

*Village of Plainfield  
Retail Site Assessment*

**SITE 3**  
U.S. Route 30 (Lincoln Hwy) at I-55

January, 2010

Prepared by:



Prepared for:



plainfield**DEVELOPMENT**

Come grow with us!



# Retail Site Assessment

January 2010

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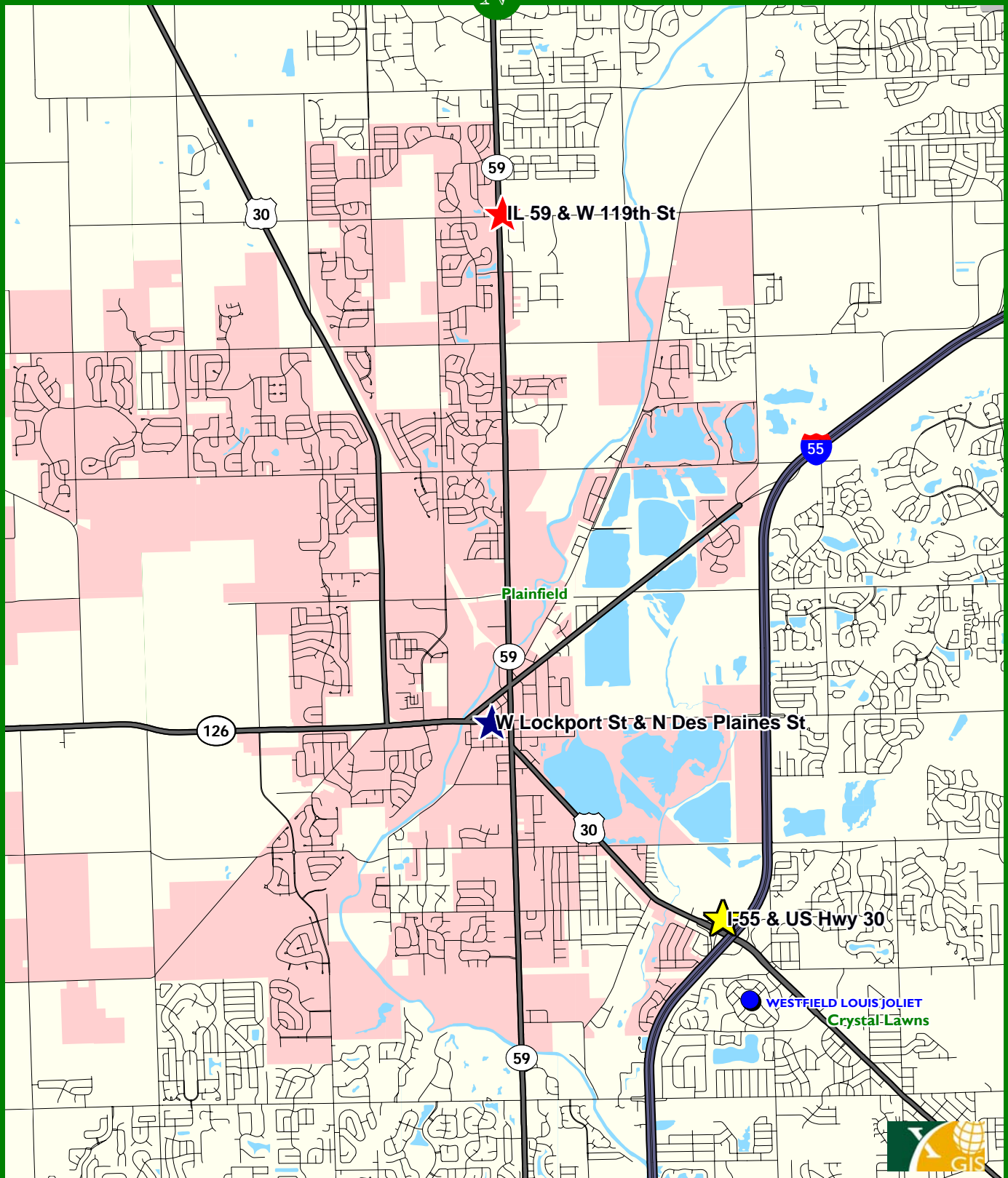
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# Plainfield, Illinois: Overview



### Shopping Centers

GLA in thousands



1000+



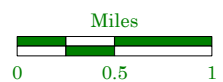
500 to 1000

City Limits

Site 1

Site 2

Site 3



## Selecting the Village of Plainfield's Retail Site

To begin the CommunityID process, the Village of Plainfield selected three sites to be analyzed for possible retail development or revitalization. The locations of the three sites are shown on the opposite page.

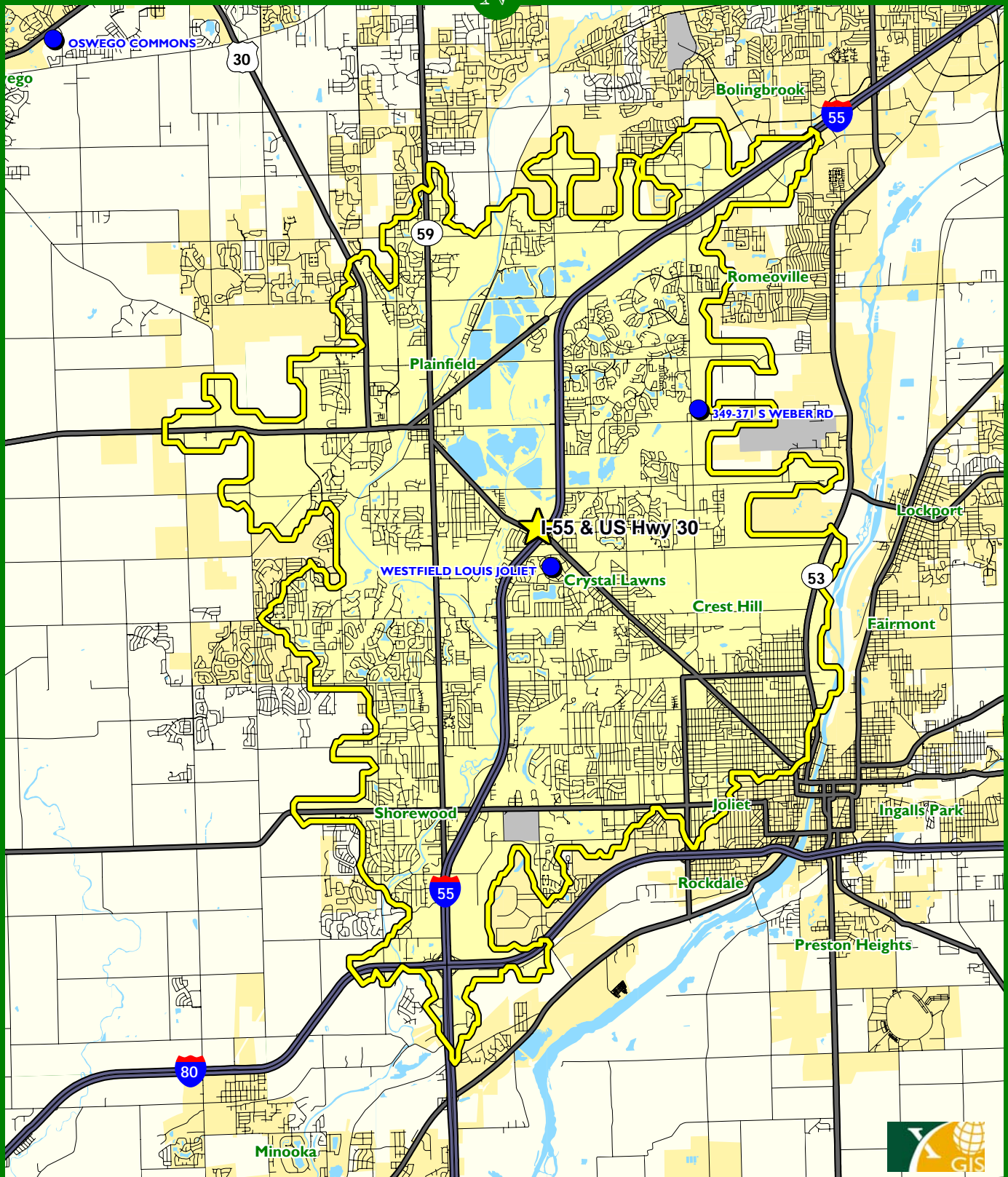
Buxton has examined the retail potential of the three sites based on the following analyses:

- A primary drive-time trade area was delineated for each site
- The customers in each trade area were segmented according to buying habits and lifestyles
- A profile of the Village of Plainfield's customers within each of the three trade areas was developed
- The surplus and leakage for 11 major store types was determined for each potential trade area

The purpose of these analyses is to develop the Village of Plainfield's Customer Profile. The Customer Profile is a snapshot of the customers that reside in the Village of Plainfield's trade area. Even though these consumers are complex and diverse, Buxton is able to capture and catalogue the extent to which potential demand for a retailer's goods and services are being met within the trade area.

By overlaying the Village of Plainfield's Customer Profile with over 4,500 retail matching profiles in Buxton's proprietary database, we are able to identify major categories of retail that are candidates for location in the Village of Plainfield. This matching provides the basis for determining the Village of Plainfield's viability to attract retailers and restaurants and forms the basis for Buxton's recommendations and conclusions.

With this analysis and Buxton's recommendations, the Village of Plainfield can make a more informed decision about investments in infrastructure and can focus resources on areas of higher retail development potential.



