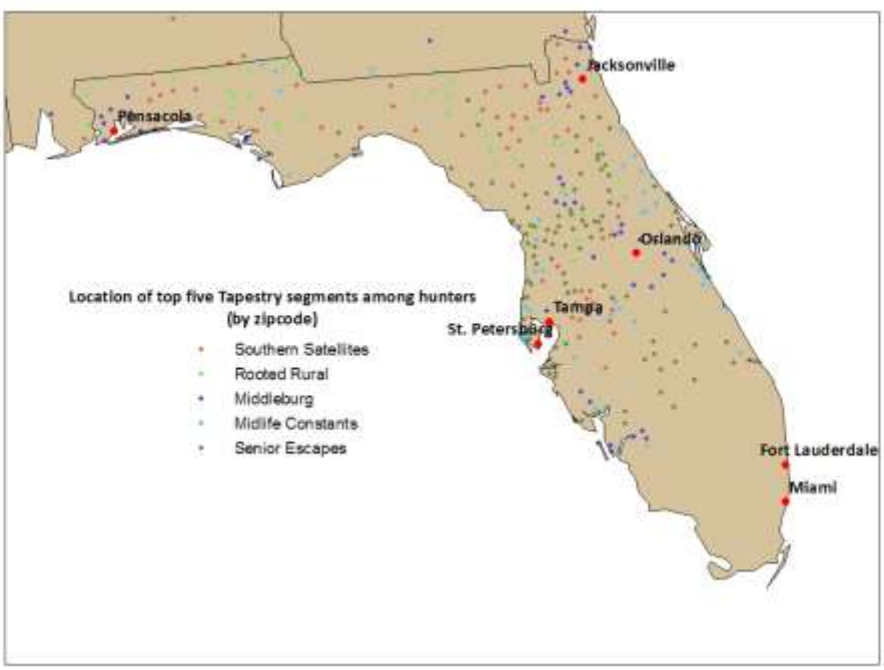


Figure E8. Top five Tapestry segments among hunters.

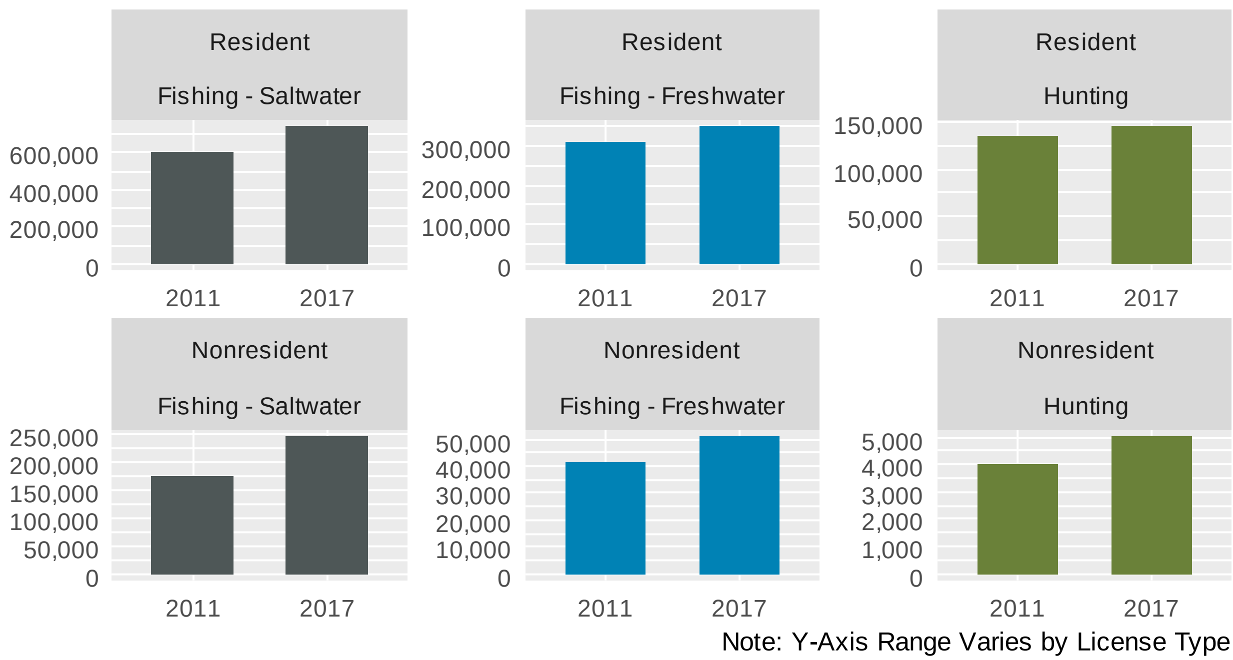


This report presents preferred media sources for major types of licenses (Figures 9, 10, 17, 18, 23, 28). Using these sources to distribute campaign promotions should be more effective than using other media sources. Significant differences were seen between rural and urban resident customers. Rural customers have a very high affinity for outdoor publications and country music and lifestyle programming, while urban customers lean towards business and financial media, talk radio, golf, news and fashion media. Non-residents from urban areas have a very high rate of viewing airline magazines, reflecting their willingness to travel.

R3 – Recruitment, retention, reactivation (R3)

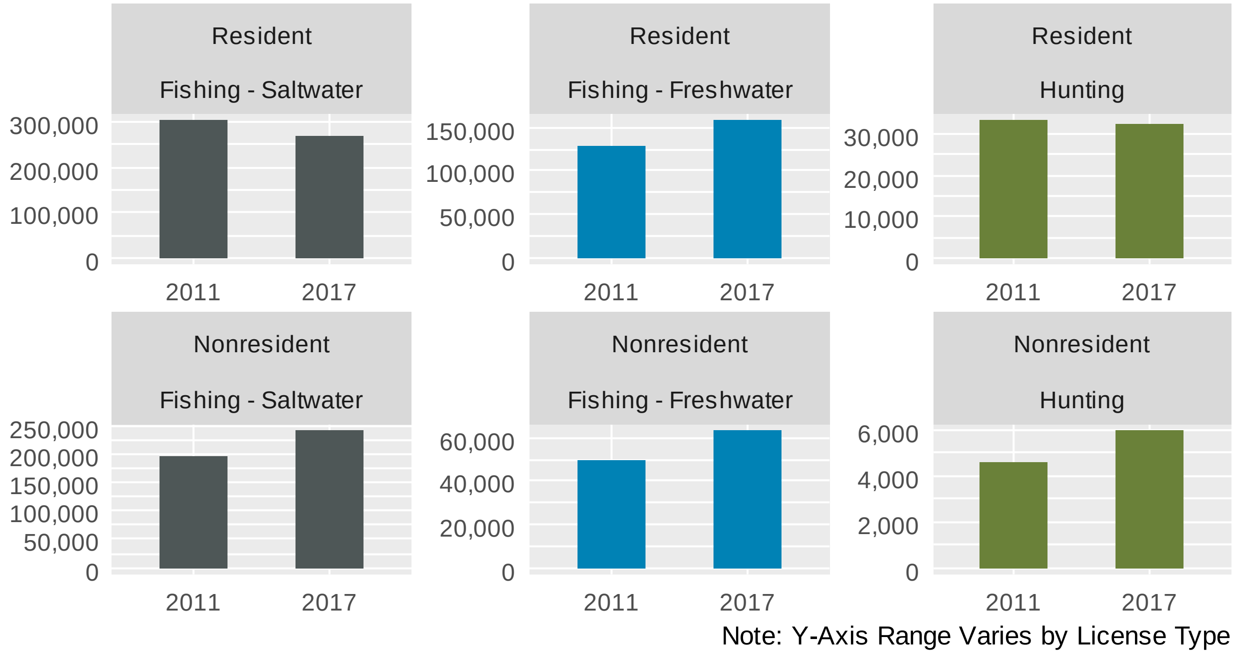
Over the past six years, the combined number of retained and reactivated anglers and hunters has increased, indicating that efforts to encourage license customers to renew have been effective. These increases are particularly strong among non-residents.

Figure E9. Retained & Reactivated License Holders - 2011 vs 2017



The same is not true for newly recruited anglers and hunters among Florida residents. The numbers of new recruits to saltwater fishing and hunting have both dropped, while new recruits among non-residents have increased across the board.

Figure E10. Recruited License Holders – 2011 vs 2017



<u>Recommendations:</u>

- The FWC has implemented multiple R3 efforts in recent years for hunting and fishing, including RBFF-funded direct mail campaigns, NSSF-funded hunting email campaigns and more. It may be time to revisit those efforts, and their evaluated results (where available), to identify if any would be applicable to areas now in need of attention.
- One area in specific need of attention is hunting and fishing among rural residents, particularly hunting. Recognizing that recruitment is more likely to occur naturally in rural areas, and that the overall rural population is growing slowly, recruitment programs would be of less importance in these areas compared to other parts of the state. Retention efforts may be more important.
- Consider implementing renewal reminder campaigns like Georgia DNR's recent RBFF-funded email campaign, which generated a significant boost in renewals and revenues. This effort kept in contact with license buyers, with continual engagement from the time they bought a license to the time the license was up for renewal. The NSSF funded a similar effort in Florida a few years ago, maintaining contact with hunting license buyers and generating a significant boost in revenues.
    - As best as possible, target specific audiences with relevant messages. Avoid one-size-fits-all messaging. For example, send renewal reminders to those who show a history of lapsing in some years. For first-time

license buyers, send them messages throughout the year with helpful insights such as where to fish locally, or how to target certain species such as bluegill or freshwater catfish, etc. Millennial-aged customers from suburban and urban areas should see group or social-oriented messages, and more.

- Certainly, continue the license auto-renewal effort.

Conclusion

If boosting hunting and fishing license sales and participation was simple, comprehensive and effective marketing campaigns would already be in place. There are many emerging trends and possibilities identified in this report that could be part of an effective marketing campaign. The trick will be choosing approaches that are expected to generate the greatest benefits for each dollar spent. We strongly suggest evaluating all marketing efforts to identify what works and where improvements can be made. If resources allow, some level of focus groups and surveys are advisable to discover the reasons behind positive trends to then inform future marketing approaches. Investing some level of funds for research is warranted, but there needs to be a balance between these investments and maintaining profits from improved marketing. Again, there is no magic balance between research, scale of marketing efforts and returns, but by carefully considering all options and evaluating all efforts, long-term success will be more likely. Southwick Associates remains available to answer questions that will likely arise from reviewing this report.

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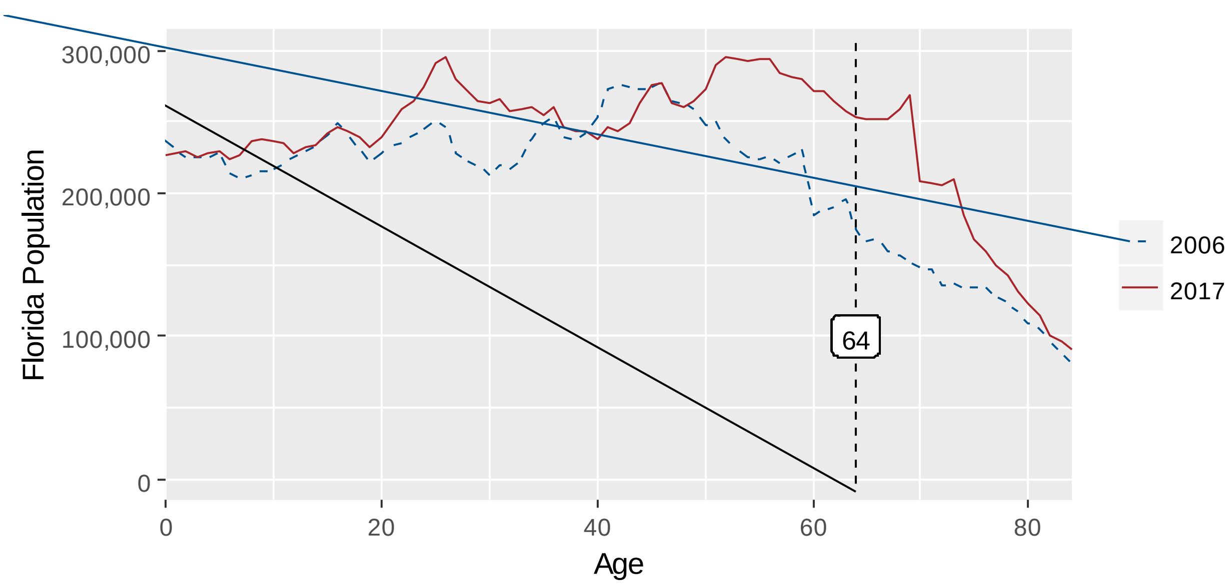
Introduction

The demographics of Florida are changing. The Baby Boomer and X generations are aging into seniors and older adults, and they are being followed by a younger generation that is more ethnically diverse and urbanized, with different preferences and lifestyle habits. These changes present a challenge for traditional activities such as hunting and fishing, which have been historically dominated by whiter and more rural populations. At the same time, these changes present opportunities to engage new groups of people. Understanding how these changes are currently influencing hunters and anglers in Florida is a key step towards developing marketing strategies to effectively address these challenges and opportunities.

Demographic Trends & Upcoming Challenges

The Florida population is becoming older on average. Between 2006 and 2017, the average age of the population increased from 39 to 41. This is driven by aging Baby Boomers, but moderated by steady increases in younger generations (particularly Millennials). This presents a challenge for Florida fishing and hunting, since people above age 64 are exempt from purchasing hunting and fishing licenses. This dynamic can be seen across age ranges in the figure below.

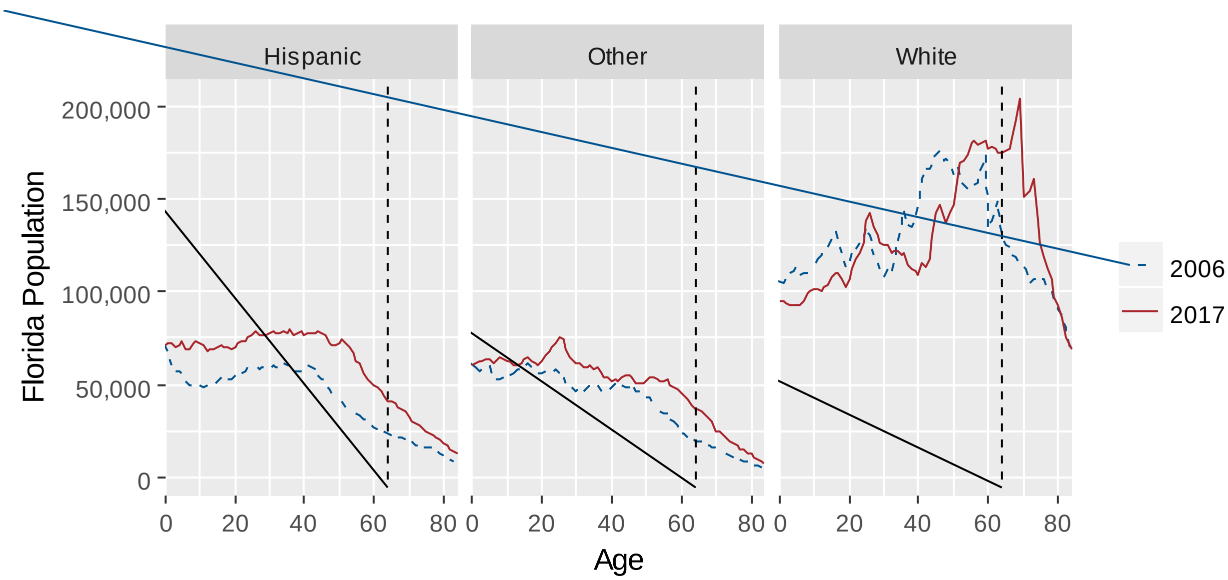
Figure 1. Age-based Demographic Shifts in the Florida Population
Residents aged 64 and over are exempt from purchasing licenses



One challenge related to the aging population is that those with the historically highest participation rates are approaching the 64-year mark. A related concern is that the age demographics within Florida vary by ethnicity. In particular, white residents, historically the group most likely to participate in hunting and fishing, tend to be much older on average than other ethnicities in Florida. This relationship is shown in the figure below that compares age distributions by ethnicity. Of particular interest is the aging of white residents, whose majority is reaching 64-year age mark, where they will be exempt from purchasing licenses.

Although this trend highlights a challenge for hunting and fishing participation, it also presents an opportunity in terms of the growing population of Hispanic residents, who are much younger on average, and are increasing their participation in hunting and fishing sports.

Figure 2. Ethnicity & Age-based Demographic Shifts in Florida Population
Residents aged 64 and over are exempt from purchasing licenses



Data & Methods

Florida License Database

License Data covering hunting and fishing sales from 2006 through fiscal year[1] 2017 were provided to Southwick Associates by FWC in July of 2017. Using these sales data, we were able to create a harmonized database of hunting and fishing participation, spanning ten years. Although ten years of data were available, this analysis focuses on the years between 2011 and 2017, which represents the most consistent data. Some hunters and anglers were also excluded from all results in this report, again in an effort to concentrate on the most consistent data and trends:

- **Age Exclusion:** Those under 16 or over 64 each year (for residents). Those under 16 and over 64 (for residents) are exempt from buying licenses in Florida.
    - For non-residents, only those under 16 were excluded since seniors are still required to purchases licenses.

- **Disabled Exclusion:** Those who bought disabled licenses were also excluded (which increase immensely from 2013 to 2016). They get free licenses and presumably aren't counted in USFWS certified numbers[2].

Exempt Customers

Another set of approximately seventy thousand customers are exempt from tracking of personal information in the license database (including date of birth and address). For this reason, these exempt customers were excluded from those results that are broken out by county or age. The exempt hunters and anglers are almost entirely residents.

Identifying Participants

Throughout this report, we refer to "participants" and "license holders" interchangeably. Our primary goal is to understand participation dynamics, and enumeration of license holders each year provides a useful proxy. Technical details of this identification:

- **Participant Identification by Privilege:** We have tracked three privileges (hunting, saltwater fishing, freshwater fishing) as part of this study. For each privilege, a license holder (identified by customer ID) is counted as a participant if they purchase (or carry over) a

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[1] Fiscal year for FWC runs from July 1 to June 30.
[2] Note that disabled-specific licenses provide both hunting and fishing privileges, and include 3 license types (IDs = 546, 547, and 548).

license that provides the specified privilege. A list of privileges by license type is included in the Appendix (Table 29 and Table 30)[3].

- **Five-year and Lifetime Licenses:** Anyone purchasing a lifetime license is counted as a participant for both the year of purchase and all subsequent years included in this study. A five-year license confers a privilege(s) for the purchase year, and also each of the successive four years.

- **Residency Identification:** Where possible, Florida residency for license holders was identified using license type (Table 30), which identified approximately 94% of license sales in this study. The remaining sales were identified preferentially by (1) residency of other purchases made by the same customer (~5.6%), or (2) customer mailing address (~0.4%).

US Census & Participation Rate Estimation

To compare anglers and hunters to the Florida population, estimates from the U.S. Census and American Community Survey were gathered for analysis (U.S. Census Bureau, 2016). These data were obtained over three demographic dimensions (age, gender, ethnicity) at two geographic levels (the state of Florida, and individual Florida counties). These data enabled calculation of the participation rates included throughout this report, where the participation rate was calculated by dividing the number of license buyers by the corresponding state or regional population.

ESRI Tapestry Segmentation & Business Analyst

To effectively identify anglers and hunters and how to better communicate with them, this report examines license holders and classifies them based on lifestyle characteristics associated with their residential neighborhoods. Significant differences regarding lifestyle can exist between two people of the same age, race, and gender. Lifestyle analysis delves deeper than just the data available from license records, and includes lifestyle details such as tastes, preferences and hobbies. As a result, lifestyle analysis can provide a better indication of what people buy and how they spend their free time than is possible from simple demographic characteristics.

ESRI® of Arlington, Virginia provides the Tapestry™ data service. ESRI describes their Tapestry segmentation system as “providing an accurate, detailed description of America’s neighborhoods.” In other words, Tapestry describes the lifestyle characteristics of groups of people working from the assumption that “birds of a feather flock together”.

Using a combination of statistical techniques to identify lifestyle clusters within the U.S. market alongside data mining techniques, every U.S. household is assigned to one of 68 Tapestry

[3] Note that some license types provide multiple privileges.

segments. The segmentation is based on demographic variables such as age, income, home value, occupation, household type and education from sources such as the Census Bureau, the Survey of the American Consumer and other sources. The segmentation also makes extensive use of consumer information obtained from third-party sources. ESRI further verifies the accuracy of segmentation assignments against other nationwide surveys, providing market-based analysis of product and brand preferences, media usage, and other characteristics (ESRI, 2014).

Using fishing and hunting license sales data and segmentation data from ESRI, this report has identified the types of neighborhoods, or lifestyles, common to anglers and hunters, whether beginners or experienced, high-end or otherwise. By accurately categorizing and understanding the many subsets of the diverse angler and hunter population, future recruitment, retention and re-engagement efforts can provide greater impact per dollar spent.

Results

The detailed analysis results are separated into three sections in this report:

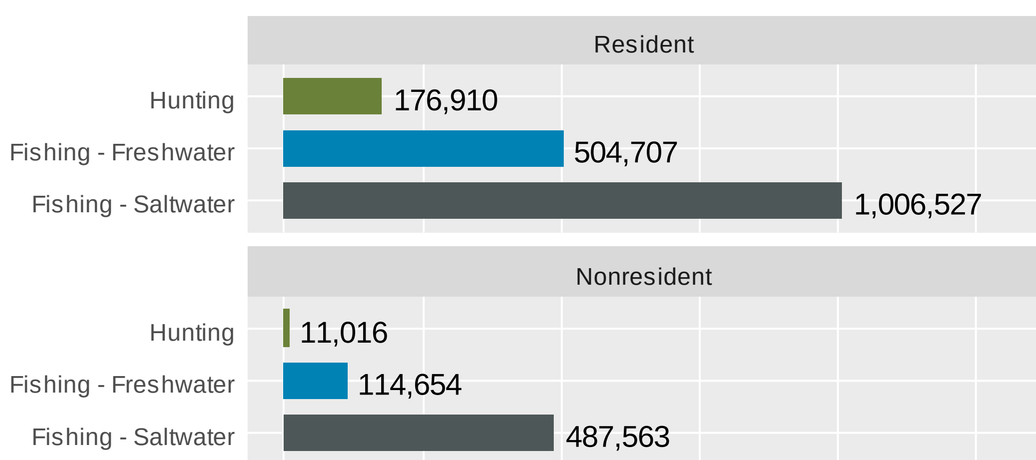
- **Overall Trends in Fishing & Hunting:** Outlines changes in fishing and hunting based on several key metrics for characterizing participation dynamics.
- **Demographic Trends in Fishing & Hunting:** Examines participation at a more detailed level for several key demographic categories. We also include an examination of trends in urban vs rural participation.
- **Key Audiences:** This section pulls together insights about some important challenges and opportunities revealed by the demographic exploration.
- **Neighborhood Geography – ESRI Tapestry Lifestyle Analysis**: A detailed geographic investigation of hunters and anglers, outlining lifestyle and media characteristics based on neighborhood of residence.

