

**Angels Camp, CA**

**Retail Site  
Assessment**

September 2010



## Table of Contents

Selecting Angels Camp Retail Site.....	1
Retail Site Analysis.....	2
Retail Site Analysis (Secondary Trade Area) .....	4
Appendix A: Leakage and Demand Analysis	
Appendix B: Demographic Report	
Appendix C: Segmentation Guide	

## Buxton CommunityID Staff

Lisa Hill, Vice President, [lhill@buxtonco.com](mailto:lhill@buxtonco.com)

Bill Shelton, Partner/CommunityID Division, [bshelton@buxtonco.com](mailto:bshelton@buxtonco.com)

Janet Ehret, Client Services, [jehret@buxtonco.com](mailto:jehret@buxtonco.com)

Philip Davis, Manager/Senior GIS Analyst, [pdavis@buxtonco.com](mailto:pdavis@buxtonco.com)

Nadine Grosse, Senior GIS Analyst, [ngrosse@buxtonco.com](mailto:ngrosse@buxtonco.com)

All Buxton personnel may be reached by phone at 817.332.3681



## Selecting Angels Camp's Retail Site

To begin the CommunityID process, the City of Angels Camp selected The Historic Downtown to be analyzed for possible retail development or revitalization. The location of the site is shown on the opposite page.

For the Proposed Site, Buxton has performed the following analyses:

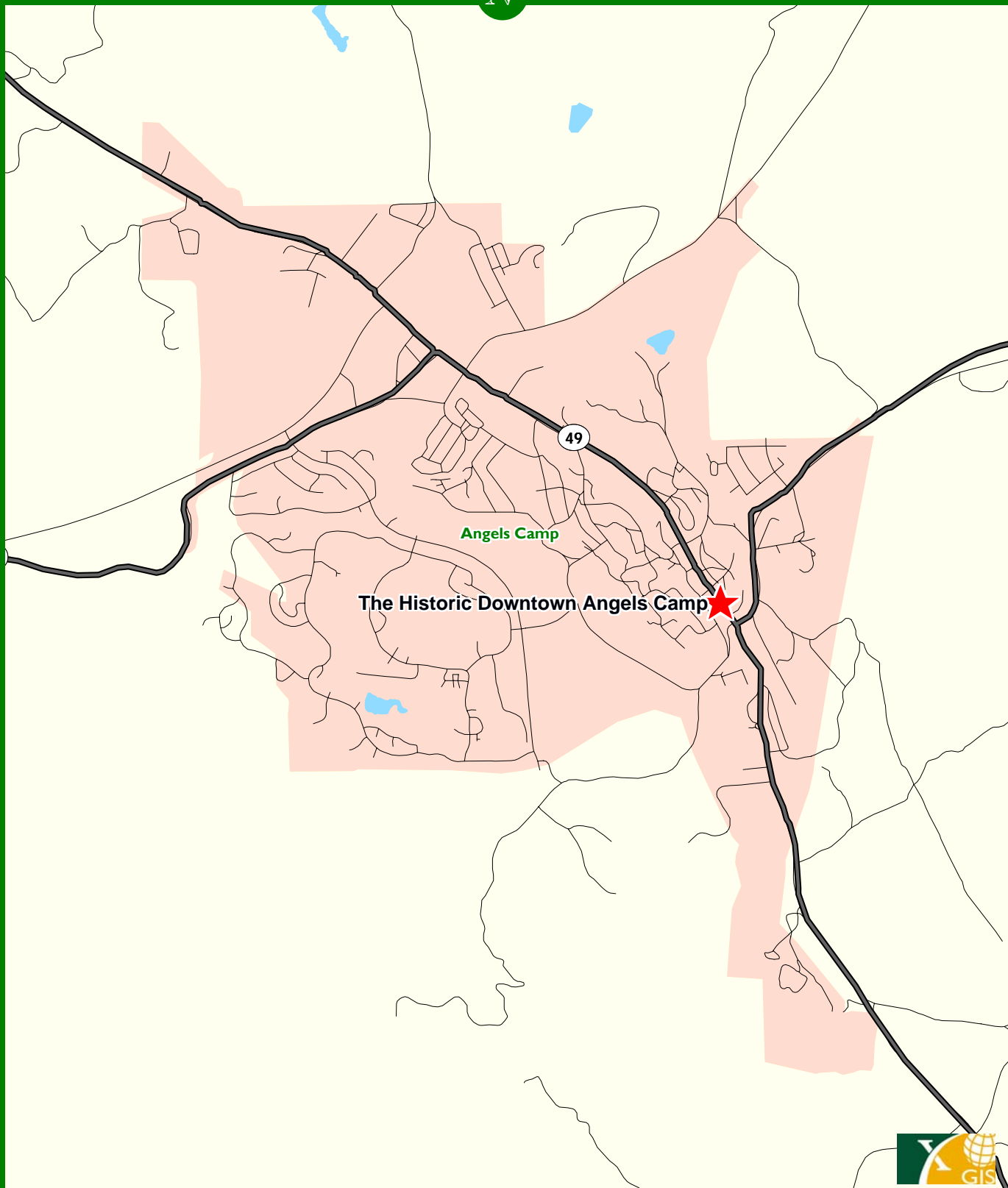
- Eighteen minute and secondary drive-time trade areas were delineated for the site
- The customers in each trade area were segmented according to buying habits and lifestyles
- A profile of Angels Camp's customers within each of the trade areas was developed
- The surplus and leakage for 11 major store types and 49 minor store types were determined for the trade areas

The purpose of these analyses is to develop Angels Camp's Customer Profile. The Customer Profile is a snapshot of the customers that reside in Angels Camp'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 Angels Camp'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 Angels Camp. This matching provides the basis for determining Angels Camp's viability to attract retailers and restaurants and forms the basis for Buxton's recommendations and conclusions.

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





## Angels Camp, California: Overview

### Shopping Centers

GLA in thousands



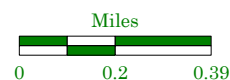
1000+

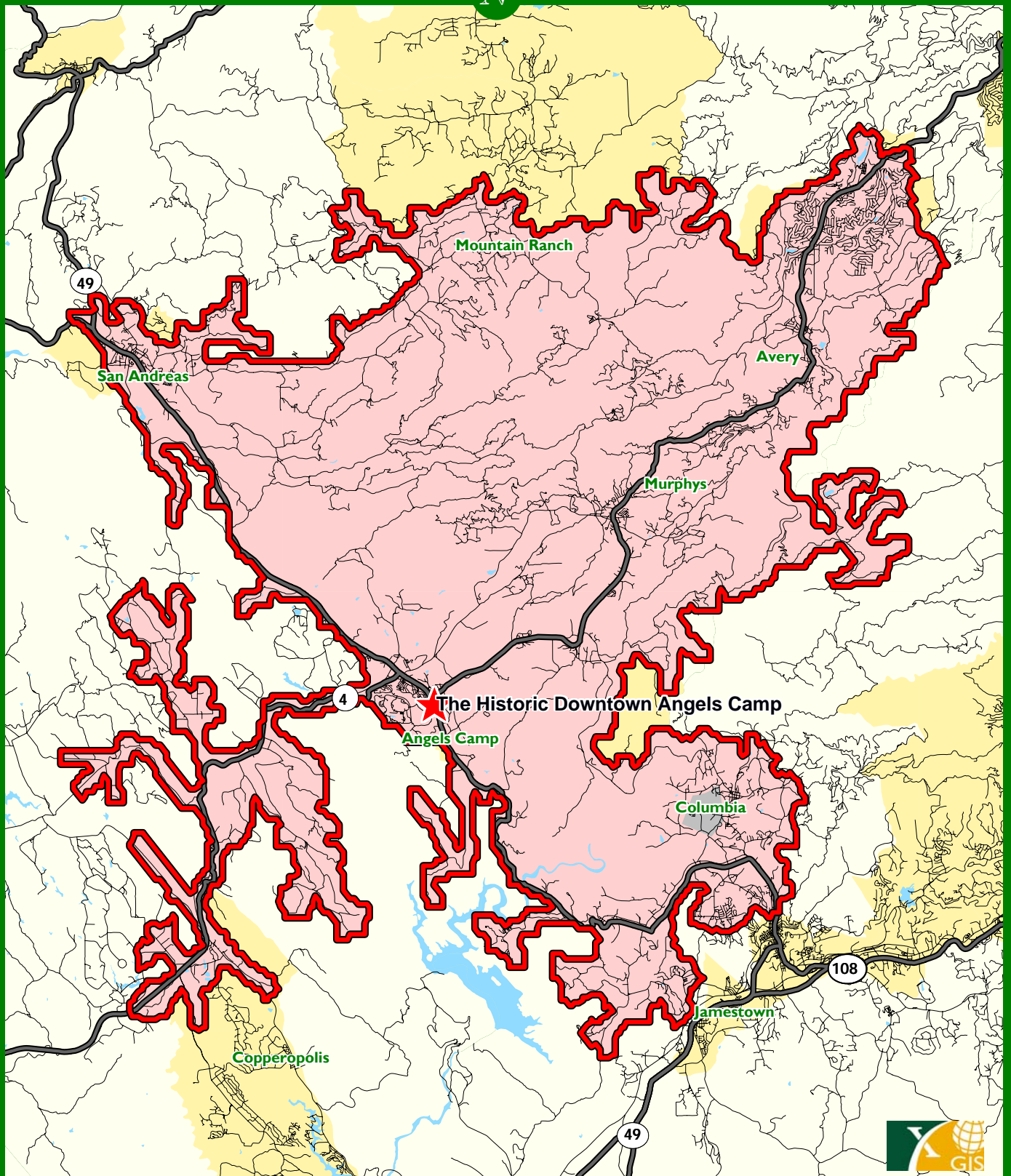


500 to 1000

City Limits

Site





# Angels Camp, California: Trade Area

## Shopping Centers

GLA in thousands

● 1000+

● 500 to 1000

□ 18 Minute Drive Time

★ Site

Miles



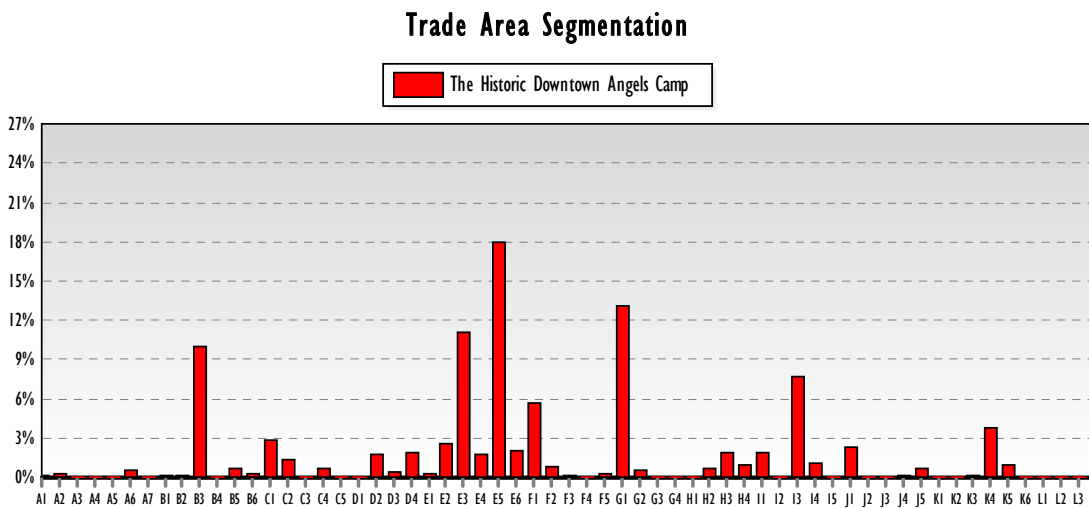
## Site Analysis (18 Minute): The Historic Downtown Angels Camp

### Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for the Site. The primary trade area consists of an eighteen-minute polygon, determined by Buxton's proprietary drive-time technology.

### Psychographics

The psychographic profile of the households within an eighteen-minute drive-time of the Site 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.

