

**CITY OF**  
**LA MESA**

*JEWEL of the HILLS*

# **Retail Site Assessment**

*April 2011*

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## Selecting La Mesa's Retail Sites

To begin the CommunityID process, the City of La Mesa selected three sites to be analyzed for possible retail development or revitalization. The locations of the three sites are shown on the following page.

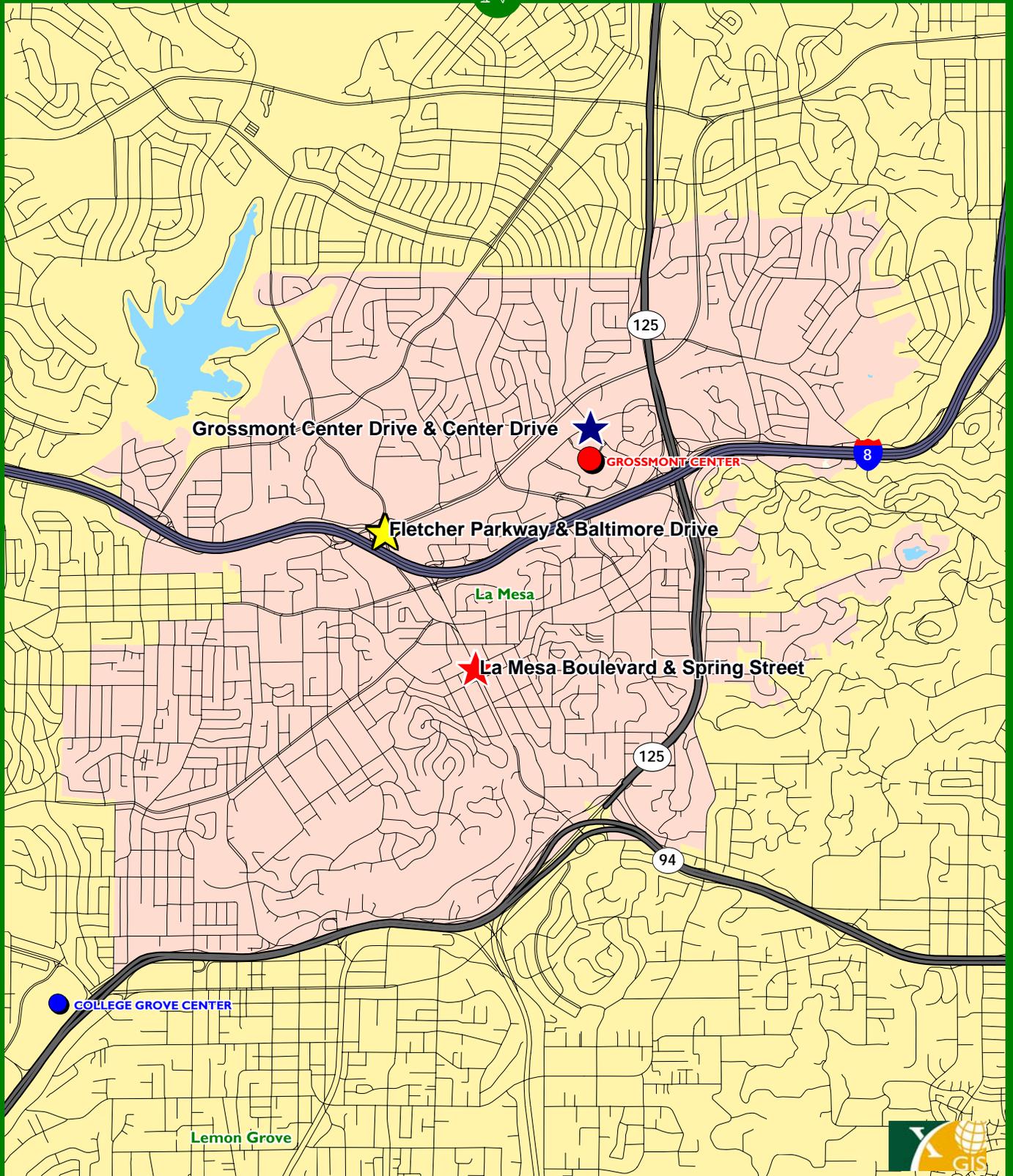
Buxton has examined the retail potential of the three sites based on the following analyses:

- 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 La Mesa's customers within each of the three trade areas was developed
- The surplus and leakage for 11 major store types and 49 minor store types were determined for the trade area

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

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



# La Mesa, California: Overview



### Shopping Centers

GLA in thousands



City Limits

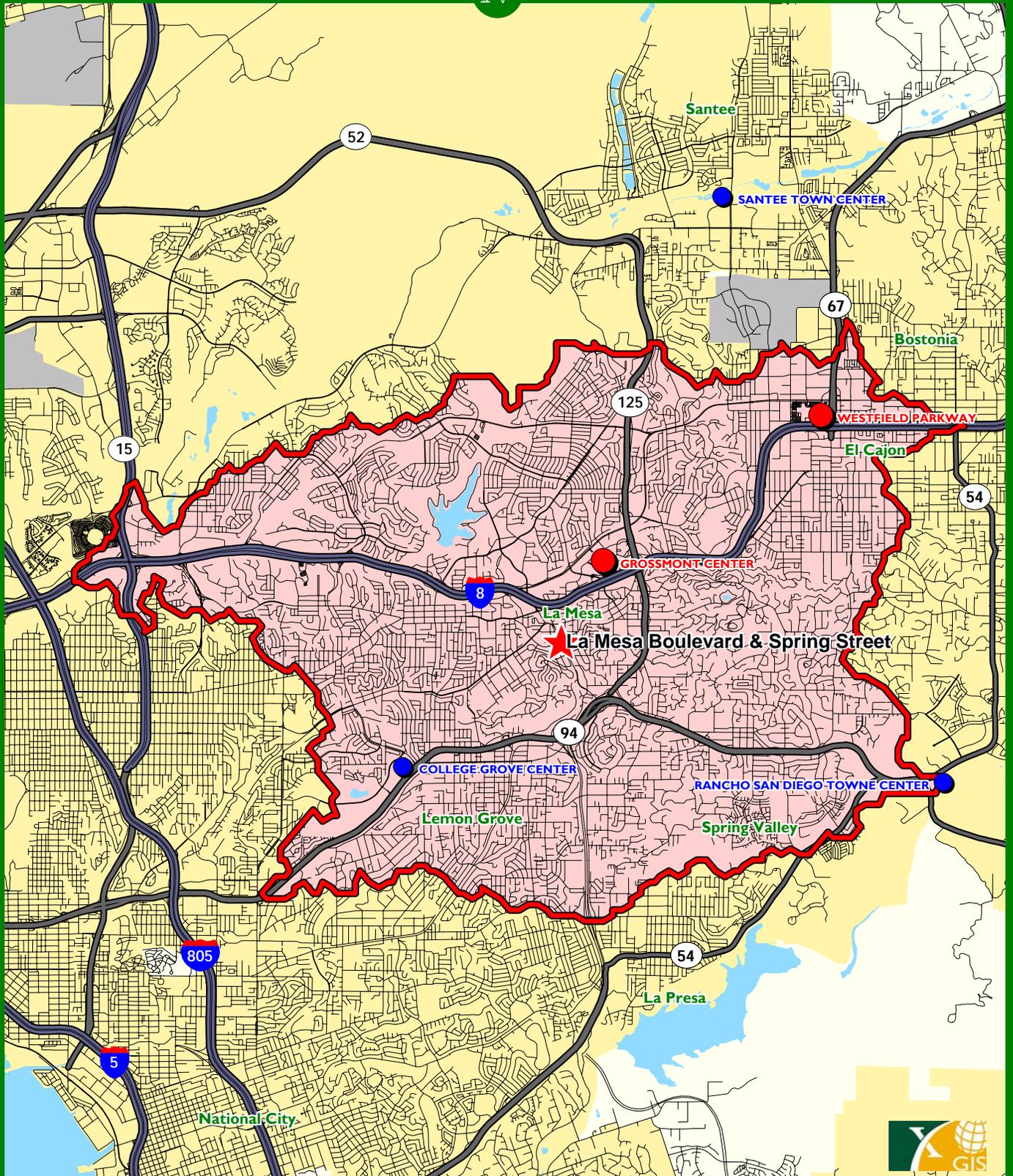
Site 1

Site 2

Site 3

Miles





# La Mesa, California: Trade Area



### Shopping Centers

GLA in thousands

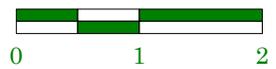
● 1000+

● 500 to 1000

□ 9 Minute Drive Time

★ Site I

Miles



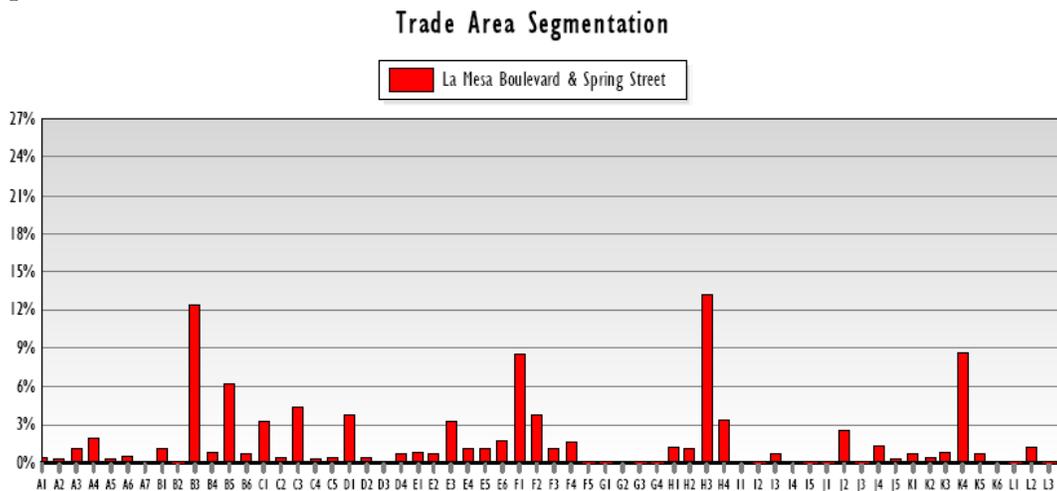
## Site 1 Analysis: La Mesa Boulevard & Spring Street

### Drive-Time Trade Area

The map on the previous page depicts the primary trade area for Site 1. The primary trade area consists of a nine-minute polygon, determined by Buxton's proprietary drive-time technology.

### Psychographics

The psychographic profile of the households within a nine-minute drive-time of Site 1 is presented below.



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### 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.

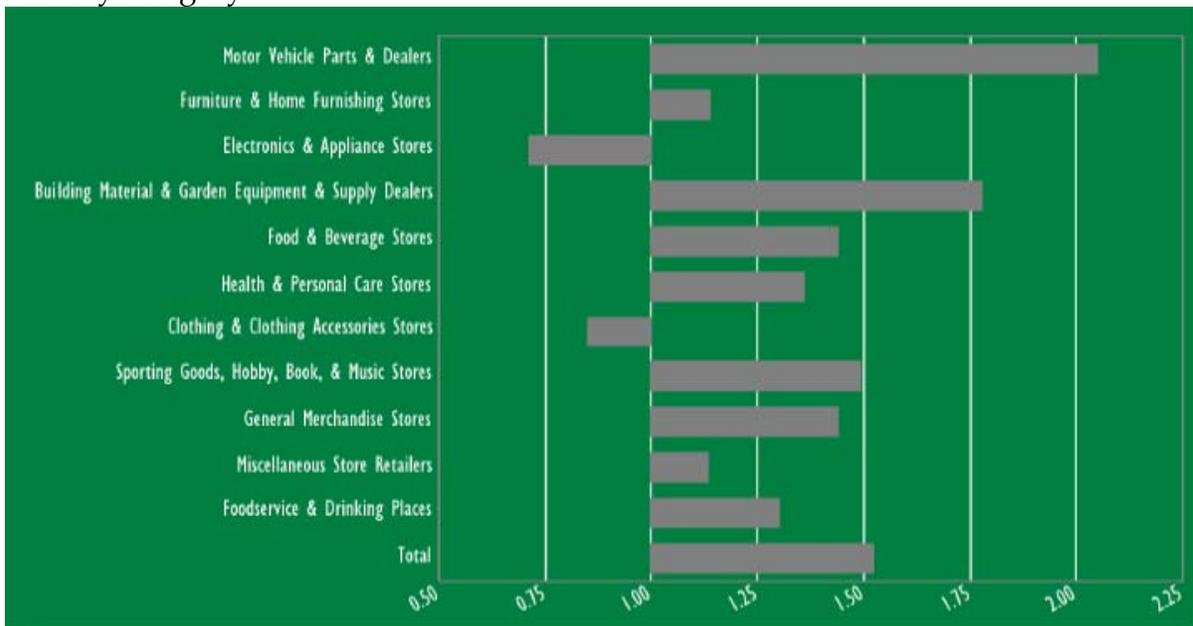
Dominant Segments	Description	Households	% of All Households
B03	URBAN COMMUTER FAMILIES	12,364	12.41%
B05	SECOND-GENERATION	6,192	6.22%
C01	SECOND CITY HOMEBODIES	3,283	3.30%
C03	SUBURBAN OPTIMISTS	4,248	4.26%
D01	NUEVO HISPANIC FAMILIES	3,719	3.73%
E03	PROFESSIONAL URBANITES	3,267	3.28%
F01	STEADFAST CONSERVATIVES	8,520	8.55%
F02	MODERATE CONVENTIONALISTS	3,726	3.74%
H03	STABLE CAREERS	13,177	13.23%
H04	ASPIRING HISPANIA	3,427	3.44%
K04	URBAN DIVERSITY	8,555	8.59%

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## Site 1 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.