Overall Trends in Fishing & Hunting

Participation – Number of License Holders

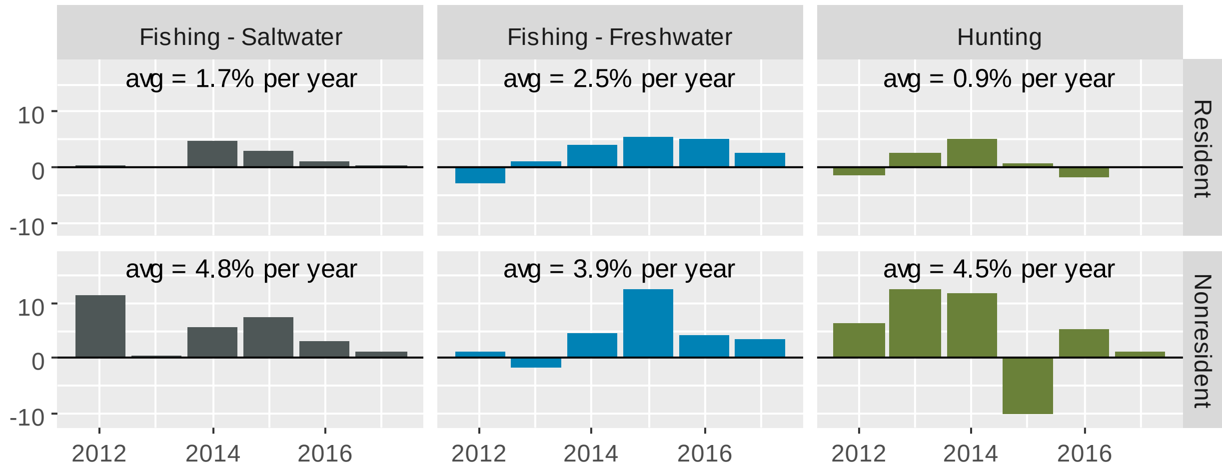
Participation in saltwater fishing included over one million residents and nearly half-a-million non-residents in 2017. Freshwater fishing, and especially hunting, are dominated by residents within Florida.

Figure 3. License Holders in 2017



The total count of Florida license holders has been trending upward, especially for non-residents. The figure below shows annual percent changes in the count of license holders.

Figure 4. License Holders – Percent Change per Year



The following pages include a set of maps which show the geographic distribution of anglers and hunters across the state at the county level.

Geographic Distributions - Residents

The largest numbers of saltwater anglers reside in the more populous counties along the coastline. The case is similar for freshwater anglers and hunters, with slightly higher relative densities in interior counties.

Figure 5. Geographic location of resident SALTWATER anglers by county (2017)

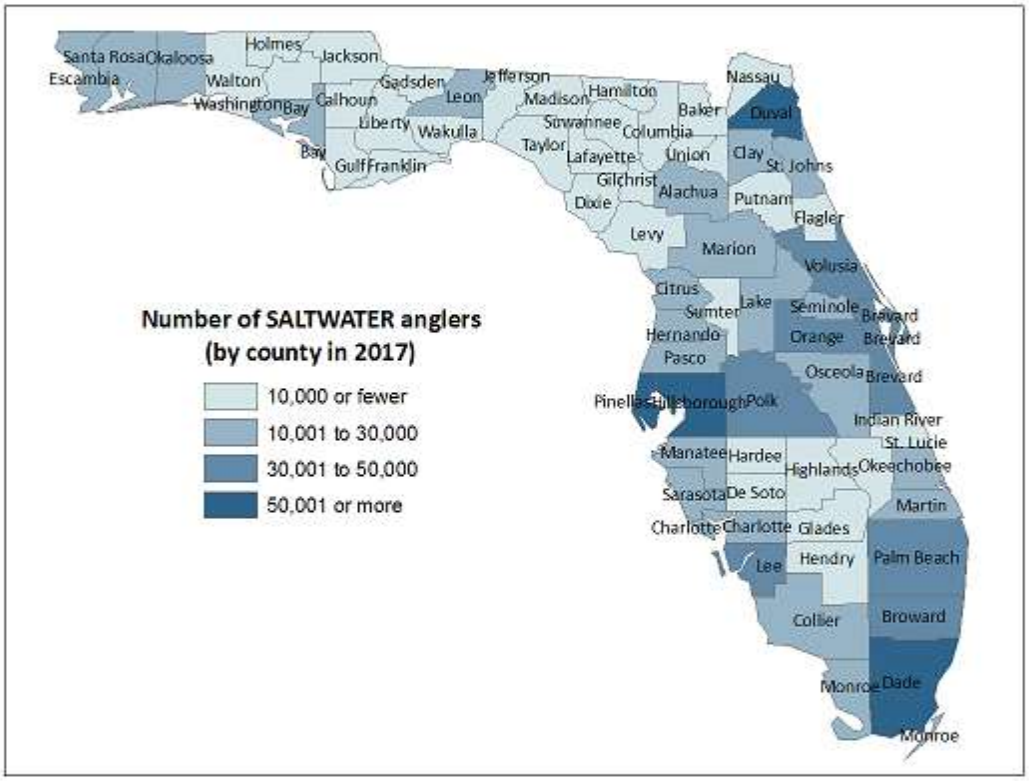


Figure 6. Geographic location of resident FRESHWATER anglers by county (2017)

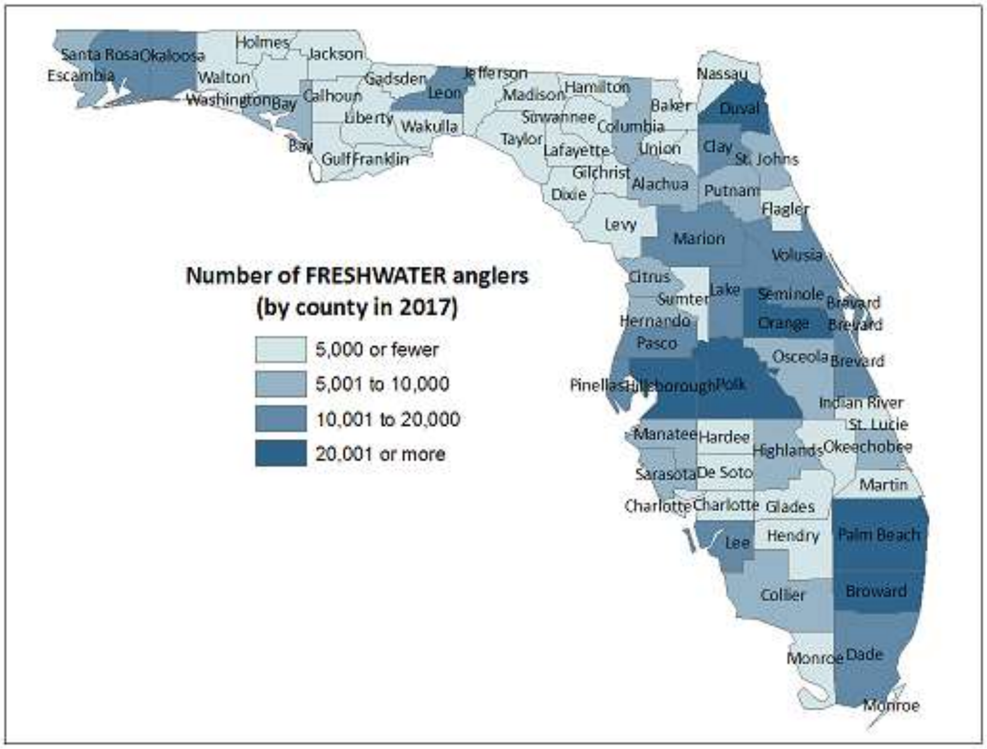
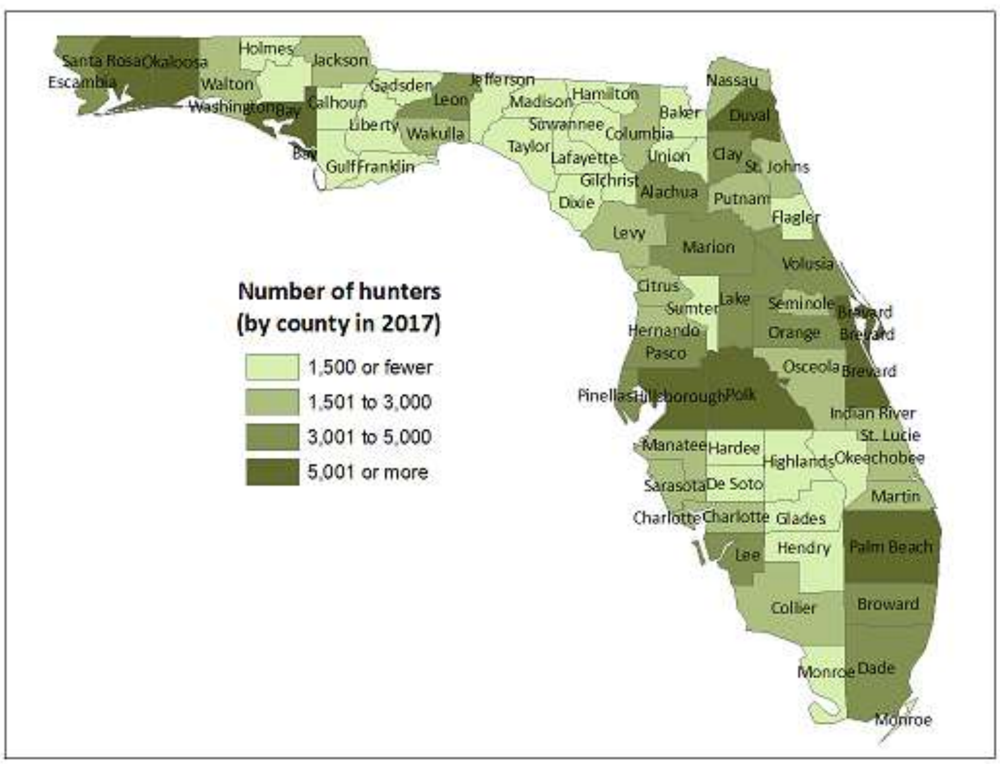


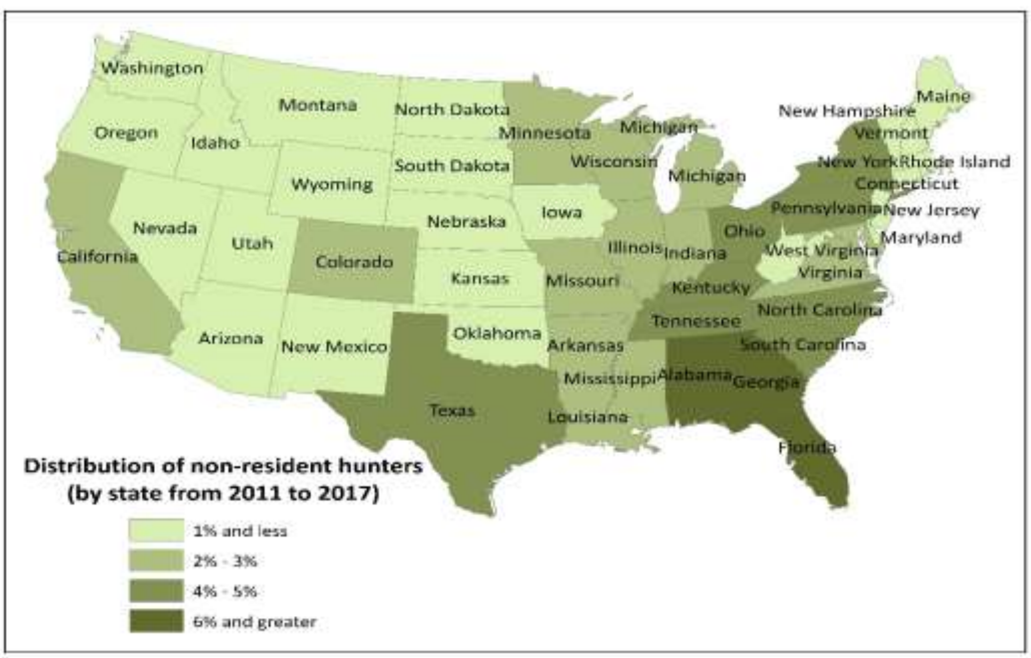
Figure 7. Geographic location of resident hunters by county (2017)



The next two figures show the geographic distribution of non-resident anglers and hunters. The southeast and south-central states account for the majority of non-resident license holders. It is important to note that many individuals holding non-resident licenses have a Florida address; these are most likely seasonal residents.

Figure 8. Geographic Distribution of Non-resident Anglers

Figure 9. Geographic Distribution of Non-resident Hunters

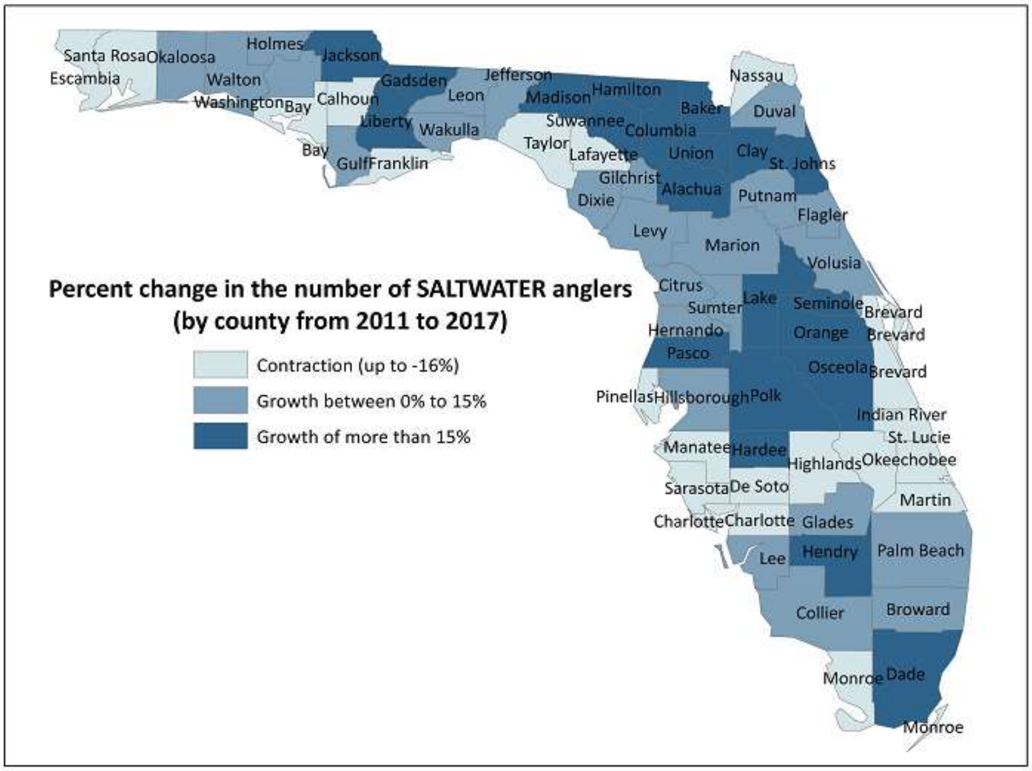


The following pages characterize trends across geographic levels.

Trends at the Geographic Level

Between 2011 and 2017, license sales growth rates were not consistent across the state. Some counties experienced a decline in license sales. Growth or contraction rates by county are shown in Figures 10 through 12. The contraction in saltwater sales across the lower central part of Florida could be related to freshwater discharges from recent hurricanes, but these events do not fully explain decreases in Pinellas and other counties.

Figure 10. Percent change in the <u>number of SALTWATER anglers</u> by county from 2011 to 2017[4]



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[4] Note that exempt customers are excluded from county-level results since their address is unknown.

Figure 11. Percent change in the number of FRESHWATER anglers by county from 2011 and 2017

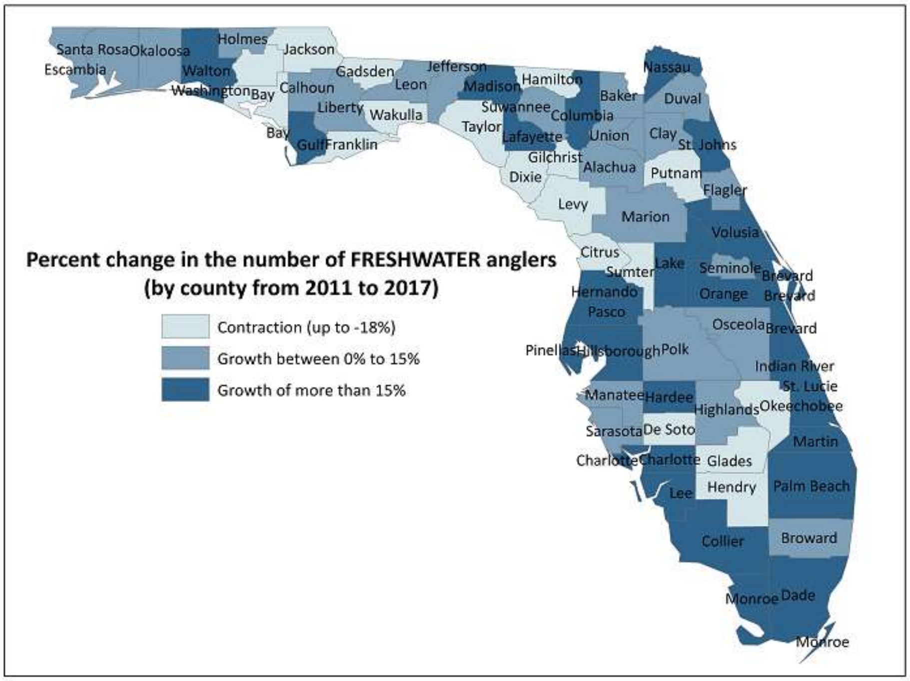
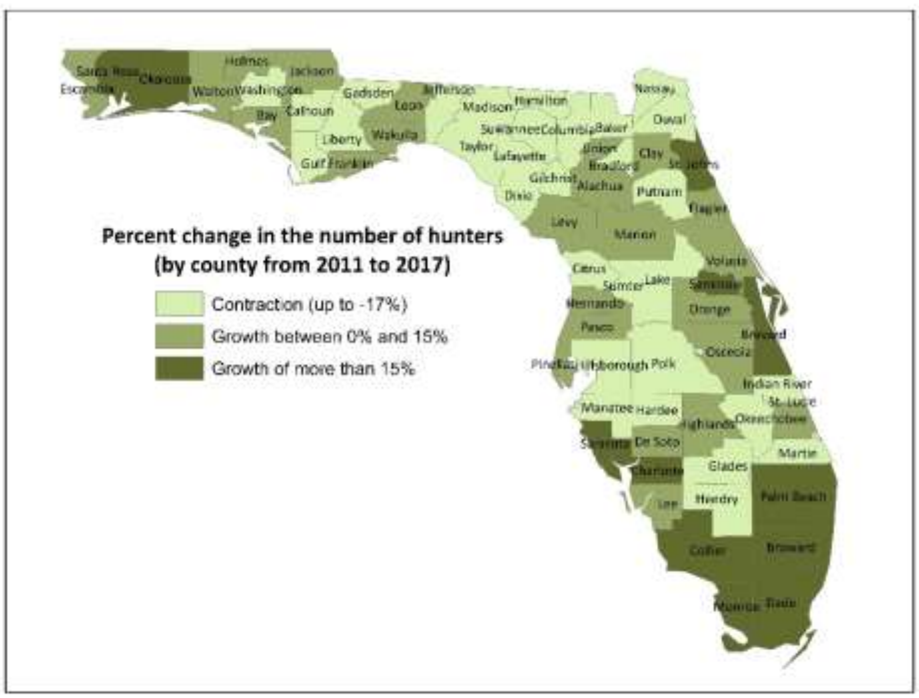


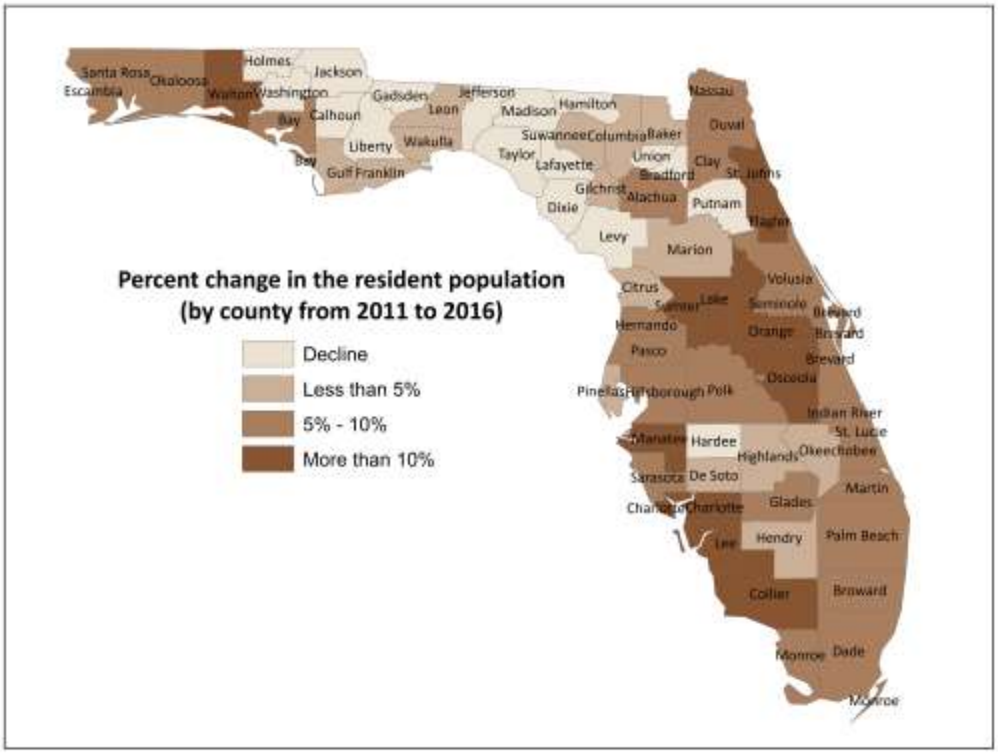
Figure 12. Percent change in the number of hunters by county from 2011 to 2017[5]



[5] Note that exempt customers are excluded from county-level results since their address is unknown.

The number of anglers and hunters in a county is typically correlated with the size of the population in the same location. In other words, it is natural to find more hunters in an area of the state where population is higher. Similarly, growth in the number of anglers can be driven to some degree by population growth (or decline) over the period under examination.