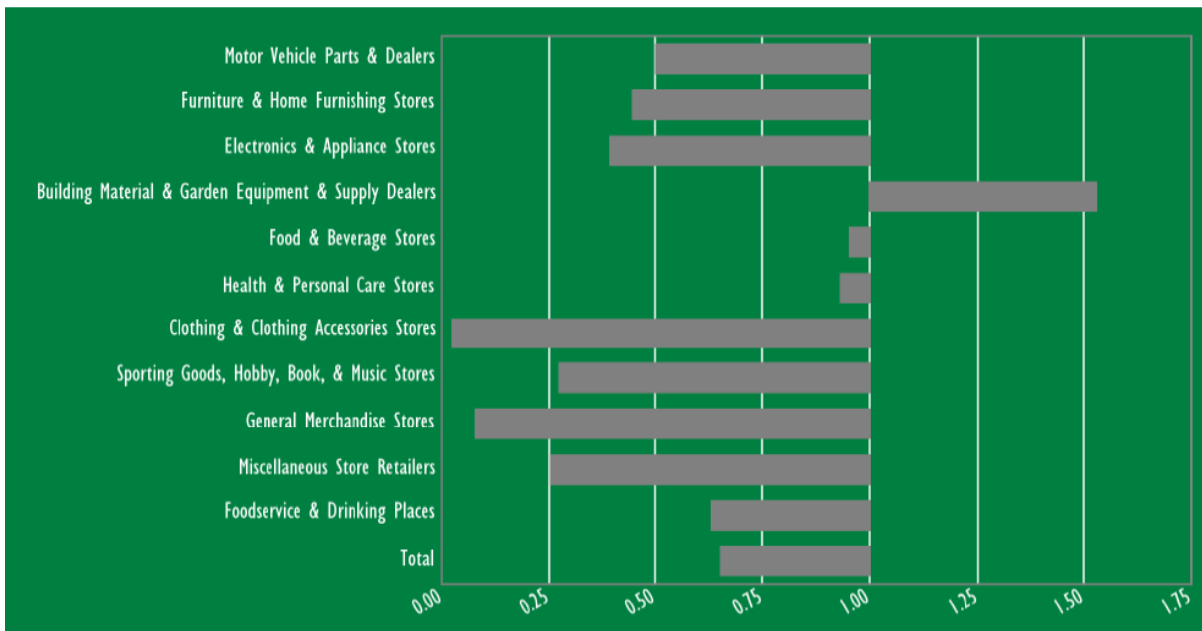
Dominant Segments	Description	Households	% of All Households
B03	URBAN COMMUTER FAMILIES	986	9.95%
E03	PROFESSIONAL URBANITES	1,101	11.11%
E05	AMERICAN GREAT OUTDOORS	1,776	17.93%
F01	STEADFAST CONSERVATIVES	562	5.67%
G01	HARDY RURAL FAMILIES	1,297	13.09%
I03	COMFY COUNTRY LIVING	762	7.69%
K04	URBAN DIVERSITY	371	3.75%

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

## Site 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.

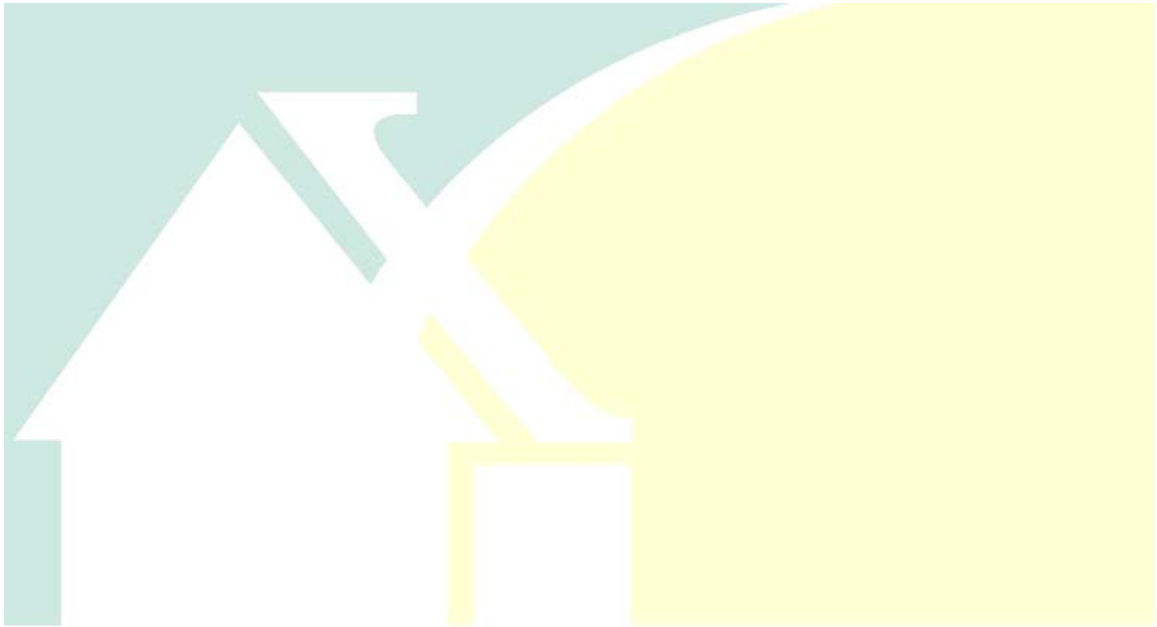


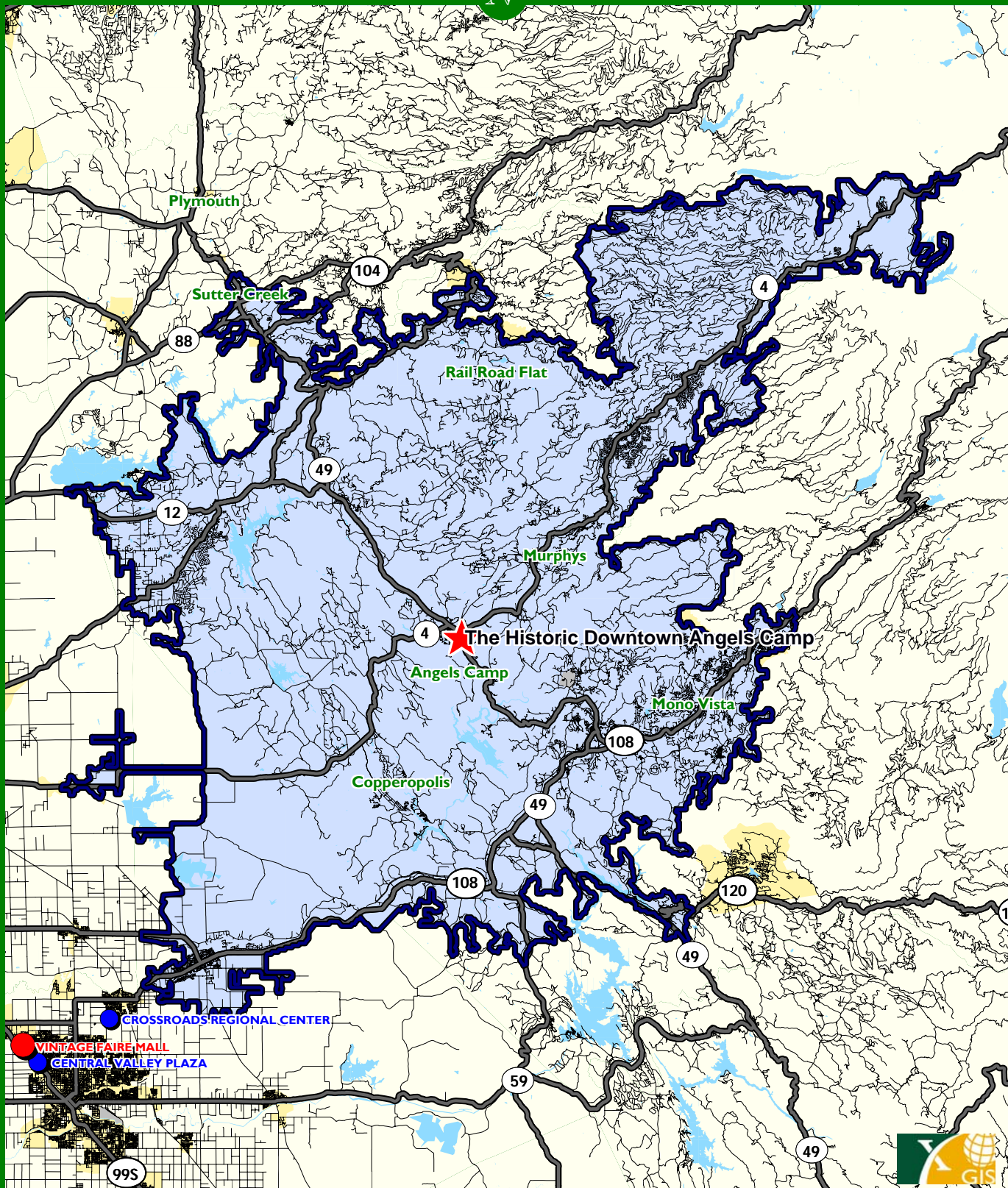
Source: Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000; Census Estimates and Projections 2008 Data

The following table presents the trade potential variables:

Trade Potential Variables	Site
Estimated Household Count	9,882
Number of Households in Dominant Segments	6,885
Traffic Count	12,900
Total Demand	\$384,661,817
Total Supply	\$251,221,505
Leakage	-\$133,440,312

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





# Angels Camp, California: Trade Area

## Shopping Centers

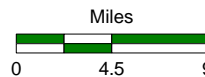
GLA in thousands

1000+

500 to 1000

Secondary Trade Area

Site



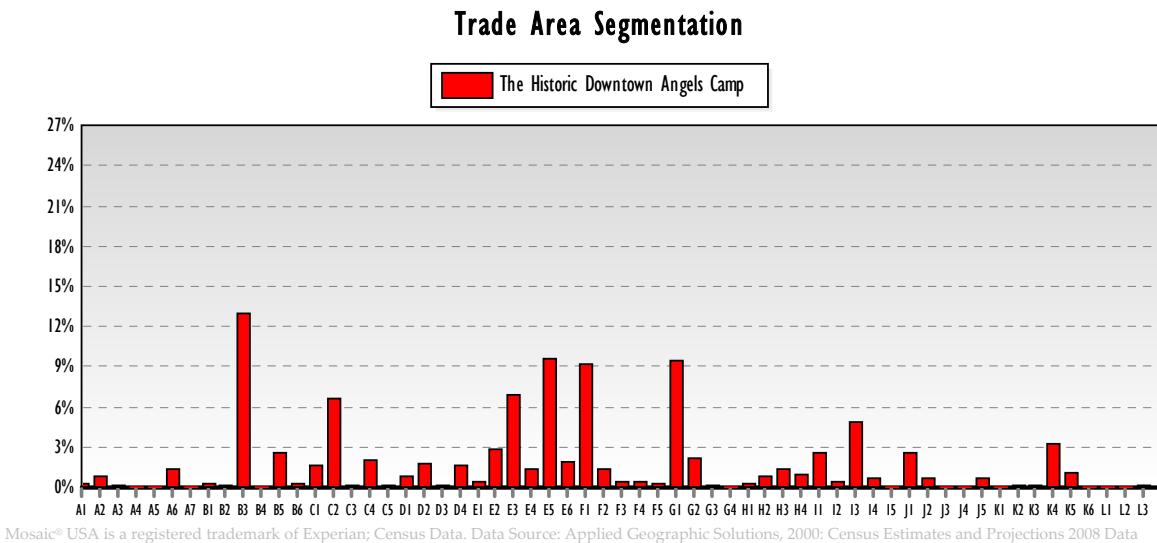
## Site Analysis (Secondary Trade Area):

### Drive-Time Trade Area

The map on the opposite page depicts the secondary trade area for the Site. The secondary trade area consists of custom polygon.