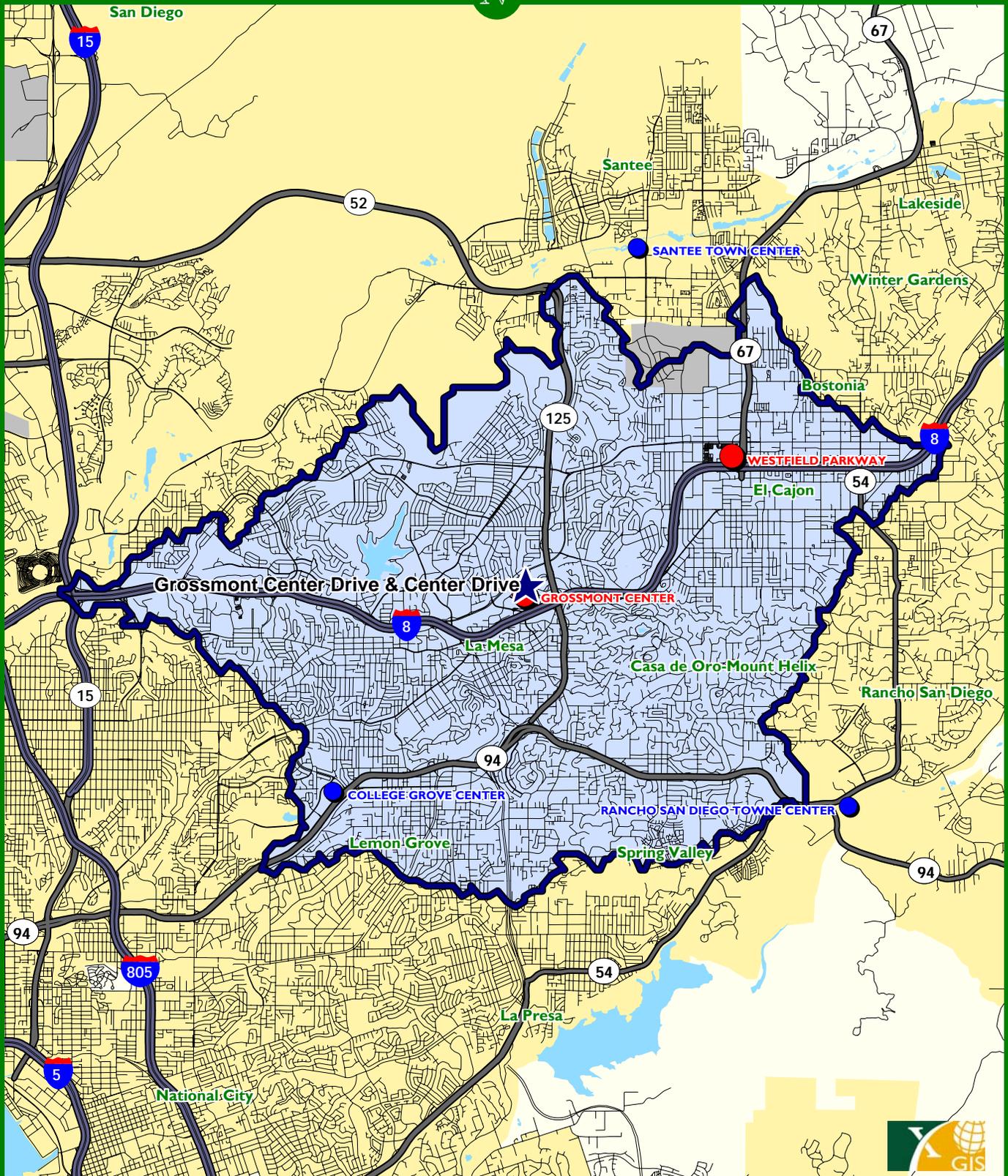


Source: Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000; Census Estimates and Projections 2008 Data

The following table presents the trade potential variables for Site 1:

Trade Potential Variables	Site 1
Estimated Household Count	99,616
Number of Households in Dominant Segments	70,478
Traffic Count	24,400
Total Demand	\$2,076,151,687
Total Supply	\$3,159,563,446
Leakage/Surplus	\$1,083,411,759

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# La Mesa, California: Trade Area



### Shopping Centers

GLA in thousands



9 Minute Drive Time

Site 2

Miles



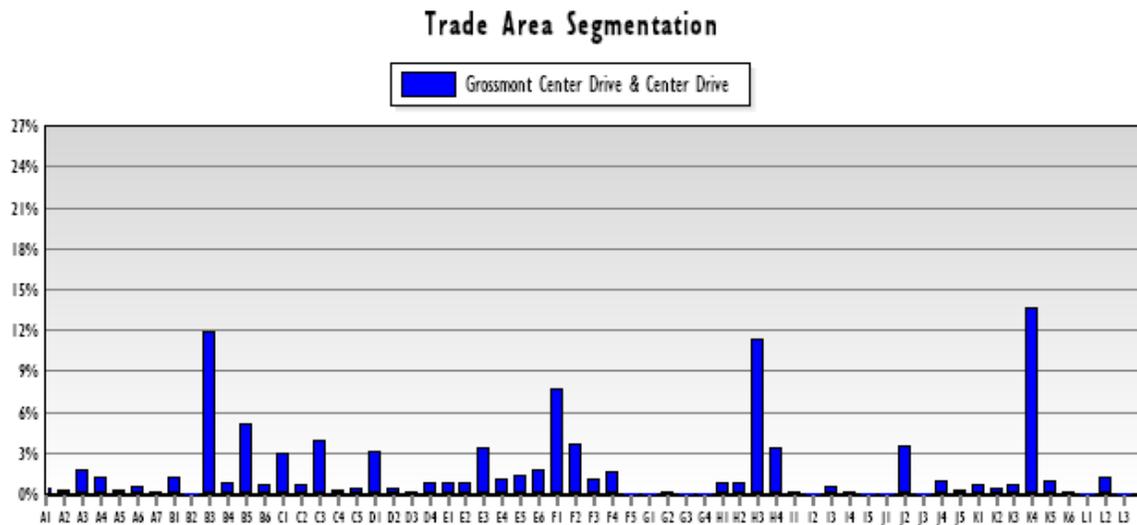
## Site 2 Analysis: Grossmont Center Drive & Center Drive

### Drive-Time Trade Area

The map on the previous page depicts the primary trade area for Site 2. The primary trade area consists of a nine-minute polygon, determined by Buxton’s proprietary drive-time technology.

### Psychographics

The psychographic profile of the households within a nine-minute drive-time of Site 2 is presented below.



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### 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.

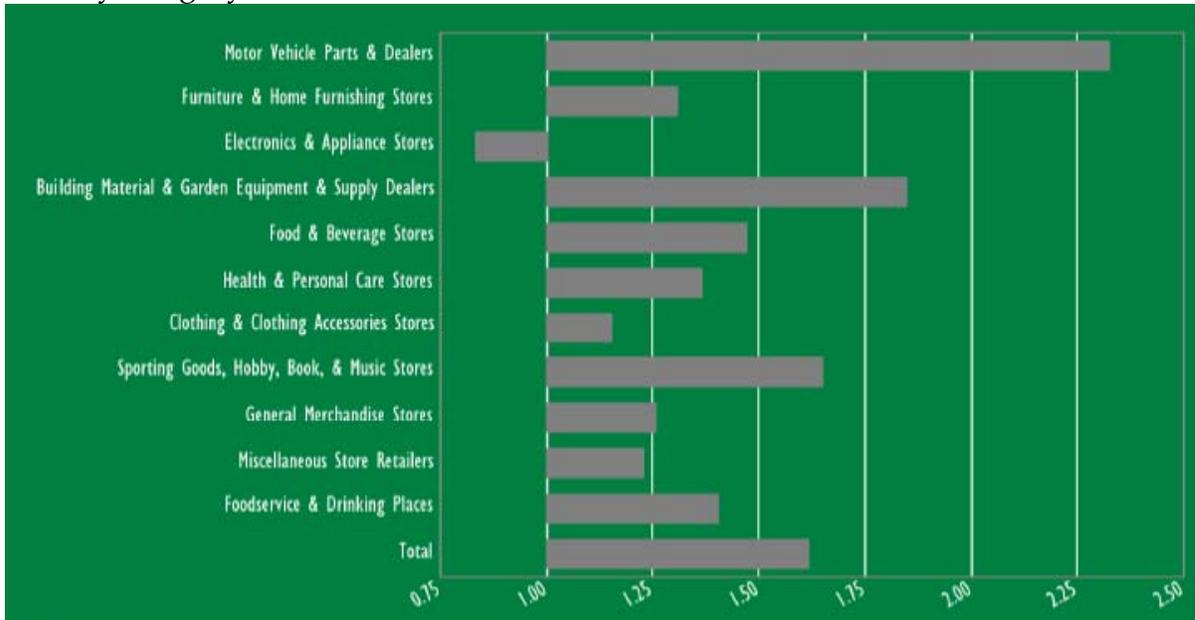
Dominant Segments	Description	Households	% of All Households
B03	URBAN COMMUTER FAMILIES	11,819	11.89%
B05	SECOND-GENERATION	5,153	5.18%
C03	SUBURBAN OPTIMISTS	3,921	3.94%
D01	NUEVO HISPANIC FAMILIES	3,048	3.07%
E03	PROFESSIONAL URBANITES	3,357	3.38%
F01	STEADFAST CONSERVATIVES	7,657	7.70%
F02	MODERATE CONVENTIONALISTS	3,665	3.69%
H03	STABLE CAREERS	11,245	11.31%
H04	ASPIRING HISPANIA	3,357	3.38%
J02	LATINO NUEVO	3,555	3.58%
K04	URBAN DIVERSITY	13,525	13.61%

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## Site 2 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.

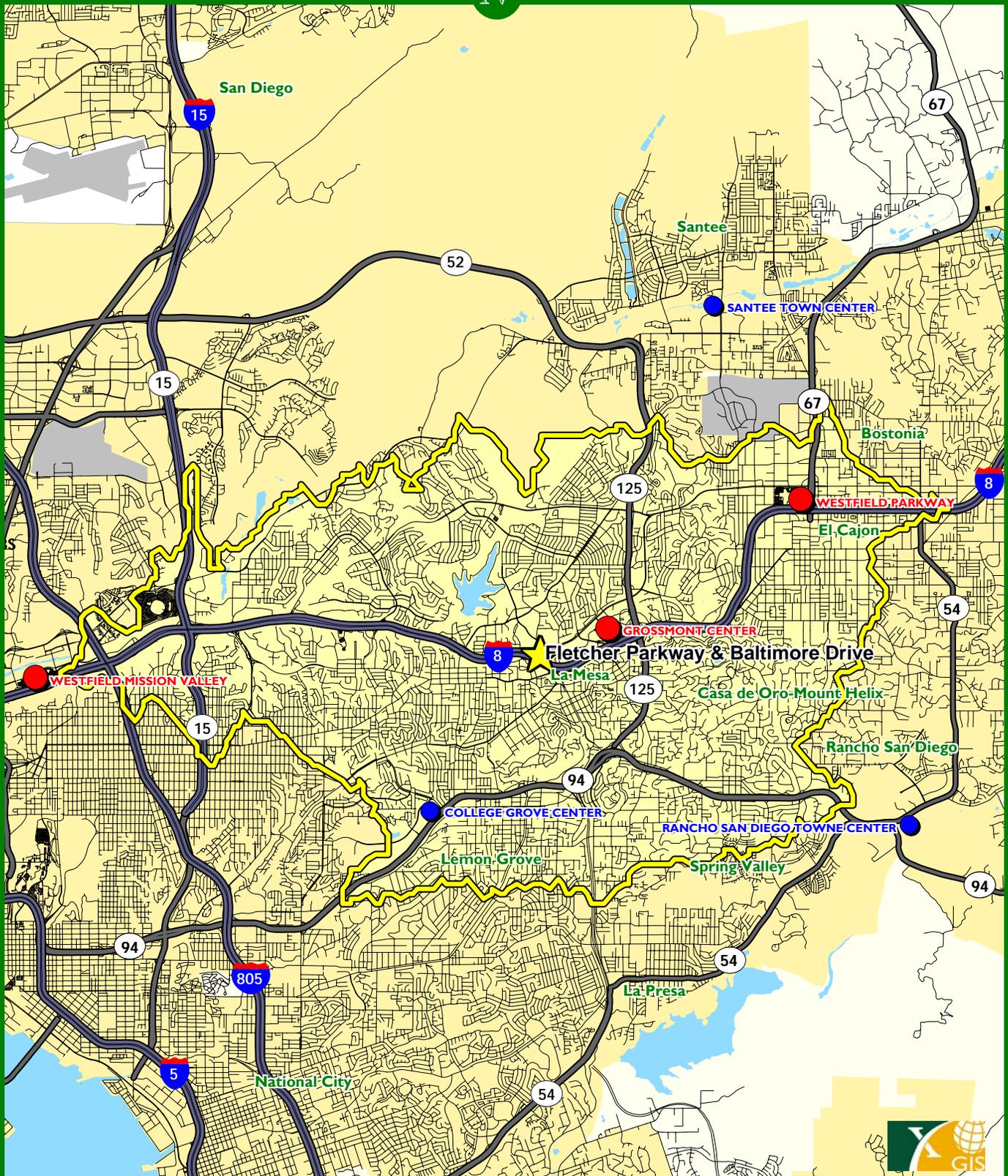


Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000: Census Estimates and Projections 2008 Data

The following table presents the trade potential variables for Site 2:

Trade Potential Variables	Site 2
Estimated Household Count	99,397
Number of Households in Dominant Segments	70,302
Traffic Count	20,700
Total Demand	\$1,993,385,141
Total Supply	\$3,218,704,007
Leakage/Surplus	\$1,225,318,866

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# La Mesa, California: Trade Area



### Shopping Centers

GLA in thousands



9 Minute Drive Time

Site 3

Miles



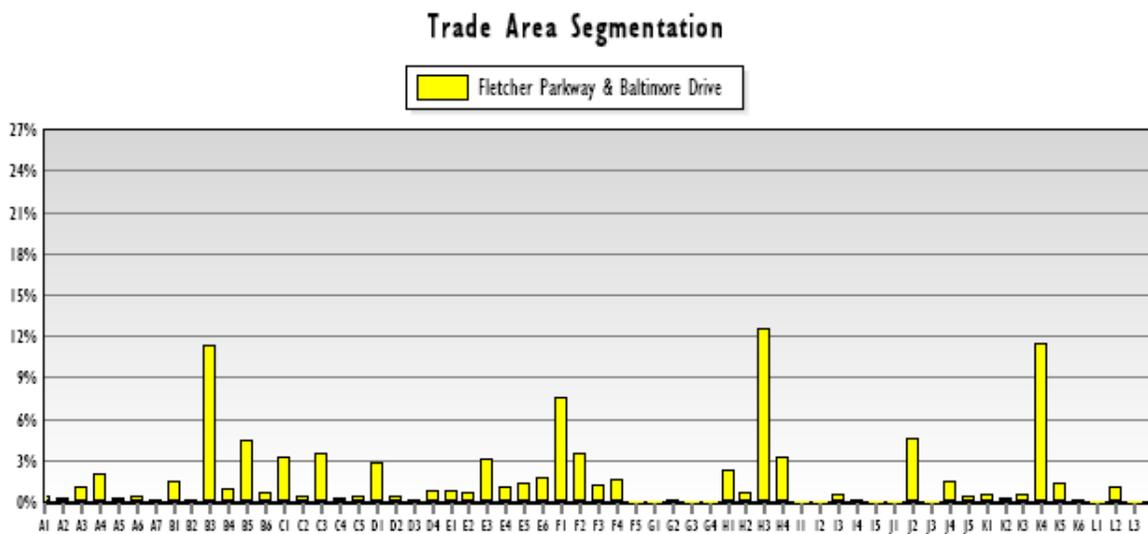
## Site 3 Analysis: Fletcher Parkway & Baltimore Drive

### Drive-Time Trade Area

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

### Psychographics

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



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### 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.