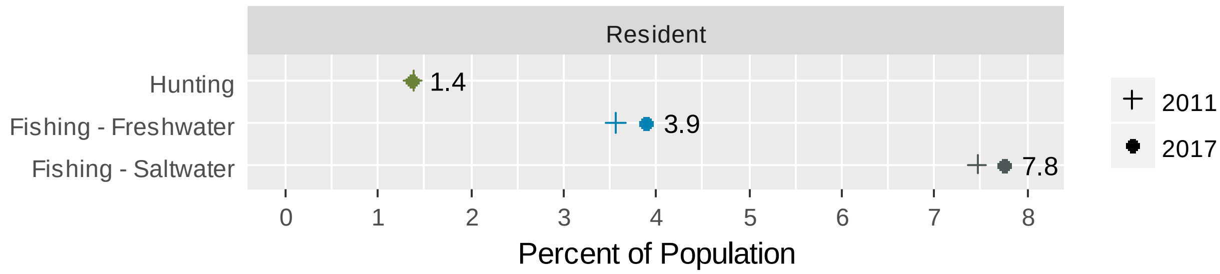
Figure 13. State population change between 2011 and 2017



Resident Participation Rate

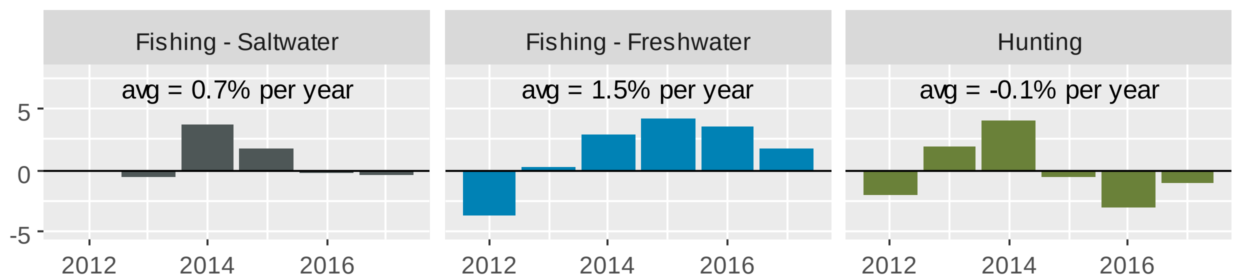
Participation rates describe the percentage of state residents participating in each activity. These rates are useful for assessing whether changes in license purchasers are keeping pace with the overall state population change. A quick comparison of participation rates across activities suggests that rates have increased moderately for fishing while rates for hunting have remained relatively flat

Figure 14. Resident Participation Rates – 2011 vs 2017
Labels refer to 2017 values



A closer look at annual percent changes reveals that fishing is characterized by somewhat regular growth, particular freshwater fishing. Hunting participation appears to have increased from 2013 to 2014, while dropping from 2015 through 2017.

Figure 15. Resident Participation Rates – Percent Change per Year



Figures 16 through 21 show the growth in the participation rates among anglers and hunters between 2011 and 2017. Angler and hunter counts were normalized using U.S. Census total population estimates for both years. The results show growth in the participation rate for saltwater fishing within interior counties. While participation rates for freshwater fishing have grown across the state, they have increased most notably within coastal counties. Participation rate for hunting has declined in most counties.

Figure 16. SALTWATER fishing participation rate by county (2017)

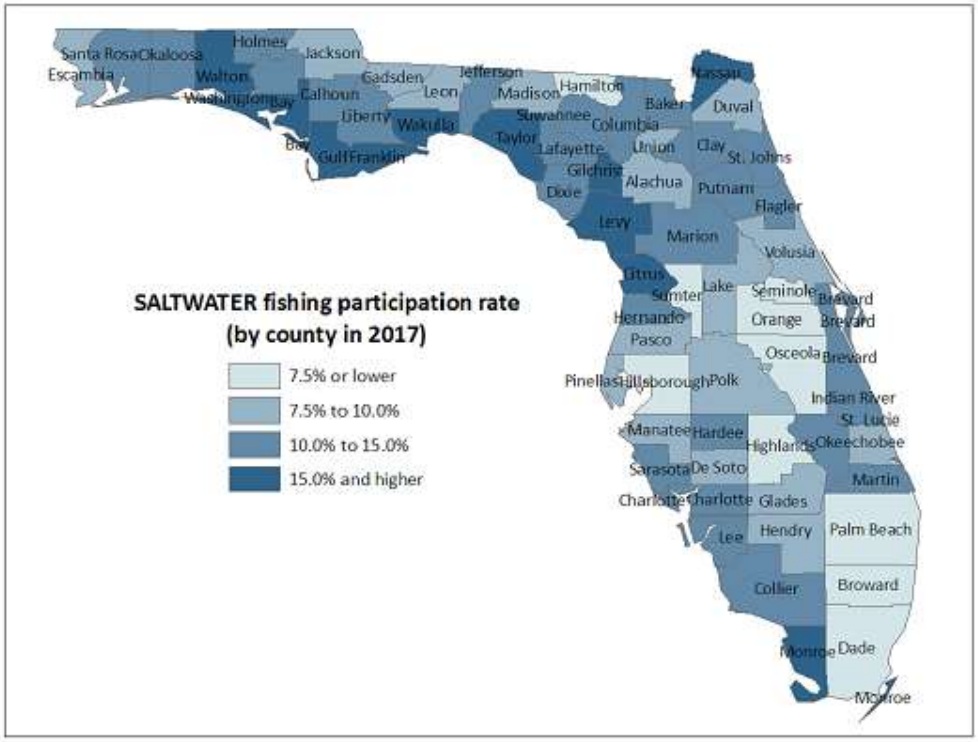


Figure 17. Percent change in <u>SALTWATER fishing participation rate</u> by county 2011 to 2017

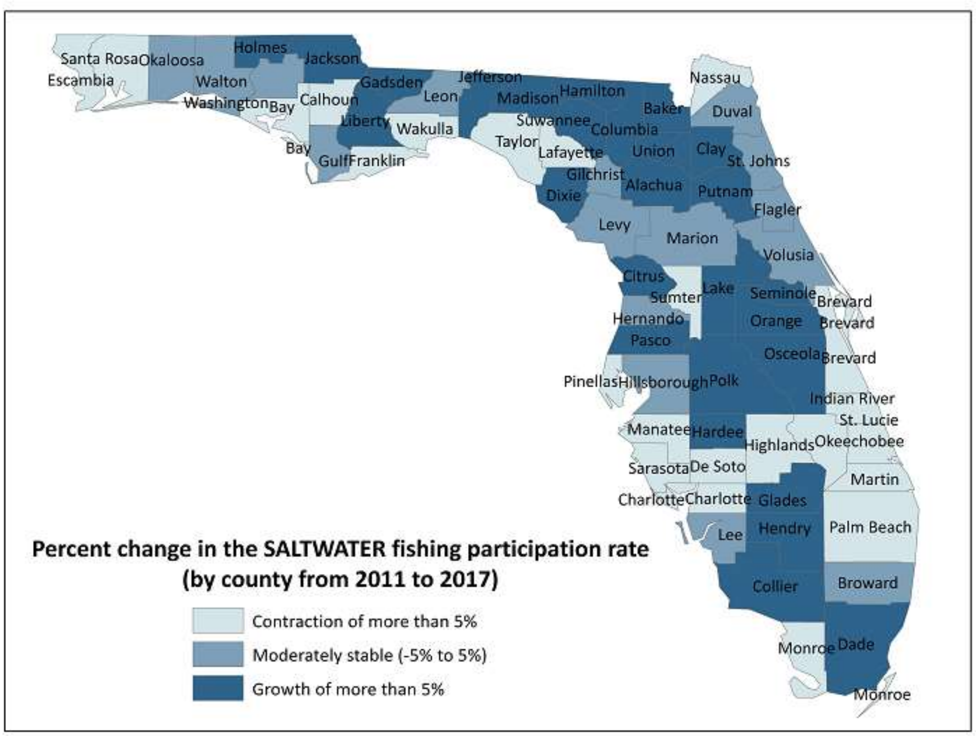


Figure 18. FRESHWATER fishing participation rate by county (2017)

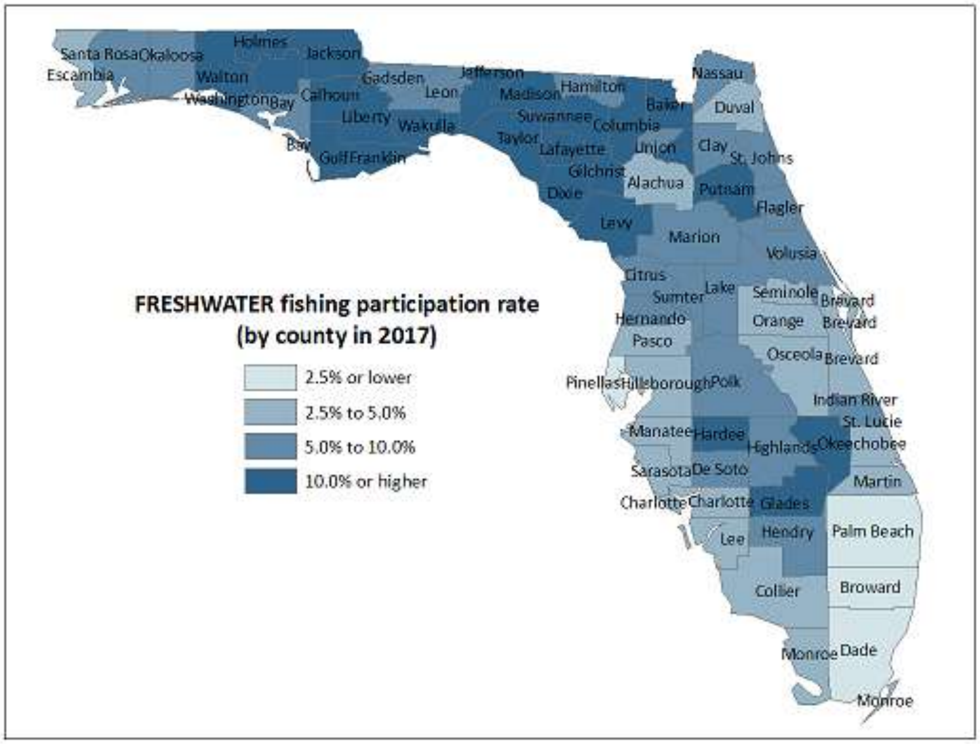


Figure 19. Percent change in <u>FRESHWATER participation rate</u> by county 2011 to 2017

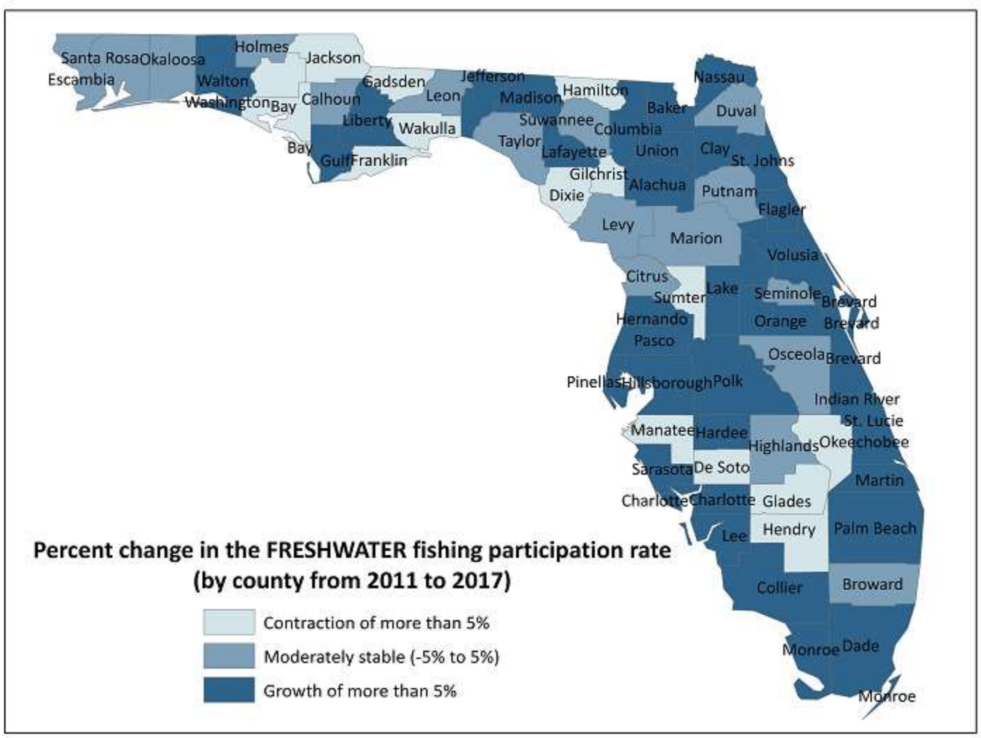


Figure 20. Hunting participation rate by county (2017)

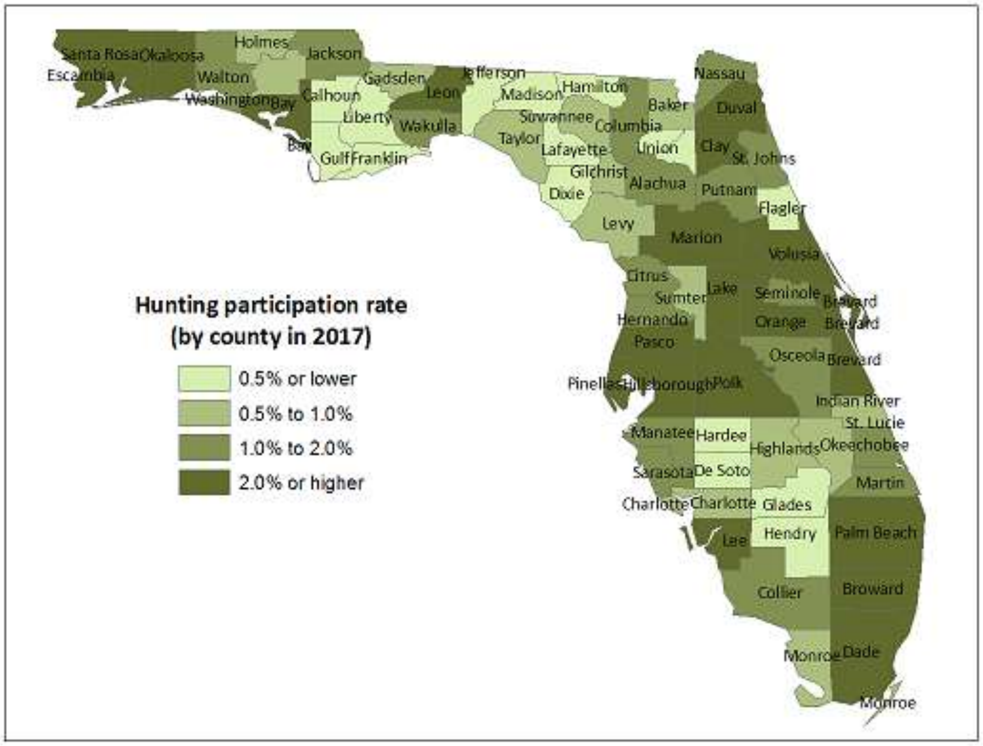
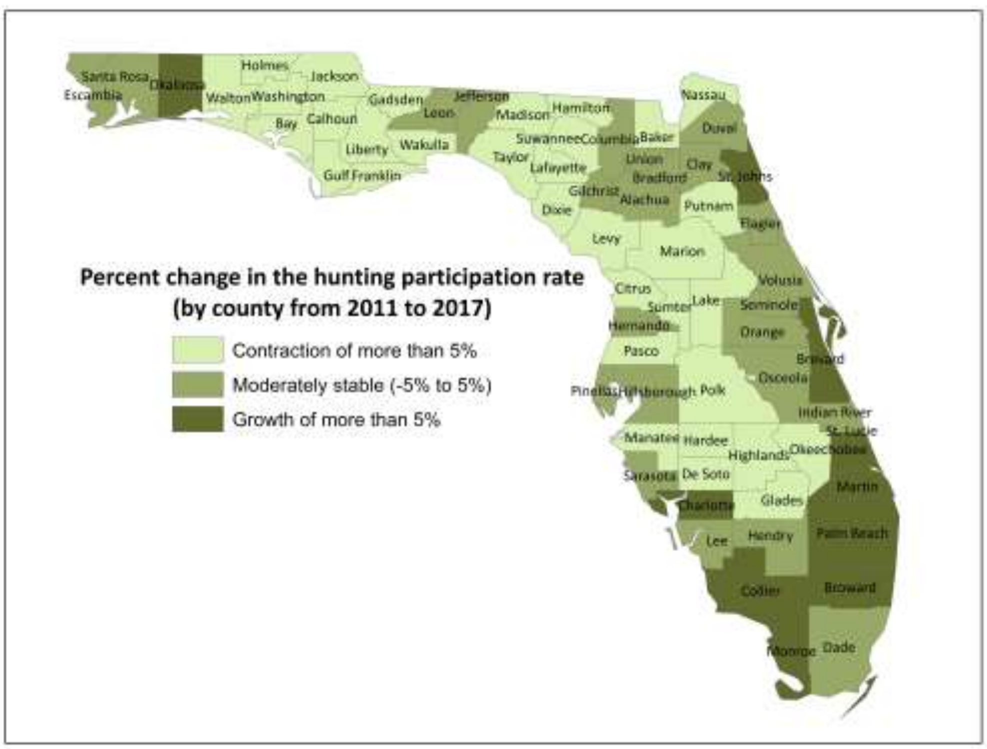


Figure 21. Percent change in the <u>hunting participation rate</u> by county 2011 to 2017



Churn Rate

Churn rate is a useful measure for assessing turnover in participation, representing the percentage of participants who failed to renew their license from the previous year. This can be a helpful metric since a key marketing strategy in hunting and fishing is to ensure that participants are staying with the sport. Previous research has shown that participants who lapse are at much greater risk of leaving the sport entirely, as compared to those that renew their licenses each year.

The following two figures show that churn rates have declined among both resident and non-resident hunters and anglers since 2011. The decrease in resident churn rates may be due, at least in part, to the increasing number of multi-year licenses that have been sold among this group.

Figure 22. Churn rates 2012 vs 2017: percent of customers who do not renew their licenses.
Labels refer to 2017 values

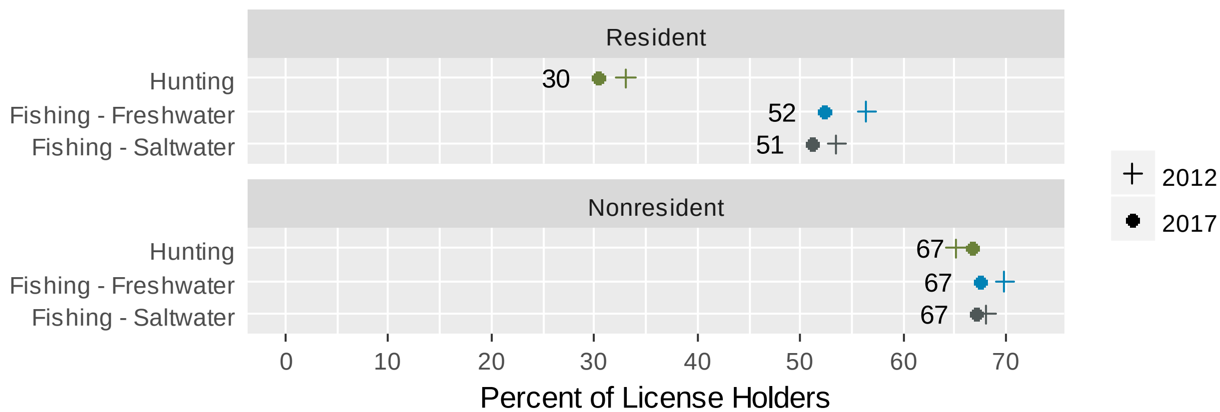
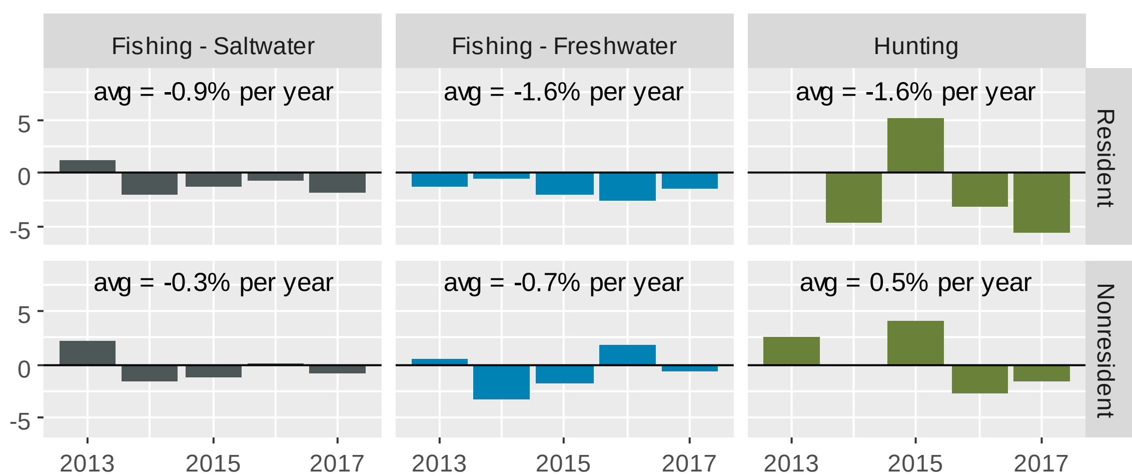


Figure 23. Percent change in churn rates, 2013 to 2017



R3 – Recruitment, Retention, and Reactivation

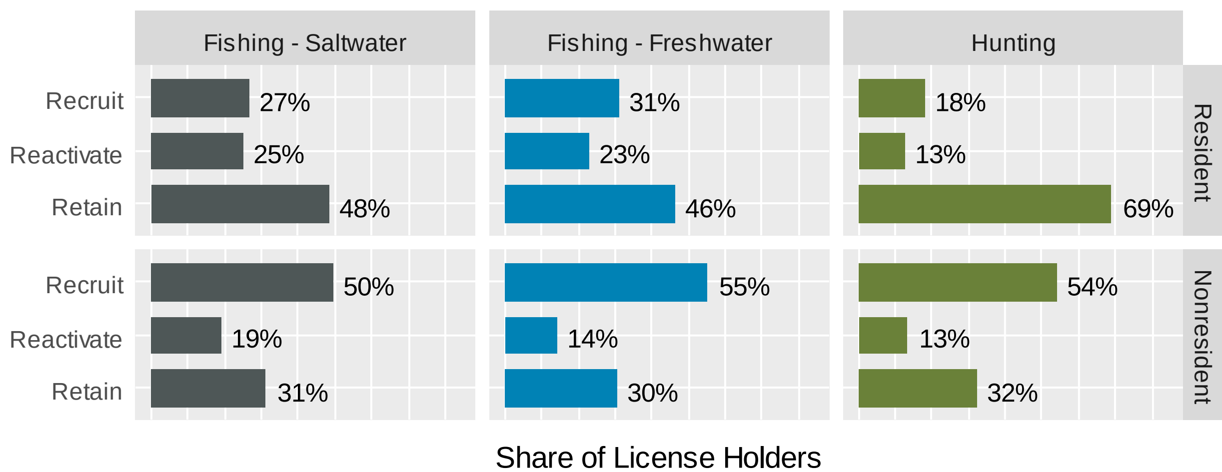
R3 is a topic closely related to churn rate. Whereas churn rate is used to assess the degree of turnover among participants (sportsmen who do not renew their license), R3 categories are used to characterize license holders by their participation in previous years. This provides a useful lens for grouping license holders based on their past behavior.