### Psychographics

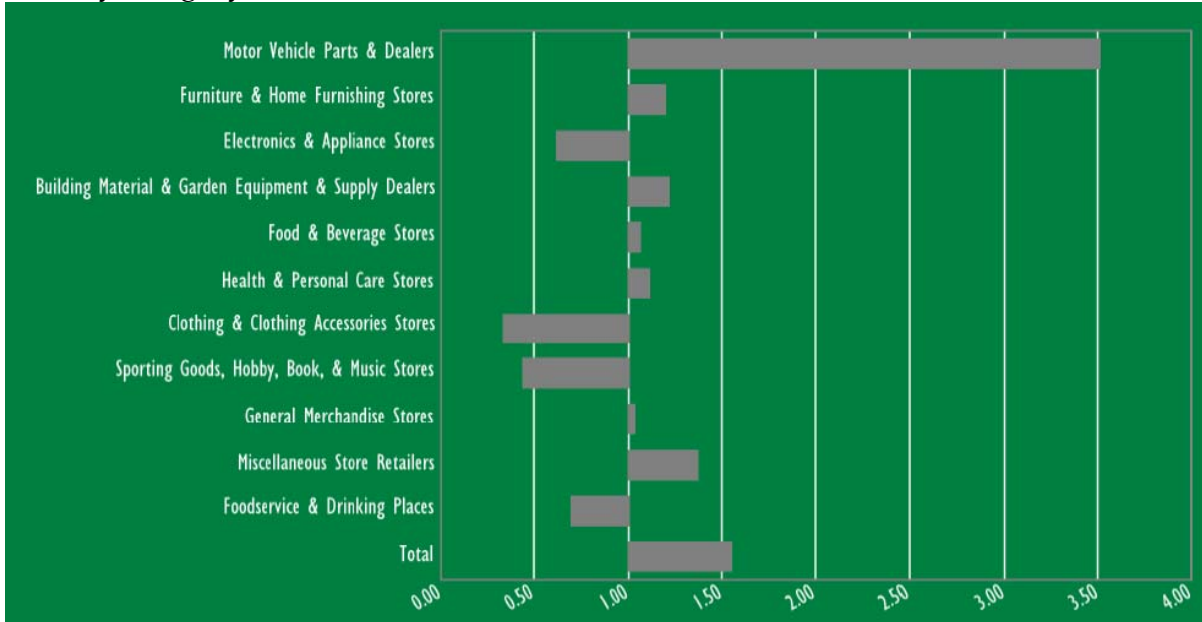
The psychographic profile of the households within the secondary trade area is presented below.



## Site 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.

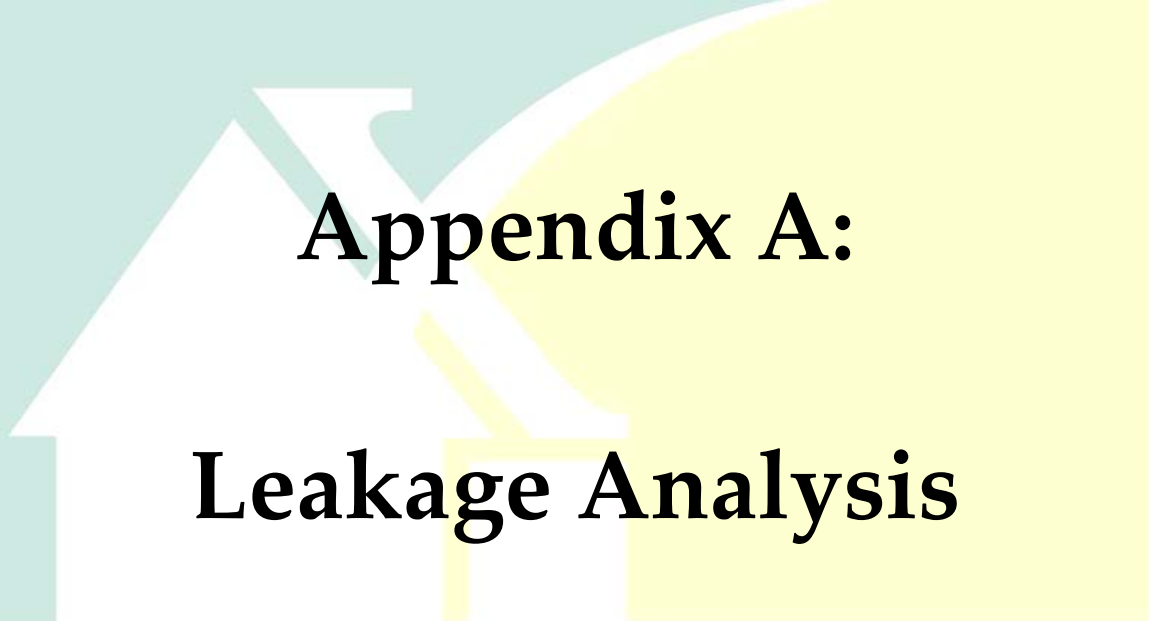


Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000; Census Estimates and Projections 2008 Data

The following table presents the trade potential variables:

Trade Potential Variables	Site (Secondary Trade Area)
Estimated Household Count	47,161
Number of Households in Dominant Segments	29,585
Traffic Count	12,900
Total Demand	\$1,807,493,078
Total Supply	\$2,810,534,085
Surplus	\$1,003,041,007

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

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



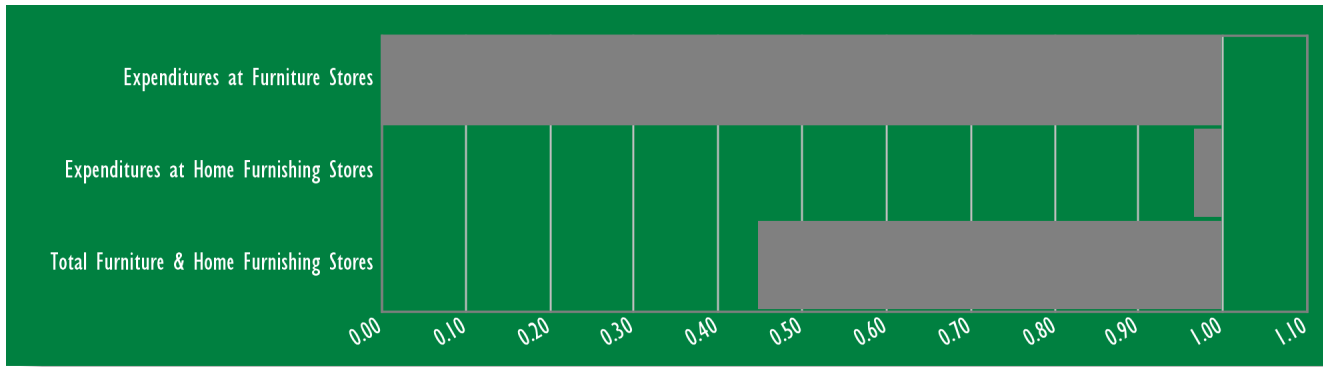
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	\$89,004,818	\$44,898,489	0.5
Furniture & Home Furnishing Stores	\$11,711,325	\$5,249,530	0.4
Electronics & Appliance Stores	\$10,608,232	\$4,160,752	0.4
Building Material & Garden Equipment & Supply Dealers	\$52,988,082	\$80,898,953	1.5
Food & Beverage Stores	\$57,454,106	\$54,787,961	1.0
Health & Personal Care Stores	\$23,364,373	\$21,802,286	0.9
Clothing & Clothing Accessories Stores	\$19,019,350	\$510,912	0.0
Sporting Goods, Hobby, Book, & Music Stores	\$7,904,337	\$2,193,404	0.3
General Merchandise Stores	\$54,091,906	\$4,327,182	0.1
Miscellaneous Store Retailers	\$12,168,369	\$3,128,612	0.3
Foodservice & Drinking Places	\$46,346,918	\$29,263,424	0.6
<b>Total</b>	<b>\$384,661,817</b>	<b>\$251,221,505</b>	<b>0.7</b>

Sub-Categories of Motor Vehicle Parts & Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	\$76,681,753	\$37,365,805	0.5
Expenditures at Other Motor Vehicle Dealers	\$5,112,499	\$2,897,089	0.6
Expenditures at Automotive Parts, Accessories, and Tire Stores	\$7,210,565	\$4,635,595	0.6
Total Motor Vehicle Parts & Dealers	\$89,004,818	\$44,898,489	0.5

Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	\$6,278,630	\$0	0.0
Expenditures at Home Furnishing Stores	\$5,432,695	\$5,249,530	1.0
Total Furniture & Home Furnishing Stores	\$11,711,325	\$5,249,530	0.4

### Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	\$8,177,884	\$3,643,083	0.4
Expenditures at Computer and Software Stores	\$2,043,946	\$517,669	0.3
Expenditures at Camera and Photographic Equipment Stores	\$386,401	\$0	0.0
Total Electronics & Appliance Stores	\$10,608,232	\$4,160,752	0.4

Sub-Categories of Building Material & Garden Equipment & Supply Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	\$19,449,035	\$19,528,591	1.0
Expenditures at Paint and Wallpaper Stores	\$1,156,100	\$963,494	0.8
Expenditures at Hardware Stores	\$4,007,933	\$7,505,508	1.9
Expenditures at Other Building Materials Dealers	\$24,256,578	\$47,886,806	2.0
Expenditures at Outdoor Power Equipment Stores	\$653,937	\$1,180,833	1.8
Expenditures at Nursery and Garden Centers	\$3,464,499	\$3,833,722	1.1
Total Building Material & Garden Equipment & Supply Dealers	\$52,988,082	\$80,898,953	1.5

### Sub-Categories of Food & Beverage Stores



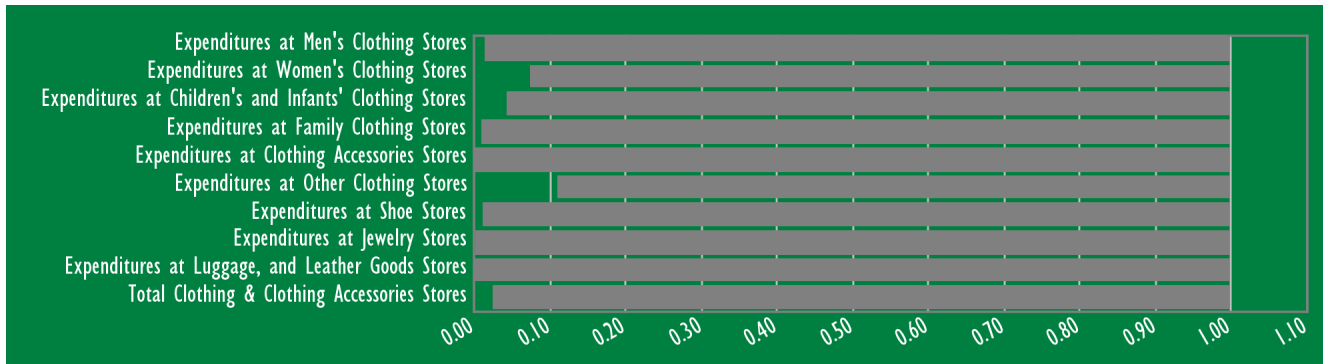
Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	\$49,713,786	\$50,354,116	1.0
Expenditures at Convenience Stores	\$2,563,922	\$1,562,902	0.6
Expenditures at Specialty Food Stores	\$1,632,793	\$1,715,697	1.1
Expenditures at Beer, Wine, and Liquor Stores	\$3,543,605	\$1,155,246	0.3
<b>Total Food &amp; Beverage Stores</b>	<b>\$57,454,106</b>	<b>\$54,787,961</b>	<b>1.0</b>

Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	\$20,274,994	\$21,182,987	1.0
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	\$804,172	\$86,189	0.1
Expenditures at Optical Goods Stores	\$837,688	\$0	0.0
Expenditures at Other Health and Personal Care Stores	\$1,447,518	\$533,110	0.4
<b>Total Health &amp; Personal Care Stores</b>	<b>\$23,364,373</b>	<b>\$21,802,286</b>	<b>0.9</b>

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



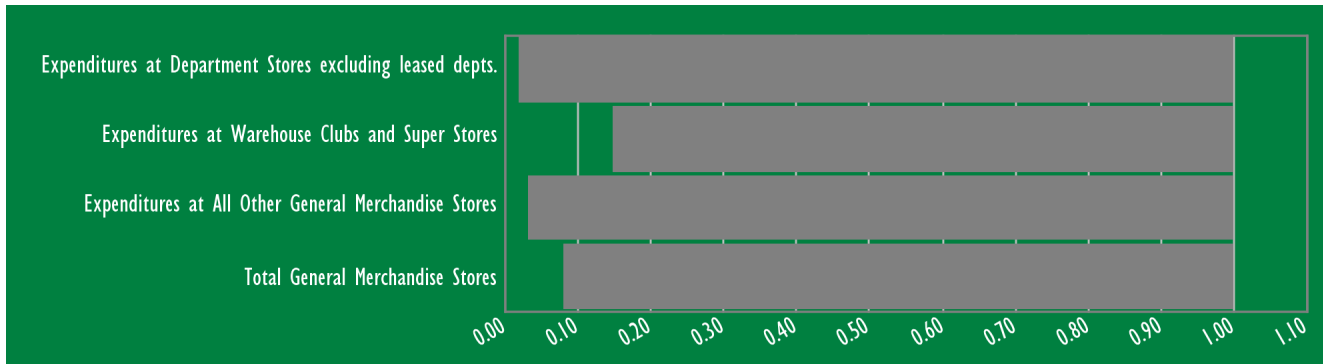
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	\$902,171	\$15,089	0.0
Expenditures at Women's Clothing Stores	\$3,422,100	\$260,594	0.1
Expenditures at Children's and Infants' Clothing Stores	\$646,119	\$27,927	0.0
Expenditures at Family Clothing Stores	\$7,367,908	\$76,996	0.0
Expenditures at Clothing Accessories Stores	\$328,531	\$0	0.0
Expenditures at Other Clothing Stores	\$869,628	\$96,215	0.1
Expenditures at Shoe Stores	\$2,365,473	\$29,257	0.0
Expenditures at Jewelry Stores	\$2,881,591	\$4,834	0.0
Expenditures at Luggage, and Leather Goods Stores	\$235,829	\$0	0.0
<b>Total Clothing &amp; Clothing Accessories Stores</b>	<b>\$19,019,350</b>	<b>\$510,912</b>	<b>0.0</b>