# Plainfield, Illinois: Trade Area

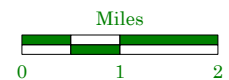


### Shopping Centers

GLA in thousands



□ 12 Minute Drive Time





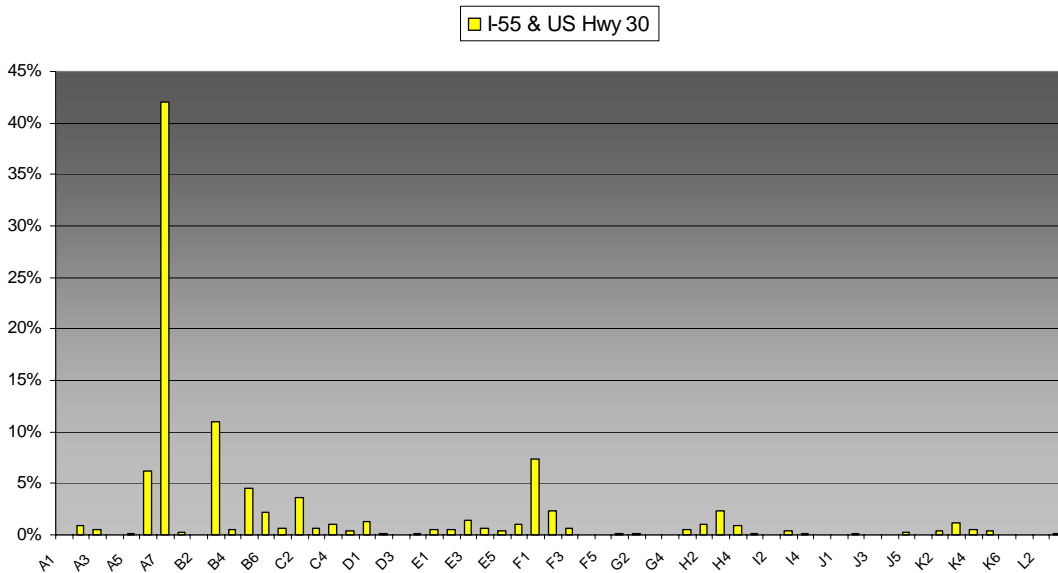
## Site 3 Analysis: I-55 & US Hwy 30

### Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for Site 3. The primary trade area consists of a twelve-minute polygon, determined by Buxton’s proprietary drive-time technology.

### Psychographics

The psychographic profile of the households within a twelve-minute drive-time of Site 3 is presented below.



Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000: Census Estimates and Projections 2008 Data

### Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. By determining dominant segments and reviewing their segment descriptions, lifestyle habits and preferences can be identified. Please refer to Appendix C for additional segment description information.

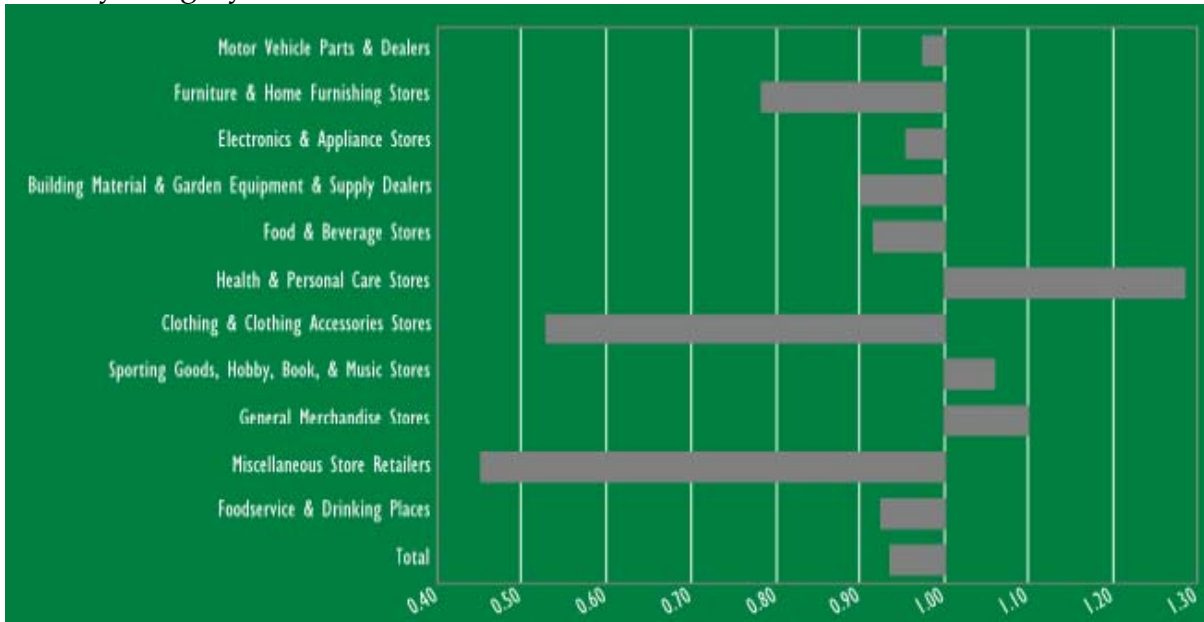
Dominant Segments	Description	Households	% of All Households
A06	SMALL-TOWN SUCCESS	4,083	6.25%
A07	NEW SUBURBIA FAMILIES	27,490	42.08%
B03	URBAN COMMUTER FAMILIES	7,183	11.00%
B05	SECOND-GENERATION	2,915	4.46%
C02	PRIME MIDDLE AMERICA	2,325	3.56%
F01	STEADFAST CONSERVATIVES	4,797	7.34%

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## Site 3 Analysis (continued)

### Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



Source: Nielsen Claritas, Global Insight, © 2009

The following table presents the trade potential variables for Site 3:

Trade Potential Variables	Site 3
Estimated Household Count	65,321
Number of Households in Dominant Segments	48,793
Traffic Count	38,200
Total Demand	\$2,952,395,456
Total Supply	\$2,766,257,823
Leakage/Surplus	(\$186,137,633)

Source: Nielsen Claritas, Global Insight, © 2009

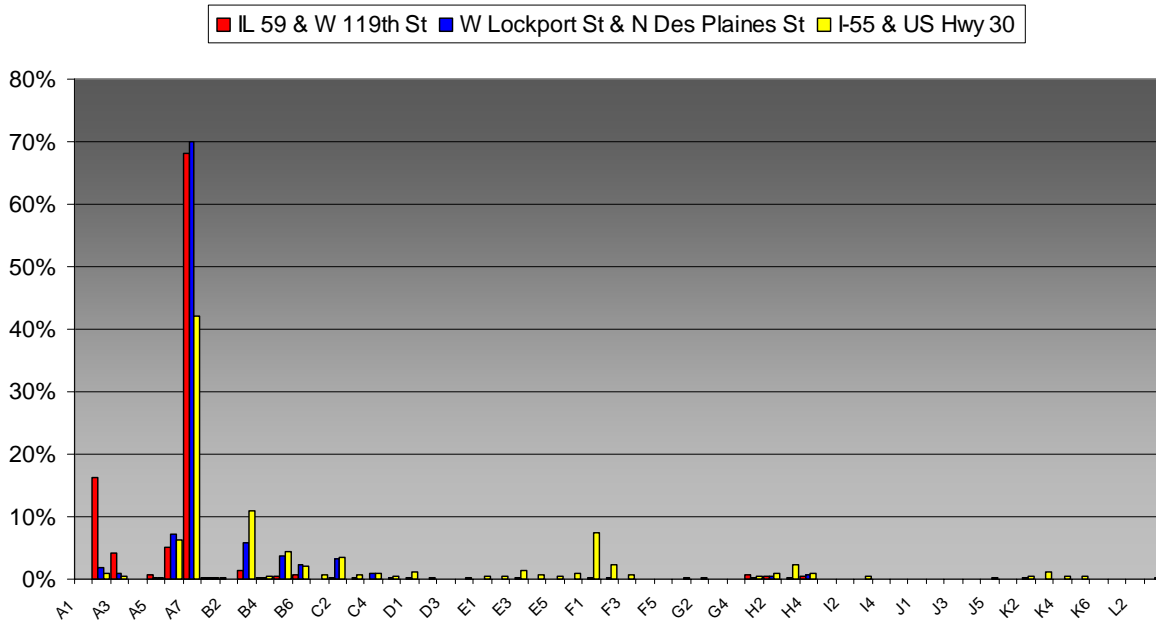
Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000: Census Estimates and Projections 2008 Data



## Site Comparison

### Trade Area Segmentation

This side by side comparison of the three trade areas shows the compositions and characteristics of the households to be similar. There are some small variations between the trade areas which will make them distinct, but most trade areas have varying amount of the same segment types. The 1-55 & US Hwy 30 trade area has the most segmentation that the other two sites do not have within their trade area boundaries.



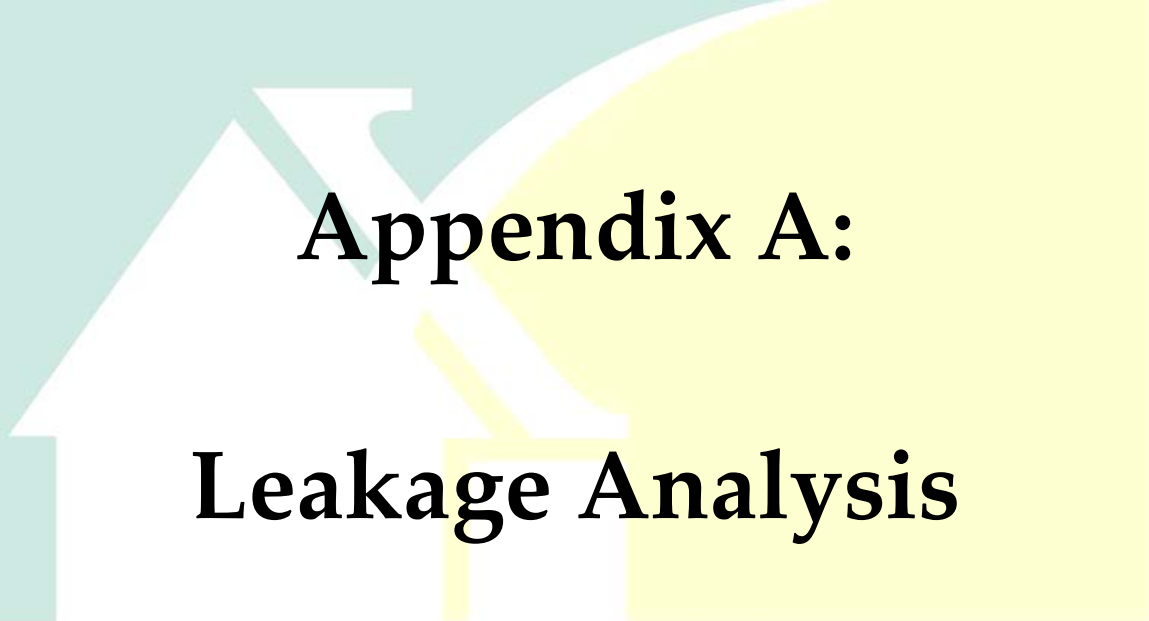
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### Trade Area Statistics