R3 categories are used to characterize three different types of participants. These categories are mutually exclusive, and together represent the entire number of participants in a given year:

- Retained customers are regular participants (participated the previous year).
- Recruited customers are new participants (haven't participated in the previous 5 years).
- Reactivated customers are irregular participants (have participated in previous 5, but not in the immediately preceding year).

The figure below shows that most resident license holders in 2017, especially resident hunters, are retained from year to year. However, most non-resident license buyers are recruits, who have not participated in these sports in Florida in the previous five years. These recruited non-residents represent an opportunity to be converted to retained (regular) customers, which could help to generate additional license sales for years to come.

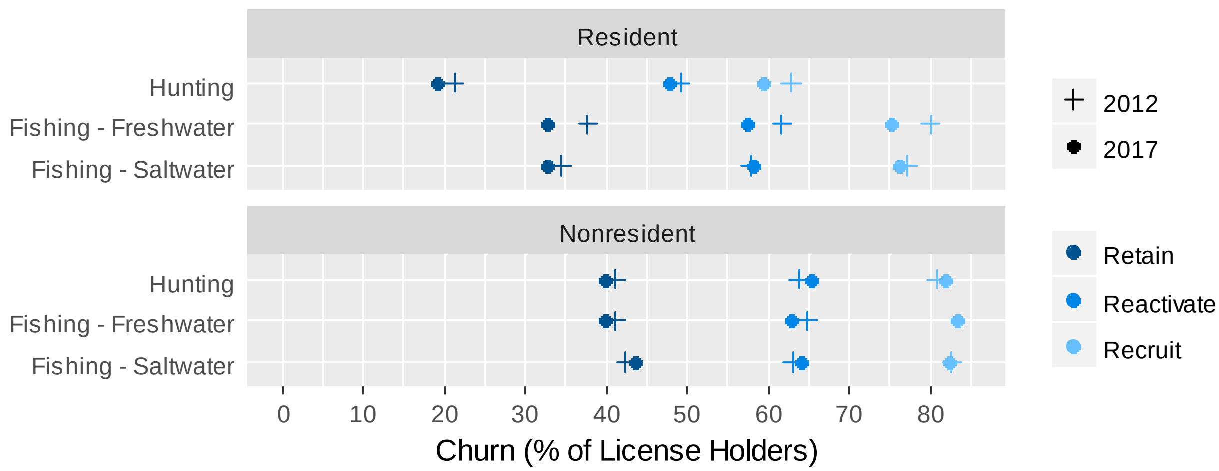
Figure 24. License Holders by R3 Category in 2017



The figure below highlights two important points. The first is that churn rate has a predictable relationship to the different R3 groups, with recruited anglers being the most likely to lapse in the next year, and retained (regular) customers being the least likely to lapse. The second point to note here is that churn rate appears to be decreasing for residents within each R3 category, but most especially among resident hunters and freshwater anglers.

Figure 25. Churn Rates by R3 Category[6]

Labels refer to 2017 values



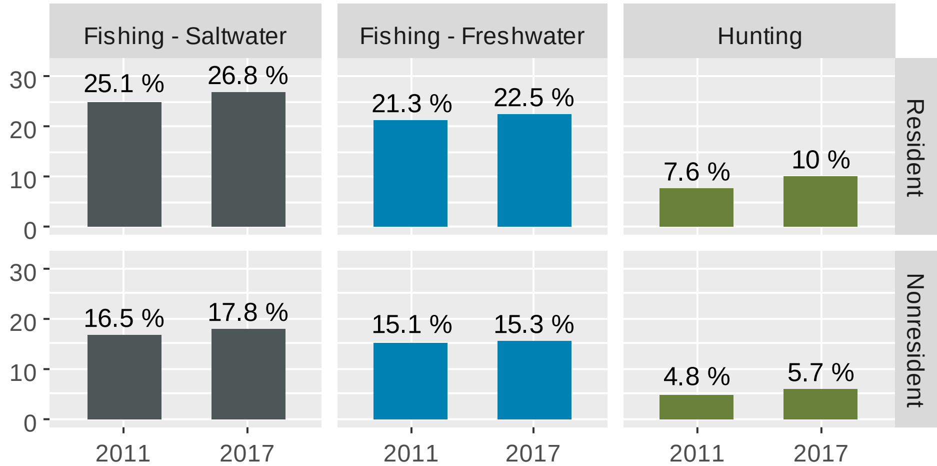
Demographic Trends in Fishing & Hunting

By Gender

Fishing and hunting sports are still very male dominated (especially hunting), but that is slowly changing. Women are making up a larger percentage of anglers and hunters for all three activity types (among both residents and non-residents) This increase is particularly noticeable among hunters (although the number of new female anglers is larger).

[6] Note that R3 categories (including “Retained”) refer to past license buying, whereas churn characterizes license buying in the following year.

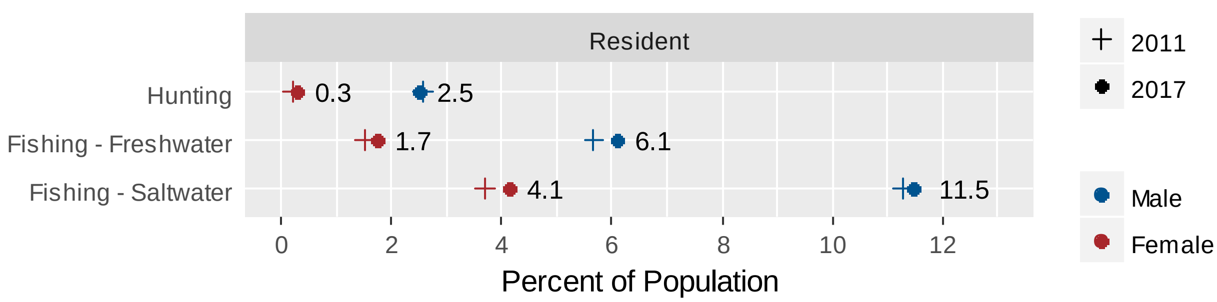
Figure 26. Percentage of Licenses Sold to Women – 2011 vs 2017



Participation rates are increasing consistently among female anglers, although women still make up a minority of the fishing population. Hunting rates have fallen slightly among resident men in the past 7 years, but have increased among resident women.

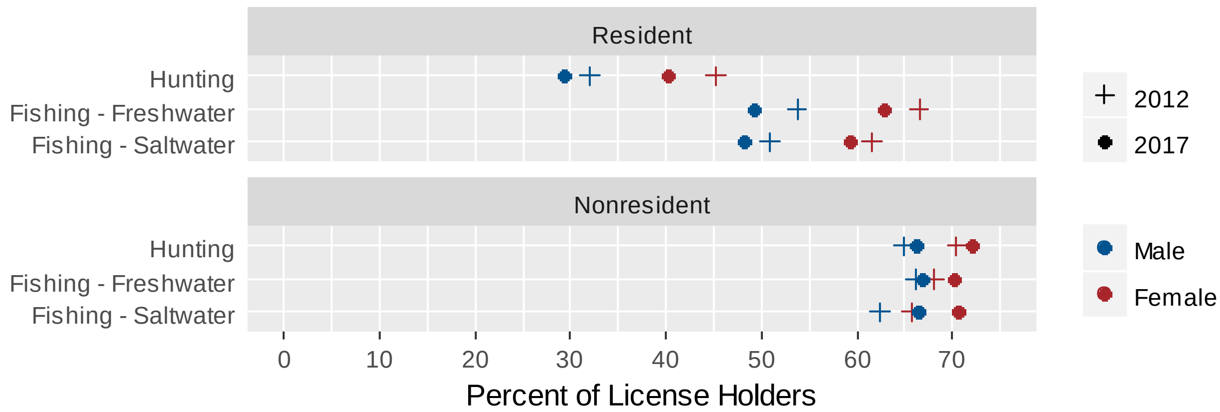
Figure 27. Resident Participation Rates by Gender – 2011 vs 2017

Labels refer to 2017 values



Both male and female residents are showing lower churn rates in 2017 as compared to 2011, indicating there is less turnover among these groups.

Figure 28. Churn by Gender – 2012 vs 2017

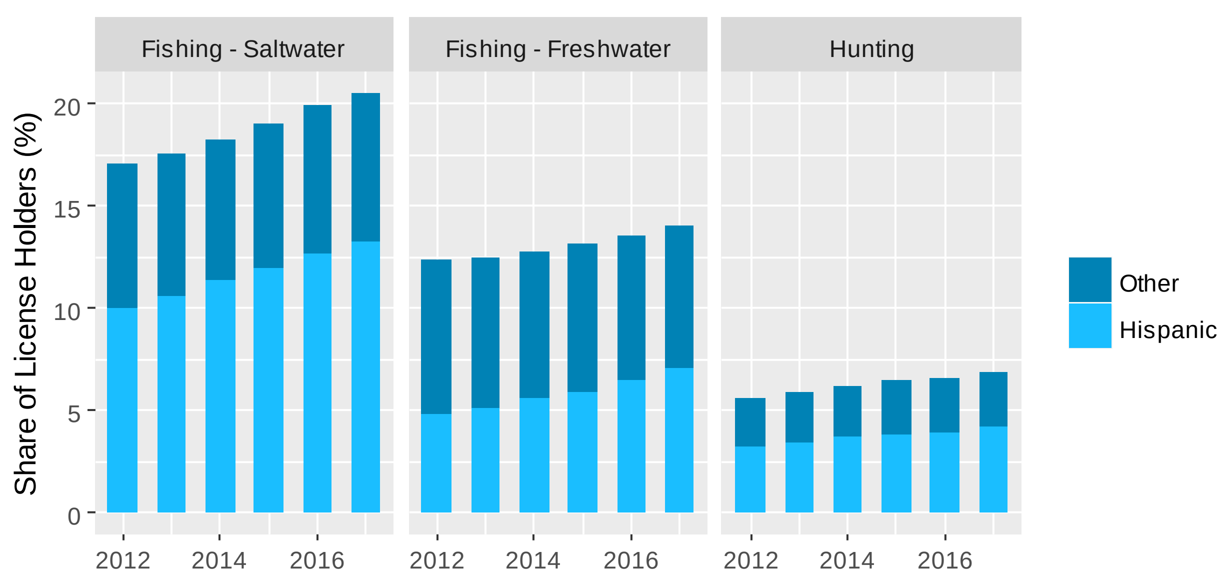


By Ethnicity

The figure below illustrates the overall trend toward increasing ethnic diversity in hunters/anglers.

- Ethnic diversity has been increasing for residents
- Minorities make up a greater share of participants among men compared to women
- Minorities make up a much greater share of anglers as compared to hunters (although some of this may be driven by urban/rural dynamics)

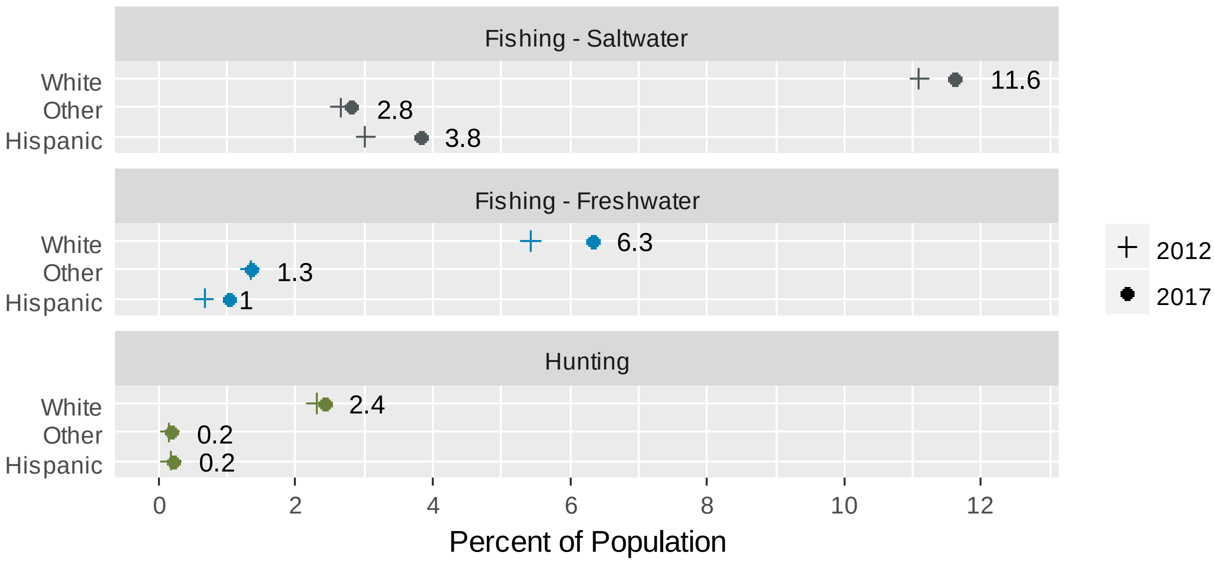
Figure 29. Share of Resident <u>Non-White</u> License Holders - 2012 to 2017



The below figure shows that participation rates for each of these sports are much higher among whites versus other ethnicities. However, Hispanics participate in fishing at a higher rate than other ethnicities, and have exhibited a large increase in saltwater fishing participation over the last five years.

Figure 30. Resident Participation Rates by Ethnicity - 2012 vs 2017

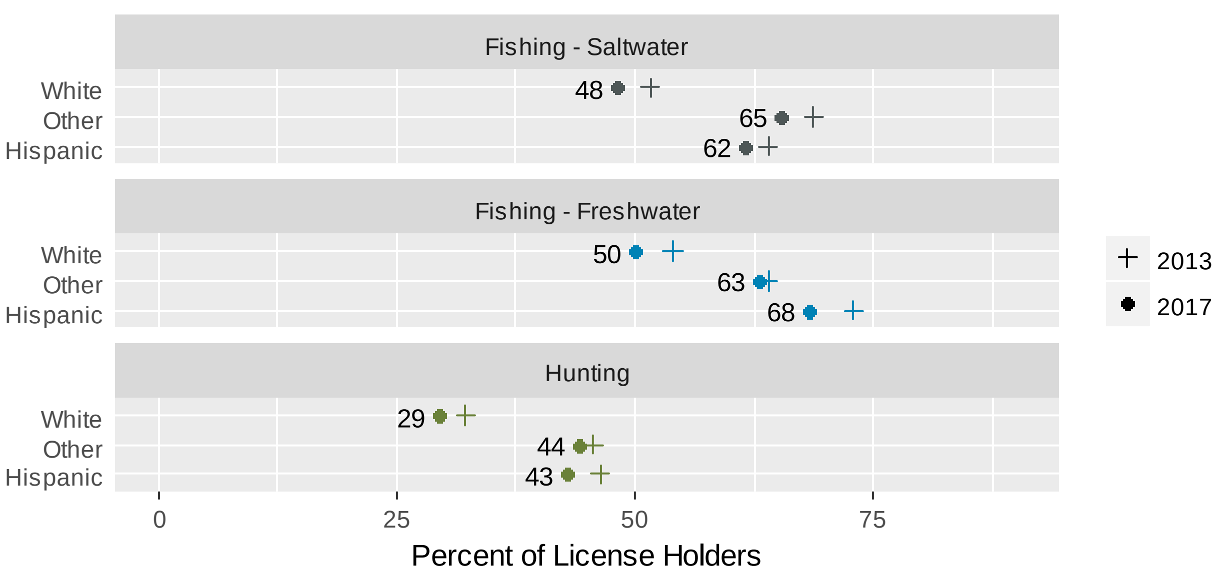
Note: Data labels refer to 2017 values



Churn rates for each sport have decreased among all ethnicities of the resident population over the past 5 years.

Figure 31. Churn Rates by Ethnicity - 2013 vs 2017

Note: Data labels refer to 2017 values

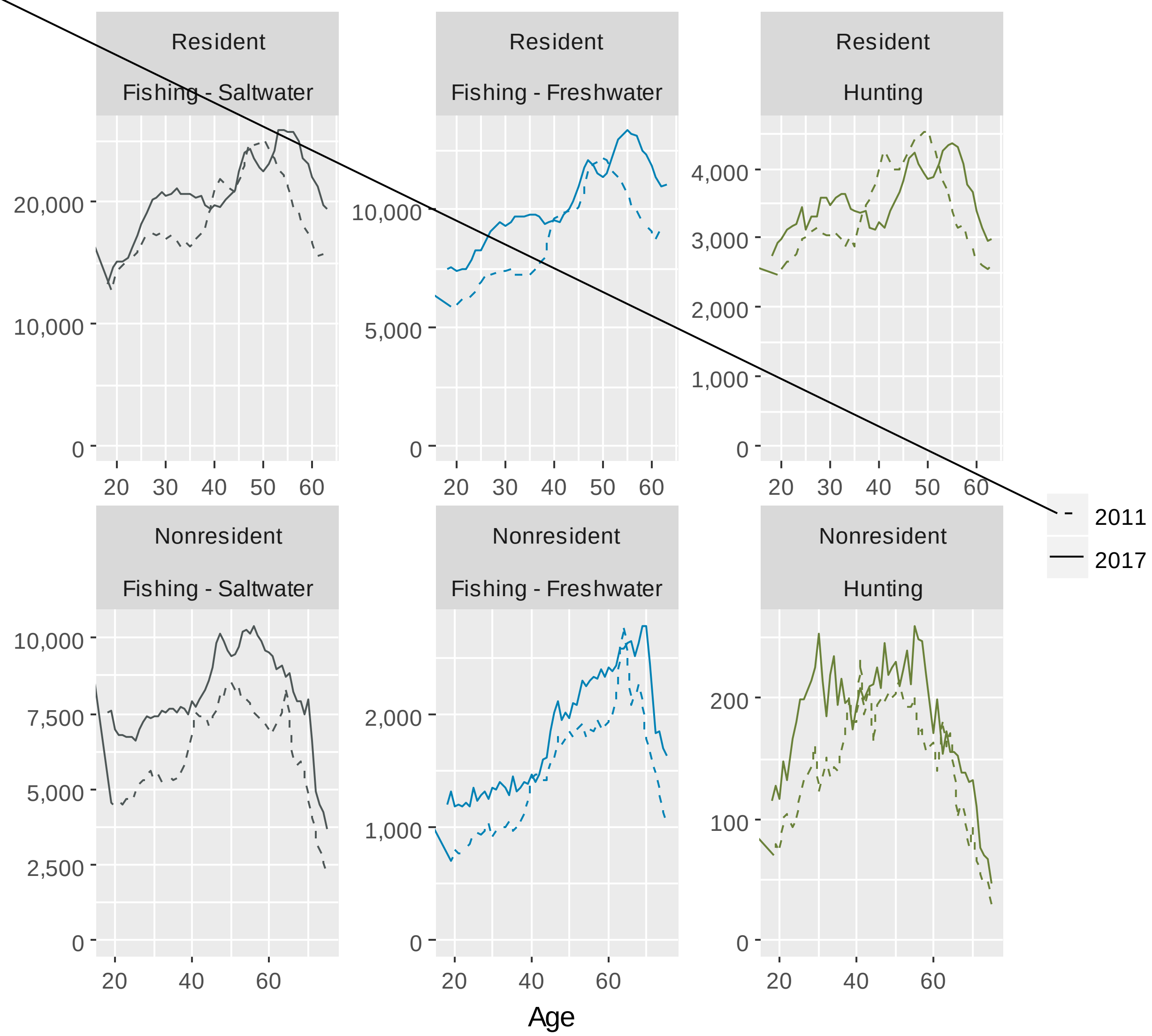


By Age

For residents, we see a clear shift in age demographics, as Millennials begin to make up a larger share of hunters and anglers. This trend will likely continue in the future, along with a general flattening of the age distribution. We also see an increase in the number of older anglers from 2011-17, which is consistent with an aging angling population.

Figure 32. Total License Holders by Age - 2011 vs 2017

Ages are bounded between 18 and 64 (70 for non-residents) to focus on the most relevant age groups (since patterns are very noisy for those aged 16 and 17).



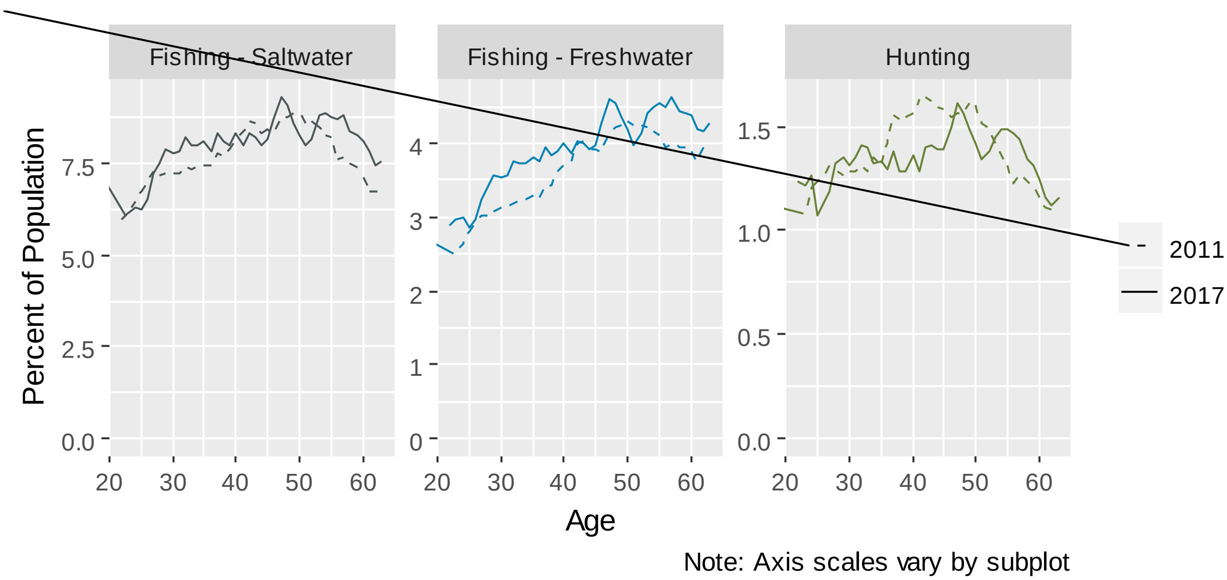
Note: Axis scales vary by subplot

Resident participation rates appear to have been increasing for most age groups. The story is noticeably different for middle-aged hunters, who's participation rate's have declined over the past seven years. It is also worth noting that participation rates are currently highest among those who are upper middle-aged. This indicates that a decline in overall hunter/angler participation may occur over the next couple of decades, if new customers cannot be recruited to take the place of these aging participants.