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



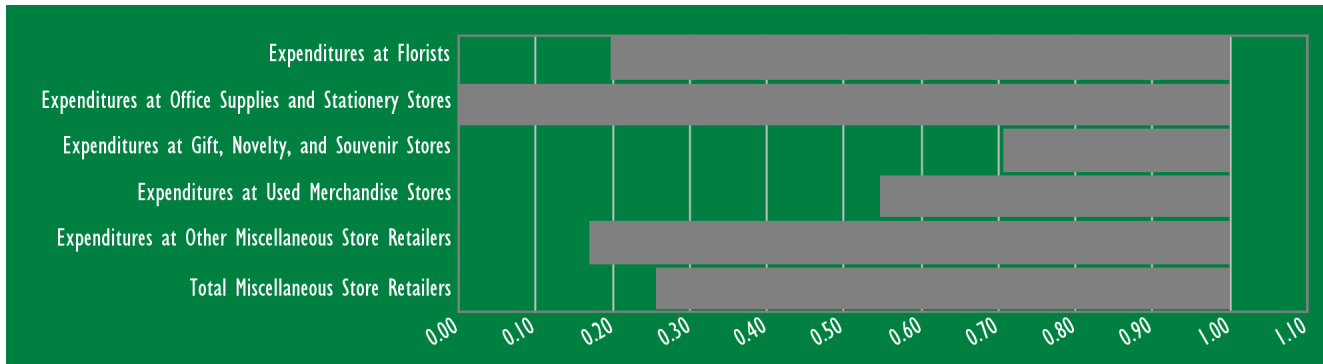
Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	\$2,469,499	\$1,229,983	0.5
Expenditures at Hobby, Toys and Games Stores	\$1,665,065	\$285,812	0.2
Expenditures at Sew/Needlework/Piece Goods Stores	\$535,988	\$155,341	0.3
Expenditures at Musical Instrument and Supplies Stores	\$550,974	\$9,915	0.0
Expenditures at Book Stores and News Dealers	\$1,799,377	\$360,276	0.2
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	\$883,435	\$152,077	0.2
<b>Total Sporting Goods, Hobby, Book, &amp; Music Stores</b>	<b>\$7,904,337</b>	<b>\$2,193,404</b>	<b>0.3</b>

Sub-Categories of General Merchandise Stores



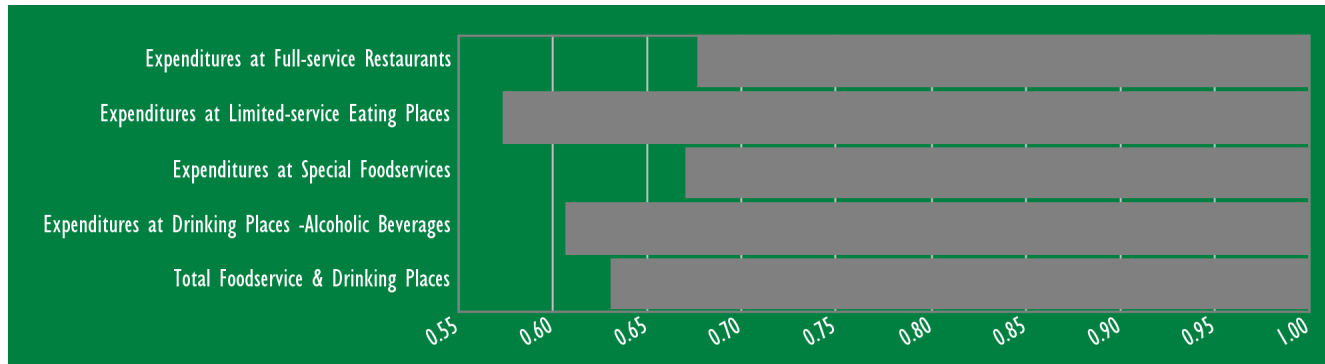
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	\$24,963,666	\$462,752	0.0
Expenditures at Warehouse Clubs and Super Stores	\$25,026,081	\$3,736,592	0.1
Expenditures at All Other General Merchandise Stores	\$4,102,159	\$127,837	0.0
Total General Merchandise Stores	\$54,091,906	\$4,327,182	0.1

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	\$888,369	\$175,970	0.2
Expenditures at Office Supplies and Stationery Stores	\$2,725,633	\$0	0.0
Expenditures at Gift, Novelty, and Souvenir Stores	\$2,090,964	\$1,481,265	0.7
Expenditures at Used Merchandise Stores	\$968,725	\$529,448	0.5
Expenditures at Other Miscellaneous Store Retailers	\$5,494,678	\$941,930	0.2
<b>Total Miscellaneous Store Retailers</b>	<b>\$12,168,369</b>	<b>\$3,128,612</b>	<b>0.3</b>

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	\$21,362,428	\$14,466,555	0.7
Expenditures at Limited-service Eating Places	\$18,832,450	\$10,815,026	0.6
Expenditures at Special Foodservices	\$3,861,734	\$2,591,152	0.7
Expenditures at Drinking Places -Alcoholic Beverages	\$2,290,307	\$1,390,690	0.6
<b>Total Foodservice &amp; Drinking Places</b>	<b>\$46,346,918</b>	<b>\$29,263,424</b>	<b>0.6</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.



## **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.

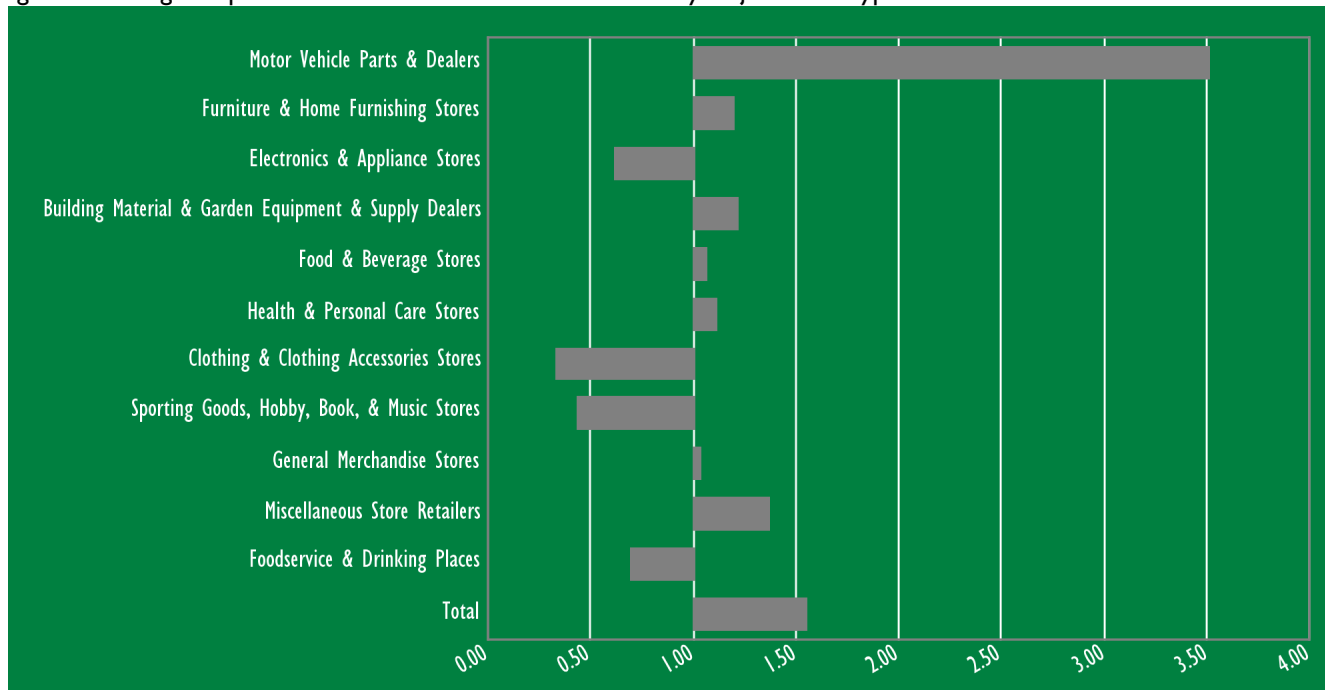
Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits 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 I provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

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



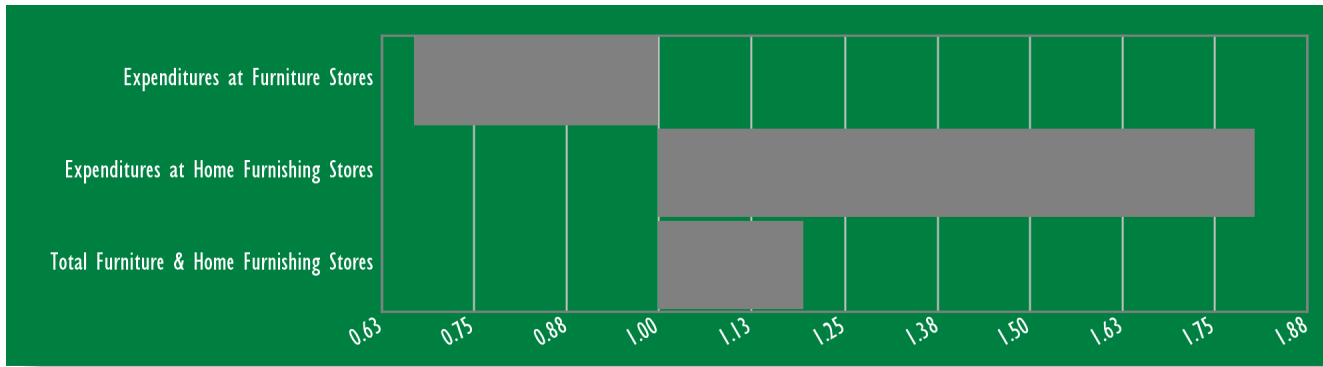
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	\$418,041,856	\$1,466,666,451	3.5
Furniture & Home Furnishing Stores	\$55,024,408	\$65,763,293	1.2
Electronics & Appliance Stores	\$50,395,988	\$31,156,251	0.6
Building Material & Garden Equipment & Supply Dealers	\$244,569,316	\$297,574,932	1.2
Food & Beverage Stores	\$270,101,254	\$286,880,478	1.1
Health & Personal Care Stores	\$106,212,685	\$118,376,013	1.1
Clothing & Clothing Accessories Stores	\$94,336,132	\$31,667,510	0.3
Sporting Goods, Hobby, Book, & Music Stores	\$37,920,728	\$16,727,217	0.4
General Merchandise Stores	\$257,405,333	\$266,959,308	1.0
Miscellaneous Store Retailers	\$56,483,023	\$77,181,191	1.4
Foodservice & Drinking Places	\$217,002,354	\$151,581,442	0.7
<b>Total</b>	<b>\$1,807,493,078</b>	<b>\$2,810,534,085</b>	<b>1.6</b>

Sub-Categories of Motor Vehicle Parts & Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	\$360,110,876	\$1,341,009,848	3.7
Expenditures at Other Motor Vehicle Dealers	\$24,329,951	\$42,233,528	1.7
Expenditures at Automotive Parts, Accessories, and Tire Stores	\$33,601,028	\$83,423,076	2.5
Total Motor Vehicle Parts & Dealers	\$418,041,856	\$1,466,666,451	3.5

Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	\$29,626,962	\$19,891,136	0.7
Expenditures at Home Furnishing Stores	\$25,397,446	\$45,872,156	1.8
Total Furniture & Home Furnishing Stores	\$55,024,408	\$65,763,293	1.2

Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	\$38,727,070	\$27,185,381	0.7
Expenditures at Computer and Software Stores	\$9,803,864	\$3,970,769	0.4
Expenditures at Camera and Photographic Equipment Stores	\$1,865,055	\$100	0.0
Total Electronics & Appliance Stores	\$50,395,988	\$31,156,251	0.6

Sub-Categories of Building Material & Garden Equipment & Supply Dealers



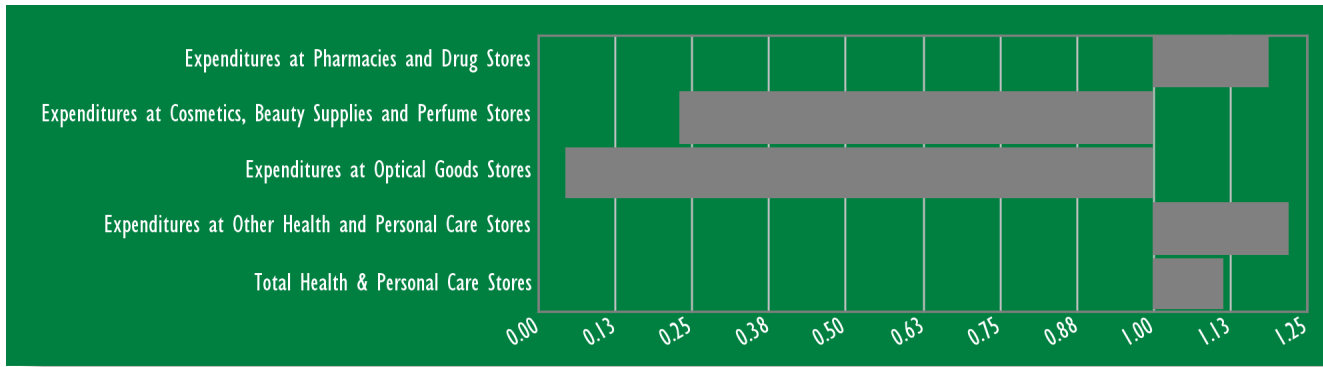
Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	\$89,675,834	\$29,547,196	0.3
Expenditures at Paint and Wallpaper Stores	\$5,239,347	\$5,333,243	1.0
Expenditures at Hardware Stores	\$18,509,530	\$72,045,968	3.9
Expenditures at Other Building Materials Dealers	\$112,128,972	\$175,343,828	1.6
Expenditures at Outdoor Power Equipment Stores	\$2,996,381	\$1,793,002	0.6
Expenditures at Nursery and Garden Centers	\$16,019,251	\$13,511,694	0.8
Total Building Material & Garden Equipment & Supply Dealers	\$244,569,316	\$297,574,932	1.2

Sub-Categories of Food & Beverage Stores



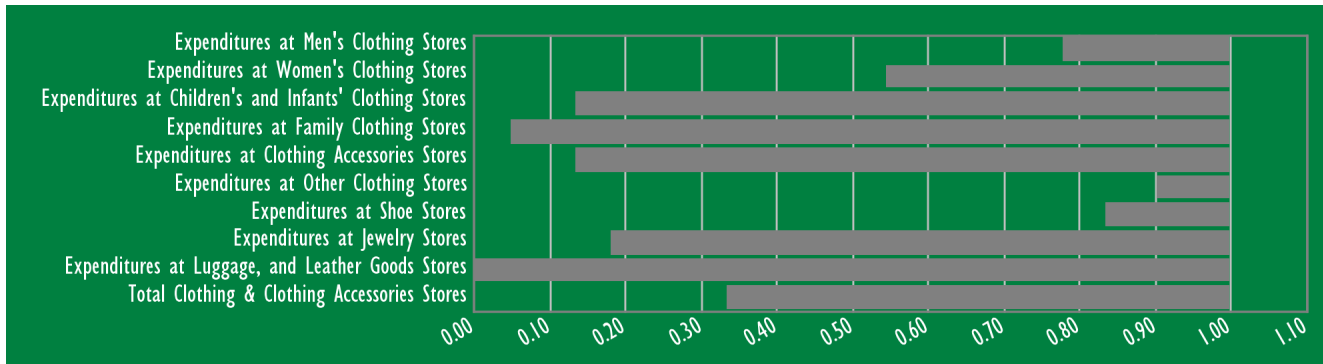
Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	\$233,864,172	\$262,815,906	1.1
Expenditures at Convenience Stores	\$12,052,956	\$7,324,762	0.6
Expenditures at Specialty Food Stores	\$7,736,156	\$10,272,319	1.3
Expenditures at Beer, Wine, and Liquor Stores	\$16,447,971	\$6,467,492	0.4
Total Food & Beverage Stores	\$270,101,254	\$286,880,478	1.1

Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	\$92,047,024	\$109,359,154	1.2
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	\$3,626,534	\$837,749	0.2
Expenditures at Optical Goods Stores	\$3,988,590	\$173,980	0.0
Expenditures at Other Health and Personal Care Stores	\$6,550,538	\$8,005,130	1.2
Total Health & Personal Care Stores	\$106,212,685	\$118,376,013	1.1

Sub-Categories of Clothing & Clothing Accessories Stores



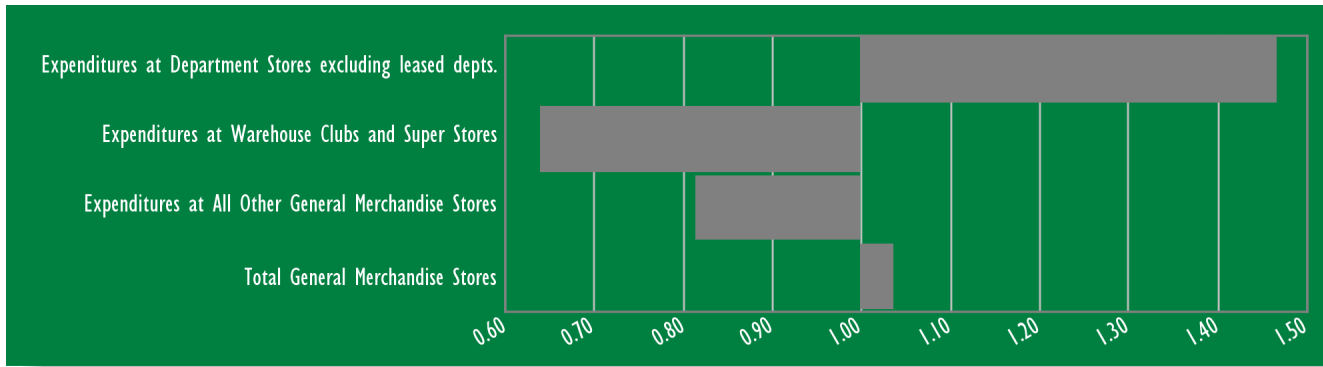
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	\$4,422,925	\$3,439,914	0.8
Expenditures at Women's Clothing Stores	\$17,150,156	\$9,364,418	0.5
Expenditures at Children's and Infants' Clothing Stores	\$3,367,712	\$454,055	0.1
Expenditures at Family Clothing Stores	\$36,471,585	\$1,771,955	0.0
Expenditures at Clothing Accessories Stores	\$1,612,780	\$217,834	0.1
Expenditures at Other Clothing Stores	\$4,334,310	\$3,916,191	0.9
Expenditures at Shoe Stores	\$11,950,473	\$9,994,163	0.8
Expenditures at Jewelry Stores	\$13,884,947	\$2,508,980	0.2
Expenditures at Luggage, and Leather Goods Stores	\$1,141,244	\$0	0.0
<b>Total Clothing &amp; Clothing Accessories Stores</b>	<b>\$94,336,132</b>	<b>\$31,667,510</b>	<b>0.3</b>

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



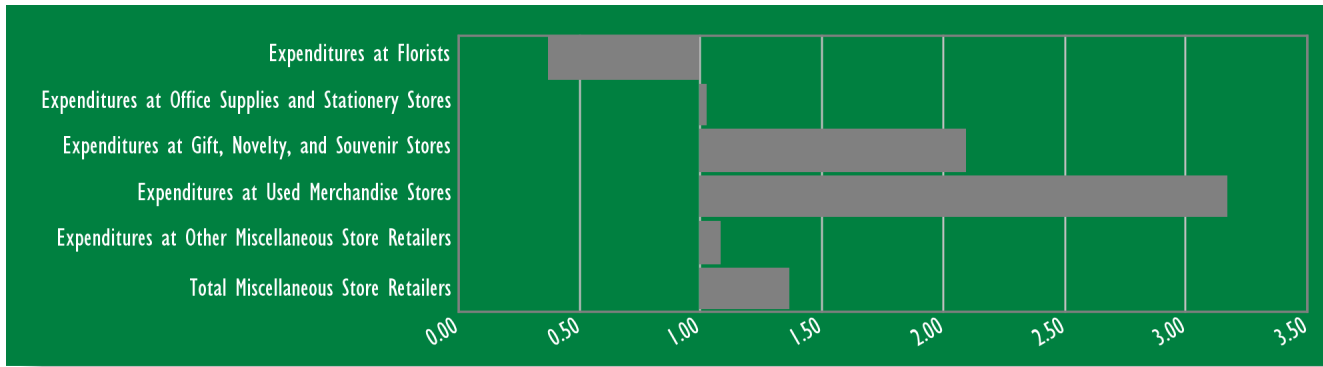
Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	\$12,164,999	\$8,793,129	0.7
Expenditures at Hobby, Toys and Games Stores	\$8,079,862	\$3,876,591	0.5
Expenditures at Sew/Needlework/Piece Goods Stores	\$2,491,422	\$1,164,708	0.5
Expenditures at Musical Instrument and Supplies Stores	\$2,654,529	\$494,027	0.2
Expenditures at Book Stores and News Dealers	\$8,317,716	\$1,466,292	0.2
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	\$4,212,199	\$932,469	0.2
<b>Total Sporting Goods, Hobby, Book, &amp; Music Stores</b>	<b>\$37,920,728</b>	<b>\$16,727,217</b>	<b>0.4</b>

Sub-Categories of General Merchandise Stores



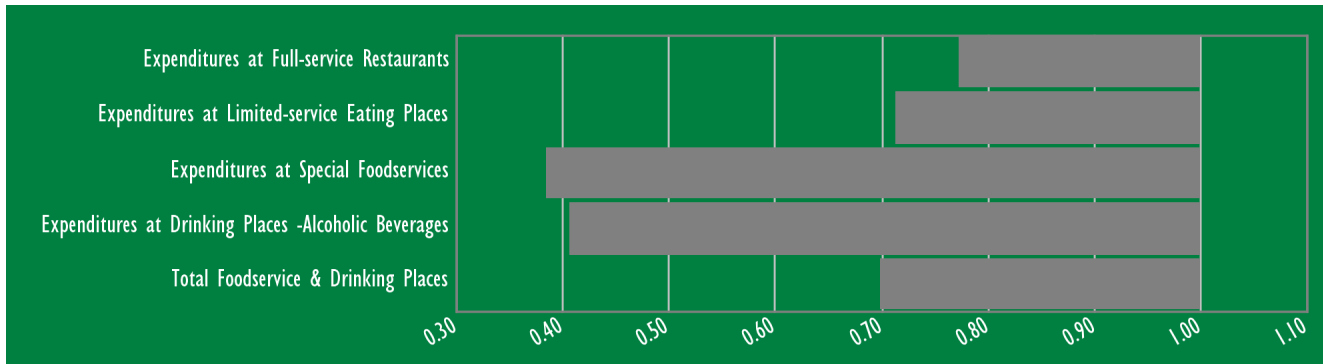
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	\$119,795,453	\$175,669,347	1.5
Expenditures at Warehouse Clubs and Super Stores	\$118,257,449	\$75,550,617	0.6
Expenditures at All Other General Merchandise Stores	\$19,352,431	\$15,739,344	0.8
Total General Merchandise Stores	\$257,405,333	\$266,959,308	1.0

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	\$4,114,433	\$1,534,527	0.4
Expenditures at Office Supplies and Stationery Stores	\$12,717,479	\$13,066,822	1.0
Expenditures at Gift, Novelty, and Souvenir Stores	\$9,776,931	\$20,554,726	2.1
Expenditures at Used Merchandise Stores	\$4,620,738	\$14,670,528	3.2
Expenditures at Other Miscellaneous Store Retailers	\$25,253,442	\$27,354,587	1.1
Total Miscellaneous Store Retailers	\$56,483,023	\$77,181,191	1.4