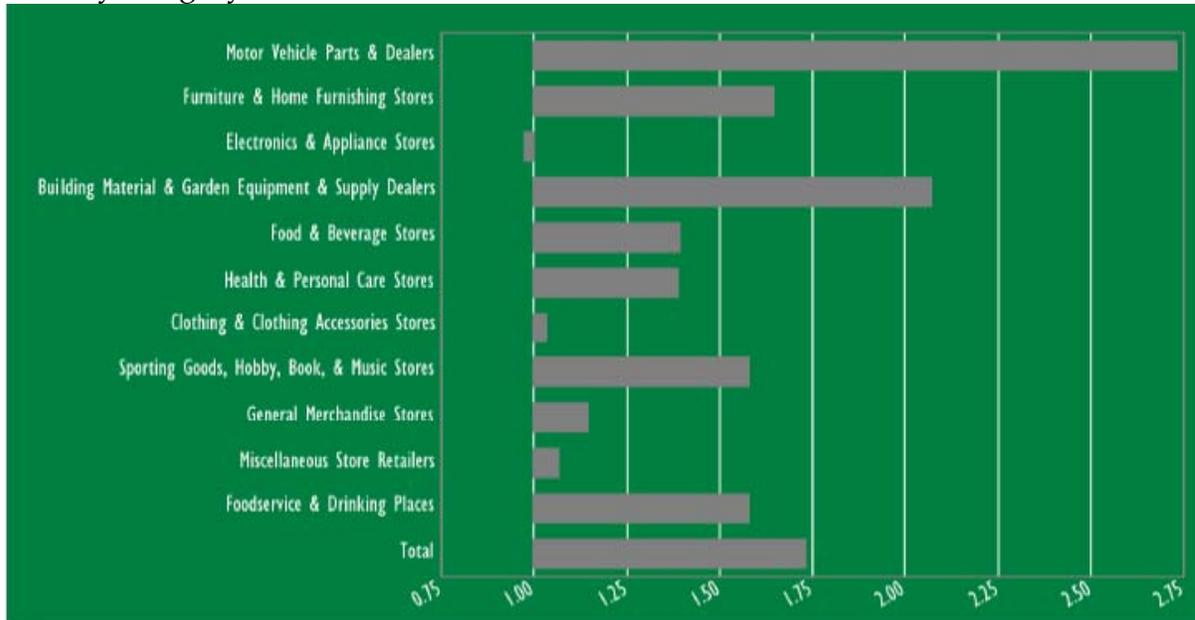
Dominant Segments	Description	Households	% of All Households
B03	URBAN COMMUTER FAMILIES	12,782	11.41%
B05	SECOND-GENERATION	5,046	4.50%
C01	SECOND CITY HOMEBODIES	3,660	3.27%
C03	SUBURBAN OPTIMISTS	3,892	3.47%
E03	PROFESSIONAL URBANITES	3,475	3.10%
F01	STEADFAST CONSERVATIVES	8,482	7.57%
F02	MODERATE CONVENTIONALISTS	3,939	3.52%
H03	STABLE CAREERS	14,050	12.54%
H04	ASPIRING HISPANIA	3,672	3.28%
J02	LATINO NUEVO	5,093	4.55%
K04	URBAN DIVERSITY	12,881	11.50%

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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.



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

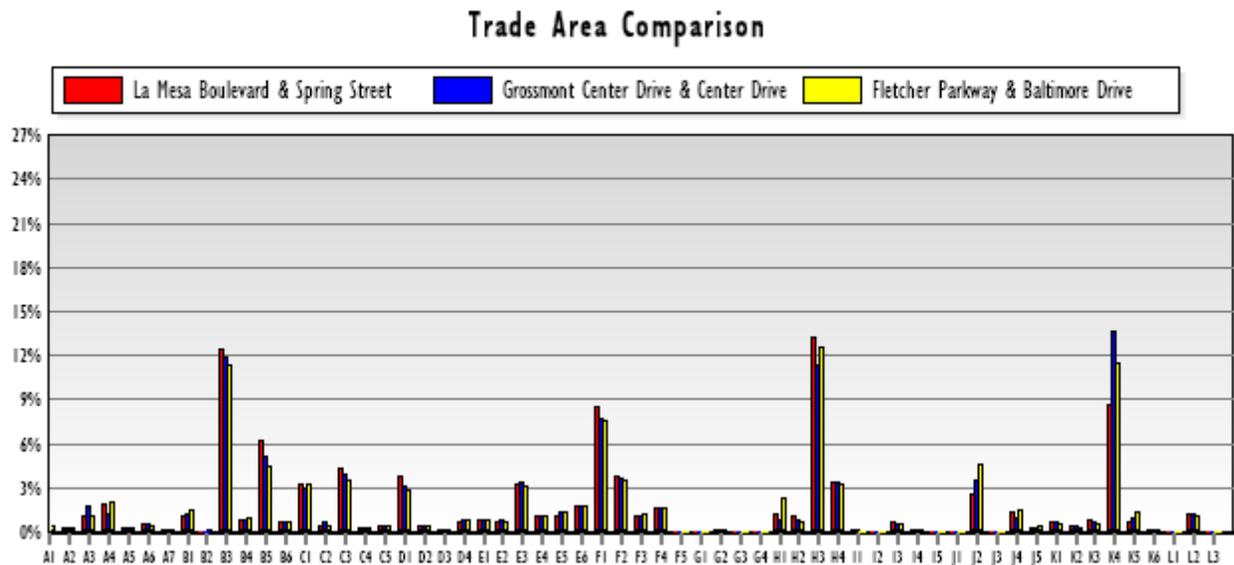
Trade Potential Variables	Site 3
Estimated Household Count	112,021
Number of Households in Dominant Segments	76,972
Traffic Count	24,900
Total Demand	\$2,020,208,615
Total Supply	\$3,495,403,675
Leakage/Surplus	\$1,475,195,060

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## 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 very similar. This is not unusual and can be expected in an area with potential sites in close proximity.

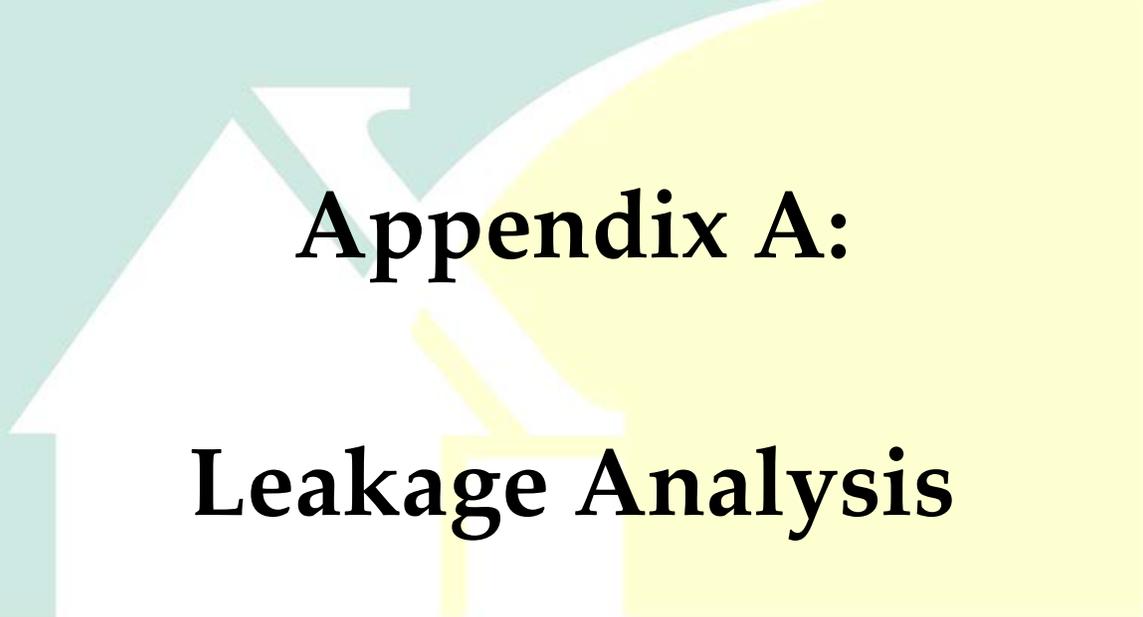


Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000: Census Estimates and Projections 2008 Data

### 9- Minute Trade Area Statistics

Trade Potential Variables	Site 1	Site 2	Site 3
Estimated Household Count	99,616	99,397	112,021
Number of Households in Dominant Segments	70,478	70,302	76,972
Traffic Count	24,400	20,700	24,900
Total Demand	\$2,076,151,687	\$1,993,385,141	\$2,020,208,615
Total Supply	\$3,159,563,446	\$3,218,704,007	\$3,495,403,675
Leakage/Surplus	\$1,083,411,759	\$1,225,318,866	\$1,475,195,060

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**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.

### Interpreting Leakage Index

1.0 = equilibrium, meaning that demand and sales in the area being analyzed are in balance.

.80 = demand exceeds sales by 20%, meaning that consumers are leaving the area being analyzed.

1.2 = sales exceed demand by 20%, meaning that consumers are coming from outside the area being analyzed.

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.

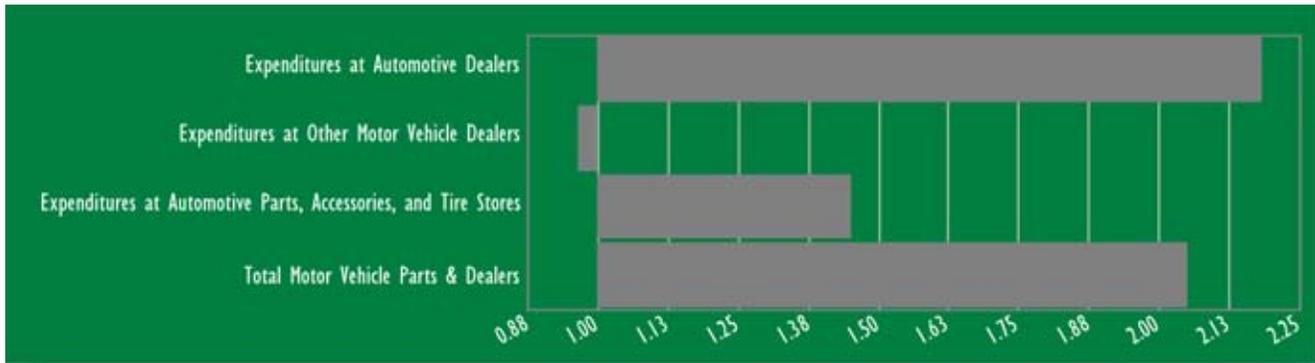
Figure 1 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

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



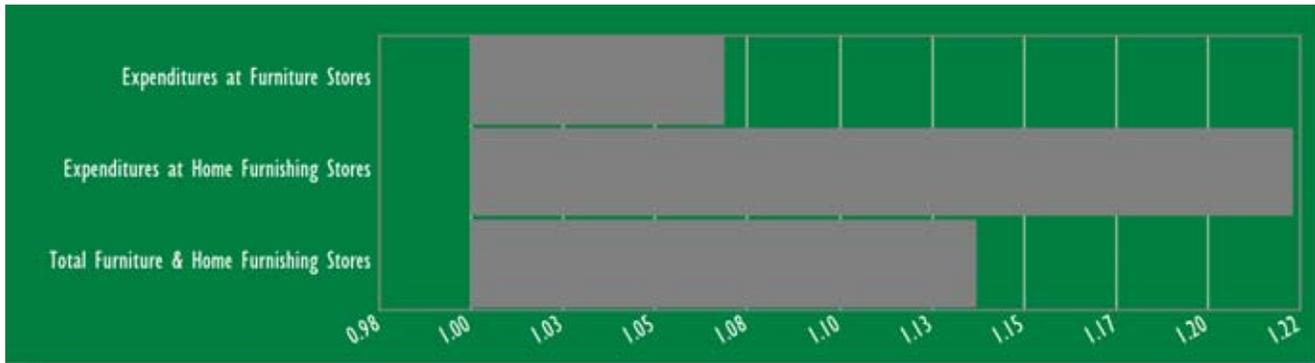
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	471,771,793	967,585,928	2.1
Furniture & Home Furnishing Stores	61,445,918	69,900,215	1.1
Electronics & Appliance Stores	61,680,362	44,035,980	0.7
Building Material & Garden Equipment & Supply Dealers	243,422,116	432,645,317	1.8
Food & Beverage Stores	314,569,631	451,943,862	1.4
Health & Personal Care Stores	116,930,570	158,826,657	1.4
Clothing & Clothing Accessories Stores	120,790,923	102,941,753	0.9
Sporting Goods, Hobby, Book, & Music Stores	49,472,684	73,827,563	1.5
General Merchandise Stores	305,351,172	439,045,192	1.4
Miscellaneous Store Retailers	63,731,058	72,188,280	1.1
Foodservice & Drinking Places	266,985,460	346,622,698	1.3
<b>Total</b>	<b>2,076,151,687</b>	<b>3,159,563,446</b>	<b>1.5</b>

Sub-Categories of Motor Vehicle Parts & Dealers



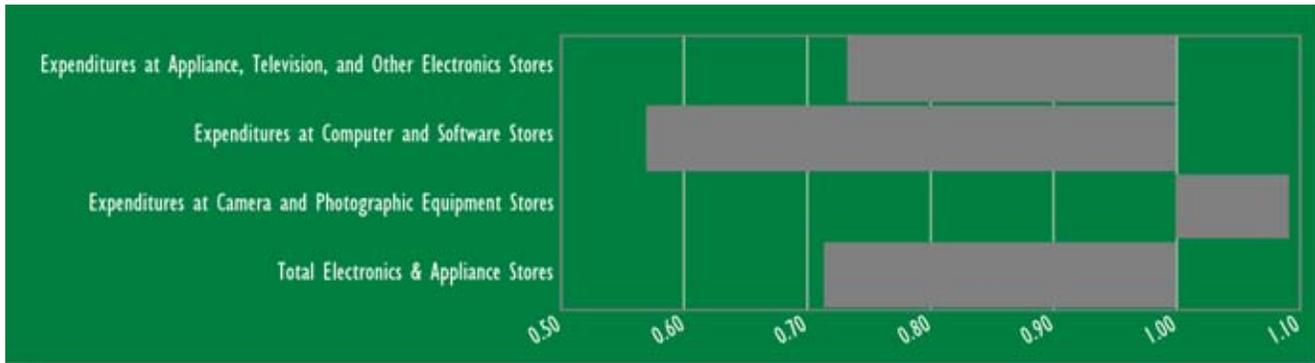
Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	405,140,570	885,003,711	2.2
Expenditures at Other Motor Vehicle Dealers	29,044,515	28,019,464	1.0
Expenditures at Automotive Parts, Accessories, and Tire Stores	37,586,708	54,562,754	1.5
Total Motor Vehicle Parts & Dealers	471,771,793	967,585,928	2.1

Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	34,088,376	36,430,492	1.1
Expenditures at Home Furnishing Stores	27,357,543	33,469,723	1.2
Total Furniture & Home Furnishing Stores	61,445,918	69,900,215	1.1

Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	46,973,237	34,480,342	0.7
Expenditures at Computer and Software Stores	12,440,714	7,081,259	0.6
Expenditures at Camera and Photographic Equipment Stores	2,266,410	2,474,378	1.1
Total Electronics & Appliance Stores	61,680,362	44,035,980	0.7