The figure below shows that the proportion of middle-aged residents participating in hunting has diminished since 2011. This is worrisome, since this age group makes up a large proportion of the resident hunting population.

Figure 33. Resident Participation Rates by Age - 2011 vs 2017

Only those aged 22 and over are included to focus on the most relevant age groups.



Resident Geography – Urbanization Dynamics

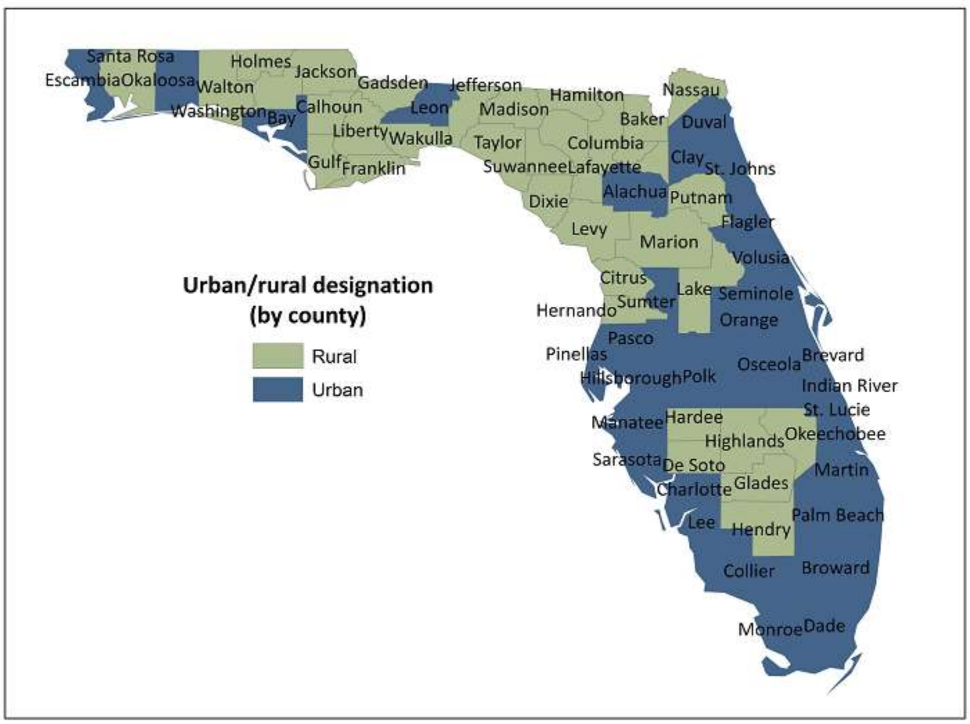
Florida has a varied geography that impacts where people live in the state and which activities they pursue. Urbanization provides a useful lens for understanding geographic dynamics of fishing and hunting; influencing available recreational opportunities, and correlating with other factors that influence lifestyle choices. In this report, we have defined urbanization in two ways:

- **County-level:** This provides a simple means of characterizing urban/rural dynamics. Counties are identified as either urban or rural based on the dominant proportion of population within six urbanization segments based on ESRI's classification (rural, semirural, suburban periphery, urban periphery, metro cities, principle urban centers). We aggregate the six segments into two categories (urban and rural) for this purpose.

- **Neighborhood-level:** A more detailed definition is applied at the neighborhood level. At this scale, it is not unusual to find rural neighborhoods in counties that are generally urban, or urban neighborhoods in counties that are generally rural. Urbanization is divided into six categories using ESRI Tapestry software. This urbanization level is explored in a later section of the report.

For each categorization, license holder location was identified by geocoding current addresses (included in the license data provided by FWC). We used a representative sample of 5% of hunters and anglers who held a license between 2011 and 2017 for all geographic analysis.

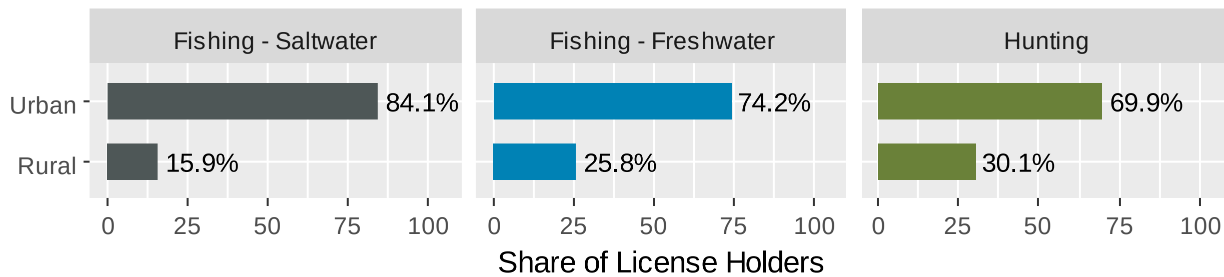
Figure 34. Urban Rural Designation by County



License Holders by Urban/Rural Counties

Most sportsmen are found in urban counties. This is especially true for saltwater anglers, which is unsurprising since much of Florida's major metropolitan area is coastal. Although it is somewhat counterintuitive to suggest that 70% of hunters live in urban areas, it is important to note that counties are large enough to contain a variety of neighborhoods, which can vary widely in urbanization. For example, if we focus on the urban counties, we find that most participants live in neighborhoods that are more specifically characterized as suburban. In terms of absolute numbers, it is also reasonable to expect that the greatest numbers of hunters and anglers are found where the greatest numbers of people live – urban/suburban areas. These neighborhood dynamics are explored in the Key Audiences section beginning on page 30.

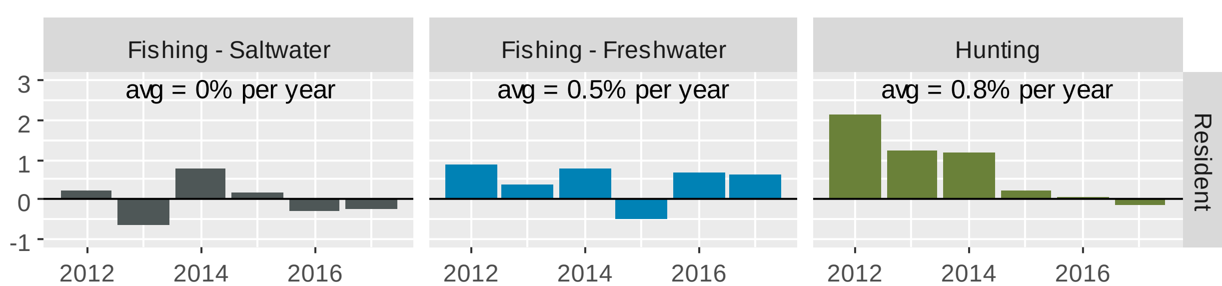
Figure 35. Share of Resident License Holders by County Urbanization - 2011 vs 2017



Trends in Urbanization

If we examine urbanization trends over the past seven years, we see moderate increases in the share of participants in urban counties for hunters and freshwater anglers, whereas the urban proportion of saltwater anglers has stayed relatively constant. While urbanization among freshwater fishing shows a fairly consistent (although small) upward trend, the direction of the trend for urban hunters is less clear, with large increases in certain years, and negligible changes in others.

Figure 36. Trend in Urban County Shares of Resident License Holders - 2011 to 2017



Participation Rate by Urban Category

Examining participation rates based on county urbanization provides additional insights about how urbanization influences fishing and hunting participation. Although most hunters and anglers live in urban counties, participation rates are much higher in rural counties (Figure 37). There is an increasing trend in the number of anglers and hunters, and these increases are generally outpacing population increases for both urban and rural counties. There is some evidence to suggest that this may not be the case for hunters in rural counties.

Figure 37. Resident Participation Rates by Urbanization - 2011 vs 2017

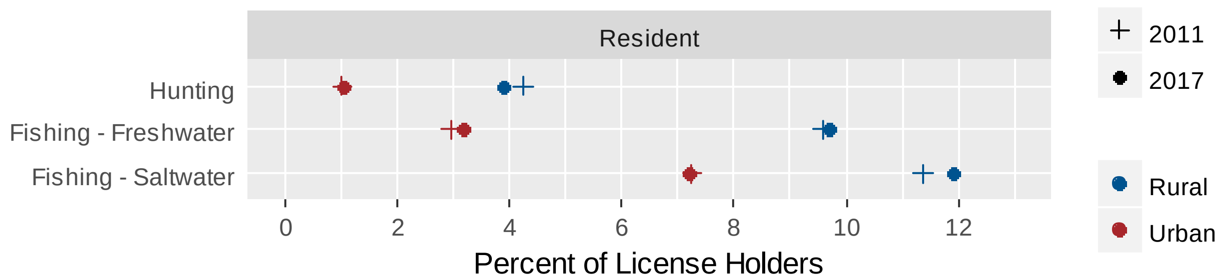


Table 1. Changes in the size of the angler and general population by county: Top twenty[7]
(Sorted by % change in the number of anglers)

County	Urban/Rural	Change in the number of anglers (2011-17)	Change in population (2011-16)
Union	Rural	29%	-1%
Osceola	Urban	24%	21%
Miami-Dade	Urban	23%	5%
Gilchrist	Rural	22%	1%
Collier	Urban	19%	12%
Suwannee	Rural	18%	1%
Baker	Rural	16%	3%
Columbia	Rural	16%	3%
Lake	Rural	15%	12%
Bradford	Rural	14%	-6%
Hernando	Rural	13%	6%
Orange	Urban	13%	12%
Pasco	Urban	13%	10%
Alachua	Urban	13%	6%
Hamilton	Rural	12%	-2%
Hendry	Rural	11%	1%
Clay	Urban	11%	8%
Lee	Urban	10%	15%
Seminole	Urban	10%	7%
Lafayette	Rural	9%	-2%

Note: A complete list by county is included in the appendix

[7] It is important to note that at the county scale, errors in the U.S. Census estimates or count of license holders (based on a 5% sample) could lead to uncertainty in the magnitude of year-to-year changes. Focusing on only those counties that exhibit large changes percent changes minimizes this risk.

Table 2. Changes in the size of the hunter and general population by county: Top twenty
(Sorted by % change in the number of hunters)

County	Urban/Rural	Change in the number of hunters (2011-17)	Change in population (2011-16)
Monroe	Urban	32%	7%
Broward	Urban	29%	7%
Brevard	Urban	22%	6%
Palm Beach	Urban	21%	8%
Okaloosa	Urban	20%	10%
Miami-Dade	Urban	18%	5%
Seminole	Urban	18%	7%
Sarasota	Urban	18%	8%
Collier	Urban	17%	12%
St. Johns	Urban	17%	20%
Charlotte	Urban	17%	12%
Santa Rosa	Urban	16%	10%
Osceola	Urban	13%	21%
Leon	Urban	13%	3%
Jackson	Rural	13%	-2%
Orange	Urban	12%	12%
DeSoto	Rural	12%	3%
Pinellas	Urban	10%	5%
Escambia	Urban	10%	5%
Franklin	Rural	9%	4%

Note: A complete list by county is included in the appendix.

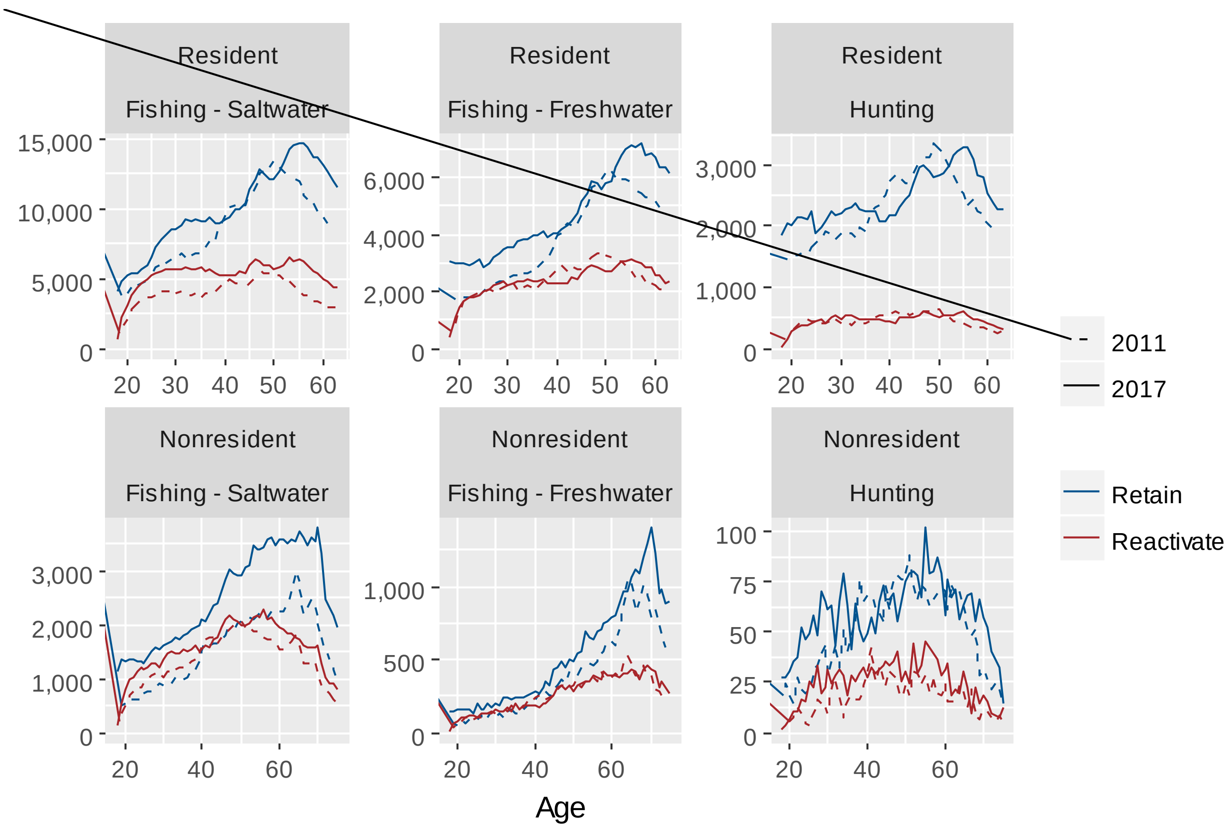
Key Audiences

In the following pages, we highlight groups that are of particular interest with regard to marketing strategies. These audiences are characterized by challenges and opportunities posed by Florida's changing demographic landscape.

Florida Anglers & Hunters

The FWC has implemented programs in recent years that appear to be paying dividends. These include, but are not limited to, increasing sales of multi-year licenses and implementation of auto-renew, both of which tend to decrease turnover among existing participants. If we look at those with a history of license buying (retained and reactivated buyers), we see general increases across all age groups for anglers, particularly among non-resident anglers.

Figure 38. License Holders (Retained & Reactivated) by Age - 2011 vs 2017



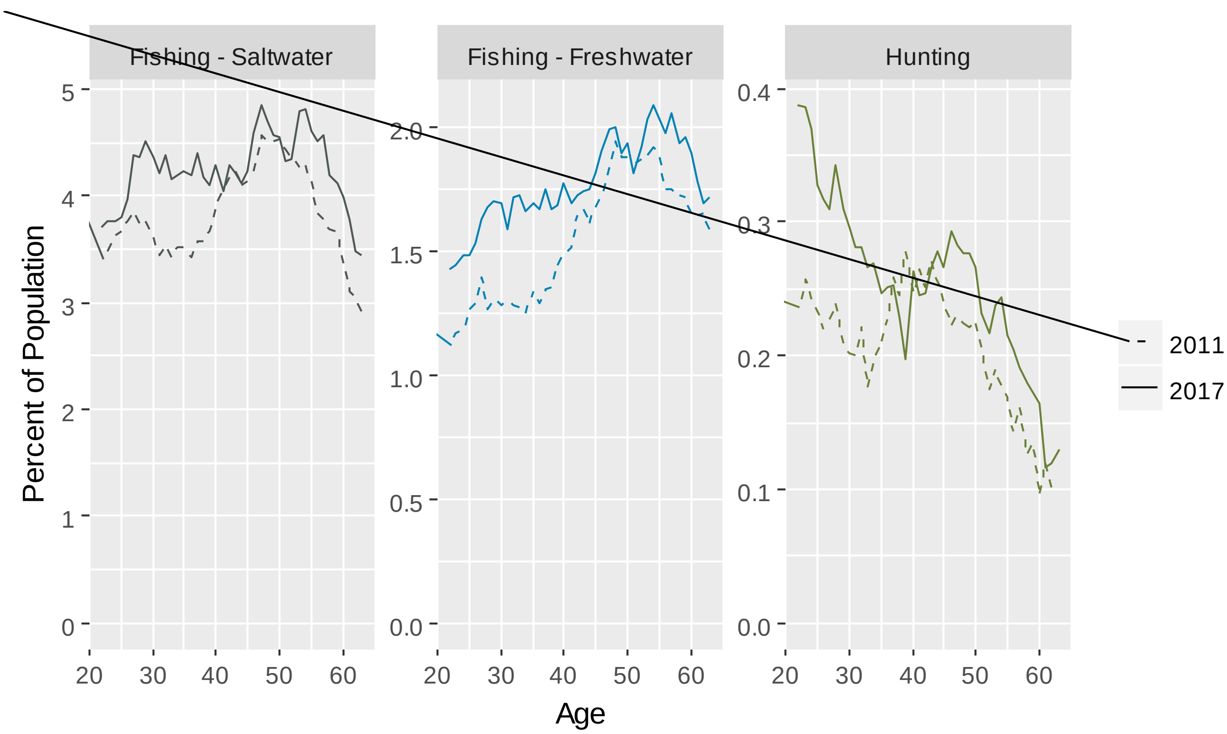
Note: Axis scales vary by subplot

Young Women

Women represent an opportunity to expand fishing and hunting in Florida. Although women represent a minority group of participants (especially in hunting), their total numbers and participation rates have been expanding in recent years. This trend is true for women as a group, but particularly for younger women (and perhaps even for minors that we cannot observe in this analysis). Though participation rates for women remain quite low, they are changing substantially. In 2011, participation rates were relatively even at around 0.2% for women aged 20 to 50. In 2017, these rates have spiked up sharply for younger women to a high of nearly 0.4% among the younger adults.

Although fishing participation has not doubled for women over this timeframe, the total gains in terms of female anglers are much greater than for female hunters, since fishing participation rates among women are much higher than their hunting participation rates. For example, freshwater fishing rates for women aged 20 have increased from about 1.05% to 1.45%. This equates to an increase in participants approximately equal to the size of the entire number of 20 year-old female hunters in 2017.

Figure 39. Resident Participation Rates for Women by Age - 2011 vs 2017

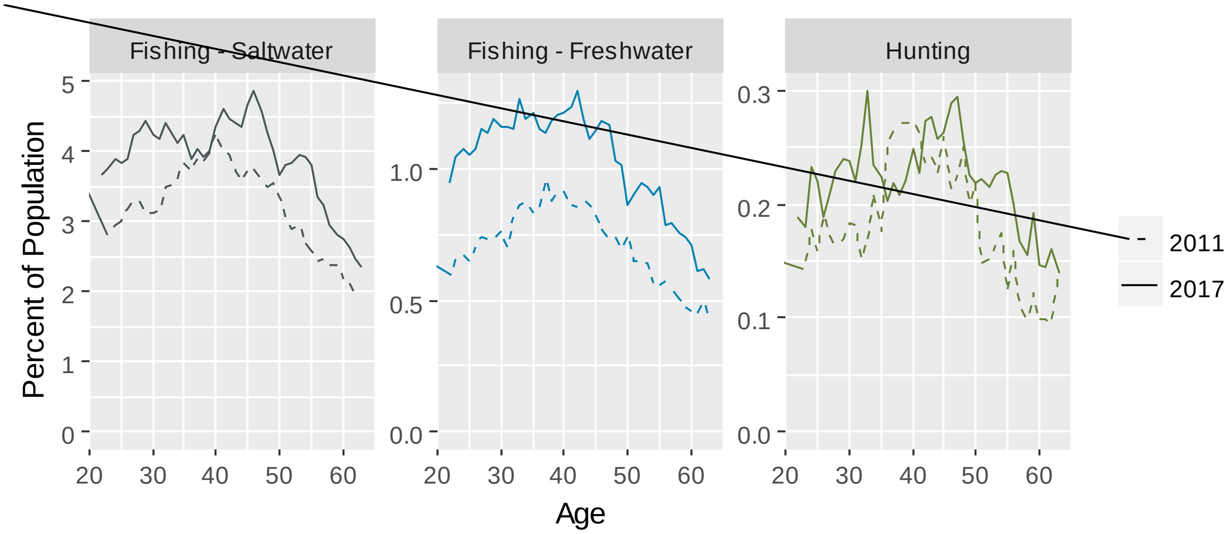


Note: Y-axis range varies by subplot (Saltwater > Freshwater > Hunting)

Hispanic Anglers

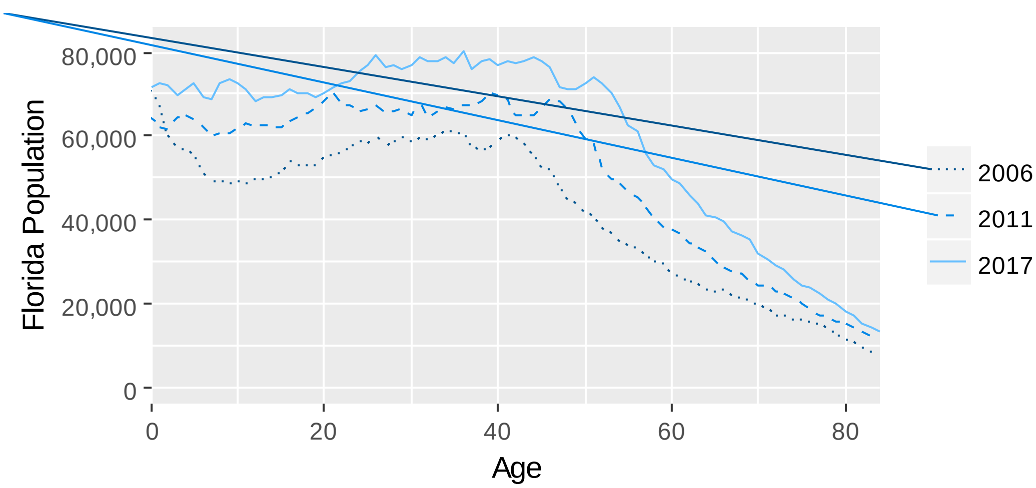
Hispanics represent an emerging group of license buyers, particularly for saltwater fishing, and to some extent for hunting. The percentage of Hispanics buying licenses is growing, and with Florida's Hispanic population growing overall, this further accelerates the number of license purchases among this group.