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	\$99,954,813	\$77,309,413	0.8
Expenditures at Limited-service Eating Places	\$88,352,543	\$63,005,798	0.7
Expenditures at Special Foodservices	\$18,111,562	\$6,965,887	0.4
Expenditures at Drinking Places -Alcoholic Beverages	\$10,583,436	\$4,300,345	0.4
<b>Total Foodservice &amp; Drinking Places</b>	<b>\$217,002,354</b>	<b>\$151,581,442</b>	<b>0.7</b>

---

## Sources and Methodology

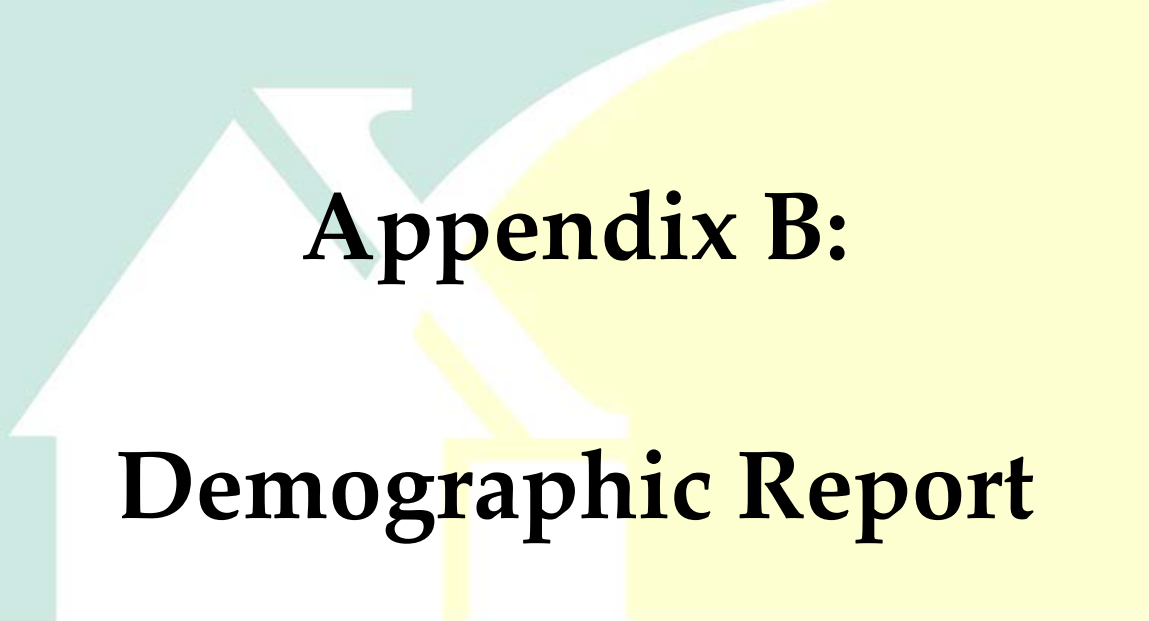
The primary data sources used in the construction of the database include:

- 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:** The Historic Downtown Angels Camp  
Angels Camp, CA

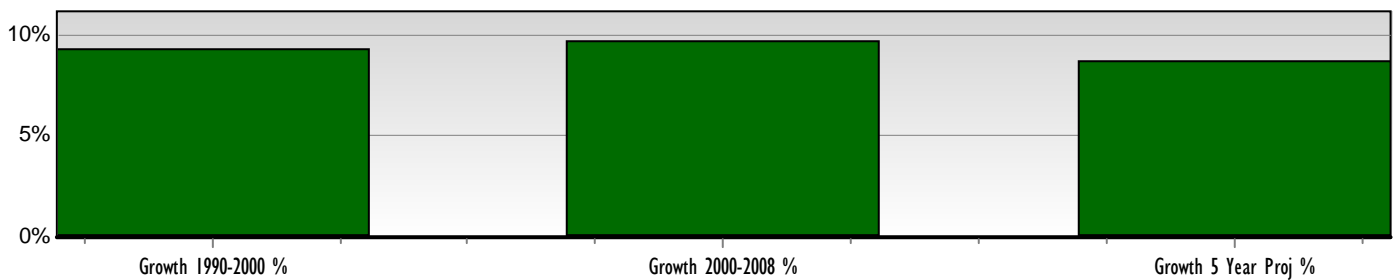
**Date:** 8/31/2010

**18 Min Drive**  
**Time**

## Population Profile

2013 Projection	25,105
2008 Estimate	23,098
2000 Census	21,058
1990 Census	19,265

## Population Change



**18 Min Drive**  
**Time**

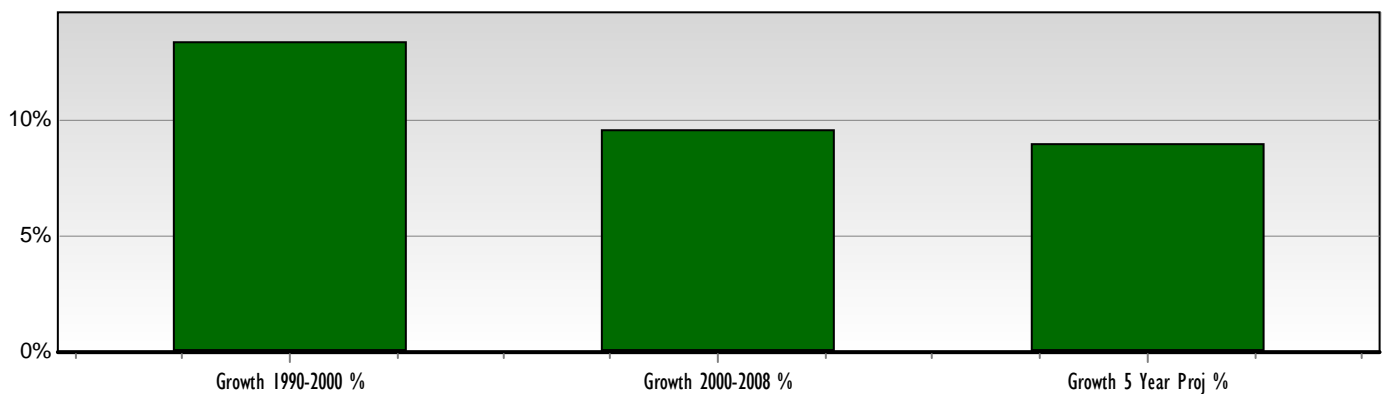
## Work Place Population

Total	5,607
-------	-------

## Household Profile

2013 Projection	10,767
2008 Estimate	9,882
2000 Census	9,015
1990 Census	7,950

## Household Change



**Analysis Geography:** The Historic Downtown Angels Camp  
Angels Camp, CA

**Date:** 8/31/2010

**18 Min Drive**  
**Time**

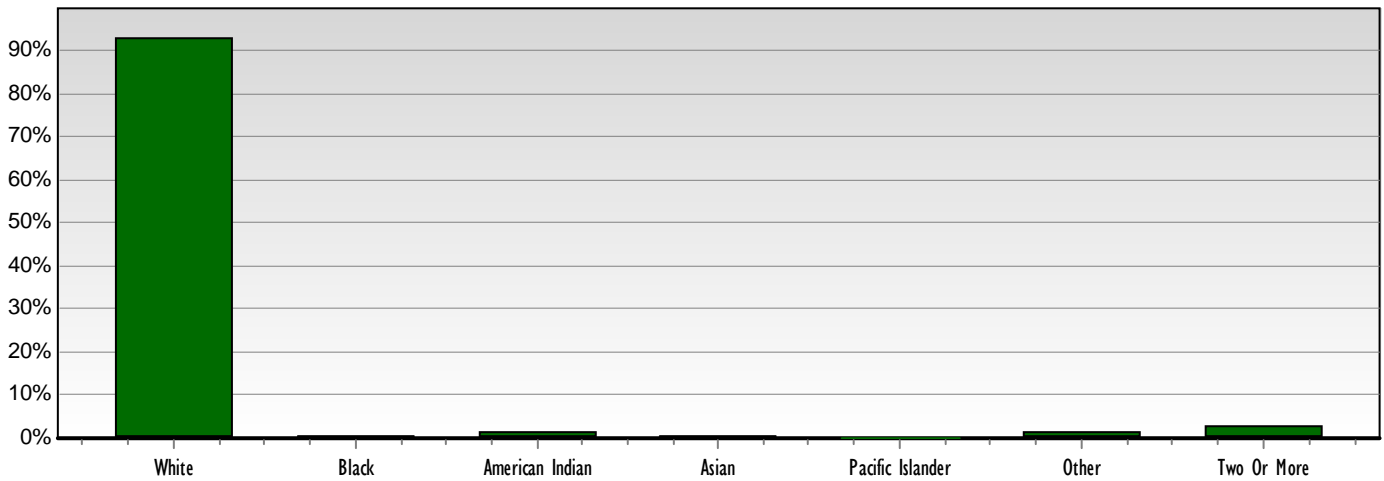
## Population By Race (Current)

White	21,466
Black	141
American Indian	338
Asian	157
Pacific Islander	28
Other	326
Two Or More	642

## Total Population By Race

**23,098**

### Population By Race (Current)



**18 Min Drive**  
**Time**

## Population By Hispanic Origin (Current)

Hispanic Origin	1,778
Non Hispanic Origin	21,320

**Analysis Geography:** The Historic Downtown Angels Camp  
Angels Camp, CA

**Date:** 8/31/2010

**18 Min Drive**  
**Time**

## Population By Age (Current)

0 to 4 years	1,036
5 to 9 years	882
10 to 13 years	883
14 to 17 years	1,012
18 to 19 years	629
20 to 24 years	1,599
25 to 34 years	2,971
35 to 44 years	2,433
45 to 49 years	1,453
50 to 54 years	1,714
55 to 59 years	1,827
60 to 64 years	1,588
65 to 74 years	2,457
75 to 84 years	1,840
85+ Years	769