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



Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	90,172,144	202,232,863	2.2
Expenditures at Paint and Wallpaper Stores	5,199,498	12,816,744	2.5
Expenditures at Hardware Stores	19,520,289	7,995,009	0.4
Expenditures at Other Building Materials Dealers	108,343,095	203,410,654	1.9
Expenditures at Outdoor Power Equipment Stores	3,003,367	1,228,773	0.4
Expenditures at Nursery and Garden Centers	17,183,722	4,961,275	0.3
<b>Total Building Material &amp; Garden Equipment &amp; Supply Dealers</b>	<b>243,422,116</b>	<b>432,645,317</b>	<b>1.8</b>

Sub-Categories of Food & Beverage Stores



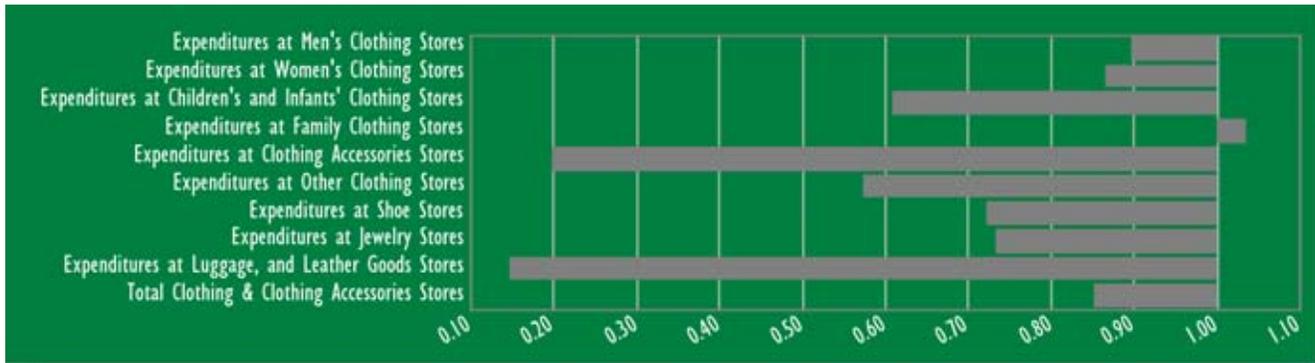
Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	271,627,637	400,137,514	1.5
Expenditures at Convenience Stores	13,794,501	25,874,958	1.9
Expenditures at Specialty Food Stores	9,148,735	9,475,905	1.0
Expenditures at Beer, Wine, and Liquor Stores	19,998,758	16,455,484	0.8
<b>Total Food &amp; Beverage Stores</b>	<b>314,569,631</b>	<b>451,943,862</b>	<b>1.4</b>

Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	101,177,351	135,338,283	1.3
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	3,946,562	9,334,742	2.4
Expenditures at Optical Goods Stores	4,615,090	6,009,975	1.3
Expenditures at Other Health and Personal Care Stores	7,191,567	8,143,658	1.1
Total Health & Personal Care Stores	116,930,570	158,826,657	1.4

Sub-Categories of Clothing & Clothing Accessories Stores



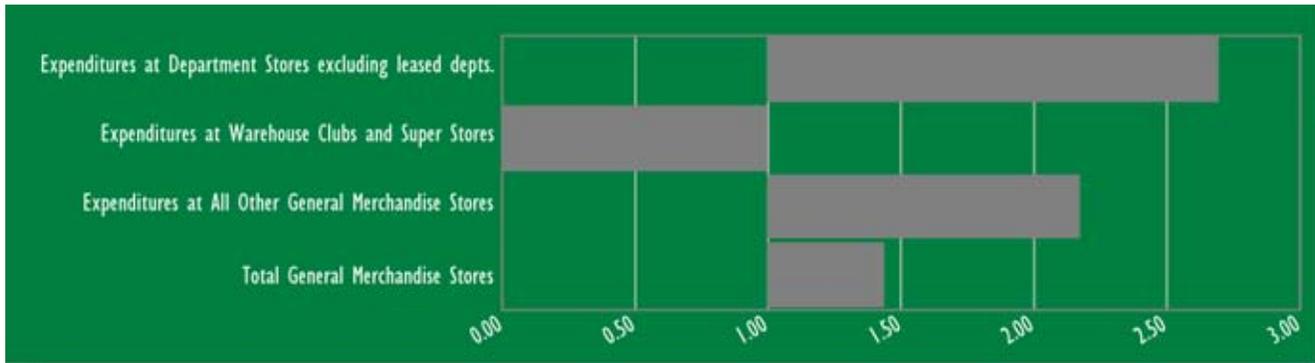
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	5,622,682	5,046,606	0.9
Expenditures at Women's Clothing Stores	22,034,720	19,069,598	0.9
Expenditures at Children's and Infants' Clothing Stores	4,618,592	2,809,947	0.6
Expenditures at Family Clothing Stores	46,435,062	48,118,139	1.0
Expenditures at Clothing Accessories Stores	2,045,992	407,352	0.2
Expenditures at Other Clothing Stores	5,555,910	3,183,527	0.6
Expenditures at Shoe Stores	15,670,023	11,327,598	0.7
Expenditures at Jewelry Stores	17,414,653	12,773,767	0.7
Expenditures at Luggage, and Leather Goods Stores	1,393,287	205,219	0.1
<b>Total Clothing &amp; Clothing Accessories Stores</b>	<b>120,790,923</b>	<b>102,941,753</b>	<b>0.9</b>

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



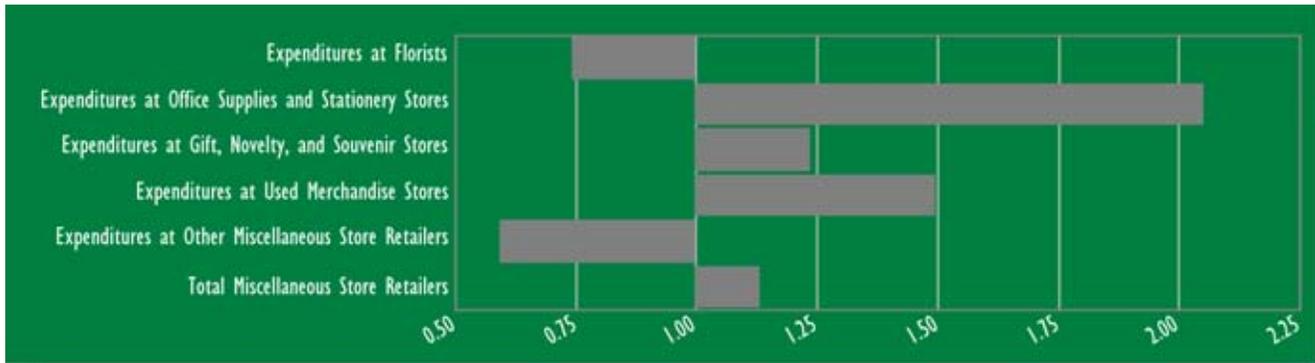
Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	15,673,236	18,184,647	1.2
Expenditures at Hobby, Toys and Games Stores	9,932,122	14,315,460	1.4
Expenditures at Sew/Needlework/Piece Goods Stores	2,822,767	10,017,229	3.5
Expenditures at Musical Instrument and Supplies Stores	3,470,365	11,418,328	3.3
Expenditures at Book Stores and News Dealers	11,955,705	18,835,337	1.6
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	5,618,489	1,056,562	0.2
<b>Total Sporting Goods, Hobby, Book, &amp; Music Stores</b>	<b>49,472,684</b>	<b>73,827,563</b>	<b>1.5</b>

Sub-Categories of General Merchandise Stores



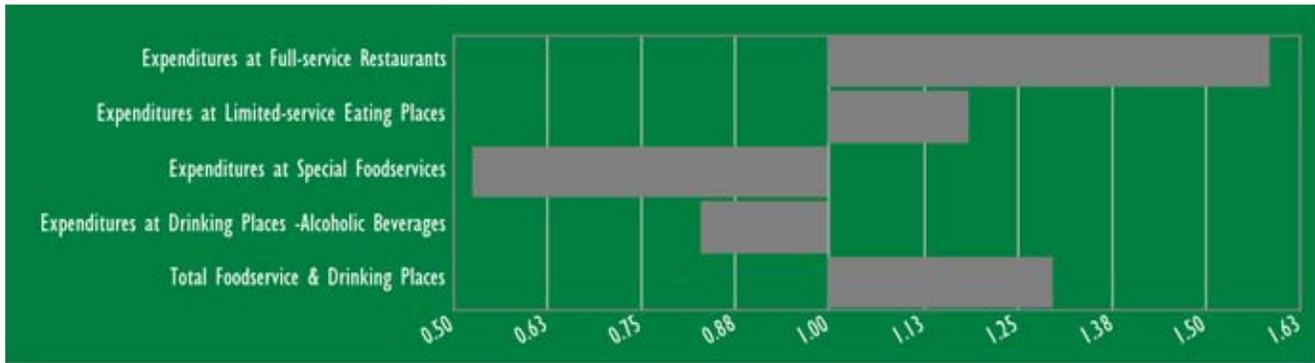
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	144,496,162	390,076,767	2.7
Expenditures at Warehouse Clubs and Super Stores	138,356,874	0	0.0
Expenditures at All Other General Merchandise Stores	22,498,136	48,968,425	2.2
Total General Merchandise Stores	305,351,172	439,045,192	1.4

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	4,516,383	3,352,156	0.7
Expenditures at Office Supplies and Stationery Stores	14,644,694	30,031,910	2.1
Expenditures at Gift, Novelty, and Souvenir Stores	11,254,452	13,927,242	1.2
Expenditures at Used Merchandise Stores	5,613,859	8,398,283	1.5
Expenditures at Other Miscellaneous Store Retailers	27,701,670	16,478,688	0.6
<b>Total Miscellaneous Store Retailers</b>	<b>63,731,058</b>	<b>72,188,280</b>	<b>1.1</b>

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	123,005,279	195,126,933	1.6
Expenditures at Limited-service Eating Places	108,818,930	129,054,812	1.2
Expenditures at Special Foodservices	22,238,525	11,699,224	0.5
Expenditures at Drinking Places -Alcoholic Beverages	12,922,727	10,741,729	0.8
Total Foodservice & Drinking Places	266,985,460	346,622,698	1.3

## 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.

### Interpreting Leakage Index

1.0 = equilibrium, meaning that demand and sales in the area being analyzed are in balance.

.80 = demand exceeds sales by 20%, meaning that consumers are leaving the area being analyzed.

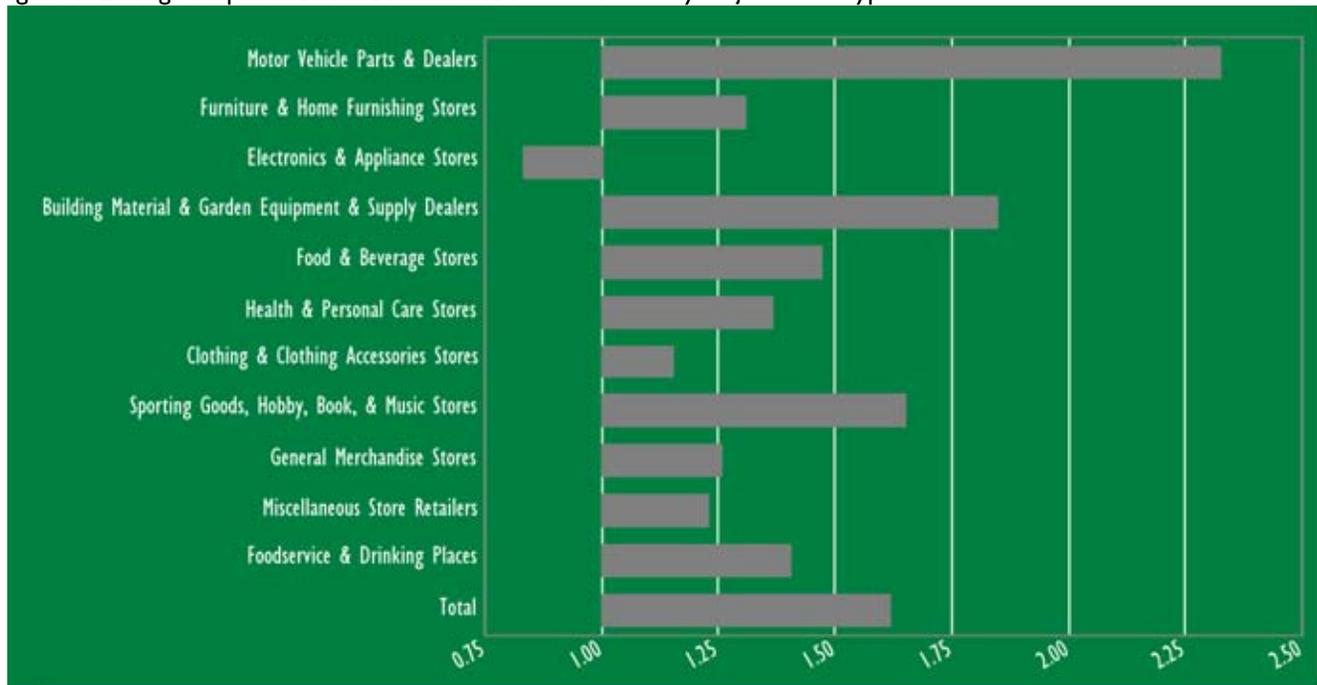
1.2 = sales exceed demand by 20%, meaning that consumers are coming from outside the area being analyzed.

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.