Trade Potential Variables	Site 1	Site 2	Site 3
Estimated Household Count	37,876	34,115	65,321
Number of Households in Dominant Segments	35,509	30,763	48,793
Traffic Count	34,300	9,519	38,200
Total Demand	\$2,212,099,349	\$1,769,763,089	\$2,952,395,456
Total Supply	\$2,048,238,119	\$1,514,895,900	\$2,766,257,823
Leakage/Surplus	(\$163,861,230)	(\$254,867,189)	(\$186,137,633)

Source: Nielsen Claritas, Global Insight, © 2009

Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000: Census Estimates and Projections 2008 Data



**Appendix A:**  
**Leakage Analysis**

## **Retail Leakage and Surplus Analysis**

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

### Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

### Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

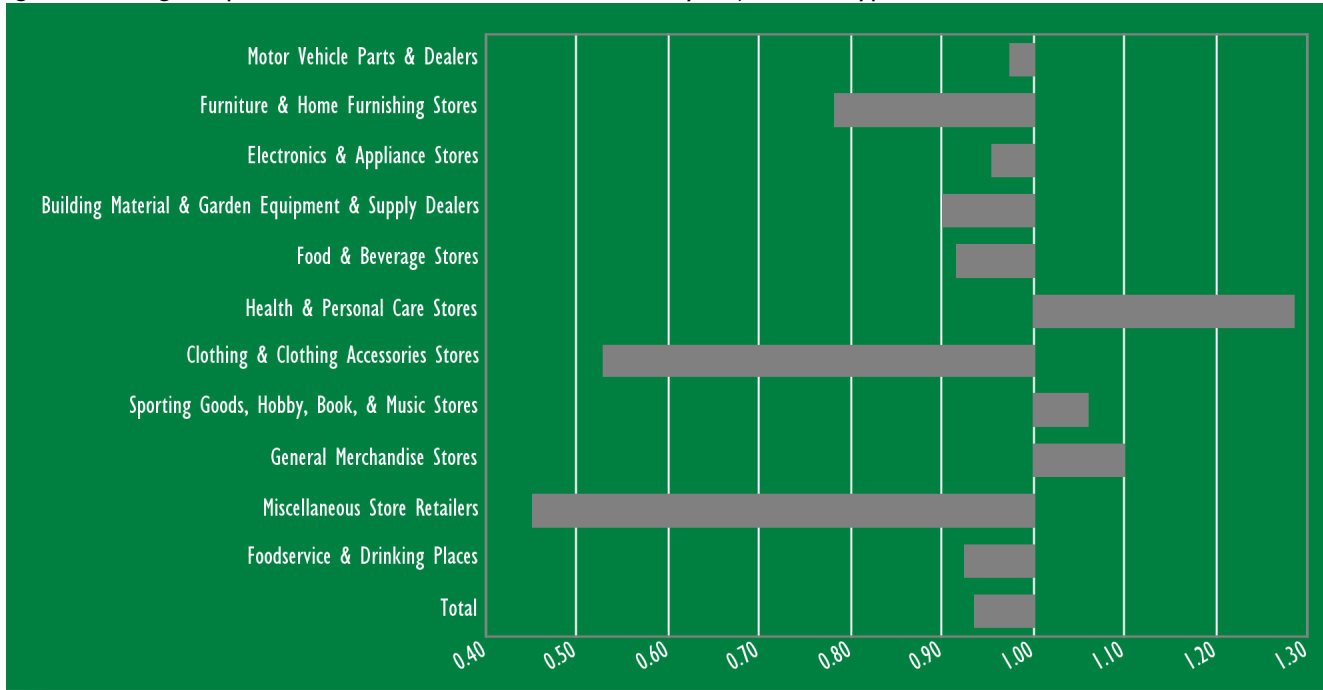
Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 1 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 1. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



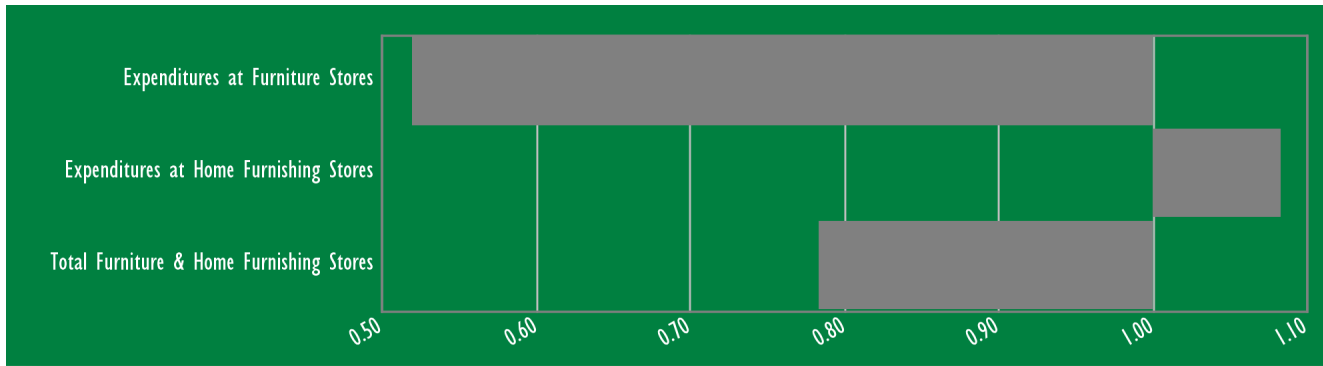
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	651,014,506	634,929,016	1.0
Furniture & Home Furnishing Stores	96,882,559	75,986,419	0.8
Electronics & Appliance Stores	85,804,928	82,014,319	1.0
Building Material & Garden Equipment & Supply Dealers	448,217,745	403,753,834	0.9
Food & Beverage Stores	396,117,447	363,090,925	0.9
Health & Personal Care Stores	159,069,223	204,374,323	1.3
Clothing & Clothing Accessories Stores	177,457,567	93,885,344	0.5
Sporting Goods, Hobby, Book, & Music Stores	68,263,377	72,260,860	1.1
General Merchandise Stores	428,162,370	470,991,979	1.1
Miscellaneous Store Retailers	92,021,613	41,619,925	0.5
Foodservice & Drinking Places	349,384,121	323,350,880	0.9
<b>Total</b>	<b>2,952,395,456</b>	<b>2,766,257,823</b>	<b>0.9</b>

Sub-Categories of Motor Vehicle Parts & Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	559,712,944	582,655,154	1.0
Expenditures at Other Motor Vehicle Dealers	41,847,963	16,334,840	0.4
Expenditures at Automotive Parts, Accessories, and Tire Stores	49,453,599	35,939,022	0.7
Total Motor Vehicle Parts & Dealers	651,014,506	634,929,016	1.0

Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	51,493,582	26,820,624	0.5
Expenditures at Home Furnishing Stores	45,388,977	49,165,795	1.1
Total Furniture & Home Furnishing Stores	96,882,559	75,986,419	0.8



Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	64,773,263	78,973,080	1.2
Expenditures at Computer and Software Stores	17,476,182	2,632,931	0.2
Expenditures at Camera and Photographic Equipment Stores	3,555,483	408,308	0.1
Total Electronics & Appliance Stores	85,804,928	82,014,319	1.0

## Sub-Categories of Building Material &amp; Garden Equipment &amp; Supply Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	163,952,057	208,538,701	1.3
Expenditures at Paint and Wallpaper Stores	9,251,127	5,769,380	0.6
Expenditures at Hardware Stores	32,675,708	33,750,556	1.0
Expenditures at Other Building Materials Dealers	206,489,765	140,754,474	0.7
Expenditures at Outdoor Power Equipment Stores	5,199,741	1,652,675	0.3
Expenditures at Nursery and Garden Centers	30,649,347	13,288,048	0.4
Total Building Material & Garden Equipment & Supply Dealers	448,217,745	403,753,834	0.9

Sub-Categories of Food & Beverage Stores



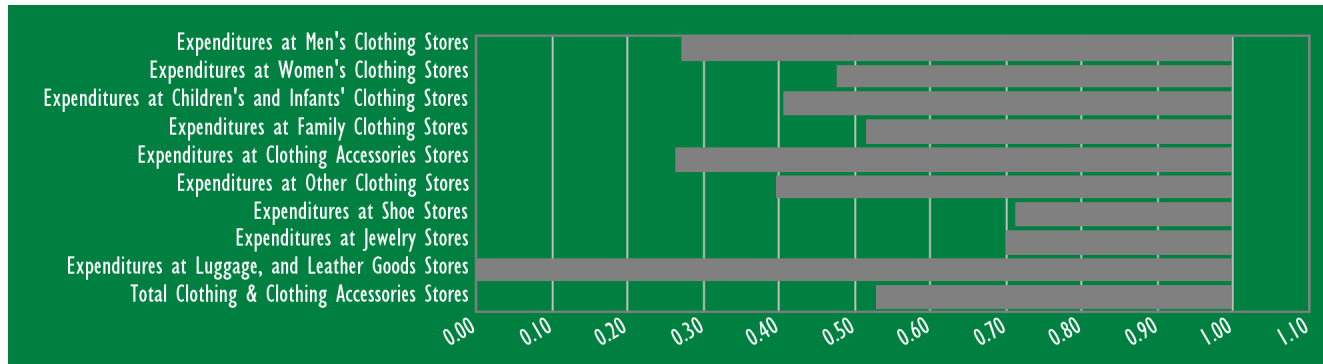
Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	340,626,748	331,163,262	1.0
Expenditures at Convenience Stores	18,561,773	8,098,343	0.4
Expenditures at Specialty Food Stores	11,235,578	6,278,549	0.6
Expenditures at Beer, Wine, and Liquor Stores	25,693,349	17,550,771	0.7
Total Food & Beverage Stores	396,117,447	363,090,925	0.9

Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	136,916,938	182,825,027	1.3
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	5,315,941	4,210,344	0.8
Expenditures at Optical Goods Stores	7,363,281	9,870,972	1.3
Expenditures at Other Health and Personal Care Stores	9,473,063	7,467,980	0.8
Total Health & Personal Care Stores	159,069,223	204,374,323	1.3