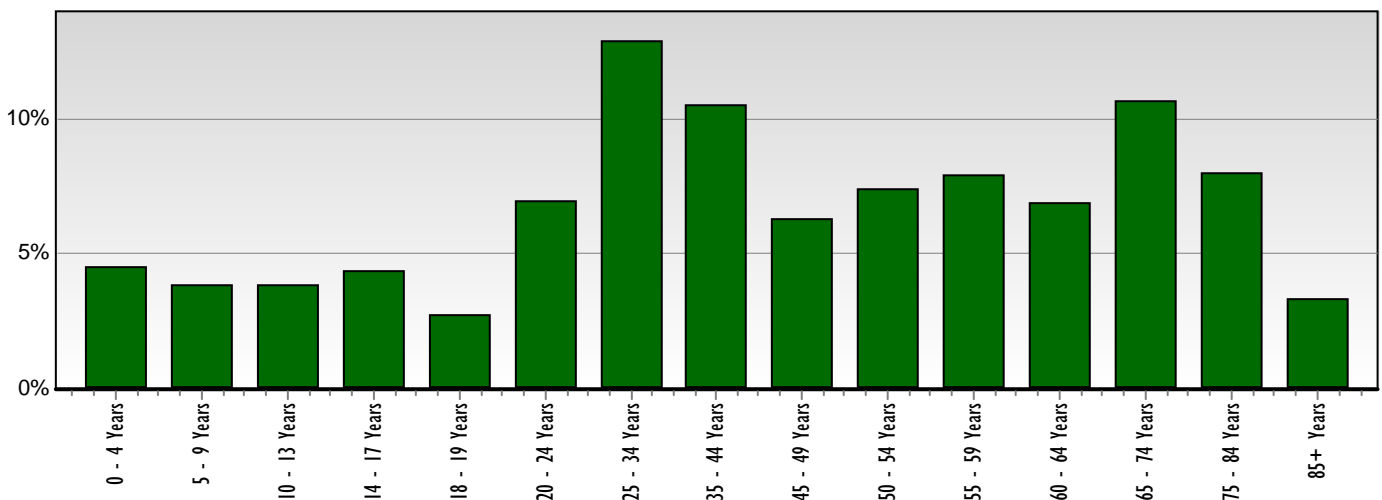
## Total Population By Age

**23,098**

Median Age

**44.8**

## Population By Age (Current)



**Analysis Geography:** The Historic Downtown Angels Camp  
Angels Camp, CA

**Date:** 8/31/2010

**18 Min Drive**  
**Time**

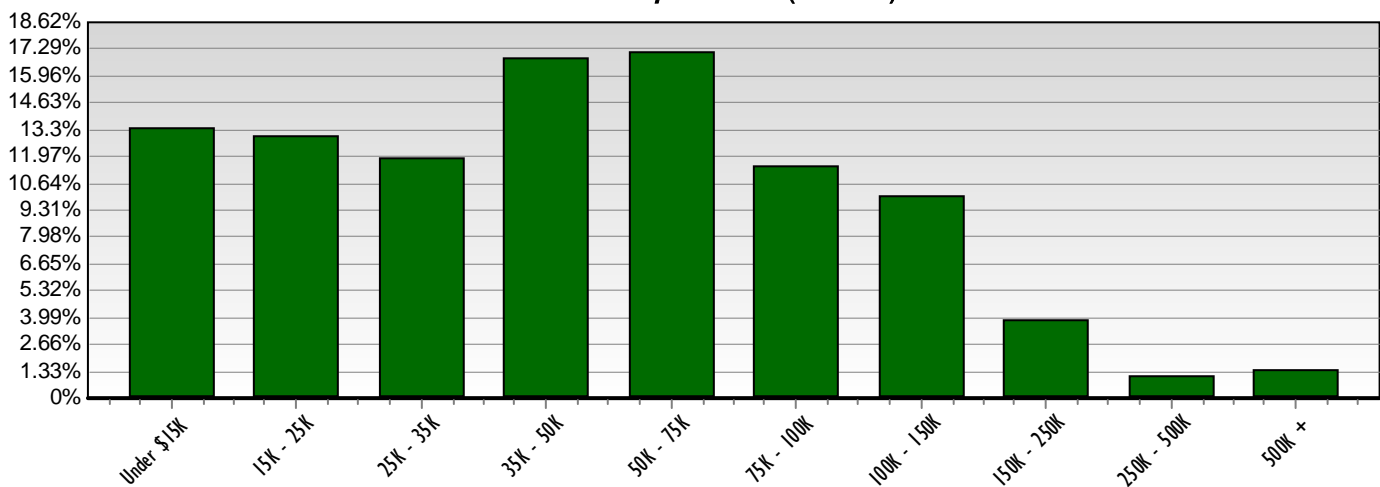
## Households By Income (Current)

Under \$15,000	1,327
\$15,000 to \$24,999	1,283
\$25,000 to \$34,999	1,175
\$35,000 to \$49,999	1,666
\$50,000 to \$74,999	1,697
\$75,000 to \$99,999	1,140
\$100,000 to \$149,999	987
\$150,000 to \$249,999	386
\$250,000 to \$499,999	109
\$500,000 +	136

## Total Households By Income

Average Household Income	\$61,837
Median Household Income	\$45,823

## Households By Income (Current)



**Analysis Geography:** The Historic Downtown Angels Camp  
Angels Camp, CA

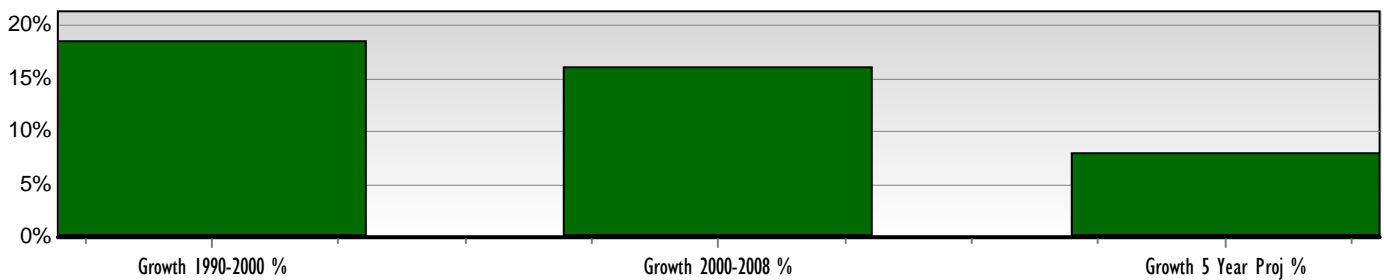
**Date:** 8/31/2010

## Population Profile

**Secondary Trade Area**

2013 Projection	131,370
2008 Estimate	121,650
2000 Census	104,860
1990 Census	88,440

### Population Change



## Work Place Population

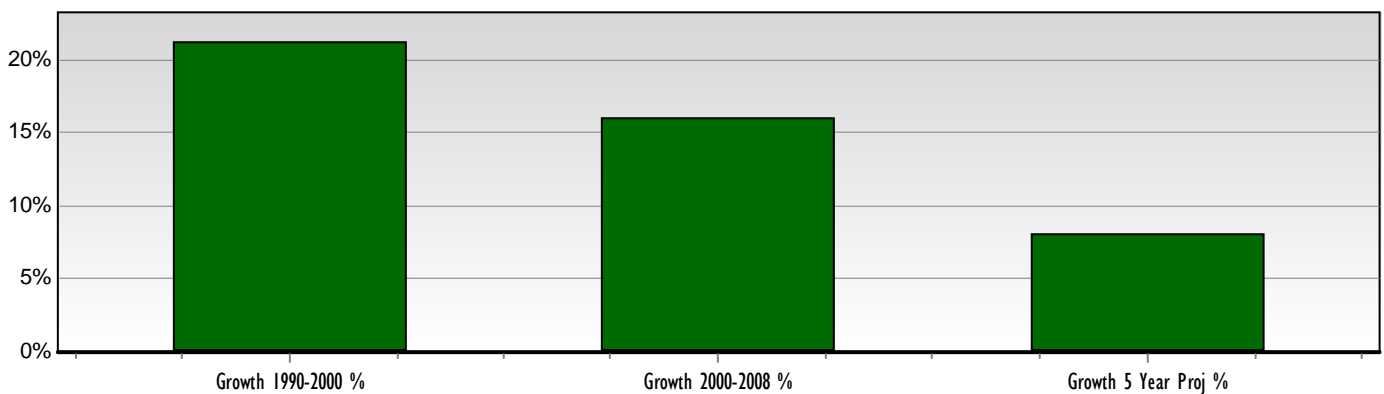
**Secondary Trade Area**

Total	39,645
-------	--------

## Household Profile

2013 Projection	50,972
2008 Estimate	47,161
2000 Census	40,642
1990 Census	33,530

### Household Change

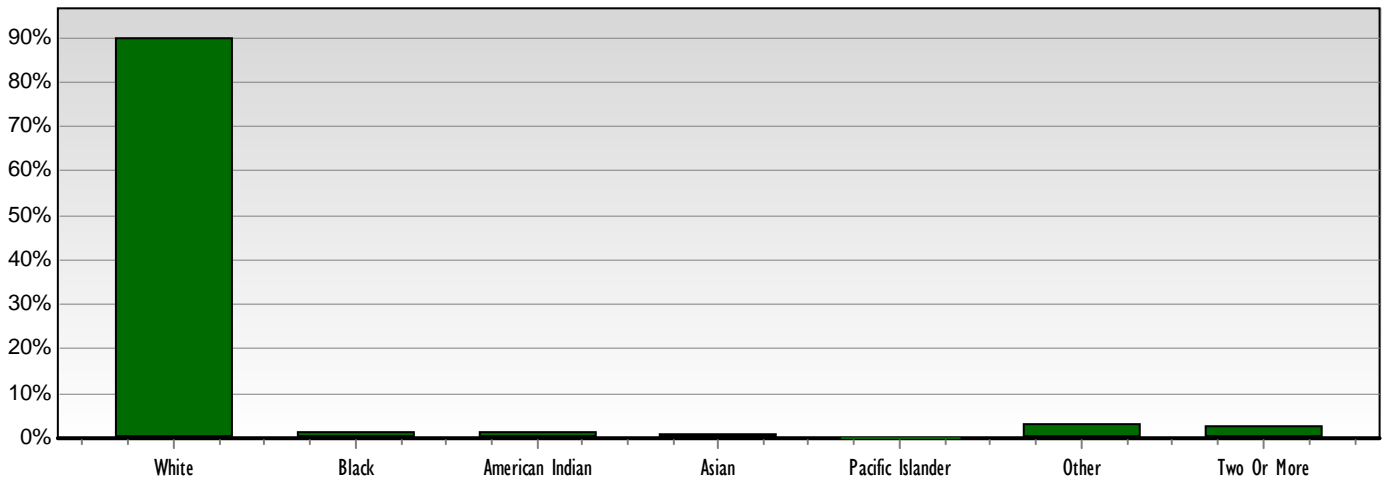


**Analysis Geography:** The Historic Downtown Angels Camp  
Angels Camp, CA

**Date:** 8/31/2010

<b>Population By Race (Current)</b>		<b>Secondary Trade Area</b>
White	109,272	
Black	1,631	
American Indian	1,847	
Asian	1,247	
Pacific Islander	209	
Other	3,925	
Two Or More	3,519	
<b>Total Population By Race</b>		<b>121,650</b>

**Population By Race (Current)**



<b>Population By Hispanic Origin (Current)</b>		<b>Secondary Trade Area</b>
Hispanic Origin	15,824	
Non Hispanic Origin	105,826	

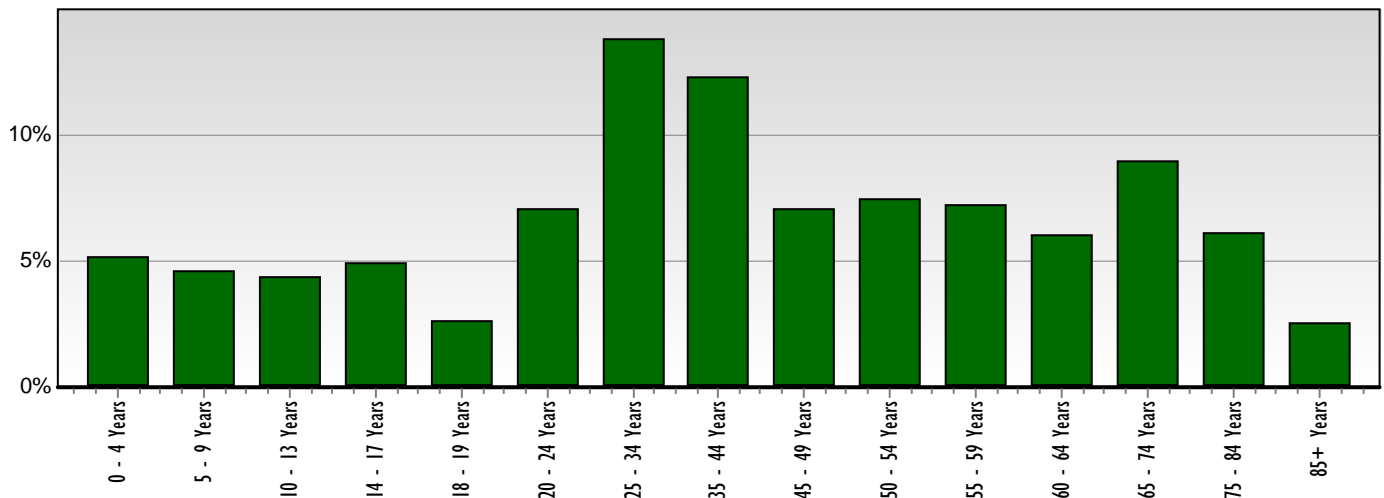
**Analysis Geography:** The Historic Downtown Angels Camp  
Angels Camp, CA

**Date:** 8/31/2010

<b>Population By Age (Current)</b>	<b>Secondary Trade Area</b>
0 to 4 years	6,264
5 to 9 years	5,596
10 to 13 years	5,276
14 to 17 years	5,941
18 to 19 years	3,199
20 to 24 years	8,579
25 to 34 years	16,754
35 to 44 years	14,937
45 to 49 years	8,533
50 to 54 years	9,080
55 to 59 years	8,794
60 to 64 years	7,344
65 to 74 years	10,852
75 to 84 years	7,409
85+ Years	3,079