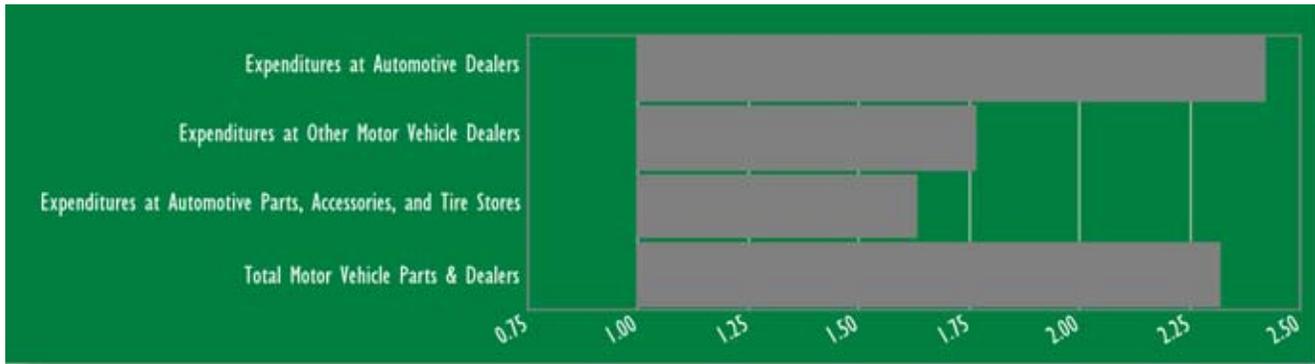
Figure I provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

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



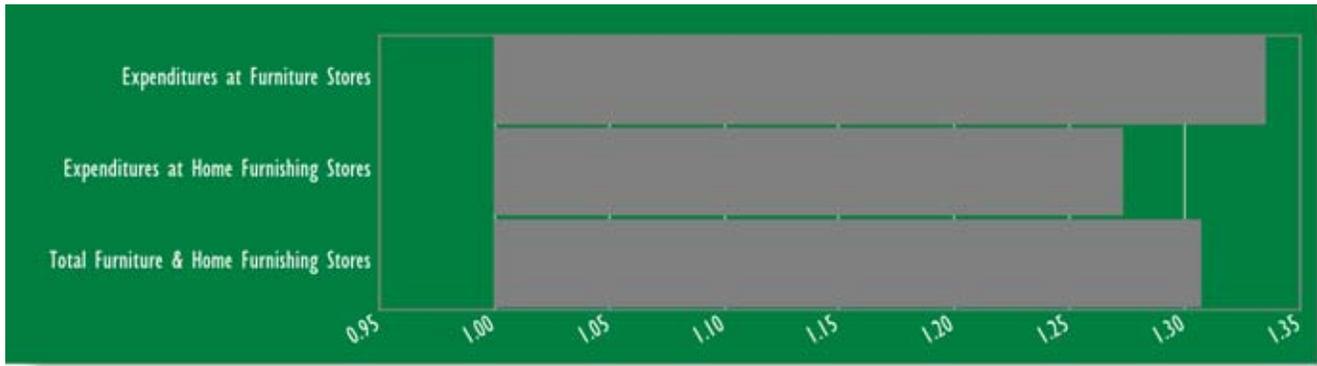
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	449,707,755	1,044,410,484	2.3
Furniture & Home Furnishing Stores	59,854,073	78,280,518	1.3
Electronics & Appliance Stores	59,145,235	49,296,700	0.8
Building Material & Garden Equipment & Supply Dealers	233,854,698	431,466,147	1.8
Food & Beverage Stores	302,784,786	444,901,820	1.5
Health & Personal Care Stores	113,439,037	155,026,089	1.4
Clothing & Clothing Accessories Stores	115,041,681	132,526,677	1.2
Sporting Goods, Hobby, Book, & Music Stores	46,752,269	77,115,266	1.6
General Merchandise Stores	292,988,009	367,583,314	1.3
Miscellaneous Store Retailers	61,756,155	75,714,785	1.2
Foodservice & Drinking Places	258,061,443	362,382,207	1.4
<b>Total</b>	<b>1,993,385,141</b>	<b>3,218,704,007</b>	<b>1.6</b>

Sub-Categories of Motor Vehicle Parts & Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	386,133,901	936,705,085	2.4
Expenditures at Other Motor Vehicle Dealers	27,893,637	49,283,034	1.8
Expenditures at Automotive Parts, Accessories, and Tire Stores	35,680,217	58,422,365	1.6
<b>Total Motor Vehicle Parts &amp; Dealers</b>	<b>449,707,755</b>	<b>1,044,410,484</b>	<b>2.3</b>

Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	33,252,172	44,400,294	1.3
Expenditures at Home Furnishing Stores	26,601,902	33,880,224	1.3
Total Furniture & Home Furnishing Stores	59,854,073	78,280,518	1.3

Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	45,096,123	34,521,386	0.8
Expenditures at Computer and Software Stores	11,860,988	11,972,943	1.0
Expenditures at Camera and Photographic Equipment Stores	2,188,124	2,802,371	1.3
Total Electronics & Appliance Stores	59,145,235	49,296,700	0.8

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



Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	86,673,314	204,900,991	2.4
Expenditures at Paint and Wallpaper Stores	5,067,209	19,101,790	3.8
Expenditures at Hardware Stores	18,750,062	10,501,858	0.6
Expenditures at Other Building Materials Dealers	103,929,262	191,948,949	1.8
Expenditures at Outdoor Power Equipment Stores	2,870,472	1,294,018	0.5
Expenditures at Nursery and Garden Centers	16,564,378	3,718,542	0.2
Total Building Material & Garden Equipment & Supply Dealers	233,854,698	431,466,147	1.8

Sub-Categories of Food & Beverage Stores



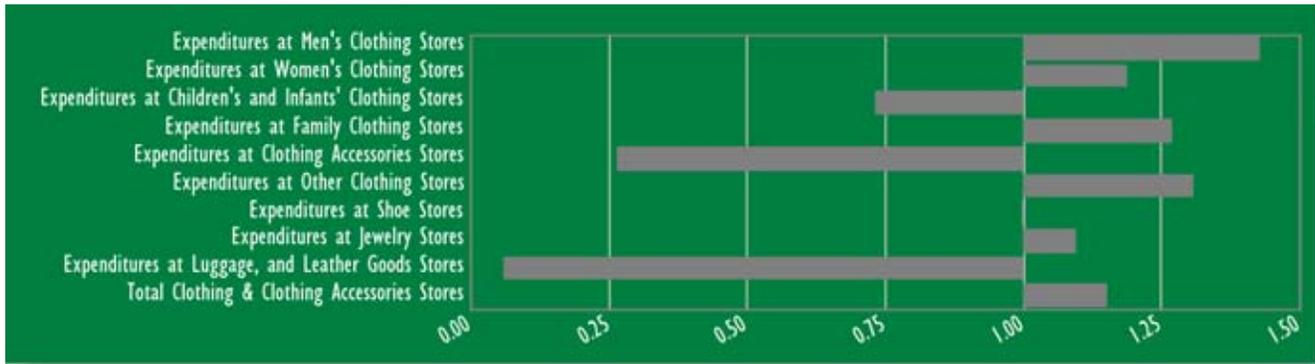
Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	261,430,371	394,919,817	1.5
Expenditures at Convenience Stores	13,320,912	24,041,955	1.8
Expenditures at Specialty Food Stores	8,772,461	10,130,630	1.2
Expenditures at Beer, Wine, and Liquor Stores	19,261,041	15,809,419	0.8
<b>Total Food &amp; Beverage Stores</b>	<b>302,784,786</b>	<b>444,901,820</b>	<b>1.5</b>

Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	98,155,110	130,178,666	1.3
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	3,834,093	11,501,659	3.0
Expenditures at Optical Goods Stores	4,477,014	6,534,410	1.5
Expenditures at Other Health and Personal Care Stores	6,972,820	6,811,354	1.0
Total Health & Personal Care Stores	113,439,037	155,026,089	1.4

Sub-Categories of Clothing & Clothing Accessories Stores



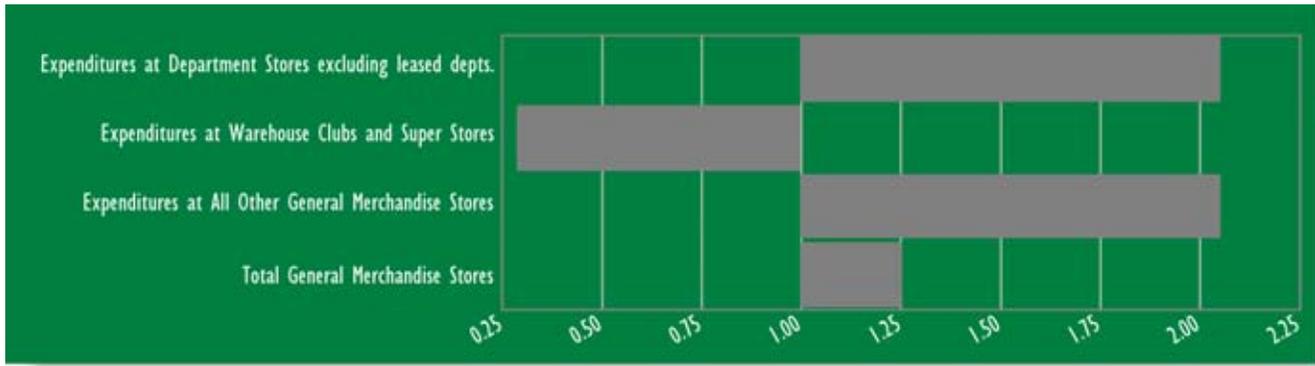
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	5,342,962	7,635,069	1.4
Expenditures at Women's Clothing Stores	20,763,448	24,663,439	1.2
Expenditures at Children's and Infants' Clothing Stores	4,406,285	3,224,938	0.7
Expenditures at Family Clothing Stores	44,079,623	56,019,852	1.3
Expenditures at Clothing Accessories Stores	1,970,805	521,108	0.3
Expenditures at Other Clothing Stores	5,246,139	6,875,210	1.3
Expenditures at Shoe Stores	14,728,626	14,677,426	1.0
Expenditures at Jewelry Stores	17,145,637	18,826,729	1.1
Expenditures at Luggage, and Leather Goods Stores	1,358,156	82,906	0.1
Total Clothing & Clothing Accessories Stores	115,041,681	132,526,677	1.2

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



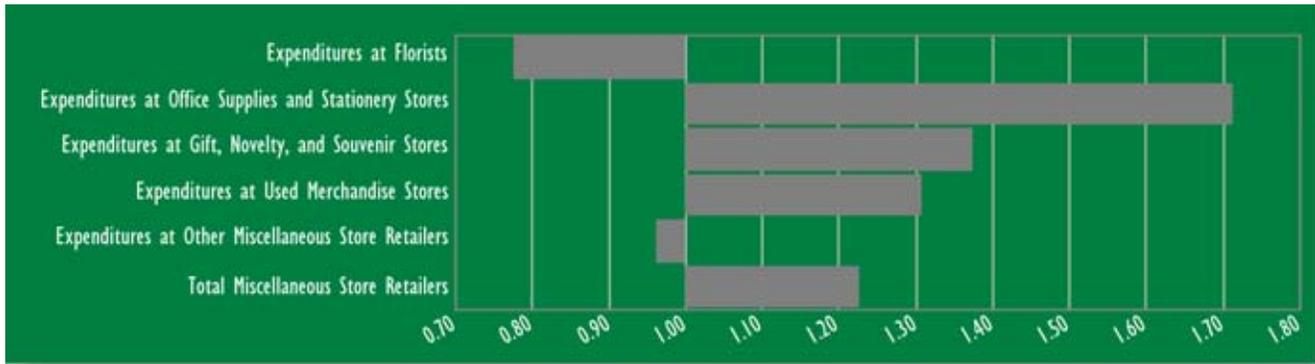
Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	15,001,768	20,039,257	1.3
Expenditures at Hobby, Toys and Games Stores	9,561,033	17,765,162	1.9
Expenditures at Sew/Needlework/Piece Goods Stores	2,719,126	9,047,560	3.3
Expenditures at Musical Instrument and Supplies Stores	3,296,661	10,561,957	3.2
Expenditures at Book Stores and News Dealers	10,861,267	18,370,788	1.7
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	5,312,414	1,330,542	0.3
Total Sporting Goods, Hobby, Book, & Music Stores	46,752,269	77,115,266	1.6

Sub-Categories of General Merchandise Stores



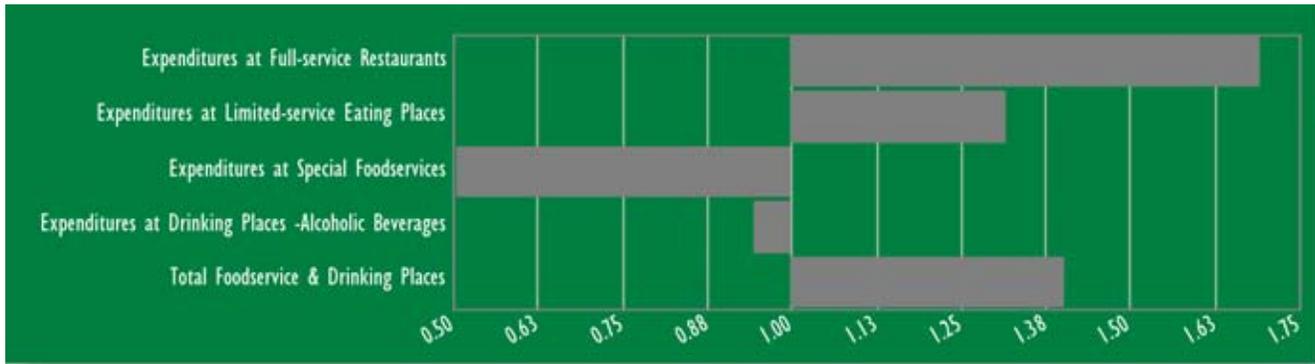
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	138,469,540	284,709,428	2.1
Expenditures at Warehouse Clubs and Super Stores	132,808,374	38,300,046	0.3
Expenditures at All Other General Merchandise Stores	21,710,095	44,573,839	2.1
Total General Merchandise Stores	292,988,009	367,583,314	1.3

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	4,377,843	3,396,970	0.8
Expenditures at Office Supplies and Stationery Stores	14,233,449	24,390,533	1.7
Expenditures at Gift, Novelty, and Souvenir Stores	10,948,156	15,048,536	1.4
Expenditures at Used Merchandise Stores	5,389,691	7,058,836	1.3
Expenditures at Other Miscellaneous Store Retailers	26,807,016	25,819,910	1.0
<b>Total Miscellaneous Store Retailers</b>	<b>61,756,155</b>	<b>75,714,785</b>	<b>1.2</b>

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	118,959,576	201,463,288	1.7
Expenditures at Limited-service Eating Places	105,009,559	138,163,867	1.3
Expenditures at Special Foodservices	21,464,252	10,839,653	0.5
Expenditures at Drinking Places -Alcoholic Beverages	12,628,056	11,915,398	0.9
Total Foodservice & Drinking Places	258,061,443	362,382,207	1.4