## Sub-Categories of Clothing &amp; Clothing Accessories Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	8,142,684	2,210,566	0.3
Expenditures at Women's Clothing Stores	32,733,837	15,622,950	0.5
Expenditures at Children's and Infants' Clothing Stores	7,097,594	2,890,477	0.4
Expenditures at Family Clothing Stores	68,310,784	35,271,426	0.5
Expenditures at Clothing Accessories Stores	2,988,025	788,742	0.3
Expenditures at Other Clothing Stores	8,205,683	3,256,678	0.4
Expenditures at Shoe Stores	22,898,304	16,337,011	0.7
Expenditures at Jewelry Stores	25,010,759	17,507,493	0.7
Expenditures at Luggage, and Leather Goods Stores	2,069,897	0	0.0
<b>Total Clothing &amp; Clothing Accessories Stores</b>	<b>177,457,567</b>	<b>93,885,344</b>	<b>0.5</b>

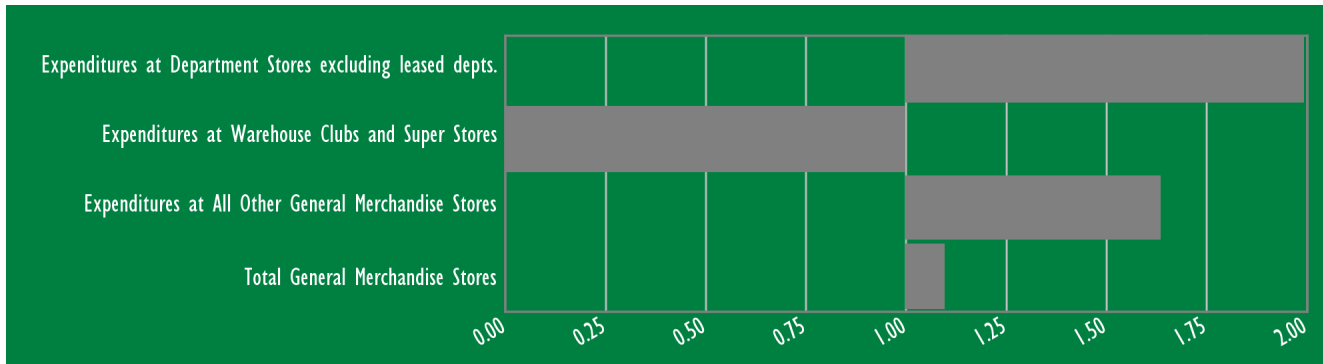
Sub-Categories of Sporting Goods, Hobby, Book, & Music Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	23,908,300	18,276,582	0.8
Expenditures at Hobby, Toys and Games Stores	15,338,340	30,835,535	2.0
Expenditures at Sew/Needlework/Piece Goods Stores	3,720,578	2,888,711	0.8
Expenditures at Musical Instrument and Supplies Stores	4,479,135	869,219	0.2
Expenditures at Book Stores and News Dealers	14,084,896	16,540,552	1.2
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	6,732,128	2,850,261	0.4
Total Sporting Goods, Hobby, Book, & Music Stores	68,263,377	72,260,860	1.1

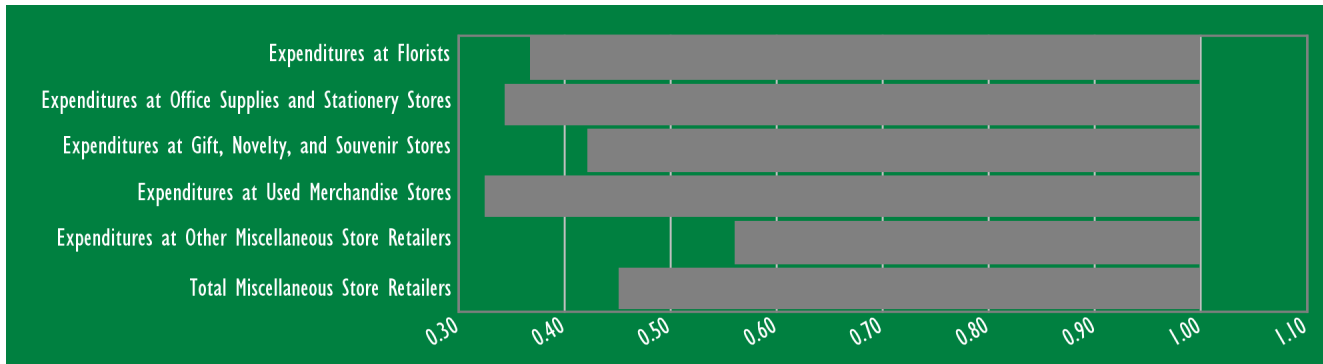


Sub-Categories of General Merchandise Stores



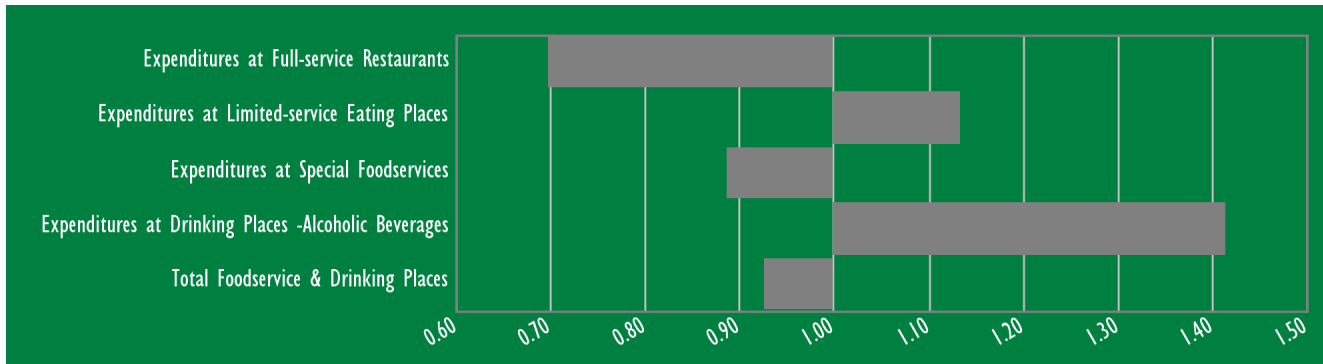
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	209,656,345	417,900,454	2.0
Expenditures at Warehouse Clubs and Super Stores	186,064,517	0	0.0
Expenditures at All Other General Merchandise Stores	32,441,508	53,091,525	1.6
Total General Merchandise Stores	428,162,370	470,991,979	1.1

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	6,838,866	2,525,536	0.4
Expenditures at Office Supplies and Stationery Stores	20,936,580	7,205,756	0.3
Expenditures at Gift, Novelty, and Souvenir Stores	16,230,572	6,864,615	0.4
Expenditures at Used Merchandise Stores	8,073,212	2,630,535	0.3
Expenditures at Other Miscellaneous Store Retailers	39,942,384	22,393,483	0.6
<b>Total Miscellaneous Store Retailers</b>	<b>92,021,613</b>	<b>41,619,925</b>	<b>0.5</b>

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	160,743,939	112,044,741	0.7
Expenditures at Limited-service Eating Places	142,890,487	162,036,718	1.1
Expenditures at Special Foodservices	29,257,251	25,919,292	0.9
Expenditures at Drinking Places -Alcoholic Beverages	16,492,444	23,350,129	1.4
<b>Total Foodservice &amp; Drinking Places</b>	<b>349,384,121</b>	<b>323,350,880</b>	<b>0.9</b>

## Sources and Methodology

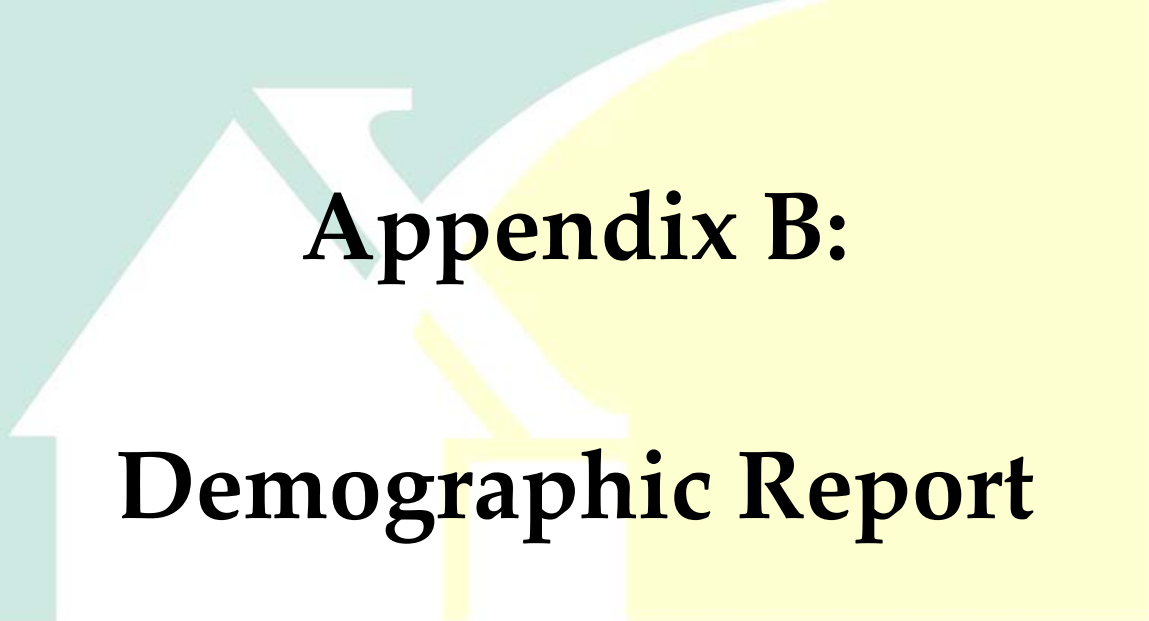
The primary data sources used in the construction of the database include:

- Current year AGS (Applied Geographic Solutions) Consumer Expenditure Estimates
- Census of Retail Trade, Merchandise Line Sales
- Census Bureau Monthly Retail Trade

The Census of Retail Trade presents a table known as the Merchandise Line summary, which relates approximately 120 merchandise lines (e.g. hardware) to each of the store types. For each merchandise line, the distribution of sales by store type can be computed, yielding a conversion table which apportions merchandise line sales by store type.

The AGS (Applied Geographic Solutions) Consumer Expenditure database was re-computed to these merchandise lines by aggregating both whole and partial categories, yielding, at the block group level, a series of merchandise line estimates which are consistent with the AGS Consumer Expenditure database.

These two components were then combined in order to derive estimated potential by store type. The results were then compared to current retail trade statistics to ensure consistency and completeness.