Figure 40. Resident Participation Rates for Hispanics by Age - 2011 vs 2017



Note: Y-axis range varies by subplot (Saltwater > Freshwater > Hunting)

Figure 41. Florida's Hispanic Population - 2011 to 2017

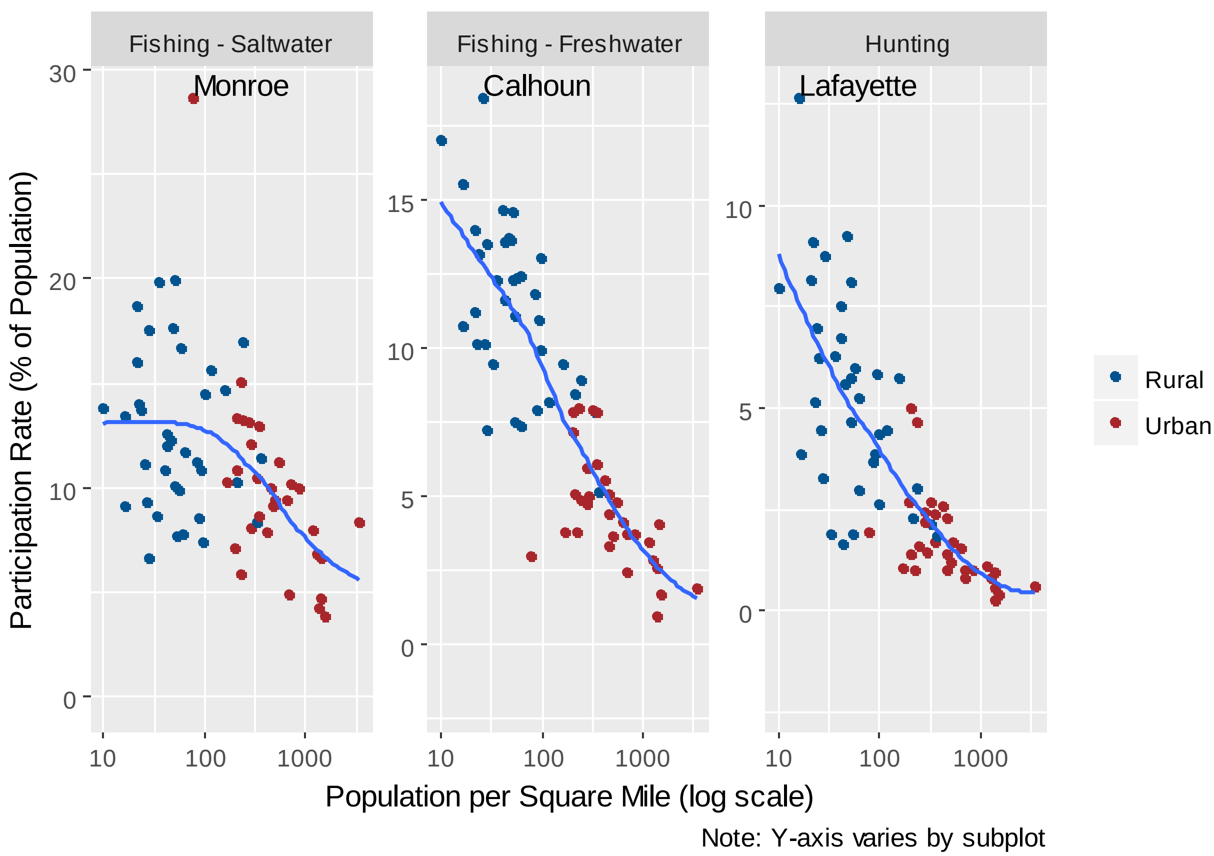


Rural Hunters & Anglers

Rural counties tend to exhibit a substantially higher rate of participation in hunting and fishing compared to their urban counterparts. This relationship becomes especially clear if we plot population density by participation rate for Florida's 67 counties. Both hunting and freshwater fishing display a strong correlation between participation rate and population density.

Regarding marketing strategies, it is important to focus on retention and reactivation efforts within these rural areas. This is particularly true for hunting, which may be experiencing a decline in popularity. Recognizing that recruitment is more likely to occur naturally in rural areas, and that the overall rural population is growing slowly, recruitment programs are of less importance in rural areas compared to other parts of the state.

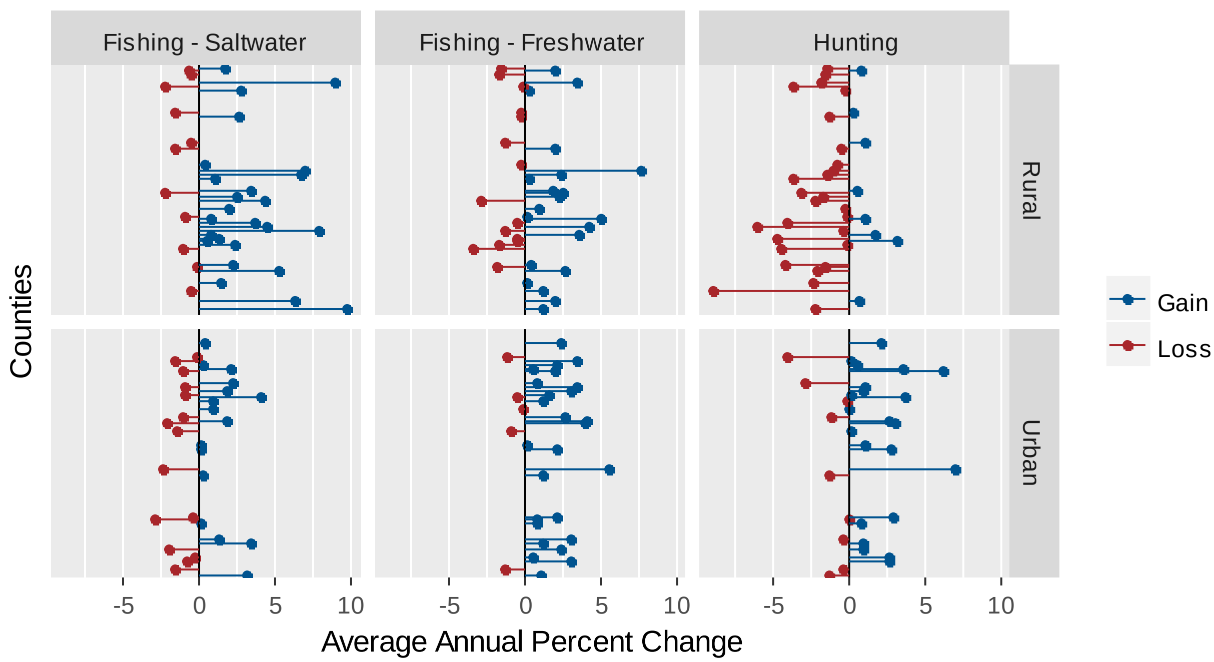
Figure 42. Participation Rate by Population Density for Florida Counties in 2017



Are Participation Rates Decreasing in Rural Counties?

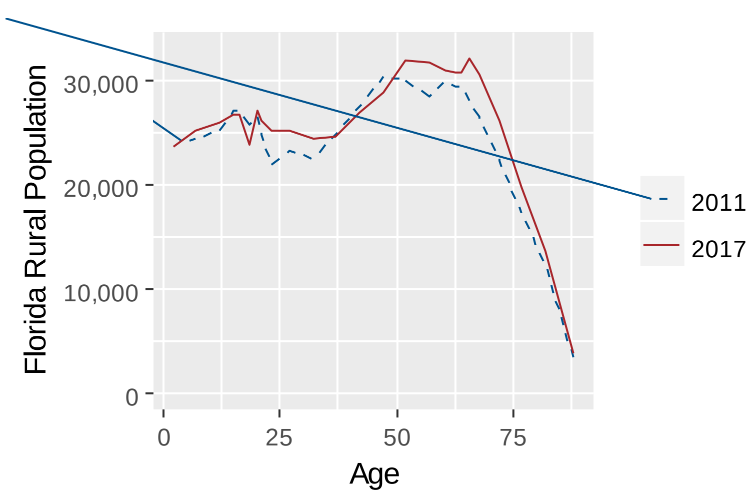
To test this question, we calculated changes in participation rates for each county from 2011 to 2017. While urban counties generally show strong growth, rural counties show a more mixed story. Hunting participation rates appear to be decreasing in most rural counties.

Figure 43. Average Annual % Change in Participation Rates by County - 2011 to 2017



Although, there are possible mitigating factors, such as net in-migration by people who might not be hunters and anglers (see Figure below), it is important to be aware of the potential risk of decreasing participation rates in rural Florida.

Figure 44. Florida Population Change in Rural Counties - 2011 vs 2017

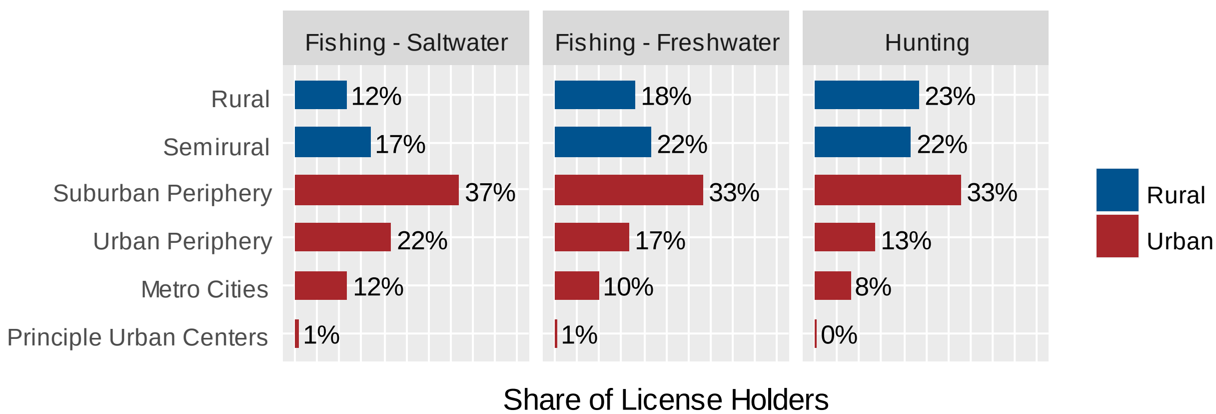


Neighborhood Geography – Employing ESRI Tapestry Lifestyle Analysis

In this section, we look at license buyers based on their lifestyles versus what they look like (demographics). This information is helpful for identifying specific customer segments with greater likelihoods of responding to marketing efforts, and for identifying best places and media resources to use in connecting with targeted individuals. This is true whether you are working to recruit new hunters and anglers or retaining current license customers.

This type of segmentation research is known as lifestyle segmentation. It draws from several data sources, including the US Census Bureau, Survey of the American Consumer and more, to provide insights about the type of activities and interest anglers or hunters may have based on the neighborhood in which they reside. We continue to explore license holders from a rural vs urban perspective, but do so at the granular level of the neighborhood, rather than at the county level.

Figure 45. Share of License Holders by Neighborhood Urbanization in 2017



Over the course of the next few sections, we show the results of lifestyle characteristic analysis, broken out by resident and non-resident anglers and hunters, and based upon the rural or urban nature of their neighborhood. We specifically highlight and investigate principle or Core Tapestry segments. These segments are defined as Core based on their proportion within the license holder community (% of anglers or hunters) and how that proportion relates to the adult population across the state (for resident license holders) or nation (for non-resident license holders). The resulting proportion is reported as an Index value, providing a measure of penetration within a segment, and thus a comparison across segments.

- Core segments are described as those that make up a large proportion of sportsmen, as well having a higher than average propensity to fish and hunt (i.e., index values greater than 100).

The Tapestry tables in the sections that follow show only the top segments. More detailed Tapestry breakouts for anglers and hunters by residency and water type are included in the Appendix.

Resident Anglers

Resident Anglers in Rural Neighborhoods

Tables 3 and 4 show the top core Tapestry segments among resident anglers living in rural neighborhoods by type of fishing. There is a great deal of similarity in Tapestry segments between the two types of fishing. The same three segments make up the majority of each angler group: Senior Escapes, Southern Satellites, and Middleburg. Senior Escapes and Southern Satellites are associated with the southeastern part of the country and reflect slightly older individuals who enjoy outdoor recreation. Middleburgs reflect a slightly younger individual enjoying the easy pace of country living.

Table 3. Resident SALTWATER anglers in rural neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed saltwater angler population	% of Florida population	Index
Core Tapestry Segments				
9D	Senior Escapes	27.3%	4.6%	591
10A	Southern Satellites	17.6%	3.2%	688
4C	Middleburg	17.7%	2.6%	556
10D	Down the Road	9.1%	1.8%	511
6C	The Great Outdoors	5.8%	1.2%	303

Table 4. Resident FRESHWATER anglers in rural neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed freshwater angler population	% of Florida population	Index
Core Tapestry Segments				
9D	Senior Escapes	25.3%	4.6%	549
10A	Southern Satellites	22.2%	2.6%	864
4C	Middleburg	15.3%	3.2%	482
10D	Down the Road	9.6%	1.8%	541
10B	Rooted Rural	7.2%	1.2%	620

ESRI uses their Tapestry segmentation data in conjunction with Mediamark Research Inc. consumer surveys data to identify leisure activity and market behavior within and among segments. Using this information, we investigate leisure activities common across resident angler core Tapestry segments. Based on the leisure activity profiles, rural anglers within these segments are more likely go hunting, motorcycling, auto racing, and power boating. Along with knowledge of the lifestyle characteristics common to Tapestry segments, leisure activity profile information can be used to target the outlets receiving communication and recruitment messages as well as to identify sectors for development of strategic partnerships.

Table 5. Cross-over activities among resident anglers in rural neighborhoods

SALTWATER		FRESHWATER	
Activities participated in:	Core Segments	Activities participated in:	Core Segments
Fishing (salt/freshwater)	150/119	Fishing (salt/freshwater)	152/119
Hunting (rifle/shotgun)	133/114	Hunting (rifle/shotgun)	130/117
Motorcycling	126	Motorcycling	119
Auto racing	118	Auto racing	117
Power boating	120	Power boating	112

Resident Anglers in Urban Neighborhoods

Among anglers living in urban neighborhoods, there is a high degree of similarity in core Tapestry segments between freshwater and saltwater anglers. However, the lifestyle segments of these urban anglers are more diverse compared to their rural counterparts, as reflected by the relatively smaller proportions of urban anglers falling into each segment. These core segments among urban anglers are not typically associated with fishing as a recreational activity, yet the Index values suggest modest penetration into those neighborhoods. There are differences between urban saltwater and urban freshwater anglers, with the saltwater anglers perhaps more settled in their community and family, while freshwater anglers are perhaps younger and more mobile.

Table 6. Resident SALTWATER anglers in urban neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed angler population	% of Florida population	Index
Core Tapestry Segment				
7C	American Dreamers	9.7%	5.6%	174
5E	Midlife Constants	7.2%	3.5%	208
9A	Silver & Gold	7.0%	3.8%	184
9C	The Elders	6.6%	4.7%	140
5D	Rustbelt Traditions	5.8%	2.5%	230

Table 7. Resident FRESHWATER anglers in urban neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed angler population	% of Florida population	Index
Core Tapestry Segment				
7C	American Dreamers	10.8%	5.6%	194
5E	Midlife Constants	7.8%	3.5%	227
9C	The Elders	7.2%	4.7%	153
9A	Silver & Gold	5.8%	3.8%	151
7A	Up and Coming Families	5.5%	3.1%	178

Based on the leisure activity profiles, urban anglers are likely go golfing, auto racing, and power boating. In general, the Index values are lower than for their rural angler counterparts, suggesting that urban anglers don't gravitate toward fishing as their only outdoor recreational activity. Successful recruitment and retention efforts need to capture these individual's interests on a competitive field of alternative recreational activities.

Table 8. Cross-over activities among resident anglers in urban neighborhoods

SALTWATER		FRESHWATER	
Activities participated in:	Core Segments	Activities participated in:	Core Segments
Golf	129	Golf	127
Auto racing	119	Attended college basketball game	121
Power boating	121	Power boating	117
Attended NFL game	123	Attended NFL game	128
Attended NASCAR race	125	Attended NASCAR race	128

Prospecting: Reaching your core Tapestry segments within the resident angler population

Along with knowledge of the lifestyle characteristics common to Tapestry segments, leisure activity profile information can be used to identify optimal media channels to reach these targeted audiences, and to identify business sectors for potential development of strategic partnerships. ESRI uses their Tapestry segmentation data in conjunction with Mediamark Research Inc. consumer surveys data to identify market behavior within and among segments. Using this information, we investigate medial channels common across license holders. An index of 100 indicates media consumption on par with the general population; Index values greater than 100 indicate higher than average levels of penetration.

Tables 9 and 10 show the media channels that rural and urban anglers within the core Tapestry segments are expected to use at the highest rate. We highlight the top two channels within three separate categories (print, television, and radio). The similarity of Tapestry segments among rural anglers results in similar media channel preferences. Comparing rural to urban anglers, the preference for different medial channels becomes more apparent.

Table 9. More popular media channels among resident anglers in rural neighborhoods

SALTWATER		FRESHWATER	
Media channels	Core Index	Media channels	Core Index
Read a fishing/hunting magazine	129	Read a fishing/hunting magazine	130
Read classified section of newspaper	124	Read classified section of newspaper	126
Watched Biography Channel	156	Watched Biography Channel	162
Speed Channel	154	Watched Country Music TV	154
Listened to country radio	148	Listened to country radio	151
Listened to classic hits radio	116	Listened to classic hits radio	118

Table 10. More popular media channels among resident anglers in urban neighborhoods

SALTWATER		FRESHWATER	
Media channels	Core Index	Media channels	Core Index
Read business/financial section	137	Read business/financial section	125
Read fashion section	135	Read fashion section	122
Watched the Golf Channel	182	Watched the Golf Channel	158
Watched HLN (formerly Headline News)	143	Watched HLN (formerly Headline News)	130
Listed to all talk radio	148	Listed to all talk radio	137
Listened to satellite radio	122	Listened to satellite radio	124

Non-resident Anglers

Non-resident Anglers in Rural Neighborhoods

Tables 11 and 12 show the top core Tapestry segments among non-resident anglers living in rural neighborhoods by water type. There is a great deal of similarity in Tapestry types between the two water types. The four core segments common to both saltwater and freshwater anglers account for more than 60% of non-resident fishing license holders. These segments are typically associated with angling, and the Index values suggest a high level of penetration in those neighborhoods. Again, it is important to note that a portion of non-resident fishing license holders have a Florida state address associated with their purchase. These records make up a small proportion of licensed anglers. Excluding them from Tapestry analysis would not impact these results.

Table 11. Non-resident SALTWATER anglers in rural neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed saltwater angler population	% of U.S. population	Index
Core Tapestry Segments				
10A	Southern Satellites	18.5%	3.2%	578
4C	Middleburg	15.0%	2.8%	536
6A	Green Acres	13.3%	3.3%	402
6B	Salt of the Earth	12.6%	2.9%	435
10B	Rooted Rural	7.6%	2.0%	380

Table 12. Non-resident FRESHWATER anglers in rural neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed freshwater angler population	% of U.S. population	Index
Core Tapestry Segments				
10A	Southern Satellites	19.1%	3.2%	595
6B	Salt of the Earth	12.4%	2.9%	426
4C	Middleburg	12.0%	2.8%	429
6A	Green Acres	10.1%	3.3%	305
10B	Rooted Rural	9.4%	2.0%	472

Based on the leisure activity profiles, anglers within these segments are more likely go hunting, motorcycling, auto racing, and power boating. Along with knowledge of the lifestyle characteristics common to Tapestry segments, leisure activity profile information can be used to target the outlets receiving communication and recruitment messages.

Table 13. Cross-over activities among Non-resident anglers in rural neighborhoods

SALTWATER		FRESHWATER	
Activities participated in:	Core Segments	Activities participated in:	Core Segments
Hunting (rifle/shotgun)	186/173	Hunting (rifle/shotgun)	186/173
Archery	152	Archery	152
Fishing (fresh/ salt water)	152/120	Fishing (fresh/salt water)	152/120
Motorcycling	144	Motorcycling	144
Auto racing	140	Auto racing	140

Non-resident Anglers in Urban Neighborhoods

Among non-resident anglers living in urban neighborhoods, there is a degree of similarity among the core Tapestry segments of both saltwater and freshwater anglers. Relative to their rural counterparts, however, there is more diversity across all Tapestry types. This is reflected in the relatively smaller proportions associated with each segment. As was the case with resident anglers, these segments are not typically associated with angling, yet the Index values suggest penetration into those neighborhoods.

Table 14. Non-resident SALTWATER anglers in urban neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed angler population	% of U.S. population	Index
Core Tapestry Segments				
4A	Soccer Moms	9.0%	3.0%	299
1D	Savvy Suburbanites	6.8%	3.2%	213
7A	Up and Coming Families	4.7%	2.4%	201
1B	Professional Pride	4.7%	1.8%	264
5B	In Style	4.2%	2.1%	201

Table 15. Non-resident FRESHWATER anglers in urban neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed angler population	% of U.S. population	Index
Core Tapestry Segments				
4A	Soccer Moms	7.5%	3.0%	251
1D	Savvy Suburbanites	6.2%	3.2%	192
5E	Midlife Constants	5.6%	2.4%	234
7A	Up and Coming Families	5.2%	2.4%	216
5A	Comfortable empty nesters	4.7%	2.5%	187

Based on the leisure activity profiles, urban non-resident anglers within the core segments are likely to attend a sporting event, go golfing, or go biking. In general, the Index values for non-resident urban anglers are lower than non-resident rural anglers (and similar to urban resident anglers), suggesting that these urban anglers don't gravitate toward fishing as their primary outdoor recreational activity.