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## Sources and Methodology

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

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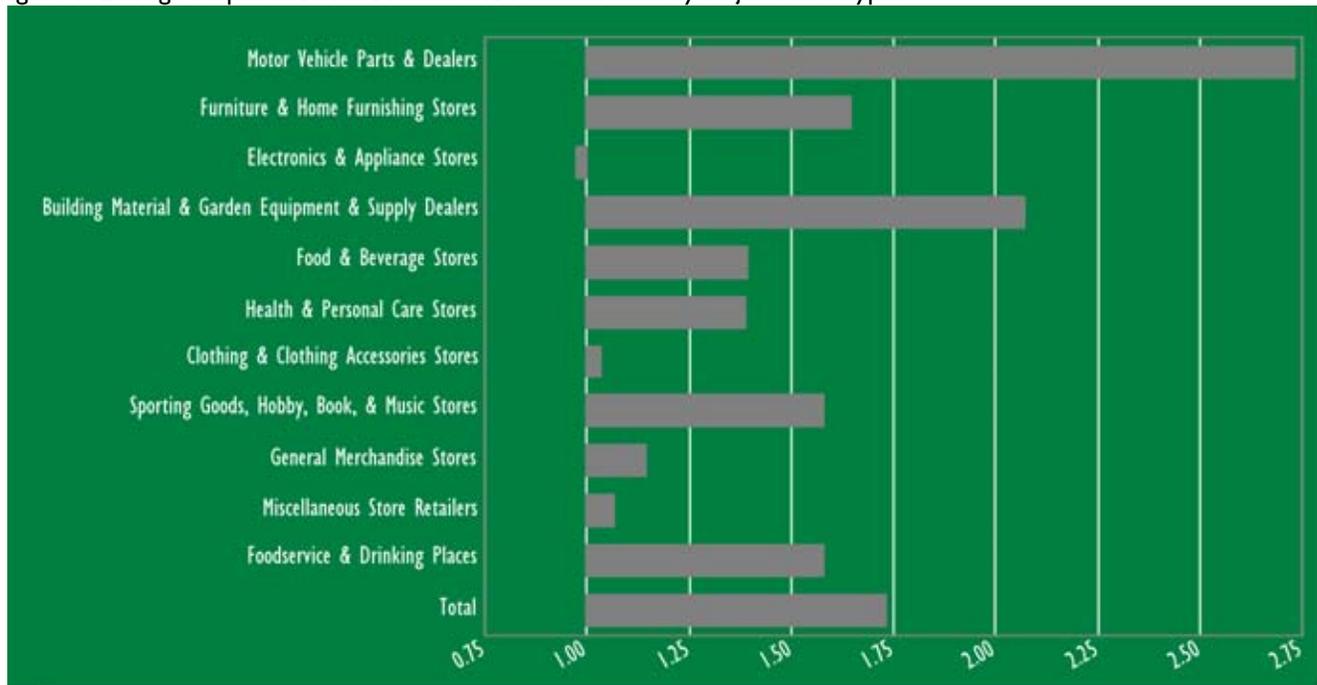
Fletcher Parkway & Baltimore Drive (9 minute drive time)

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



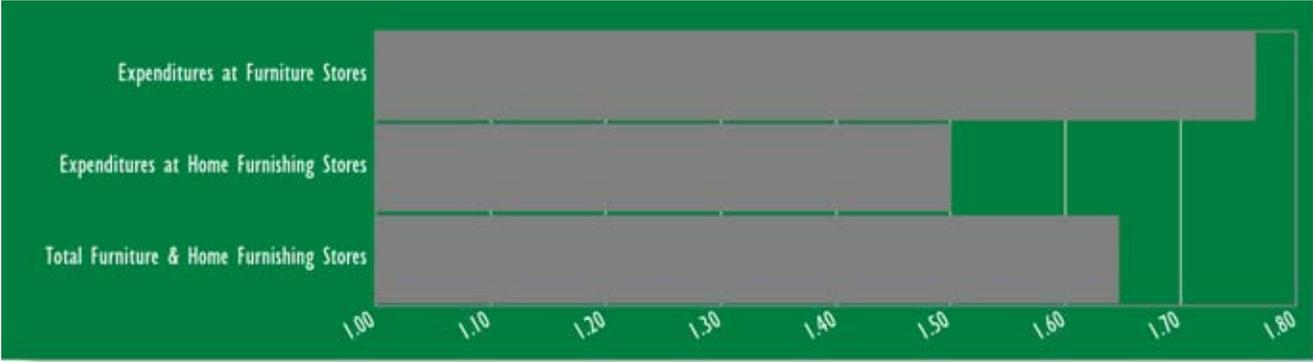
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	452,363,213	1,236,307,759	2.7
Furniture & Home Furnishing Stores	61,306,389	100,966,050	1.6
Electronics & Appliance Stores	60,821,542	59,393,208	1.0
Building Material & Garden Equipment & Supply Dealers	243,600,441	504,121,273	2.1
Food & Beverage Stores	299,342,836	416,710,995	1.4
Health & Personal Care Stores	115,331,350	159,925,621	1.4
Clothing & Clothing Accessories Stores	117,054,965	120,789,998	1.0
Sporting Goods, Hobby, Book, & Music Stores	49,555,748	78,254,359	1.6
General Merchandise Stores	295,669,060	337,866,601	1.1
Miscellaneous Store Retailers	63,365,086	67,685,085	1.1
Foodservice & Drinking Places	261,797,987	413,382,728	1.6
<b>Total</b>	<b>2,020,208,615</b>	<b>3,495,403,675</b>	<b>1.7</b>

Sub-Categories of Motor Vehicle Parts & Dealers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Automotive Dealers	387,649,913	1,156,061,889	3.0
Expenditures at Other Motor Vehicle Dealers	28,379,985	30,209,909	1.1
Expenditures at Automotive Parts, Accessories, and Tire Stores	36,333,316	50,035,961	1.4
Total Motor Vehicle Parts & Dealers	452,363,213	1,236,307,759	2.7

Sub-Categories of Furniture & Home Furnishing Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Furniture Stores	33,718,898	59,572,569	1.8
Expenditures at Home Furnishing Stores	27,587,490	41,393,481	1.5
Total Furniture & Home Furnishing Stores	61,306,389	100,966,050	1.6

Sub-Categories of Electronics & Appliance Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Appliance, Television, and Other Electronics Stores	46,118,407	41,186,206	0.9
Expenditures at Computer and Software Stores	12,463,233	15,680,145	1.3
Expenditures at Camera and Photographic Equipment Stores	2,239,901	2,526,857	1.1
Total Electronics & Appliance Stores	60,821,542	59,393,208	1.0

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



Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	90,293,223	237,072,191	2.6
Expenditures at Paint and Wallpaper Stores	5,326,273	12,671,129	2.4
Expenditures at Hardware Stores	19,370,826	8,839,048	0.5
Expenditures at Other Building Materials Dealers	108,552,532	238,537,165	2.2
Expenditures at Outdoor Power Equipment Stores	2,993,502	1,689,743	0.6
Expenditures at Nursery and Garden Centers	17,064,086	5,311,997	0.3
Total Building Material & Garden Equipment & Supply Dealers	243,600,441	504,121,273	2.1

Sub-Categories of Food & Beverage Stores



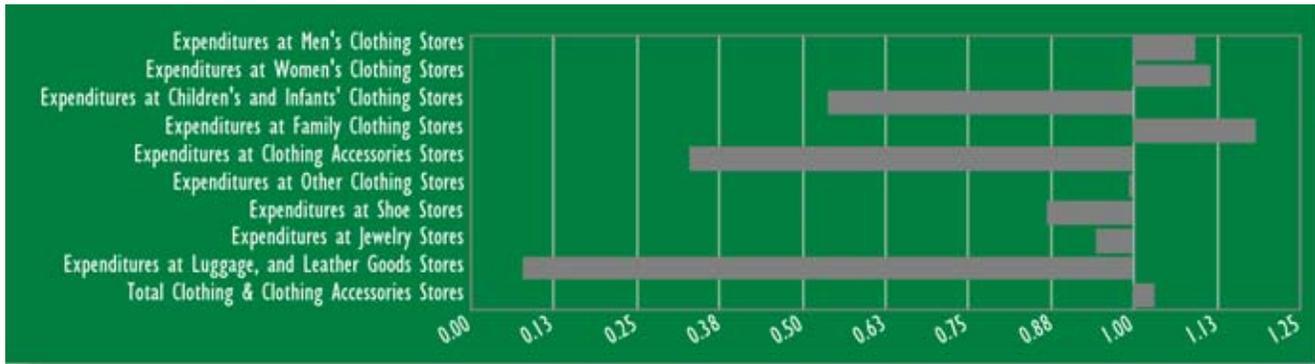
Store Type	Potential	Actual Sales	Leakage
Expenditures at Supermarkets and Other Grocery (except Convenience) Stores	257,839,899	364,932,648	1.4
Expenditures at Convenience Stores	13,202,454	22,815,345	1.7
Expenditures at Specialty Food Stores	8,601,121	11,456,104	1.3
Expenditures at Beer, Wine, and Liquor Stores	19,699,362	17,506,897	0.9
Total Food & Beverage Stores	299,342,836	416,710,995	1.4

Sub-Categories of Health & Personal Care Stores



Store Type	Potential	Actual Sales	Leakage
Expenditures at Pharmacies and Drug Stores	99,819,757	134,917,506	1.4
Expenditures at Cosmetics, Beauty Supplies and Perfume Stores	3,910,386	10,410,157	2.7
Expenditures at Optical Goods Stores	4,521,332	6,707,293	1.5
Expenditures at Other Health and Personal Care Stores	7,079,876	7,890,665	1.1
Total Health & Personal Care Stores	115,331,350	159,925,621	1.4

Sub-Categories of Clothing & Clothing Accessories Stores



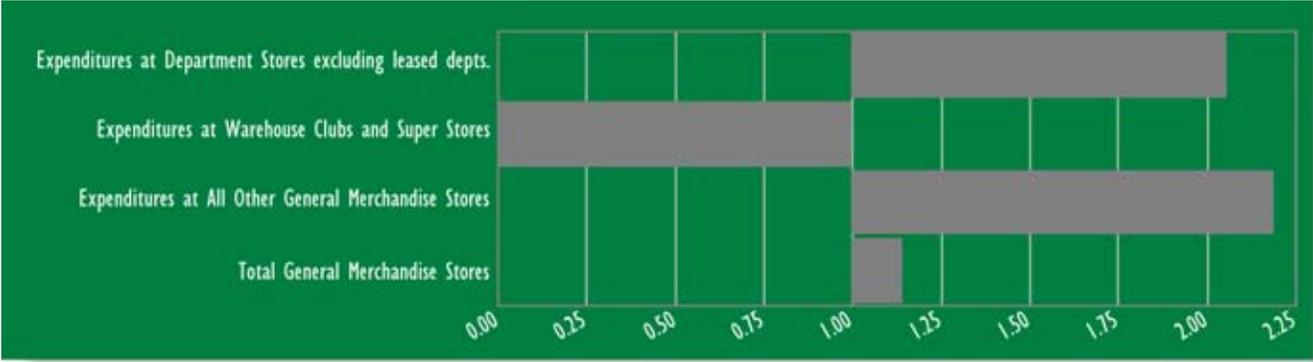
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	5,452,701	5,957,047	1.1
Expenditures at Women's Clothing Stores	21,422,144	23,954,217	1.1
Expenditures at Children's and Infants' Clothing Stores	4,104,723	2,209,649	0.5
Expenditures at Family Clothing Stores	44,836,340	53,079,138	1.2
Expenditures at Clothing Accessories Stores	2,031,319	669,996	0.3
Expenditures at Other Clothing Stores	5,385,020	5,342,513	1.0
Expenditures at Shoe Stores	14,720,206	12,792,263	0.9
Expenditures at Jewelry Stores	17,702,595	16,674,889	0.9
Expenditures at Luggage, and Leather Goods Stores	1,399,916	110,286	0.1
<b>Total Clothing &amp; Clothing Accessories Stores</b>	<b>117,054,965</b>	<b>120,789,998</b>	<b>1.0</b>

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



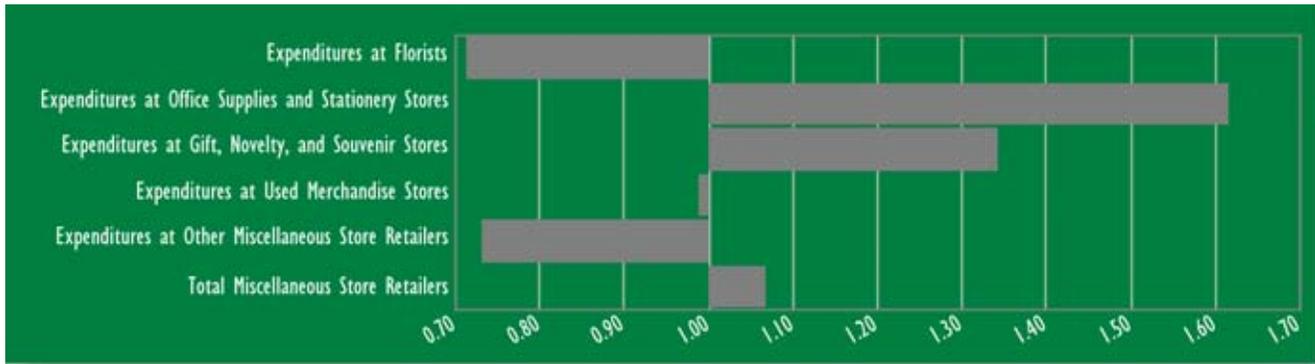
Store Type	Potential	Actual Sales	Leakage
Expenditures at Sporting Goods Stores	15,391,429	18,579,639	1.2
Expenditures at Hobby, Toys and Games Stores	9,629,162	17,123,616	1.8
Expenditures at Sew/Needlework/Piece Goods Stores	2,784,528	8,752,920	3.1
Expenditures at Musical Instrument and Supplies Stores	3,392,334	16,031,834	4.7
Expenditures at Book Stores and News Dealers	12,848,638	16,288,026	1.3
Expenditures at Prerecorded Tape, Compact Disc, and Record Stores	5,509,657	1,478,325	0.3
Total Sporting Goods, Hobby, Book, & Music Stores	49,555,748	78,254,359	1.6

Sub-Categories of General Merchandise Stores



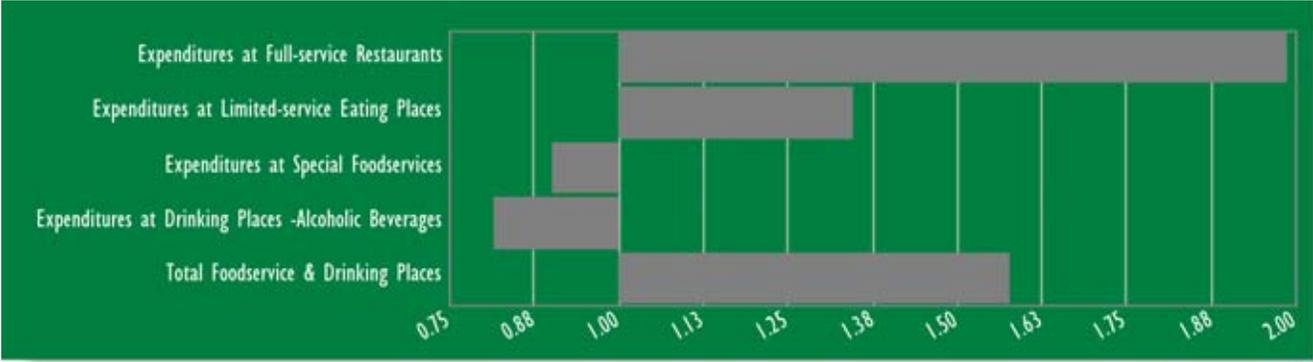
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	140,552,266	289,440,735	2.1
Expenditures at Warehouse Clubs and Super Stores	133,018,167	0	0.0
Expenditures at All Other General Merchandise Stores	22,098,627	48,425,865	2.2
Total General Merchandise Stores	295,669,060	337,866,601	1.1

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	4,524,278	3,234,712	0.7
Expenditures at Office Supplies and Stationery Stores	14,721,227	23,808,266	1.6
Expenditures at Gift, Novelty, and Souvenir Stores	11,285,252	15,161,404	1.3
Expenditures at Used Merchandise Stores	5,581,319	5,515,515	1.0
Expenditures at Other Miscellaneous Store Retailers	27,253,009	19,965,187	0.7
Total Miscellaneous Store Retailers	63,365,086	67,685,085	1.1