**Appendix B:**  
**Demographic Report**

**Analysis Geography:** I-55 & US Hwy 30  
Plainfield, IL

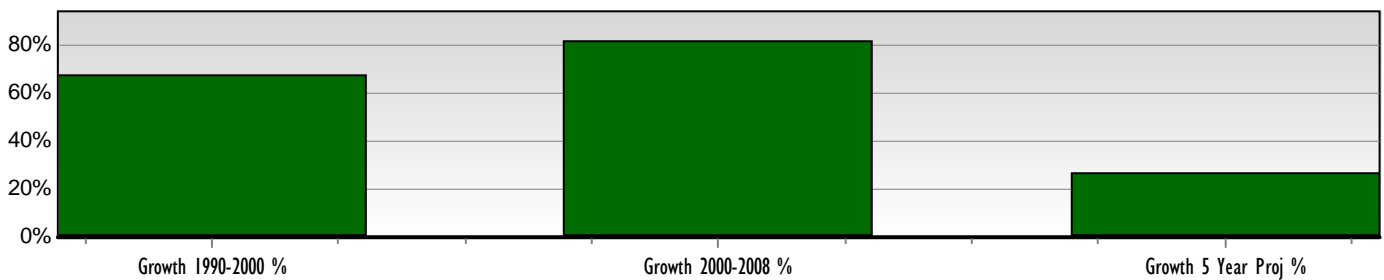
**Date:** 1/7/2010

**12 Min Drive  
Time**

## Population Profile

2013 Projection	262,923
2008 Estimate	207,969
2000 Census	114,639
1990 Census	68,465

## Population Change



**12 Min Drive  
Time**

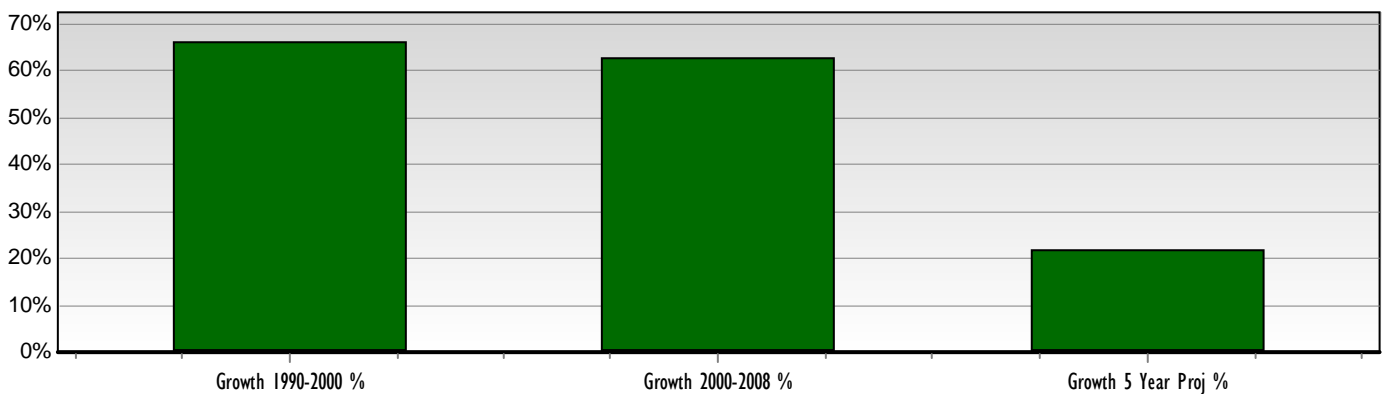
## Work Place Population

Total	60,054
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## Household Profile

2013 Projection	79,457
2008 Estimate	65,321
2000 Census	40,199
1990 Census	24,201

## Household Change





**Analysis Geography:** I-55 & US Hwy 30  
Plainfield, IL

**Date:** 1/7/2010

**12 Min Drive  
Time**

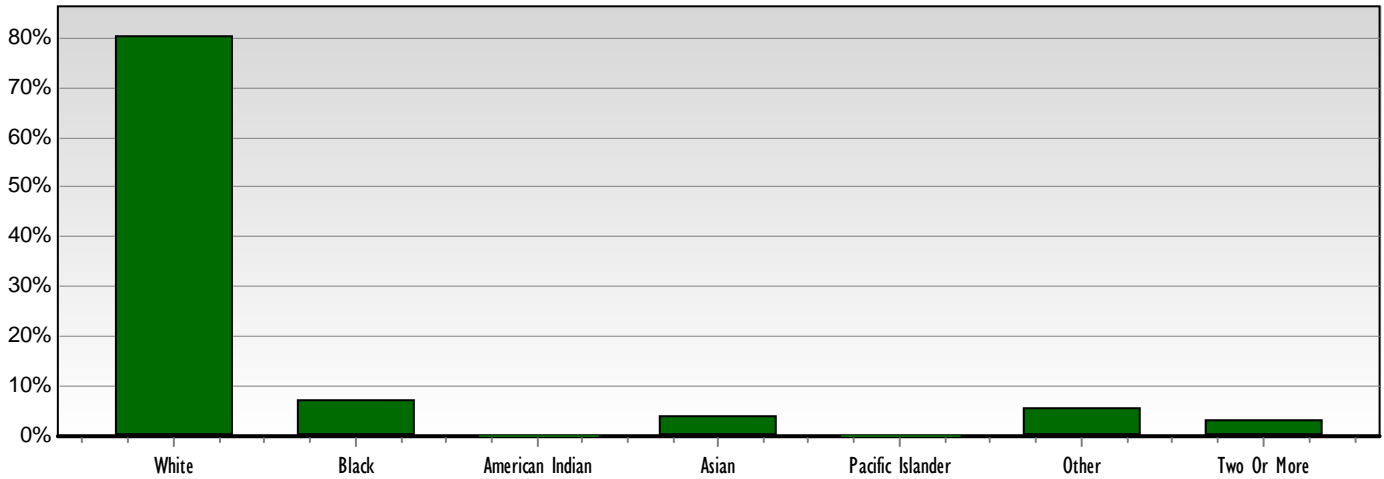
**Population By Race (Current)**

White	166,947
Black	14,742
American Indian	142
Asian	8,203
Pacific Islander	113
Other	11,385
Two Or More	6,437

**Total Population By Race**

**207,969**

**Population By Race (Current)**



**12 Min Drive  
Time**

**Population By Hispanic Origin (Current)**

Hispanic Origin	29,919
Non Hispanic Origin	178,050

**Analysis Geography:** I-55 & US Hwy 30  
Plainfield, IL

**Date:** 1/7/2010

**12 Min Drive  
Time**

## Population By Age (Current)

0 to 4 years	18,145
5 to 9 years	15,304
10 to 13 years	11,812
14 to 17 years	11,042
18 to 19 years	5,582
20 to 24 years	13,805
25 to 34 years	37,962
35 to 44 years	32,654
45 to 49 years	14,149
50 to 54 years	12,125
55 to 59 years	9,766
60 to 64 years	7,628
65 to 74 years	10,121
75 to 84 years	5,797
85+ Years	2,068