Table 16. Cross-over activities among Non-resident anglers in urban neighborhoods

SALTWATER		FRESHWATER	
Activities participated in:	Core Segments	Activities participated in:	Core Segments
Attended college football/MLB game	156/150	Attended high school or college sport event	142
Skiing (downhill)	151	Golf	141
Golf	149	Power boating	138
Power boating	143	Attended MLB/NFL game	137
Mountain biking	142	Mountain biking	134

Prospecting: Reaching your Core Tapestry segments with in the Non-resident angler population

Tables 17 and 18 show the media channels rural and urban non-resident anglers within the core Tapestry segments are expected to use at the highest rate. We highlight the top two channels within three separate categories (print, television, and radio). The similarity of Tapestry segments among rural non-resident anglers results in similar media channel preferences. Comparing rural to urban anglers, the preference for different medial channels becomes more apparent. We also note the similarity in media channel preference between rural resident and non-resident anglers across all platforms.

Table 17. More popular media channels among Non-resident anglers in rural neighborhoods

SALTWATER		FRESHWATER	
Media channels	Core Segments	Media channels	Core Segments
Read a fishing/hunting magazine	162	Read a fishing/hunting magazine	162
Read classified section of newspaper	136	Read classified section of newspaper	136
Watched Outdoor Channel	188	Watched Outdoor Channel	188
Watched Country Music Television	177	Watched Country Music Television	177
Listened to country radio	177	Listened to country radio	177
Listened to classic hits radio	133	Listened to classic hits radio	133

Table 18. More popular media channels among Non-resident anglers in urban neighborhoods

SALTWATER		FRESHWATER	
Media channels	Core Segments	Media channels	Core Segments
Read Airline magazine	155	Read business/finance section of newspaper	131
Read travel section of newspaper	134	Read Airline magazine	128
Watched Golf Channel	147	Watched Golf Channel	142
Watched DIY network/HGTV	143/140	Watched DIY network/HGTV	146/137
Listened to satelite radio	162	Listened to satelite radio	151
Listened to sports radio	147	Listened to sports radio	138

Resident Hunters

In the next few sections, we limit the discussion as the same interpretive approaches employed above in the angler section can be applied here as well.

Resident hunters in rural neighborhoods

Tables 19 and 20 profile the top core Tapestry segments among resident hunters living in rural neighborhoods. There is a great deal of similarity in Tapestry types between rural hunters and anglers. Cross-over activity profiles as well as the license data suggest that this is in part driven by the fact that many hunters are also anglers. Florida's rural hunters reside in neighborhoods across the northern and central areas of the state. In addition to hunting and fishing, they also like to go auto racing and power boating.

Table 19. Resident hunters in rural neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of Florida population	Index
Core Tapestry Segments				
10A	Southern Satellites	25%	3%	955
9D	Senior Escapes	21%	5%	464
4C	Middleburg	15%	3%	481
10B	Rooted Rural	10%	1%	816
10D	Down the Road	9%	2%	493

Table 20. Cross-over activities among Resident hunters in rural neighborhoods

Activities participated in:	Core Segments
Fishing (salt or fresh water)	150/125
Hunting (rifle or shotgun)	141/127
Horseback riding	121
Auto racing	120
Motorcycling	119

Resident hunters in urban neighborhoods

The similarity in Tapestry types between urban hunters and anglers is apparent. Florida's urban hunters reside in coastal neighborhoods. In addition to hunting, they also like to attend sporting events.

Table 21. Resident hunters: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of Florida population	Index
Core Tapestry Segments				
5E	Midlife Constants	7.9%	3.5%	228
7C	American Dreamers	7.6%	5.6%	137
9C	The Elders	6.5%	4.7%	138
9A	Silver & Gold	6.2%	3.8%	163
5A	Comfortable empty nesters	5.8%	2.4%	241

Table 22. Cross-over activities among Resident hunters in urban neighborhoods

Activities participated in:	Core Segments
Attended NFL weekend	130
Attended NASCAR race	130
Golf	127
Attended college basketball game	126
Power boating	119

Prospecting: Reaching your Core Tapestry segments within the resident hunter population

Table 23 shows the preferred media channels among hunters, both rural and urban. Outlets such as fishing and hunting magazines or country radio ads would reach the Core Tapestry segments among the rural hunter population. Index values among urban hunters are lower, in general, than for their rural angler counterparts, suggesting that urban anglers don't gravitate toward any particular media channel.

Table 23. More popular media channels among Resident hunters in rural neighborhoods

RURAL		URBAN	
Media channels	Core Index	Media channels	Core Index
Read fishing/hunting magazine	137	Read business/financial section	128
Read Classified section of newspaper	129	Read fashion section	123
Watched Country Music Television	167	Watched the Golf Channel	159
Watched Outdoor Channel	158	Watched HLN (formerly Headline News)	133
Listened to country radio	160	Listened to all talk radio	136
Listened to classic hits radio	120	Listened to easy listening music	115

Non-resident hunters in rural neighborhoods

Tables 24 and 25 profile the top core Tapestry segments among non-resident hunters living in rural neighborhoods.

Table 24. Non-resident hunters in rural neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of U.S. population	Index
Core Tapestry Segments				
10A	Southern Satellites	21.2%	3.2%	662
6B	Salt of the Earth	12.0%	2.9%	410
10E	Rural Bypasses	11.6%	1.4%	808
4C	Middleburg	11.0%	2.8%	394
10B	Rooted Rural	10.0%	2.0%	498

Table 25. Cross-over activities among Non-resident hunters in rural neighborhoods

Activities participated in:	Core Segments
Hunting (rifle or shotgun)	179/158
Horseback riding	147
Fishing (fresh or salt water)	143/138
Auto racing	135
Archery	123

Non-resident hunters in urban neighborhoods

Tables 26 and 27 profile the top core Tapestry segments among non-resident hunters living in urban neighborhoods.

Table 26. Non-resident hunters in urban neighborhoods: Top tapestry segments (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of U.S. population	Index
Core Tapestry Segments				
4A	Soccer Moms	8.5%	3.0%	281
5E	Midlife Constants	6.4%	2.4%	268
1D	Savvy Suburbanites	5.4%	3.2%	169
7A	Up and Coming Families	4.8%	2.4%	204
1A	Top Tier	4.3%	1.8%	239

Table 27. Cross-over activities among Non-resident hunters in urban neighborhoods

Activities participated in:	Core Index
Downhill skiing	150
Attended college football game	146
Attended high school sports game	140
Attended MLB baseball game	140
Golf	139

Prospecting: Reaching your Core and Tapestry segments with in the Non-resident hunter population

Table 28 shows the preferred media channels among non-resident hunters, both rural and urban. As was the case with resident hunters, outlets such as fishing and hunting magazines or country radio ads would reach the core Tapestry segments among the rural hunter population. Urban non-resident hunters rely on a distinctly different media profile.

Table 28. More popular media channels among Non-resident hunters in rural neighborhoods

RURAL		URBAN	
Media channels	Core Segments	Media channels	Core Segments
Read Fishing/hunting magazine	172	Read Airline magazine	147
Read motorcycle magazine	154	Read business section of newspaper	138
Watched Outdoor Channel	208	Watched Golf Channel	142
Watched Country Music Television	198	Watched HGTV/DIY Network	134/129
Listened to country radio	176	Listened to all news radio	137
Listened to gospel radio	174	Listened to sports radio	135

References

ESRI. (2014). *Tapestry Segmentation: Methodology.* Retrieved from https://www.esri.com/library/whitepapers/pdfs/esri-data-tapestry-segmentation.pdf

U.S. Census Bureau. (2016, July). Annual State Resident Population Estimates for 6 Race Groups (5 Race Alone Groups and Two or More Races) by Age, Sex, and Hispanic Origin. Retrieved November 2017, from https://www2.census.gov/programs-surveys/popest/technical-documentation/file-layouts/2010-2016/sc-est2016-alldata6.pdf

Appendix

Table 29. SQL logic used for Participant Identification

Privilege	Selection Logic
Hunting	*type* IN (*hunt, trap, combo*)
Freshwater Fishing	*priv* IN (*fresh, fresh/salt, sport, gold-sport*)
Saltwater Fishing	*priv* IN (*salt, fresh/salt, salt-pier, salt-shore, snook, tarpon, lobster, gold-sport*)

Table 30. Florida License Types used to identify Participants

lic_id	description	type	priv	duration	residency
10	Freshwater Fishing/Hunting Combination	combo	fresh	1 YEAR	res
11	Sportsman (Freshwater Only)	combo	sport	1 YEAR	res
48	Freshwater/Saltwater Fishing/Hunting	combo	fresh/salt	1 YEAR	res
50	Gold Sportsman	combo	gold-sport	1 YEAR	res
60	Sportsman's (0-4) Lifetime	combo	sport	LIFETIME	res
61	Sportsman's (5-12) Lifetime	combo	sport	LIFETIME	res
62	Sportsman's (13-15) Lifetime	combo	sport	LIFETIME	res
132	Sportsman's (16-64) Lifetime	combo	sport	LIFETIME	res
137	UPGRADE LIFETIME SPORTSMAN 0-4	combo	sport	LIFETIME	res
138	UPGRADE LIFETIME SPORTSMAN 5-12	combo	sport	LIFETIME	res
139	UPGRADE LIFETIME SPORTSMAN 13-64	combo	sport	LIFETIME	res
166	Hunting & Freshwater Fishing	combo	fresh	1 YEAR	res
168	Freshwater/Saltwater/Hunting	combo	fresh/salt	1 YEAR	res
169	Sportsman (Freshwater Only)	combo	sport	1 YEAR	res
170	Gold Sportsman	combo	gold-sport	1 YEAR	res
229	Military Gold Sportsman's License	combo	gold-sport	1 YEAR	res
239	Sportsman (Freshwater Only)	combo	sport	1 YEAR	res
240	Gold Sportsman	combo	gold-sport	1 YEAR	res
512	Gold Sportsman	combo	gold-sport	5 YEAR	res
522	Youth Gold Sportsman	combo	gold-sport	OTHER	res
534	Sportsman's (5-21 Promotion) Lifetime	combo	sport	LIFETIME	res
535	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
536	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
537	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
538	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
539	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
540	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
541	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
542	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res

543	Sportsman's Lifetime (Promo Upgrade)	combo	sport	LIFETIME	res
560	Sportsman's (0-4) Lifetime License Gift	combo	sport	LIFETIME	
568	Sportsman's Lifetime (Prior to July 1, 1998)	combo	sport	LIFETIME	res
573	Military Gold Sportsman's License	combo	gold-sport	1 YEAR	res
576	Sportsman's (5-12) Lifetime License Gift	combo	sport	LIFETIME	
579	Sportsman's (16-64) Lifetime License Gift	combo	sport	LIFETIME	res
12	Freshwater Fishing	fish	fresh	1 YEAR	res
13	Saltwater Fishing	fish	salt	1 YEAR	res
20	Freshwater Fishing Non-Resident	fish	fresh	1 YEAR	nonres
21	Saltwater Fishing Non-Resident	fish	salt	1 YEAR	nonres
23	Freshwater Fishing Non-Resident	fish	fresh	7 DAY	nonres
24	Saltwater Fishing Non-Resident	fish	salt	3 DAY	nonres
25	Saltwater Fishing Non-Resident	fish	salt	7 DAY	nonres
30	Snook Permit	fish	snook	1 YEAR	res
31	Lobster Permit	fish	lobster	1 YEAR	res
44	Saltwater Pier	fish	salt	1 YEAR	
45	TARPON TAG	fish	tarpon	FIXED	
47	Freshwater/Saltwater Fishing	fish	fresh/salt	1 YEAR	res
58	Snook Permit	fish	snook	5 YEAR	res
59	Lobster Permit	fish	lobster	5 YEAR	res
67	Freshwater Fishing (0-4) Lifetime	fish	fresh	LIFETIME	res
68	Freshwater Fishing (5-12) Lifetime	fish	fresh	LIFETIME	res
69	Freshwater Fishing (13-64) Lifetime	fish	fresh	LIFETIME	res
70	Saltwater Fishing (0-4) Lifetime	fish	salt	LIFETIME	res
71	Saltwater Fishing (5-12) Lifetime	fish	salt	LIFETIME	res
72	Saltwater Fishing (13-64) Lifetime	fish	salt	LIFETIME	res
81	Freshwater Fishing	fish	fresh	5 YEAR	res
82	Saltwater Fishing	fish	salt	5 YEAR	res
103	Snook Permit	fish	snook	1 YEAR	nonres
104	Lobster Permit	fish	lobster	1 YEAR	nonres
126	RESIDENT COMMERCIAL FRESHWATER FISHING	fish	fresh	1 YEAR	res
143	UPGRADE LIFETIME FRESHWATER 0-4	fish	fresh	LIFETIME	res
144	UPGRADE LIFETIME FRESHWATER 5-12	fish	fresh	LIFETIME	res
145	UPGRADE LIFETIME FRESHWATER 13-64	fish	fresh	LIFETIME	res
146	Saltwater Fishing Lifetime (0-4)	fish	salt	LIFETIME	res
147	Saltwater Fishing Lifetime (5-12)	fish	salt	LIFETIME	res
148	Saltwater Fishing Lifetime (13-64)	fish	salt	LIFETIME	res
150	Charter Boat - Snook Permit	fish	snook	1 YEAR	
151	Charter Boat - Lobster Permit	fish	lobster	1 YEAR	
153	Saltwater Pier - Snook Permit	fish	snook	1 YEAR	
154	TARPON TAG 04/05	fish	tarpon	FIXED	

163	Freshwater Fishing	fish	fresh	1 YEAR	res
164	Saltwater Fishing	fish	salt	1 YEAR	res
167	Freshwater/Saltwater Fishing	fish	fresh/salt	1 YEAR	res
171	Freshwater Fishing	fish	fresh	7 DAY	nonres
172	Saltwater Fishing	fish	salt	3 DAY	nonres
173	Saltwater Fishing	fish	salt	7 DAY	nonres
174	Freshwater Fishing	fish	fresh	1 YEAR	nonres
175	Saltwater Fishing	fish	salt	1 YEAR	nonres
176	Freshwater Fishing	fish	fresh	5 YEAR	res
177	Saltwater Fishing	fish	salt	5 YEAR	res
179	Freshwater Fishing	fish	fresh	3 DAY	nonres
190	TARPON TAG 08/09	fish	tarpon	FIXED	
191	TARPON TAG 09/10	fish	tarpon	FIXED	
195	Saltwater Shoreline Fishing	fish	salt-shore	1 YEAR	res
224	TARPON TAG 05/06	fish	tarpon	FIXED	
238	TARPON TAG 06/07	fish	tarpon	FIXED	
243	Saltwater Products License	fish	salt	1 YEAR	
324	TARPON TAG 07/08	fish	tarpon	FIXED	
514	Charter Captain - Lobster Permit	fish	lobster	1 YEAR	
515	Charter Captain - Snook Permit	fish	snook	1 YEAR	
516	Recreational Vessel - Lobster Permit	fish	lobster	1 YEAR	
517	Recreational Vessel - Snook Permit	fish	snook	1 YEAR	
521	Youth Saltwater	fish	salt	OTHER	res
523	Youth Freshwater	fish	fresh	OTHER	res
580	Saltwater (13-64) Lifetime License Gift	fish	salt	LIFETIME	res
32	Management Area Permit	hunt		1 YEAR	res
33	Archery Season Permit	hunt		1 YEAR	res
34	Muzzleloading Season Permit	hunt		1 YEAR	res
35	Waterfowl Permit	hunt		1 YEAR	res
36	Turkey Permit	hunt		1 YEAR	res
37	Migratory Bird Permit	hunt		SEASON	
51	Management Area Permit	hunt		5 YEAR	res
52	Archery Season Permit	hunt		5 YEAR	res
53	Muzzleloading Season Permit	hunt		5 YEAR	res
54	Waterfowl Permit	hunt		5 YEAR	res
55	Turkey Permit	hunt		5 YEAR	res
96	Deer Permit	hunt		1 YEAR	res
97	Deer Permit	hunt		1 YEAR	nonres
98	Deer Permit	hunt		5 YEAR	res
102	Migratory Bird Permit	hunt		SEASON	nonres
105	Management Area Permit	hunt		1 YEAR	nonres
106	Archery Season Permit	hunt		1 YEAR	nonres

107	Muzzleloading Season Permit	hunt	1 YEAR	nonres
108	Waterfowl Permit	hunt	1 YEAR	nonres
109	Turkey Permit	hunt	1 YEAR	nonres
156	EMERALDA M SMALL GAME	hunt	FIXED	
157	ORANGE C SMALL GAME	hunt	FIXED	
180	Federal Duck Stamp (Annual Will Be Mailed)	hunt	45 DAY	
241	Crossbow Season Permit	hunt	1 YEAR	res
242	Crossbow Season Permit	hunt	1 YEAR	nonres
244	Crossbow Season Permit	hunt	5 YEAR	res
254	SPECIAL OPP HOG - NO COST	hunt	FIXED	
563	Bear Special-Use Permit	hunt	SEASON	nonres
564	Bear Special Use Permit - Lifetime/1998	hunt	SEASON	
565	Bear Special Use Permit - Youth	hunt	SEASON	res
567	Bear Special-Use Permit	hunt	SEASON	res
125	Alligator Trapping Agent	trap	1 YEAR	
562	Disabled Resident Alligator Trapping Agent	trap	1 YEAR	res
574	FWC Nuisance Alligator Trapper	trap	OTHER	

Table 31. Angler and general population change (2011-17)

County	Urban/Rural	Change in the number of anglers (2011-17)	Change in population (2011-16)
Union	Rural	29%	-1%
Osceola	Urban	24%	21%
Miami-Dade	Urban	23%	5%
Gilchrist	Rural	22%	1%
Collier	Urban	19%	12%
Suwannee	Rural	18%	1%
Baker	Rural	16%	3%
Columbia	Rural	16%	3%
Lake	Rural	15%	12%
Bradford	Rural	14%	-6%
Hernando	Rural	13%	6%
Orange	Urban	13%	12%
Pasco	Urban	13%	10%
Alachua	Urban	13%	6%
Hamilton	Rural	12%	-2%
Hendry	Rural	11%	1%
Clay	Urban	11%	8%
Lee	Urban	10%	15%
Seminole	Urban	10%	7%
Lafayette	Rural	9%	-2%
Flagler	Urban	9%	11%
Hillsborough	Urban	9%	8%
Polk	Urban	9%	9%
Hardee	Rural	8%	-1%
St. Johns	Urban	8%	20%
Walton	Rural	8%	18%
Duval	Urban	7%	6%
Broward	Urban	6%	7%
Citrus	Rural	6%	3%
Levy	Rural	6%	-1%
Okaloosa	Urban	6%	10%
Sumter	Urban	6%	26%
Volusia	Urban	6%	7%
Madison	Rural	5%	-5%
Monroe	Urban	5%	7%
Dixie	Rural	4%	0%
Highlands	Rural	4%	3%
Nassau	Rural	4%	9%
Brevard	Urban	3%	6%

Leon	Urban	3%	3%
Manatee	Urban	3%	15%
Marion	Rural	3%	5%
Palm Beach	Urban	3%	8%
Pinellas	Urban	3%	5%
Charlotte	Urban	2%	12%
Santa Rosa	Rural	2%	10%
Martin	Urban	1%	8%
Okeechobee	Rural	1%	2%
Wakulla	Rural	1%	3%
Liberty	Rural	0%	0%
Putnam	Rural	0%	-2%
Sarasota	Urban	0%	8%
Glades	Rural	-1%	6%
Jefferson	Rural	-1%	-4%
Bay	Urban	-2%	8%
Indian River	Urban	-2%	9%
Calhoun	Rural	-3%	-2%
Washington	Rural	-3%	0%
Holmes	Rural	-4%	-2%
St. Lucie	Urban	-4%	9%
Gadsden	Rural	-5%	-3%
DeSoto	Rural	-8%	3%
Jackson	Rural	-8%	-2%
Gulf	Rural	-9%	2%
Franklin	Rural	-11%	4%
Taylor	Rural	-11%	-2%
Escambia	Urban	-12%	5%

Table 32. Hunter and general population change (2011-17)

County	Urban/Rural	Change in the number of hunters (2011-17)	Change in population (2011-16)
Monroe	Urban	32%	7%
Broward	Urban	29%	7%
Brevard	Urban	22%	6%
Palm Beach	Urban	21%	8%
Okaloosa	Urban	20%	10%
Miami-Dade	Urban	18%	5%
Sarasota	Urban	18%	8%
Seminole	Urban	18%	7%
Charlotte	Urban	17%	12%
Collier	Urban	17%	12%
St. Johns	Urban	17%	20%
Santa Rosa	Rural	16%	10%
Jackson	Rural	13%	-2%
Leon	Urban	13%	3%
Osceola	Urban	13%	21%
DeSoto	Rural	12%	3%
Orange	Urban	12%	12%
Escambia	Urban	10%	5%
Pinellas	Urban	10%	5%
Franklin	Rural	9%	4%
Holmes	Rural	8%	-2%
Highlands	Rural	7%	3%
St. Lucie	Urban	7%	9%
Walton	Rural	7%	18%
Union	Rural	6%	-1%
Volusia	Urban	4%	7%
Clay	Urban	3%	8%
Alachua	Urban	2%	6%
Flagler	Urban	2%	11%
Lee	Urban	2%	15%
Levy	Rural	2%	-1%
Bay	Urban	1%	8%
Hernando	Rural	1%	6%
Marion	Rural	1%	5%
Pasco	Urban	1%	10%
Wakulla	Rural	1%	3%
Columbia	Rural	0%	3%
Glades	Rural	0%	6%
Baker	Rural	-2%	3%

Nassau	Rural	-2%	9%
Bradford	Rural	-4%	-6%
Citrus	Rural	-4%	3%
Lafayette	Rural	-4%	-2%
Hamilton	Rural	-5%	-2%
Martin	Urban	-5%	8%
Okeechobee	Rural	-5%	2%
Polk	Urban	-5%	9%
Putnam	Rural	-5%	-2%
Hillsborough	Urban	-6%	8%
Jefferson	Rural	-6%	-4%
Lake	Rural	-6%	12%
Manatee	Urban	-6%	15%
Washington	Rural	-6%	0%
Suwannee	Rural	-7%	1%
Calhoun	Rural	-8%	-2%
Sumter	Urban	-8%	26%
Indian River	Urban	-9%	9%
Gulf	Rural	-10%	2%
Liberty	Rural	-12%	0%
Taylor	Rural	-12%	-2%
Hardee	Rural	-13%	-1%
Duval	Urban	-14%	6%
Dixie	Rural	-15%	0%
Gilchrist	Rural	-15%	1%
Gadsden	Rural	-16%	-3%
Madison	Rural	-16%	-5%
Hendry	Rural	-17%	1%

ESRI Tapestry Segments

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 full descriptions can be found at the following link: http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation.htm. Abbreviated descriptions are provided here.