<b>Total Population By Age</b>	<b>121,650</b>
Median Age	41.8

**Population By Age (Current)**

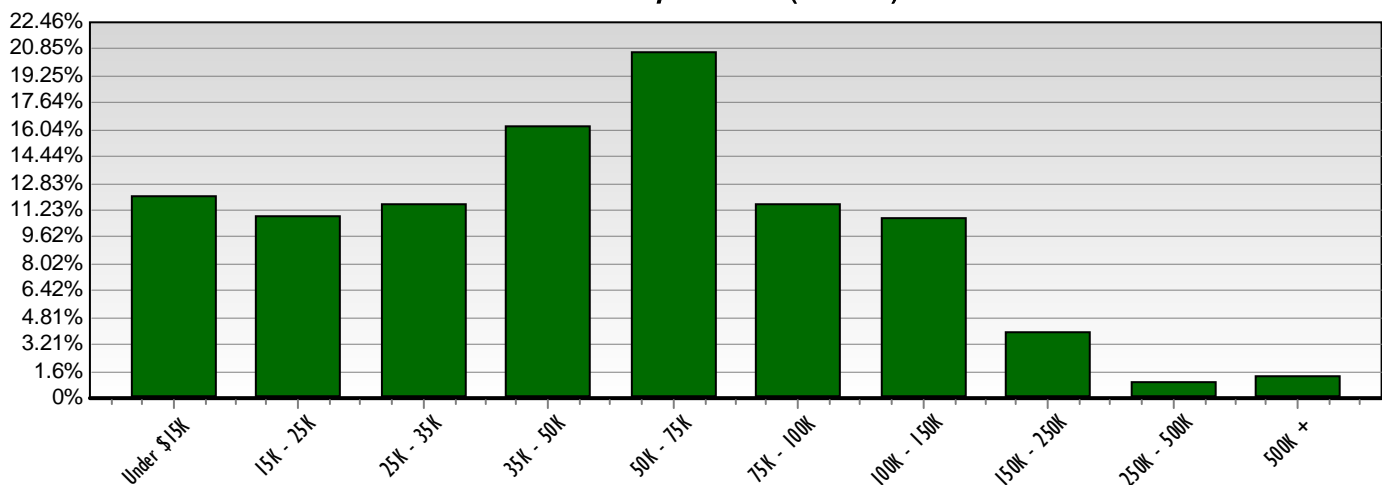


**Analysis Geography:** The Historic Downtown Angels Camp  
Angels Camp, CA

**Date:** 8/31/2010

Households By Income (Current)	Secondary Trade Area
Under \$15,000	5,685
\$15,000 to \$24,999	5,129
\$25,000 to \$34,999	5,462
\$35,000 to \$49,999	7,663
\$50,000 to \$74,999	9,752
\$75,000 to \$99,999	5,443
\$100,000 to \$149,999	5,101
\$150,000 to \$249,999	1,876
\$250,000 to \$499,999	442
\$500,000 +	640
<b>Total Households By Income</b>	<b>47,193</b>
Average Household Income	\$64,317
Median Household Income	\$49,983

**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

---

*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

---

*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

---

*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**

---

*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**

---

*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**

---

*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**

---

*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**

---

*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**

---

*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**

---

*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**

---

*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**

---

*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 B: Upscale America

**Segment B03: Urban Commuter Families**

---

*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 C: Small-town Contentment

**Segment C02: Prime Middle America**

---

*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 E: American Diversity

**Segment E03: Professional Urbanites**

---

*An upper-middle-class retirement oasis in the metropolitan sprawl containing very active empty nesting couples and older singles*

**Demographics**

Professional Urbanites is a haven for aging singles and couples, an upper-middle-class retirement oasis in the metropolitan sprawl. With most residents over the age of 65, these households have already empty-nested, with their children having gone off to college and work. The adults in this cluster boast college degrees with aboveaverage incomes as white-collar professionals and managers in retail, education and health care. And they tend to live in relatively new homes and well-kept apartments, enjoying an upscale lifestyle in the twilight of their careers.

**Lifestyles**

The financially secure members of Professional Urbanites enjoy cosmopolitan lifestyles. They have high rates for traveling abroad, taking cruises and staying at vacation resorts in the U.S. Their favorite leisure activities include attending live theater and operas, frequenting restaurants and antique shows, and visiting gambling casinos. Their preferred sports are golfing and boating. These well-off, conservative consumers like to drive full-sized luxury cars and hang on to old consumer electronics such as stereos, and favor 35-mm cameras over digital models. When they go shopping, they like to buy clothes at upscale boutique stores like Talbot's and Ann Taylor, and home furnishings from big-box stores like Costco, Home Depot and Bed, Bath & Beyond. Increasingly, they look for products that are environmentally friendly and, in their words, "have stood the test of time" —much like themselves.

**Media**

Professional Urbanites residents are media traditionalists. They're more likely than average Americans to read newspapers, subscribe to magazines and listen to the radio. They're avid fans of news oriented magazines such as U.S. News & World Report, Newsweek and the New Yorker and turning to cable news networks like CNN, CNBC and Fox News. They're also fans of family-friendly entertainment, and they have high rates for watching the Hallmark Channel, Turner Classic Movies and A&E. Their preferred radio stations go back to an earlier age—big band, easy listening and classical music. They're still relative new comers when it comes to the Internet, and some find computers confusing and will never get used to them. However, they're starting to go online to trade stocks, make travel reservations and seek out medical information.

Group E: American Diversity

## **Segment E05: American Great Outdoors**

---

*Older rural couples and retirees scattered in remote communities around the country living on low wage and Social Security in modest homes, small apartment buildings and mobile homes*

### **Demographics**

A rugged blend of rural couples and retirees makes up American Great Outdoors. Scattered in remote communities around the country, this segment is characterized by aging households—about half are over 65— who like an outdoor lifestyle. These singles and couples live in modest homes, small apartment buildings and mobile homes. There's little emphasis on educational achievement, and one in five did not complete high school. Most households get by on Social Security or relatively low wages earned at blue-collar and service industry jobs in retail, health care and food services. Money seems to go further in these isolated communities affording a number of households with full-sized cars and boats.

### **Lifestyles**

As the name suggests, the small-town households in American Great Outdoors spend their leisure time outside, gardening, bird-watching, camping and saltwater fishing. These older Americans also enjoy social activities through their memberships in veterans clubs and fraternal orders. Playing bingo is also a favorite pastime. With only modest incomes, they are very conservative owning few investments and prefer the safety of CDs and money markets. They're more comfortable shopping at discount department stores and at do-it-yourself home improvement chains like Ace Hardware and True Value Hardware. Whether it's clothes or cars, these blue-collar folks are proud of their American roots and buy products with a made-in-the-USA label or brand.

### **Media**

American Great Outdoors households would rather be outside than sitting down with most media. They will come inside to watch TV programs that feature how-to renovations and makeover challenges as well as game shows or classic movies on AMC or the Hallmark Channel. They aren't radio fans, but they'll occasionally tune in stations that offer news or easy listening music. These consumers would rather thumb through magazine pages than click through anything online. Their taste in magazines reflects titles geared to women and older-than-average readers including Woman's World, Reader's Digest, Prevention and Good Housekeeping.

Group F: Metro Fringe

## **Segment F01: Steadfast Conservatives**

---

*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.

Group G: Remote America

## **Segment G01: Hardy Rural Families**

---

*Predominantly middle-class, older Americans living rustic lifestyles in older single-family houses and mobile homes located in tiny towns and isolated villages*

### **Demographics**

Far beyond the nation's beltways in tiny towns and isolated villages, the households of Hardy Rural Families are thriving. Predominantly white and middle-class, these older Americans have crafted rustic lifestyles in older single-family houses and mobile homes. Most of the households comprise married couples with a single wage earner who are high school educated and have blue-collar jobs in agriculture, construction and transportation. In these tradition-steeped communities, a disproportionate number of households have single wage-earners. To cover the long distances required for even the simplest of errands, these households rely on pickups and SUVs to handle the rough terrain in their rural communities.

### **Lifestyles**

The members of Hardy Rural Families share active outdoor lifestyles. They like to spend their leisure time pursuing activities such as hiking, boating and gardening. Their social lives revolve around fraternal orders, veterans clubs and church groups. They prefer to shop at local stores but, if they can't find what they want, they'll head to discount retail chains like Wal-Mart, Big Lots and Fashion Bug. This is buy-America country where residents look for domestically made pickups and SUVs. They like to take driving trips for short weekend getaways. Many consumers are late adopters of new products, especially consumer electronics: They have relatively low rates for owning computers and digital devices, and their living rooms are likely to be equipped with stereos and TVs hooked up to VCRs. They are not big investors and feel the stock market is too risky. They prefer to pay in cash for things and carry personal loans, car loans and low-to-medium value insurance policies.

### **Media**

In Hardy Rural Families, residents are loyal to traditional media. They listen to country music and classic rock on the radio. They have high rates for reading daily newspapers and magazines that reflect their down-home lifestyles including Country Weekly, Family Handyman and Motor Trend. On television, they tune in to network dramas and daytime soaps as well as cable networks like the Outdoor Channel, Speed Channel and National Geographic Channel. Hardy Rural Families households have low Internet usage rates, but when residents do go online, they're most likely to visit websites of another traditional media—the network TV home pages—to follow the exploits of their favorite programs and stars.

Group I: Rural Villages and Farms

## **Segment I03: Comfy Country Living**

---

*Older, empty-nesting college-educated couples and retirees reside in quiet small-town communities*

### **Demographics**

In Comfy Country Living, empty-nesting couples and retirees reside in quiet exurban communities. These households, predominantly white, married and college educated, are above-average in age with roughly one in four being 65 years or older. They're solidly middle-class from a mix of well-paying white-collar and blue-collar jobs in manufacturing, retail and food services. Many residents are pursuing the good life in relatively new houses and mobile homes worth close to the national median. With their children grown and out of the house, these mature adults have greater discretionary income to enjoy active social lives. Many have at least two cars to access entertainment and cultural amenities outside their small-town communities.

### **Lifestyles**

With households skewing older and middle-class, Comfy Country Living features relaxing lifestyles. Residents have cultured sensibilities and enjoy going to plays, movies and music concerts. At home, they like to read, play a musical instrument, do woodworking and collect stamps. However, they wouldn't consider themselves as homebodies. They enjoy a variety of outdoor sports, such as biking, golfing and hiking. They travel regularly to domestic locations, typically gambling casinos and beachside resorts. These households have enough savings to invest in stocks and municipal bonds, and many like to give back to the community by donating money to political and environmental causes. To maintain their active schedules, these residents typically drive domestic pickup trucks, luxury sedans, and compact cars, with many being equipped with satellite radio.

### **Media**

Comfy Country Living households like to get their news from magazines and their entertainment from television. When it comes to magazines, they're drawn to publications like Time and Newsweek as well as The New Yorker and Consumer Reports. On TV, they watch reality programs, evening newscasts, sitcoms and comedy shows. Their cable channels switch between A&E, FX, History Channel and HGTV. Unlike many of the country and rural Mosaic segments, Comfy Country Living households exhibit higher rates for listening to jazz and classical music on the radio than country. They are also spending their leisure time going online to shop, visit news websites and research health information.

Group K: Urban Essence

**Segment K04: Urban Diversity**

---

*Young and mobile multi-ethnic singles and single-parent families living in inter-city neighborhoods in a mix of rowhouses and high-rise apartment buildings*

**Demographics**

With nearly half of households containing minorities, Urban Diversity is known as a transient world of young, multi-ethnic singles and single-parent families. In these inter-city neighborhoods, residents struggle against challenging economics in a mix of rowhouses and high-rise apartment buildings. Most adults have completed high school or some college, with many working at entry-level jobs in retail, health care and food services. With a high unemployment rate, the median income is a third below the general population, and sometimes it's a stretch for households to make the rent for their less-than-lavish apartments that nevertheless cost more than the U.S. average. Young and mobile, a disproportionate number have lived in their units less than a year and mostly alone.

**Lifestyles**

Modest incomes haven't kept the young members of Urban Diversity from leading vibrant lifestyles. They have high rates for going to nightclubs, theme parks, comedy clubs and bowling alleys. They enjoy an impressive number of athletic activities, from soccer and basketball to weight lifting and jogging. Residents describe themselves as the first among their friends to try a new store and fashion, but they also frequent retail chains like Old Navy, Marshalls and Mervyn's. With a third of households having children, this is a strong market for kids' products including toys, books, dolls, board games and easy-to-prepare foods such as lunch kits and frozen pizza. They buy consumer electronics for themselves and their kids, including video game devices, MP3 players and digital cameras. They claim they're not good at saving money, but prefer the safety of short-term CDs versus stocks or other investments.

**Media**

The households of Urban Diversity are omnivorous media fans. They describe themselves as TV addicts, radio lovers, regular movie-goers and Internet surfers. Television is still their entertainment source of choice, and they watch sitcoms, reality shows, evening animation and late-night talk shows all at high rates. On their radios, they gravitate to talk stations, Spanish programming and urban contemporary music. Residents alternate between reading ethnic-targeted magazines and mainstream titles covering music, parenting and popular culture. They pick up a daily newspaper for job and TV listings. These young households typically go online each day for a variety of activities, from finding sports scores and job openings to listening to streaming radio and trying their luck at gambling sites.