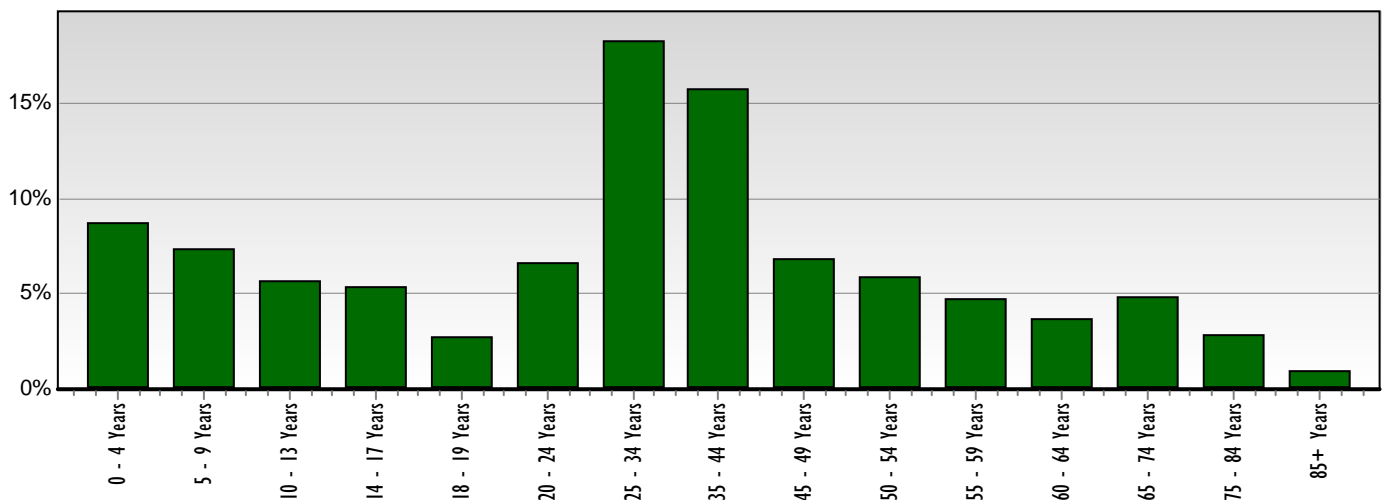
## Total Population By Age

**207,969**

Median Age

33.9

## Population By Age (Current)

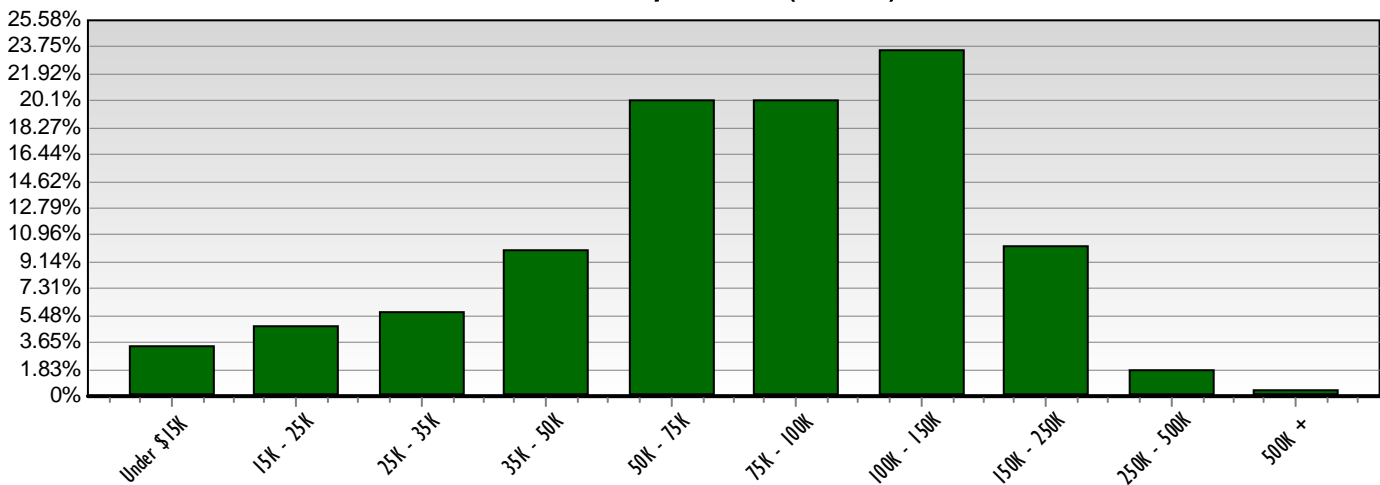


**Analysis Geography:** I-55 & US Hwy 30  
Plainfield, IL

**Date:** 1/7/2010

Households By Income (Current)	12 Min Drive Time
Under \$15,000	2,203
\$15,000 to \$24,999	3,128
\$25,000 to \$34,999	3,764
\$35,000 to \$49,999	6,446
\$50,000 to \$74,999	13,164
\$75,000 to \$99,999	13,130
\$100,000 to \$149,999	15,375
\$150,000 to \$249,999	6,697
\$250,000 to \$499,999	1,155
\$500,000 +	259
<b>Total Households By Income</b>	<b>65,321</b>
Average Household Income	\$83,708
Median Household Income	\$82,213

**Households By Income (Current)**





# **Appendix C:**

# **Segmentation Guide**

## Group Structure

Segment Group	Label	Segment Name	% of US Households
<b>A</b> Affluent Suburbia 11.19%	A01	America's Wealthiest	1.14%
	A02	Dream Weavers	1.74%
	A03	White-collar Suburbia	1.43%
	A04	Upscale Suburbanites	0.84%
	A05	Enterprising Couples	0.84%
	A06	Small-town Success	2.38%
	A07	New Suburbia Families	2.82%
<b>B</b> Upscale America 13.26%	B01	Status-conscious Consumers	1.55%
	B02	Affluent Urban Professionals	1.44%
	B03	Urban Commuter Families	6.33%
	B04	Solid Suburban Life	0.63%
	B05	Second-generation Success	2.40%
	B06	Successful Suburbia	0.91%
<b>C</b> Small-town Contentment 7.64%	C01	Second City Homebodies	0.74%
	C02	Prime Middle America	3.52%
	C03	Suburban Optimists	0.61%
	C04	Family Convenience	1.93%
	C05	Mid-market Enterprise	0.84%
<b>D</b> Blue-collar Backbone 6.57%	D01	Nuevo Hispanic Families	2.73%
	D02	Working Rural Communities	1.06%
	D03	Lower-income Essentials	0.83%
	D04	Small-city Endeavors	1.95%
<b>E</b> American Diversity 9.73%	E01	Ethnic Urban Mix	1.89%
	E02	Urban Blues	1.74%
	E03	Professional Urbanites	2.09%
	E04	Suburban Advantage	1.15%
	E05	American Great Outdoors	1.37%
	E06	Mature America	1.48%
<b>F</b> Metro Fringe 10.63%	F01	Steadfast Conservatives	6.51%
	F02	Moderate Conventionalists	1.60%
	F03	Southern Blues	0.92%
	F04	Urban Grit	0.55%
	F05	Grass-roots Living	1.05%
<b>G</b> Remote America 7.39%	G01	Hardy Rural Families	2.70%
	G02	Rural Southern Living	2.71%
	G03	Coal and Crops	1.81%
	G04	Native Americana	0.18%
<b>H</b> Aspiring Contemporaries 11.18%	H01	Young Cosmopolitans	3.22%
	H02	Minority Metro Communities	2.20%
	H03	Stable Careers	4.29%
	H04	Aspiring Hispania	1.48%
<b>I</b> Rural Villages and Farms 4.77%	I01	Industrious Country Living	1.30%
	I02	America's Farmlands	1.04%
	I03	Comfy Country Living	0.73%
	I04	Small-town Connections	0.48%
	I05	Hinterland Families	1.23%
<b>J</b> Struggling Societies 8.20%	J01	Rugged Rural Style	1.62%
	J02	Latino Nuevo	2.91%
	J03	Struggling City Centers	1.72%
	J04	College Town Communities	0.98%
	J05	Metro Beginnings	0.98%
<b>K</b> Urban Essence 8.63%	K01	Unattached Multi-cultures	0.38%
	K02	Academic Influences	0.47%
	K03	African-American Neighborhoods	1.93%
	K04	Urban Diversity	2.44%
	K05	New Generation Activists	2.37%
	K06	Getting By	1.05%
<b>L</b> Varying Lifestyles 0.80%	L01	Military Family Life	0.31%
	L02	Major University Towns	0.27%
	L03	Gray Perspectives	0.22%

## Mosaic USA Group Descriptions

A full Mosaic media guide is available online at: [www.buxtonco.com/mosaic.asp](http://www.buxtonco.com/mosaic.asp)

### Group A: Affluent Suburbia

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*The wealthiest households in the U.S. living in exclusive suburban neighborhoods enjoying the best of everything that life has to offer*

The seven Segments in the Affluent Suburbia group comprise the wealthiest households in the nation. These segments outrank all other Mosaic Segments in terms of household income, home value and educational achievement. Concentrated in exclusive suburban neighborhoods, these households are predominantly white, college educated and filled with Baby Boom parents and their children. With their managerial and executive positions paying six-figure-plus incomes, they enjoy the good life in fashionable houses outfitted with the latest technology. These are the Americans who drive luxury cars, belong to country clubs, travel abroad and relax by sailing, golfing or skiing. Many are culture buffs who attend the theater, art shows, dance performances and concerts, all at high rates. Both their purchasing behavior and media choices reflect their interests in money management, travel, computers and gourmet foods.

### Group B: Upscale America

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*College-educated couples and families living in the metropolitan sprawl earning upscale incomes providing them with large homes and very comfortable and active lifestyles*

The six Segments in Upscale America are populated with mainly white, college-educated couples and families living in the metropolitan sprawl. Most of the adults work as executives and white-collar professionals, and their upscale incomes provide them with large homes and comfortable lifestyles. They like to spend their leisure time getting exercise—jogging, biking and swimming are popular—or shopping for the latest in-fashion and high-tech electronics. They are active in community affairs as members of business clubs, environmental groups and arts associations. They're selective media fans who prefer magazines and cable TV channels that cover business, fashion and the arts. Their one exception is the Internet. These Americans are omnivorous Web users who go online for everything from banking and trading stocks to downloading music and buying merchandise.

### Group C: Small-town Contentment

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*Middle-aged, upper-middle-class families living in small towns and satellite cities with moderate educations employed in white-collar, blue-collar and service professions*

The five Segments in Small-town Contentment represent the nation's middle-aged, upper-middle-class families living in small towns and satellite cities. As a group, they share moderate educations and a mix of well-paying jobs in white-collar, blue-collar and service professions. With their locations outside the nation's major metros, these households can afford recently built homes and new SUVs and pickup trucks. They enjoy outdoor sports like hiking, fishing and camping. They are also close enough to big cities to frequent comedy clubs, nightclubs and upscale malls for designer clothes and sporting goods. They tend to have varied media tastes, enjoying music and comedy shows on television, modern rock and country music on the radio and fitness and music magazines from newsstands. They are active Internet users going online for instant messaging, exchanging email and getting the latest sports scores and news.



## **Group D: Blue-collar Backbone**

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*Budget-conscious, young and old blue-collar households living in older towns working in manufacturing, construction and retail trades*

The four Segments in Blue-collar Backbone are a bastion of blue-collar diversity. This group features above-average proportions of both old and young residents, whites and Hispanics, families and singles, homeowners and apartment renters. Most residents live in older outlying towns and cities, and work at blue-collar jobs in manufacturing, construction and retail trades. Their lifestyle reflects a working-class sensibility. Their most popular leisure activities include baseball, soccer, fishing and woodworking. They're more likely to go out to a veterans club than attend a concert or play. These budget-conscious households shop at discount clothiers and department stores, and they have low rates for buying investments or insurance products. With relatively few entertainment options due to their remote location or lack of discretionary income, this group is a strong market for traditional media. Residents like to watch soaps and game shows on television, listen to country music on the radio and read a variety of outdoor and women's magazines.

## **Group E: American Diversity**

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*A diverse group of ethnically mixed singles and couples, middle-aged and retired with middleclass incomes from blue-collar and service industry jobs*

American Diversity is a reflection of how contrasting mid-America's population is. It is an ethnic mix of middle-aged couples, singles and retirees. With a few exceptions, these six Mosaic Segments consist of households with average educations and middle-class incomes from blue-collar and service industry jobs. Many of the group's adults are older Americans—aging singles and couples who've already exited the workplace. They tend to have unassuming lifestyles, scoring high for reading books and newspapers, going to movies and plays, and socializing through fraternal orders and veterans clubs. They have traditional media tastes, enjoying TV news, movies and game shows as well as business and shelter magazines. Conservative in their politics and fashion, they have limited interest in new clothing styles, consumer electronics or the Internet.

## **Group F: Metro Fringe**

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*Racially mixed, lower-middle-class clusters in older single-family homes, semi-detached houses and low-rise apartments in satellite cities*

Metro Fringe is a collection of five racially mixed, lower-middle-class Mosaic Segments located primarily in satellite cities such as Kissimmee, FL, Flint MI, Joliet, IL and Fresno, CA. Many of the group's households consist of young singles and couples who work at blue-collar and service industry jobs. They tend to live in older singlefamily homes, semidetached houses and low-rise apartments. Overall, this group is relatively active and pursues sports-oriented lifestyles participating in activities such as soccer and softball, rollerblading, skateboarding, gocarting and video gaming. As shoppers, they patronize discount retailers where they buy the latest fashion and tech gear at low prices. In their homes, they're fans of electronic media, whether it's watching youth-oriented cable channels like Spike TV, FX and Cartoon Network, or going online to chat forums and Web sites for job listings or music downloading.