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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Tapestry Segmentation

SALTWATER angler Tapestry segmentation: Resident and non-resident

Tapestry Code	Tapestry segment	Percent of SALTWATER anglers
10A	Southern Satellites	5.6
4C	Middleburg	5.1
9D	Senior Escapes	4.5
7C	American Dreamers	4.3
5E	Midlife Constants	4.0
9A	Silver & Gold	3.9
4A	Soccer Moms	3.9
7A	Up and Coming Families	3.2
5D	Rustbelt Traditions	3.2
9C	The Elders	3.0
1D	Savvy Suburbanites	3.0
6A	Green Acres	2.8
8C	Bright Young Professionals	2.6
5A	Comfortable empty nesters	2.5
8F	Old and New comers	2.1
4B	Home Improvement	2.1
6B	Salt of the Earth	2.1
10B	Rooted Rural	1.9
5B	In Style	1.9
1B	Professional Pride	1.8
10D	Down the Road	1.8
1C	Boomburbs	1.7
11B	Young and Restless	1.7
1E	Exurbanites	1.6
6C	The Great Outdoors	1.5
7F	Southwestern Families	1.5
10E	Rural Bypasses	1.5
8B	Emerald City	1.5
12C	Small Town Simplicity	1.4
11C	Metro Fusion	1.3
6E	Rural Resort Dwellers	1.3
9E	Retirement Communities	1.2
9B	Golden Years	1.1
2B	Pleasantville	1.1
12D	Modest Income Homes	1.0
12B	Traditional Living	1.0
1A	Top Tier	.9
5C	Parks and Rec	.9

6F	Heartland Communities	.9
14B	College Towns	.8
3B	Metro Renters	.8
7B	Urban Villages	.7
8G	Hardscrabble Road	.7
8E	Front Porches	.7
11D	Set to Impress	.6
14C	Dorms to Diplomas	.6
2A	Urban Chic	.6
12A	Family Foundations	.6
2D	Enterprising Professionals	.5
7D	Barrios Urbanos	.4
11E	City Commons	.3
13C	NeWest Residents	.3
13A	International Marketplace	.3
10C	Diners & Miners	.2
3A	Laptops and Lattes	.2
8A	City Lights	.2
6D	Prairie Living	.2
7E	Valley Growers	.2
13D	Fresh Ambitions	.2
3C	Trendsetters	.1
14A	Military Proximity	.1
13B	Las Casas	.1
11A	City Strivers	.1
2C	Pacific Heights	.1
8D	Downtown Melting Pot	.1
9F	Social Security Set	.0
13E	High Rise Renters	.0
15	Unclassified	.0

FRESHWATER angler Tapestry segmentation: Resident and non-resident

Tapestry Code	Tapestry segment	Percent of FRESHWATER anglers
10A	Southern Satellites	8.3
9D	Senior Escapes	7.5
4C	Middleburg	5.6
7C	American Dreamers	5.4
5E	Midlife Constants	4.4
9C	The Elders	3.7
7A	Up and Coming Families	3.3
10B	Rooted Rural	3.1
9A	Silver & Gold	3.1
4A	Soccer Moms	3.0
5D	Rustbelt Traditions	3.0
10D	Down the Road	3.0
8C	Bright Young Professionals	2.6
5A	Comfortable empty nesters	2.6
1D	Savvy Suburbanites	2.4
6A	Green Acres	2.4
4B	Home Improvement	2.1
10E	Rural Bypasses	2.1
8F	Old and New comers	1.8
12C	Small Town Simplicity	1.7
6B	Salt of the Earth	1.7
1C	Boomburbs	1.6
11B	Young and Restless	1.4
11C	Metro Fusion	1.4
1B	Professional Pride	1.3
1E	Exurbanites	1.3
5B	In Style	1.3
6C	The Great Outdoors	1.3
9E	Retirement Communities	1.0
8G	Hardscrabble Road	.9
9B	Golden Years	.9
8B	Emerald City	.8
6F	Heartland Communities	.8
6E	Rural Resort Dwellers	.8
12D	Modest Income Homes	.8
7F	Southwestern Families	.8
14B	College Towns	.7
5C	Parks and Rec	.7
7D	Barrios Urbanos	.7
12B	Traditional Living	.7

2B	Pleasantville	.7
14C	Dorms to Diplomas	.6
12A	Family Foundations	.6
8E	Front Porches	.5
11D	Set to Impress	.5
7E	Valley Growers	.4
11E	City Commons	.4
3B	Metro Renters	.4
2A	Urban Chic	.4
1A	Top Tier	.3
7B	Urban Villages	.3
2D	Enterprising Professionals	.3
10C	Diners & Miners	.2
13C	NeWest Residents	.2
6D	Prairie Living	.2
14A	Military Proximity	.2
13A	International Marketplace	.1
13D	Fresh Ambitions	.1
8A	City Lights	.1
3A	Laptops and Lattes	.1
11A	City Strivers	.1
3C	Trendsetters	.1
13B	Las Casas	.1
2C	Pacific Heights	.0
8D	Downtown Melting Pot	.0
9F	Social Security Set	.0
13E	High Rise Renters	.0
15	Unclassified	.0

Hunter Tapestry segmentation: Residents and non-residents

Tapestry Code	Tapestry segment	Percent of hunters
10A	Southern Satellites	10.4
9D	Senior Escapes	8.3
4C	Middleburg	6.4
5E	Midlife Constants	4.4
10B	Rooted Rural	4.2
7C	American Dreamers	4.0
10D	Down the Road	3.5
9C	The Elders	3.4
9A	Silver & Gold	3.4
5A	Comfortable empty nesters	3.1
7A	Up and Coming Families	3.1
4A	Soccer Moms	3.0
8C	Bright Young Professionals	2.8
5D	Rustbelt Traditions	2.8
1D	Savvy Suburbanites	2.5
10E	Rural Bypasses	2.4
6A	Green Acres	2.1
4B	Home Improvement	2.1
8F	Old and New comers	1.9
12C	Small Town Simplicity	1.9
1E	Exurbanites	1.8
6C	The Great Outdoors	1.7
1C	Boomburbs	1.5
1B	Professional Pride	1.3
5B	In Style	1.3
8B	Emerald City	1.2
6B	Salt of the Earth	1.1
11B	Young and Restless	1.1
11C	Metro Fusion	1.0
9E	Retirement Communities	.9
9B	Golden Years	.9
7F	Southwestern Families	.8
14B	College Towns	.6
6E	Rural Resort Dwellers	.6
7D	Barrios Urbanos	.6
12D	Modest Income Homes	.6
8G	Hardscrabble Road	.5
2A	Urban Chic	.5
5C	Parks and Rec	.5
14A	Military Proximity	.4
14C	Dorms to Diplomas	.4

7B	Urban Villages	.4
12A	Family Foundations	.4
11D	Set to Impress	.4
2B	Pleasantville	.4
3B	Metro Renters	.3
8E	Front Porches	.3
2D	Enterprising Professionals	.3
6F	Heartland Communities	.3
7E	Valley Growers	.3
12B	Traditional Living	.3
11E	City Commons	.2
13C	NeWest Residents	.1
3A	Laptops and Lattes	.1
13D	Fresh Ambitions	.1
6D	Prairie Living	.1
10C	Diners & Miners	.1
13A	International Marketplace	.1
11A	City Strivers	.0
3C	Trendsetters	.0
8A	City Lights	.0
9F	Social Security Set	.0
13B	Las Casas	.0
2C	Pacific Heights	.0
1A	Top Tier	.0
8D	Downtown Melting Pot	.0
13E	High Rise Renters	.0
15	Unclassified	.0

Tapestry Segmentation: Residency, water type, and rural vs urban breakouts

Residents

Resident SALTWATER anglers in rural neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of Florida population	Index
Core Tapestry Segments				
9D	Senior Escapes	27.3%	4.6%	591
10A	Southern Satellites	17.6%	3.2%	688
4C	Middleburg	17.7%	2.6%	556
10D	Down the Road	9.1%	1.8%	511
6C	The Great Outdoors	5.8%	1.2%	303
12C	Small Town Simplicity	4.9%	1.9%	345
10B	Rooted Rural	4.9%	1.4%	421
6A	Green Acres	4.8%	1.5%	307
10E	Rural Bypasses	2.8%	1.0%	268
6E	Rural Resort Dwellers	2.8%	0.7%	404
7E	Valley Growers	1.2%	0.4%	290
6B	Salt of the Earth	0.7%	0.5%	135
	Subtotal	99.5%	20.8%	
	All other segments	0.5%	79.2%	
	Total	100.0%	100.0%	

Resident FRESHWATER anglers in rural neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of Florida population	Index
Core Tapestry Segments				
9D	Senior Escapes	25.3%	4.6%	549
10A	Southern Satellites	22.2%	2.6%	864
4C	Middleburg	15.3%	3.2%	482
10D	Down the Road	9.6%	1.8%	541
10B	Rooted Rural	7.2%	1.2%	620
6A	Green Acres	4.5%	1.9%	294
12C	Small Town Simplicity	4.2%	1.4%	294
10E	Rural Bypasses	4.0%	1.5%	385
6C	The Great Outdoors	3.4%	1.0%	180
7E	Valley Growers	1.5%	0.7%	363
6E	Rural Resort Dwellers	1.3%	0.4%	188
6B	Salt of the Earth	0.9%	0.5%	177
	Subtotal	99.5%	20.8%	
	All other segments	0.5%	79.2%	
	Total	100.0%	100.0%	

Resident SALTWATER anglers in urban neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of Florida population	Index
Core Tapestry Segment				
7C	American Dreamers	9.7%	5.6%	174
5E	Midlife Constants	7.2%	3.5%	208
9A	Silver & Gold	7.0%	3.8%	184
9C	The Elders	6.6%	4.7%	140
5D	Rustbelt Traditions	5.8%	2.5%	230
7A	Up and Coming Families	4.9%	3.1%	158
8C	Bright Young Professionals	4.3%	2.7%	161
4B	Home Improvement	3.8%	3.3%	114
4A	Soccer Moms	3.7%	2.8%	132
5A	Comfortable empty nesters	3.6%	2.4%	150
7F	Southwestern Families	3.4%	2.8%	119
8F	Old and New comers	3.2%	2.5%	127
1D	Savvy Suburbanites	3.1%	2.0%	154
11B	Young and Restless	2.4%	1.9%	129
9E	Retirement Communities	2.4%	2.3%	103
1E	Exurbanites	2.1%	1.7%	122
9B	Golden Years	2.0%	1.7%	119
8B	Emerald City	2.0%	1.4%	139
5B	In Style	1.9%	1.7%	112
1C	Boomburbs	1.9%	1.3%	142
12D	Modest Income Homes	1.7%	1.5%	111
1B	Professional Pride	1.5%	1.2%	129
7B	Urban Villages	1.5%	1.4%	103
	Subtotal	85.6%	57.8%	
	All other segments	14.4%	42.2%	
	Total	100.0%	100.0%	

Resident FRESHTWATER anglers in urban neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of Florida population	Index
Core Tapestry Segment				
7C	American Dreamers	10.8%	5.6%	194
5E	Midlife Constants	7.8%	3.5%	227
9C	The Elders	7.2%	4.7%	153
9A	Silver & Gold	5.8%	3.8%	151
7A	Up and Coming Families	5.5%	3.1%	178
5D	Rustbelt Traditions	5.3%	2.5%	209
8C	Bright Young Professionals	4.5%	2.7%	169
4A	Soccer Moms	4.4%	2.8%	159
5A	Comfortable empty nesters	4.2%	2.4%	173
4B	Home Improvement	4.0%	3.3%	122
1D	Savvy Suburbanites	3.5%	2.0%	172
8F	Old and New comers	3.0%	2.5%	120
11C	Metro Fusion	2.7%	2.7%	101
1C	Boomburbs	2.6%	1.3%	193
11B	Young and Restless	2.4%	1.9%	129
1E	Exurbanites	2.2%	1.7%	130
1B	Professional Pride	1.9%	1.2%	163
5B	In Style	1.8%	1.7%	104
8G	Hardscrabble Road	1.4%	0.9%	159
7D	Barrios Urbanos	1.2%	0.6%	197
14B	College Towns	1.1%	0.6%	168
14C	Dorms to Diplomas	1.0%	0.7%	140
	Subtotal	84.3%	52.1%	
	All other segments	15.7%	47.9%	
	Total	100.0%	100.0%	

Non-residents

Non-resident SALTWATER anglers in rural neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of U.S. population	Index
Core Tapestry Segments				
10A	Southern Satellites	18.5%	3.2%	578
4C	Middleburg	15.0%	2.8%	536
6A	Green Acres	13.3%	3.3%	402
6B	Salt of the Earth	12.6%	2.9%	435
10B	Rooted Rural	7.6%	2.0%	380
10E	Rural Bypasses	6.7%	1.4%	477
6E	Rural Resort Dwellers	5.4%	0.9%	604
6F	Heartland Communities	5.2%	2.2%	237
6C	The Great Outdoors	4.2%	1.5%	281
12C	Small Town Simplicity	4.2%	1.7%	245
10D	Down the Road	2.3%	1.2%	193
9D	Senior Escapes	2.3%	0.8%	288
10C	Diners & Miners	1.4%	0.7%	194
6D	Prairie Living	1.3%	1.1%	115
	Subtotal	99.9%	25.7%	
	All other segments	0.1%	74.3%	
	Total	100.0%	100.0%	

Non-resident FRESHWATER anglers in rural neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of U.S. population	Index
Core Tapestry Segments				
10A	Southern Satellites	19.1%	3.2%	595
6B	Salt of the Earth	12.4%	2.9%	426
4C	Middleburg	12.0%	2.8%	429
6A	Green Acres	10.1%	3.3%	305
10B	Rooted Rural	9.4%	2.0%	472
10E	Rural Bypasses	8.8%	1.4%	626
6F	Heartland Communities	6.1%	2.2%	277
9D	Senior Escapes	4.6%	0.8%	575
12C	Small Town Simplicity	4.5%	1.7%	265
6E	Rural Resort Dwellers	3.8%	0.9%	424
6C	The Great Outdoors	2.9%	1.5%	194
10D	Down the Road	2.8%	1.2%	234
10C	Diners & Miners	2.1%	0.7%	296
6D	Prairie Living	1.4%	1.1%	125
	Subtotal	99.9%	25.7%	
	All other segments	0.1%	74.3%	
	Total	100.0%	100.0%	

Urban

Non-resident SALTWATER anglers in urban neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of U.S. population	Index
Core Tapestry Segments				
4A	Soccer Moms	9.0%	3.0%	299
1D	Savvy Suburbanites	6.8%	3.2%	213
7A	Up and Coming Families	4.7%	2.4%	201
1B	Professional Pride	4.7%	1.8%	264
5B	In Style	4.2%	2.1%	201
5E	Midlife Constants	4.2%	2.4%	175
5A	Comfortable empty nesters	4.2%	2.5%	168
1C	Boomburbs	3.6%	1.6%	228
5D	Rustbelt Traditions	3.4%	2.1%	163
12B	Traditional Living	3.2%	1.8%	176
8F	Old and New comers	3.2%	2.0%	159
1A	Top Tier	3.1%	1.8%	174
9A	Silver & Gold	3.0%	0.7%	446
8C	Bright Young Professionals	3.0%	2.0%	151
2B	Pleasantville	3.0%	2.5%	120
1E	Exurbanites	2.8%	1.9%	144
5C	Parks and Rec	2.7%	2.0%	137
11B	Young and Restless	2.6%	1.4%	188
8B	Emerald City	2.4%	1.2%	196
4B	Home Improvement	2.0%	1.8%	111
14B	College Towns	1.9%	1.0%	182
3B	Metro Renters	1.8%	1.2%	157
2D	Enterprising Professionals	1.6%	1.3%	121
9C	The Elders	1.4%	0.6%	232
12D	Modest Income Homes	1.3%	1.3%	104
8G	Hardscrabble Road	1.2%	1.2%	104
14C	Dorms to Diplomas	1.0%	1.0%	104
	Subtotal	86.0%	47.8%	
	All other segments	14.0%	52.2%	
	Total	100.0%	100.0%	

Non-resident FRESHWATER anglers in urban neighborhoods (2011-2017)

Segment code	Segment name	% of licensed angler population	% of U.S. population	Index
Core Tapestry Segments				
4A	Soccer Moms	7.5%	3.0%	251
1D	Savvy Suburbanites	6.2%	3.2%	192
5E	Midlife Constants	5.6%	2.4%	234
7A	Up and Coming Families	5.2%	2.4%	216
5A	Comfortable empty nesters	4.7%	2.5%	187
5D	Rustbelt Traditions	4.2%	2.1%	201
12B	Traditional Living	3.9%	1.8%	218
5B	In Style	3.8%	2.1%	181
8C	Bright Young Professionals	3.5%	2.0%	177
1B	Professional Pride	3.5%	1.8%	194
8F	Old and New comers	3.2%	2.0%	158
1C	Boomburbs	3.0%	1.6%	189
2B	Pleasantville	3.0%	2.5%	121
5C	Parks and Rec	2.8%	2.0%	139
9A	Silver & Gold	2.7%	0.7%	387
1E	Exurbanites	2.4%	1.9%	125
9C	The Elders	2.3%	0.6%	385
1A	Top Tier	2.2%	1.8%	122
11B	Young and Restless	2.2%	1.4%	156
7C	American Dreamers	2.0%	1.7%	116
12D	Modest Income Homes	2.0%	1.3%	151
14B	College Towns	1.9%	1.0%	195
4B	Home Improvement	1.8%	1.8%	101
8G	Hardscrabble Road	1.7%	1.2%	144
8B	Emerald City	1.7%	1.2%	142
8E	Front Porches	1.5%	1.5%	101
2D	Enterprising Professionals	1.5%	1.3%	112
3B	Metro Renters	1.2%	1.2%	101
14C	Dorms to Diplomas	1.1%	1.0%	114
	Subtotal	74.7%	44.8%	
	All other segments	25.3%	55.2%	
	Total	100.0%	100.0%	

Hunting residents

Rural

Resident hunters in rural neighborhoods (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of Florida population	Index
Core Tapestry Segments				
10A	Southern Satellites	25%	3%	955
9D	Senior Escapes	21%	5%	464
4C	Middleburg	15%	3%	481
10B	Rooted Rural	10%	1%	816
10D	Down the Road	9%	2%	493
10E	Rural Bypasses	5%	1%	448
12C	Small Town Simplicity	4%	1%	301
6A	Green Acres	4%	2%	271
6C	The Great Outdoors	4%	2%	221
6B	Salt of the Earth	1%	1%	218
6E	Rural Resort Dwellers	1%	1%	162
7E	Valley Growers	1%	0%	166
	Subtotal	100%	21%	
	All other segments	0%	79%	
	Total	100%	100%	

Urban

Resident hunters in urban neighborhoods (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of Florida population	Index
Core Tapestry Segments				
5E	Midlife Constants	7.9%	3.5%	228
7C	American Dreamers	7.6%	5.6%	137
9C	The Elders	6.5%	4.7%	138
9A	Silver & Gold	6.2%	3.8%	163
5A	Comfortable empty nesters	5.8%	2.4%	241
7A	Up and Coming Families	5.6%	3.1%	180
5D	Rustbelt Traditions	5.2%	2.5%	206
8C	Bright Young Professionals	5.1%	2.7%	191
4A	Soccer Moms	5.0%	2.8%	180
1D	Savvy Suburbanites	4.3%	2.0%	213
4B	Home Improvement	3.9%	3.3%	119
8F	Old and New comers	3.4%	2.5%	136
1E	Exurbanites	3.1%	1.7%	184
1C	Boomburbs	2.7%	1.3%	203
1B	Professional Pride	2.2%	1.2%	187
5B	In Style	2.1%	1.7%	122
8B	Emerald City	2.0%	1.4%	140
11B	Young and Restless	1.9%	1.9%	100
7D	Barrios Urbanos	1.1%	0.6%	174
8G	Hardscrabble Road	0.9%	0.9%	104
14B	College Towns	0.9%	0.6%	143
2A	Urban Chic	0.9%	0.7%	121
14A	Military Proximity	0.8%	0.1%	606
2D	Enterprising Professionals	0.5%	0.3%	145
	Subtotal	85.6%	51.4%	
	All other segments	14.4%	48.6%	
	Total	100.0%	100.0%	

Non-resident

Rural

Non-resident hunters in rural neighborhoods (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of U.S. population	Index
Core Tapestry Segments				
10A	Southern Satellites	21.2%	3.2%	662
6B	Salt of the Earth	12.0%	2.9%	410
10E	Rural Bypasses	11.6%	1.4%	808
4C	Middleburg	11.0%	2.8%	394
10B	Rooted Rural	10.0%	2.0%	498
6A	Green Acres	9.3%	3.3%	282
6F	Heartland Communities	4.3%	2.2%	194
12C	Small Town Simplicity	4.3%	1.7%	249
6E	Rural Resort Dwellers	3.6%	0.9%	382
10D	Down the Road	3.6%	1.2%	313
9D	Senior Escapes	3.4%	0.8%	406
6C	The Great Outdoors	2.9%	1.5%	192
10C	Diners & Miners	1.3%	0.7%	192
6D	Prairie Living	1.2%	1.1%	114
	Subtotal	99.7%	25.7%	
	All other segments	0.3%	74.3%	
	Total	100.0%	100.0%	

Urban

Non-resident hunters in urban neighborhoods (2011-2017)

Segment code	Segment name	% of licensed hunter population	% of U.S. population	Index
Core Tapestry Segments				
4A	Soccer Moms	8.5%	3.0%	281
5E	Midlife Constants	6.4%	2.4%	268
1D	Savvy Suburbanites	5.4%	3.2%	169
7A	Up and Coming Families	4.8%	2.4%	204
1A	Top Tier	4.3%	1.8%	239
9A	Silver & Gold	4.0%	0.7%	581
5A	Comfortable empty nesters	3.8%	2.5%	154
1E	Exurbanites	3.6%	1.9%	182
5B	In Style	3.6%	2.1%	169
8B	Emerald City	3.6%	1.2%	293
8F	Old and New comers	3.6%	2.0%	176
1B	Professional Pride	3.4%	1.8%	192
1C	Boomburbs	3.4%	1.6%	212
8C	Bright Young Professionals	3.3%	2.0%	165
12D	Modest Income Homes	3.3%	1.3%	254
5D	Rustbelt Traditions	2.5%	2.1%	117
11B	Young and Restless	2.5%	1.4%	179
14B	College Towns	2.4%	1.0%	229
7C	American Dreamers	2.3%	1.7%	138
3B	Metro Renters	2.1%	1.2%	180
9C	The Elders	1.8%	0.6%	299
14C	Dorms to Diplomas	1.8%	1.0%	178
9B	Golden Years	1.4%	1.2%	121
9E	Retirement Communities	1.4%	1.0%	141
3A	Laptops and Lattes	1.3%	0.9%	148
8G	Hardscrabble Road	1.3%	1.2%	107
14A	Military Proximity	0.3%	0.3%	123
	Subtotal	86%	44%	
	All other segments	14%	57%	
	Total	100%	100%	