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	120,799,669	240,053,873	2.0
Expenditures at Limited-service Eating Places	106,223,856	143,090,906	1.3
Expenditures at Special Foodservices	21,726,401	19,597,337	0.9
Expenditures at Drinking Places -Alcoholic Beverages	13,048,061	10,640,613	0.8
Total Foodservice & Drinking Places	261,797,987	413,382,728	1.6

## Sources and Methodology

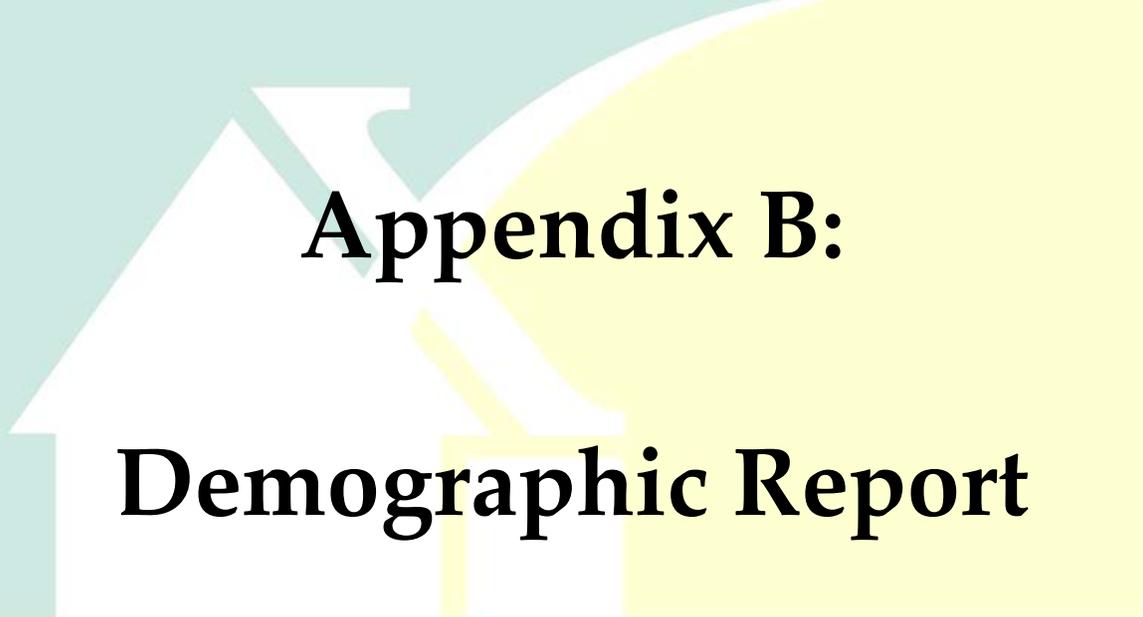
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**Appendix B:**  
**Demographic Report**

**Analysis Geography:** La Mesa Boulevard & Spring Street  
La Mesa, CA

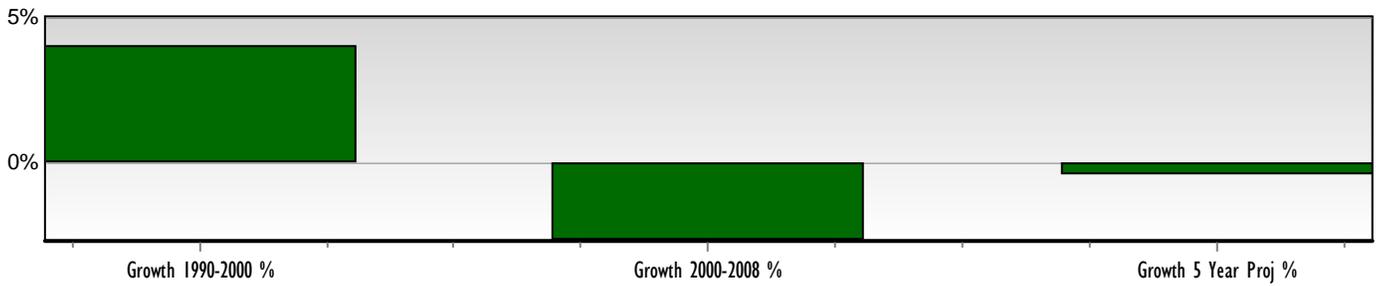
**Date:** 3/30/2011

**9 Min Drive  
Time**

## Population Profile

2013 Projection	255,422
2008 Estimate	256,568
2000 Census	263,774
1990 Census	253,492

### Population Change



**9 Min Drive  
Time**

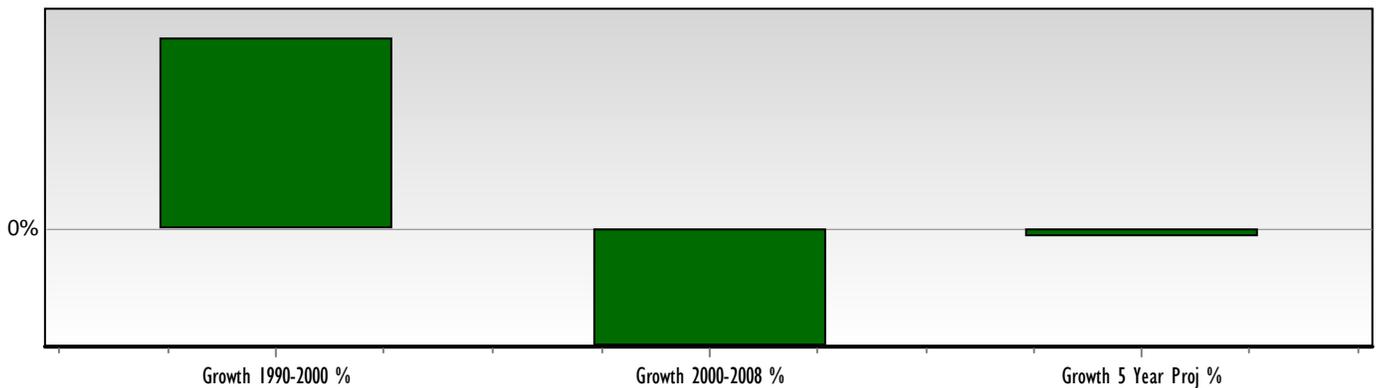
## Work Place Population

Total	112,241
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## Household Profile

2013 Projection	99,462
2008 Estimate	99,616
2000 Census	102,019
1990 Census	98,231

### Household Change



**Analysis Geography:** La Mesa Boulevard & Spring Street  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive  
Time**

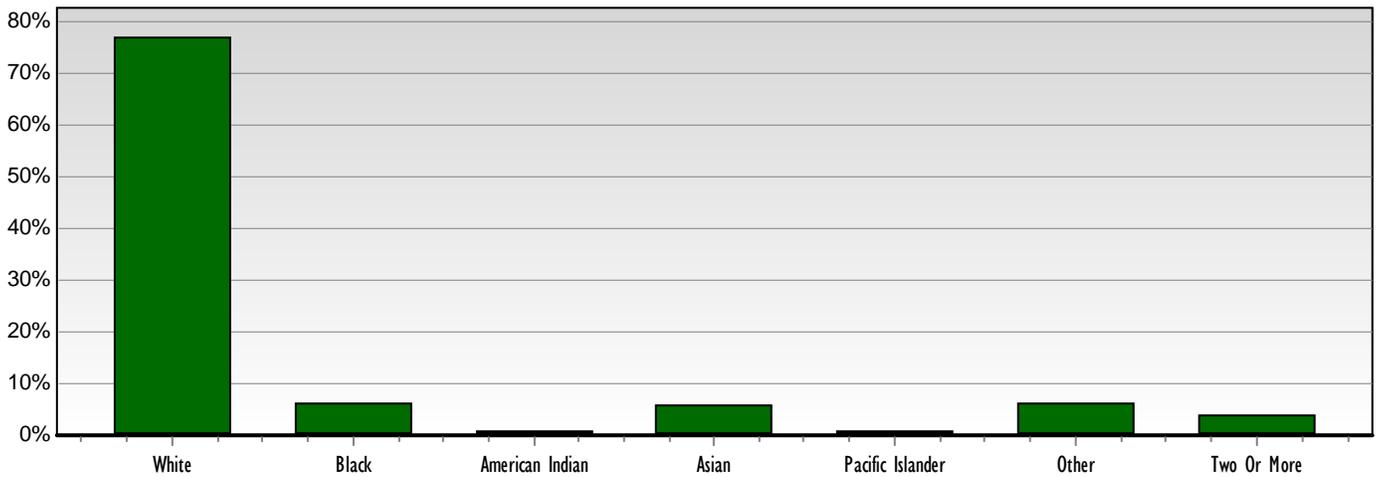
## Population By Race (Current)

White	196,984
Black	15,978
American Indian	1,628
Asian	15,250
Pacific Islander	1,550
Other	15,501
Two Or More	9,677

## Total Population By Race

**256,568**

**Population By Race (Current)**



## Population By Hispanic Origin (Current)

**9 Min Drive  
Time**

Hispanic Origin	61,336
Non Hispanic Origin	195,232

**Analysis Geography:** La Mesa Boulevard & Spring Street  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive**  
**Time**

## Population By Age (Current)

0 to 4 years	16,900
5 to 9 years	15,927
10 to 13 years	12,301
14 to 17 years	12,834
18 to 19 years	8,560
20 to 24 years	22,047
25 to 34 years	36,554
35 to 44 years	35,345
45 to 49 years	17,709
50 to 54 years	16,547
55 to 59 years	14,347
60 to 64 years	11,362
65 to 74 years	16,459
75 to 84 years	13,492
85+ Years	6,234

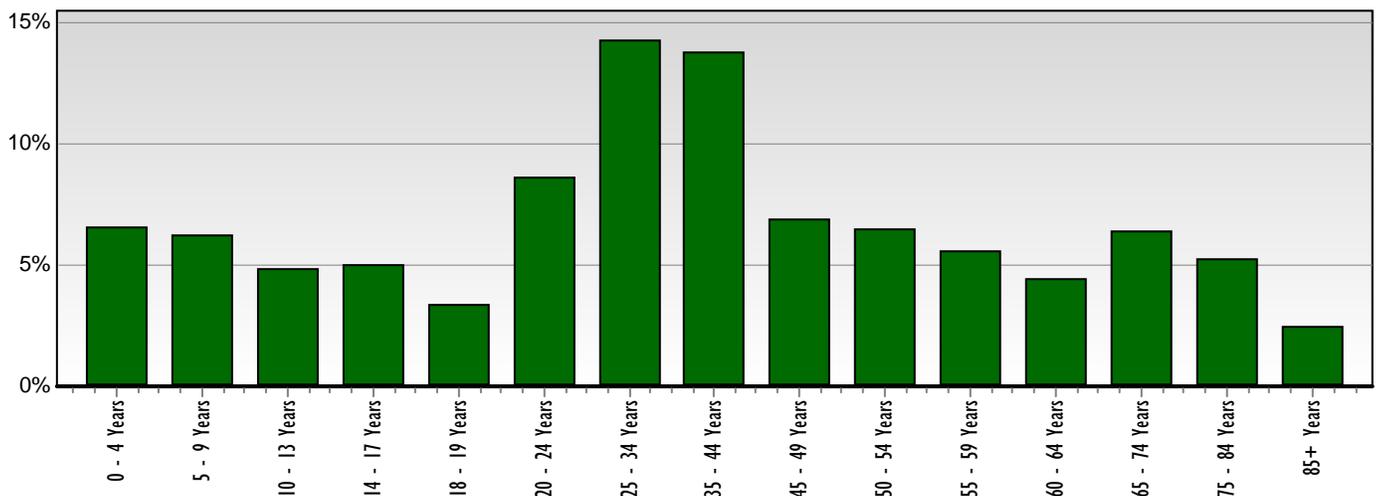
## Total Population By Age

**256,568**

Median Age

36.6

## Population By Age (Current)



**Analysis Geography:** La Mesa Boulevard & Spring Street  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive  
Time**

## Households By Income (Current)

Under \$15,000	10,274
\$15,000 to \$24,999	10,062
\$25,000 to \$34,999	10,759
\$35,000 to \$49,999	16,358
\$50,000 to \$74,999	20,229
\$75,000 to \$99,999	13,198
\$100,000 to \$149,999	11,964
\$150,000 to \$249,999	4,489
\$250,000 to \$499,999	1,098
\$500,000 +	1,185