## **Group G: Remote America**

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*A mix of farming and small industrial rural communities with outdoor oriented lifestyles living primarily in America's heartland*

The four Remote America Segments reflect heartland lifestyles, a mix of farming and small industrial communities mostly located in the nation's midsection. The working-class couples and families in this group tend to be employed in agriculture and blue-collar jobs that pay modest wages. The median home value is about half the national average, and a significant number of residents live in mobile homes. No group has a lower population density, and few have higher rates for outdoors-oriented lifestyles. Households spend their leisure time fishing, hunting, hiking and horseback riding. In their homes, they look to their TV sets for entertainment, especially game shows, soap operas and home improvement shows. Their magazine tastes may split along gender lines with the men reading hunting publications while the women peruse shelter magazines. On the radio, country and western is the preferred choice of music.

## **Group H: Aspiring Contemporaries**

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*Young, mostly single, ethnically diverse, online active households living in new homes or apartments with discretionary income to spend on themselves*

The four Segments in Aspiring Contemporaries are all filled with upward strivers. The households tend to be young (Generation Xers between 18 and 34 years old), ethnically diverse (about 40 percent are minorities) and unattached (about two-thirds are single or divorced). Yet despite traditional barriers to affluence, the members of these metropolitan segments are already solidly middle-class. Many live in relatively new homes or apartments valued at more than the national average—a reliable sign of upward mobility. They're big culture buffs who like to see plays, movies, comics and live bands. They spend a lot of their discretionary income on the latest fashions and consumer electronics. They're heavy media consumers, listening to jazz on the radio and reading the Sunday paper for science and technology news. Raised on technology, they are very Internet savvy, spending their leisure time online to chat, shop, job search, send instant messages, bid in auctions and frequent dating Web sites.

## **Group I: Rural Villages and Farms**

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*Rural, middle-class married families and couples of varied ages, living and working in agricultural and mining communities*

Representing America's agricultural and mining communities, Rural Villages and Farms is a collection of five low-density Segments filled with middle-class families and couples of varied ages. Most of the households in this group are married, white and high school educated. They maintain tranquil lifestyles in unpretentious houses and comfortable mobile homes. They share a fondness for outdoor sports, enjoying fishing, hunting, camping and motor sports. Many residents are do-it-yourselfers who are into woodworking and needlework. They like to shop at the big-box home improvement chains and watch how-to shows on TV. When it comes to media, nothing dominates like country music. They watch their favorite country and western stars on TV, listen to them on the radio and attend their concerts.

## **Group J: Struggling Societies**

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*Young minorities, students and single parents trying to raise families on low-level jobs in manufacturing, health care and food services*

The five Segments in Struggling Societies symbolize the challenges facing a significant number of economically challenged Americans. These households tend to be disadvantaged and uneducated. With incomes half the national average and nearly a third never completing high school, they are consigned to low-level jobs in manufacturing, health care and food services. Many of these residents are young, minorities, students and single parents trying to raise families on low incomes and tight budgets. Without much discretionary income their activities are limited and leisure pursuits include playing sports like basketball, volleyball and skateboarding. They shop at discount clothiers and sporting goods stores for casual apparel and athletic shoes. In these lessfortunate communities, television is a main source of entertainment, specifically reality programs, sitcoms, talk shows and sports. This group also relates to ethnic-oriented media, creating a strong radio market for stations that play Spanish, Mexican and urban contemporary music.

## **Group K: Urban Essence**

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*Young, single and single-parent minorities living in older apartments working at entry-level jobs in service industries*

As a whole, the six segments in Urban Essence make up the nation's least affluent group, a collection of relatively young minorities living in older apartments. More than half the households consist of African Americans and Hispanics. Many of these residents are single or single parents working at entry-level jobs in service industries. With their low education levels and household incomes, residents lead unpretentious lifestyles. Many spend their leisure time playing sports like baseball, basketball and football. With their above-average household size, they make a strong market for children's toys and electronic gear, especially video games, dolls and board games. They have high rates for enjoying traditional media, reading ethnic-targeted magazines, listening to jazz and urban contemporary radio and, especially, watching television. It's hard to find a network program or cable channel that they don't view watching comedies, cartoons, sports, soaps and game shows.

## **Group L: Varying Lifestyles**

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*Residents who primarily live in group quarters including students, military personnel and institution populations*

The three Segments that make up Varying Lifestyles are an unconventional group. What they share is the singular experience of living in group quarters. A majority of this group lives the unique lifestyles offered by the military and university dorm life. Though their daily lives are different from many Americans—as well as each other—those who have the ability are more likely than average Americans to visit museums, zoos and state fairs. They like to stay active doing aerobic exercise, hiking, bowling and playing sports like tennis, baseball and volleyball. They're frequent travelers who vacation abroad as well as within the United States. At home, they divide their time between the television and computer screens. They typically watch TV news, comedy programs and latenight talk shows. When online they frequent chat rooms, auction and banking sites and listen to Internet radio with a preference for rock 'n' roll.

Group A: Affluent Suburbia

**Segment A02: Dream Weavers**

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*Well-off families with school age children, living an affluent, suburban version of the American Dream*

**Demographics**

Dream Weavers is home to well-off families living an affluent, suburban version of the American Dream. Ranked second in terms of wealth, they live in new-money subdivisions, possess high incomes, have college degrees and own large houses valued at more than twice the national average. Many households contain families with school-aged children—no segment has a higher rate of married residents—and more than half contain dual-income couples. These middle-aged adults typically work as white-collar professionals in the information, finance and education industries. They commute to work in luxury sedans and SUVs from mostly homogeneous communities as Overland Park, KS, Naperville, IL and Austin, TX. Like America's Wealthiest, Dream Weavers is overwhelmingly white with an above-average presence of Asian Americans.

**Lifestyles**

The members of Dream Weavers are deeply rooted in their suburban communities. They have high rates for belonging to churches and synagogues, parents/teachers association, art associations and business and country clubs. They rank at the top for donating money to charities. With their large families, they lead active athletic lives and enjoy swimming, golfing and fitness walking. Weekends find these households on the hunt for familyfriendly activities, resulting in high rates for visiting zoos, museums and bowling alleys. When they go shopping, they look for quality merchandise—no matter the price—at stores like Ann Taylor, Banana Republic, Lord & Taylor and Bloomingdale's. These consumers try to keep up with the latest technological trends, and many own home theater systems and digital cameras. To manage their money, they use financial planners and invest in a variety of savings vehicles for college and retirement.

**Media**

Dream Weavers households enjoy media that relate to their homes and families. They tune in to cable networks like HGTV, the Food Network, E! Entertainment and ESPN. They read a number of upscale shelter magazines, such as Architectural Digest, Traditional Home and Bon Appetit, as well as titles that appeal to time-pressed, dual-income households, like Real Simple and Working Mother. With their longer-than-average commutes, they listen to all news and news talk stations on the radio. Once they sit down in front of a computer, it's hard to tear them away from surfing the Internet. They are frequently online for email, news, shopping, stock trading and making travel arrangements.

Group A: Affluent Suburbia

**Segment A03: White-collar Suburbia**

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*A haven for upscale, college educated Baby Boomers living in suburban comfort in expensive new subdivisions*

**Demographics**

White-collar Suburbia is a haven for upscale Baby Boomers living in suburban comfort. But unlike the overwhelmingly white suburbs of a generation ago, this cluster has the highest concentration of Asians in the nation—about four times the U.S. average. Most of the adults are married couples with children, have attended college and are employed as white-collar professionals, managers and executives. Their high incomes allow them to purchase expensive homes in relatively new subdivisions. One other major difference between the White-Collar Suburbia of today versus the post-war years, is that a majority of households have dual-working couples and one in six has three workers in the family. This helps to explain why many own more cars than in any other Mosaic segment.

**Lifestyles**

The residents of White-collar Suburbia are unabashedly family centered, and they take pride in pursuing active, healthy lifestyles. These households are into aerobic exercise and enjoy jogging, biking and working out on cardio machines. They own SUVs and minivans to transport their children and their friends to school, sports, malls and movie theaters. They like to travel in the U.S. and abroad, and their spending patterns reflect an interest in keeping up with the latest styles in fashion and consumer electronics. They frequently shop at stores like Abercrombie & Fitch, Ann Taylor and J. Crew. When it comes to technology like music and recording devices, they proudly claim that friends look to them for purchasing advice. Careful consumers, they often research products on the Internet before they buy.

**Media**

White-collar Suburbia households are eclectic media consumers who enjoy newspapers, radio and television as well as an array of magazines. Their TV viewing is broad—everything from HBO and PBS to “Jeopardy!” and “The Apprentice.” Their preferred radio stations include news talk, classic rock and adult contemporary stations. These adventurous households like to research their destinations online and through print media. At the newsstands, they pick up issues of Arthur Frommer’s Budget Travel and Endless Vacations as well as the Sunday newspaper for the travel section. Just to be safe, they read Consumer Reports to make sure they get the best deal. They turn to the Internet for almost everything including auctions, banking, digital imaging, financial information, sport and stock trading.

Group A: Affluent Suburbia

**Segment A06: Small-town Success**

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*White-collar, college educated, middle-aged working couples living in newly developed subdivisions outside the nation's beltways*

**Demographics**

Small-town Success is typically home to the families of the most prominent citizens in their exurban communities. White-collar, college educated and upscale, they live in recently developed subdivisions outside the nation's beltways in the Midwest and West. Most of these households contain white, middle-aged working couples who have positions as executives and professionals in health care, retail and education. More than eight in ten drive alone to work, pulling out of the driveways of large single-family homes valued at 50 percent above the national median. These high-earners drive to work in comfort and have high rates for owning luxury SUVs as well as family vehicles including minivans.

**Lifestyles**

Small-town Success households enjoy a prosperous way of life. For athletic activities, they enjoy biking, swimming, bowling and jogging. They tend to seek out intellectual stimulation, reading books and taking adult education classes at high rates, and they don't mind driving to big cities to visit museums or see a show. They're conservative by nature and describe themselves as "smart shoppers." They like to buy quality merchandise at low prices at big-box chains such as Sam's Club, Circuit City and Bed, Bath & Beyond. They're late adopters when it comes to consumer electronics and are more likely to own 35-mm cameras than digital models, VHS players than DVD units. They own a wide range of insurance products, including life, health, disability and homeowner's coverage. However, being conservative hasn't dampened their enthusiasm for travel as they are likely to take a trip for either business or pleasure almost every month of the year.

**Media**

Small-town Success households share a fondness for a variety of media. They like to watch primetime crime dramas and comedies on television, especially "CSI," "Law and Order" and "Two and a Half Men." They are avid radio listeners and enjoy stations that offer news talk, golden oldies and country music. They have high rates for reading the Sunday newspaper to catch up on sports, business and entertainment news and read mainstream magazine titles as National Geographic, Good Housekeeping and Better Homes and Gardens. They have above average interest in the Internet, and they go online to get news, do their banking and buy merchandise such as books and CDs.

Group A: Affluent Suburbia

## **Segment A07: New Suburbia Families**

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*Young, affluent working couples with pre-school children concentrated in fast-growing, metro fringe communities*

### **Demographics**

Young couples with pre-school children have turned New Suburbia Families into a booming lifestyle. Concentrated in fast-growing, metro fringe communities mainly in the West and Southwest, the segment's population has more than tripled since 1990. With many households under 35 years old, these young families are making the most of their new subdivisions. More than half the housing has been built since 2000 and the median value worth nearly 50 percent above the U.S. average. Residents have both brains and bucks. More than two-thirds have gone to college and many workers earn six-figure incomes. It takes hard work to have achieved success at such a young age. More than two-thirds of families have multiple workers in the labor force, gravitating to jobs as managers, executives and white-collar professionals.

### **Lifestyles**

The members of New Suburbia Families have crafted active, children-centered lifestyles. These families participate in a number of team sports such as baseball, basketball and soccer, shuttling kids and gear to activities in their SUVs and minivans. They go to kid-friendly destinations and frequent zoos, aquariums and campgrounds. At supermarkets, they fill their grocery carts with pizza, Pop Tarts and prepared lunch kits. This is one of the top-ranked segments for owning toys, books and video games, and residents here never met a consumer electronics device they didn't like including cell phones, gaming systems and home theater systems. With their relatively large families, money still needs to be managed. They maintain that price and functionality trump style when they purchase electronics and clothing at retailers like Target, Best Buy and Wal-Mart. Contributing to 529 college savings plans is a priority, but this segment can be debt heavy due to first mortgages and home equity loans.

### **Media**

These energetic households are only moderate consumers of most media. New Suburbia Families are often too busy to read a newspaper or magazine, although they will sit in front of a TV to watch network sitcoms and reality shows as well as sports and entertainment on cable channels such as ESPN, MTV and Comedy Central. Thanks to their lengthy commutes, they exhibit high rates for listening to radio stations that offer news and sports as well as classic rock and adult contemporary music. When they finally wind down, many go online to trade stocks, search for jobs and check out real estate listings.



Group B: Upscale America

## **Segment B03: Urban Commuter Families**

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*Upscale, college educated Baby Boomer families and couples living in comfortable, single detached homes in city neighborhoods on the metropolitan fringe*

### **Demographics**

Not all families have fled the nation's cities for the far-out suburbs. In Urban Commuter Families, Baby Boomer families and couples are content to live in comfortable, single detached homes in city neighborhoods on the metro fringe. Many of these upscale, college-educated households contain dual-income couples who put in long hours as professionals and managers in retail, health care and education services. They tend to leverage their home equity with major home improvement projects, and build their real estate holdings with recent purchases of second homes for family getaways.

### **Lifestyles**

With its concentration of empty-nesters, Urban Commuter Families lifestyle is relatively serene. They are not into aerobic sports, preferring to get their exercise from low-impact activities such as gardening, golfing and birdwatching. They enjoy leisure activities like going to the theater or antique show rather than a rock concert or an auto race. They describe themselves as brand-loyal shoppers who prefer to buy functional clothes over expensive designer labels, shopping at stores like Sears and J.C. Penney. With limited interest in the latest electronics and technology products, their homes are more likely to contain stereos and 35-mm cameras than MP3 players and digital cameras. These conservative investors put their money to work in CDs, U.S. savings bonds and taxsheltered annuities. With their high rates of owning houses and vacation homes, they take out home improvement loans and spend their free time roaming the aisles at Home Depot and Lowe's, Linens 'N Things and Pottery Barn.

### **Media**

The households in Urban Commuter Families are old-fashioned media fans. They subscribe to daily newspapers at high rates and spend their Sunday mornings poring over the travel section and the ad inserts. They pick up traditional general interest magazines at the supermarket, enjoying Reader's Digest, Family Circle and Good Housekeeping. On their commute to work, they listen to the calming strains of classical, golden oldies and big band music on the radio. When they finally wind down in front of a TV, these conservative households watch Fox News, the History Channel and the old movies on AMC and TMC. Their Mosaic motto could be "No surprises, please."



Group B: Upscale America

## **Segment B05: Second-generation Success**

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*Upper-middle-class and large multi-ethnic households working in white and blue-collar jobs within metro fringe communities*

### **Demographics**

These grandchildren of immigrants who live in Second-generation Success, life is sweet. These multi-ethnic households—of Asian, Hispanic and varied European descent—have achieved upper-middle-class status through hard work and devotion to family. They are primarily married couples with children. Their household size with five or more people is almost double the U.S. average. More than half of adults have attended college, landing a mix of blue- and white-collar jobs in retail, manufacturing, transportation and public administration. In these metro fringe communities, located primarily in coastal states, many households strive to balance the need to assimilate with the desire to retain their cultural traditions. For now, most have found the American Dream in a single detached house built in the early 1980s in what was then the suburban frontier.

### **Lifestyles**

With their upscale incomes and children of all ages, Second-generation Success households enjoy active, familycentered lifestyles. They participate in a number of team sports, including soccer, basketball, football and baseball. On weekends, they typically pile into their vans and SUVs for outings to a zoo, aquarium, cinema or one of the kids' sporting games. Those vehicles also come in handy when they go on shopping excursions patronizing big-box stores such as Home Depot, Toys R Us and Best Buy. Indeed, these relatively young families make a strong market for toys, sporting goods and high-tech products, and they say they're heavily influenced by their children when shopping. With these households, most of their savings is tied up in their home equity. At the supermarket they buy a lot of fresh fish, poultry and meat for home-cooked meals.

### **Media**

Second-generation Success is a media-filled lifestyle where residents enjoy virtually all media channels at aboveaverage rates. They watch network television programs that feature sitcoms, sports, reality shows and even animation—the grownups watching alongside their kids. They read celebrity publications such as People and Us Weekly as well as Spanish-language newspapers and magazines. Radio preferences vary but with many of the households whose families are of Hispanic origin there is a tendency for ranchero and Tejano music. When it comes to the Internet, this ethnic mix has relatively high rates for surfing the Internet to download music, get sports scores, upload family pictures and search for jobs.

Group C: Small-town Contentment

**Segment C02: Prime Middle America**

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*A mix of young, upper-middle-class couples and families living in both small towns and mid-sized cities working in well paying white-collar and blue-collar jobs*

**Demographics**

Prime Middle America features a mix of couples and families living in both small towns and mid-sized cities in the South and Northwest. Younger than average and upper-middle-class in status, these predominantly white dual-income households have well-paying blue-collar and white-collar jobs in transportation, manufacturing and public administration. Most of the households own their own homes and are nearly twice as likely to live in mobile homes than the national average.

**Lifestyles**

Prime Middle America features a small-town, family-centered lifestyle. Households enjoy leisure activities like playing cards and board games as well as outdoor pursuits such as fishing, biking and swimming at a lake. Many are do-it-yourselfers who load up their SUVs and pickup trucks with home improvement supplies from stores such as Lowe's, Home Depot and True Value Hardware. Their incomes afford them a wide range of mortgages, home equity loans and college savings plans. As consumers, they describe themselves as less interested in new fashions than the latest high-tech gadgets.

**Media**

When the folks in this cluster put down their hammers and saws, they enjoy a variety of media. Prime Middle America residents like to gather round their large-screen TVs to watch reality shows, sports and cable channels such as MTV, FX, Discovery and Country Music Television. They're traditionalists who enjoy reading established magazines such as Woman's World, Field & Stream and Parents. The radio soundtrack usually playing features a mix of country music, classic rock and contemporary hits. The Internet has expanded the entertainment and convenience choices for residents of small towns, and Prime Middle America households are no exception. They like to go online to play games, do their banking and participate in auctions for antiques and collectibles.

Group F: Metro Fringe

## **Segment F01: Steadfast Conservatives**

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*Home to high-school educated mature singles and couples living in middle-class urban bluecollar neighborhoods*

### **Demographics**

A quietly aging cluster, Steadfast Conservatives is home to mature singles and couples living in midscale urban neighborhoods. Households tend to be white, high school-educated and middle class. Many have begun to empty nest or are already filled with couples and singles aged 65 years or older. The seniority of many residents does have benefits in the workplace. They earn middle class incomes from skilled jobs in manufacturing, retail and health care. Their incomes go far, allowing residents to own older homes and multiple cars and trucks at higher than average rates.

### **Lifestyles**

The residents of Steadfast Conservatives live up to their old fashioned reputation. They think the stock market is too risky, computers and the Internet too confusing and take preventive medicine before any sign of illness. They even regard aerobic exercise as too strenuous, preferring to spend their leisure time fishing, gardening, antiques or doing needlework or woodworking. For their social life, they attend activities sponsored by fraternal orders, veterans clubs and church groups. As consumers, they're likely to be brand loyal when they shop at favorite stores like J.C. Penney for clothes, Dick's Sporting Goods for outdoor gear and Jo-Ann for needlecrafts. With their middle-class incomes, they make a strong automotive market, especially for American-made pickup trucks and mid-sized sedans. To further protect their established lifestyles, they buy a variety of insurance products— covering health, life, car and home— though primarily low-value policies.

### **Media**

Households in Steadfast Conservatives are fans of traditional media, including print, TV and radio. They like to get their news from a daily paper or the nightly newscasts on network TV. They consider television as a primary source of entertainment in their lives, and they have high rates for watching sitcoms, reality shows, daytime soaps and religious programs. They enjoy reading magazines that appeal to their do-it-yourself sensibilities including popular titles as Family Handyman, Better Homes & Gardens and Country Living. Their radio tastes include a mix of big band, classic rock, country and golden oldies. These households are mostly unenthusiastic about the Internet, but when online they engage in chat forums and visit NASCAR.com.