## Total Households By Income

**99,616**

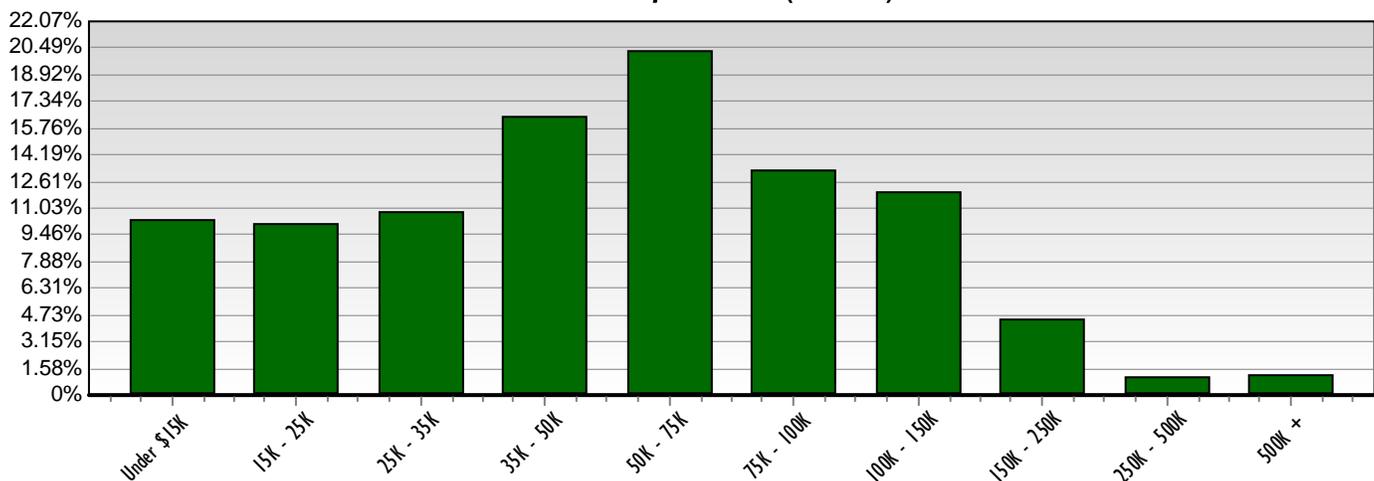
Average Household Income

**\$70,819**

Median Household Income

**\$56,218**

## Households By Income (Current)



**Analysis Geography:** Grossmont Center Drive & Center Drive  
La Mesa, CA

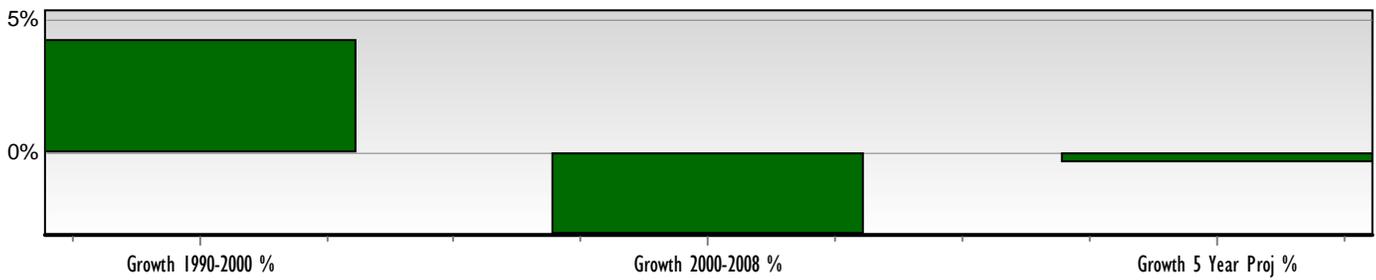
**Date:** 3/30/2011

**9 Min Drive**  
**Time**

## Population Profile

2013 Projection	257,446
2008 Estimate	258,425
2000 Census	266,584
1990 Census	255,627

## Population Change



**9 Min Drive**  
**Time**

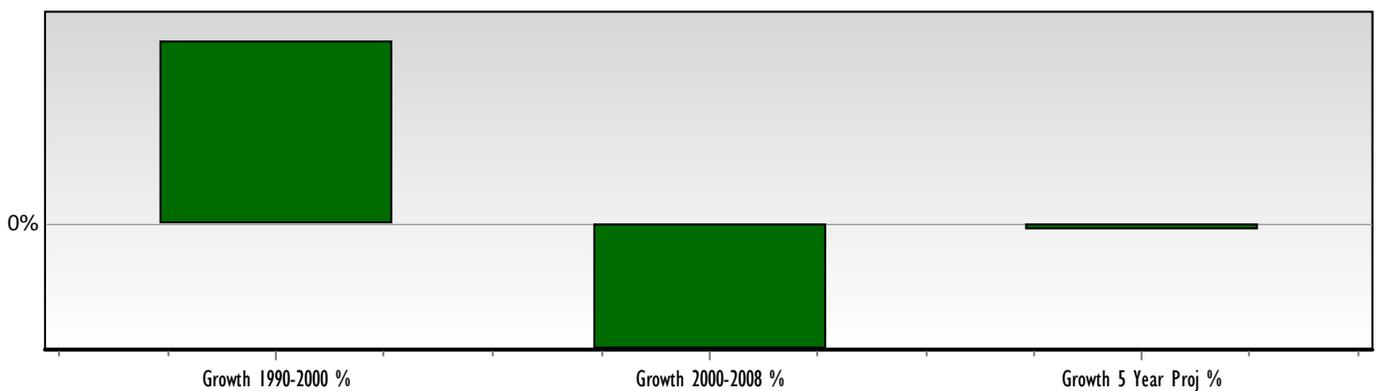
## Work Place Population

Total	103,158
-------	---------

## Household Profile

2013 Projection	99,304
2008 Estimate	99,397
2000 Census	102,138
1990 Census	98,253

## Household Change



**Analysis Geography:** Grossmont Center Drive & Center Drive  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive  
Time**

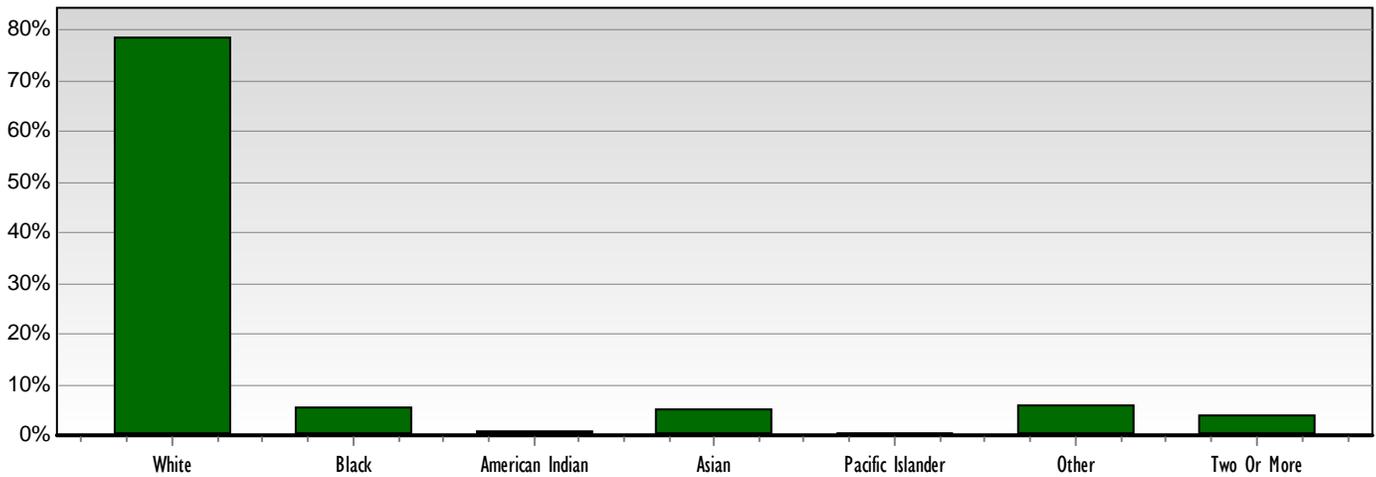
## Population By Race (Current)

White	203,058
Black	13,922
American Indian	1,706
Asian	13,242
Pacific Islander	1,395
Other	15,185
Two Or More	9,917

## Total Population By Race

**258,425**

### Population By Race (Current)



**9 Min Drive  
Time**

## Population By Hispanic Origin (Current)

Hispanic Origin	61,036
Non Hispanic Origin	197,389

**Analysis Geography:** Grossmont Center Drive & Center Drive  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive**  
**Time**

## Population By Age (Current)

0 to 4 years	17,537
5 to 9 years	16,430
10 to 13 years	12,735
14 to 17 years	13,211
18 to 19 years	8,671
20 to 24 years	21,954
25 to 34 years	36,346
35 to 44 years	35,474
45 to 49 years	17,585
50 to 54 years	16,602
55 to 59 years	14,560
60 to 64 years	11,456
65 to 74 years	16,438
75 to 84 years	13,236
85+ Years	6,232

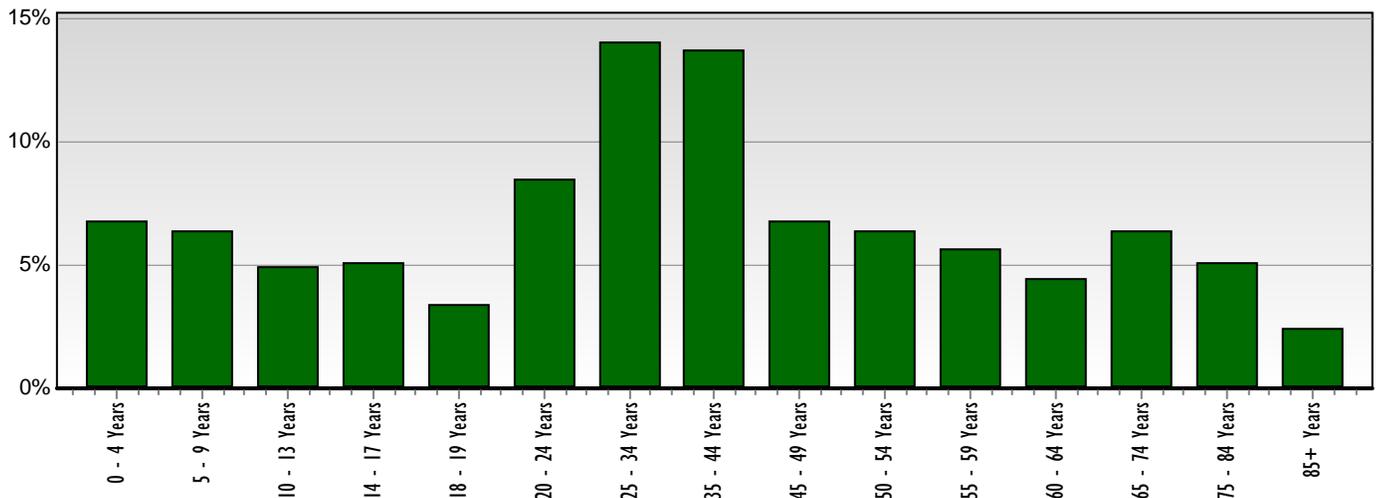
## Total Population By Age

**258,425**

Median Age

**36.3**

## Population By Age (Current)



**Analysis Geography:** Grossmont Center Drive & Center Drive  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive  
Time**

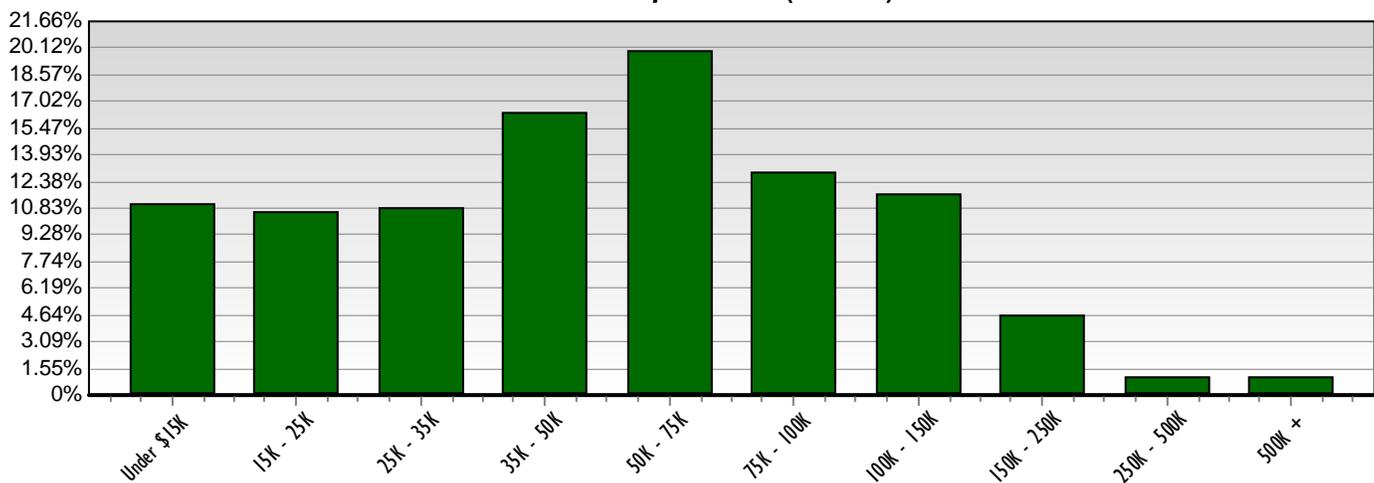
## Households By Income (Current)

Under \$15,000	10,949
\$15,000 to \$24,999	10,499
\$25,000 to \$34,999	10,817
\$35,000 to \$49,999	16,278
\$50,000 to \$74,999	19,816
\$75,000 to \$99,999	12,774
\$100,000 to \$149,999	11,600
\$150,000 to \$249,999	4,542
\$250,000 to \$499,999	1,064
\$500,000 +	1,058

## Total Households By Income

<b>Total Households</b>	<b>99,397</b>
Average Household Income	\$69,100
Median Household Income	\$55,226

## Households By Income (Current)



**Analysis Geography:** Fletcher Parkway & Baltimore Drive  
La Mesa, CA

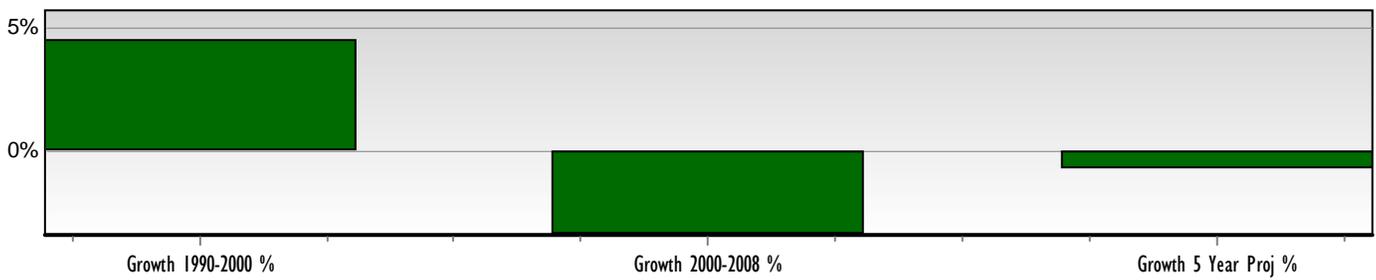
**Date:** 3/30/2011

**9 Min Drive  
Time**

## Population Profile

2013 Projection	280,234
2008 Estimate	282,315
2000 Census	292,374
1990 Census	279,673

## Population Change



**9 Min Drive  
Time**

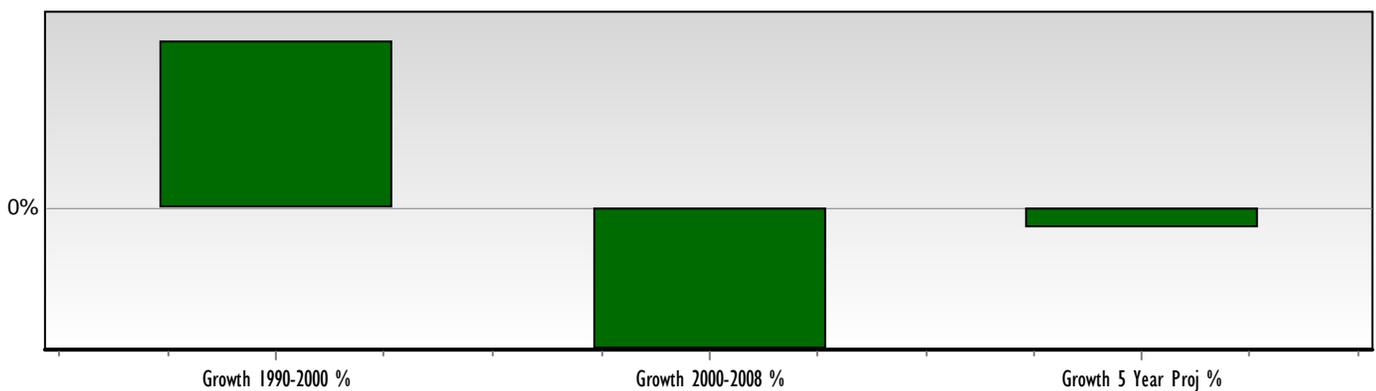
## Work Place Population

Total	118,911
-------	---------

## Household Profile

2013 Projection	111,522
2008 Estimate	112,021
2000 Census	115,567
1990 Census	111,500

## Household Change



**Analysis Geography:** Fletcher Parkway & Baltimore Drive  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive  
Time**

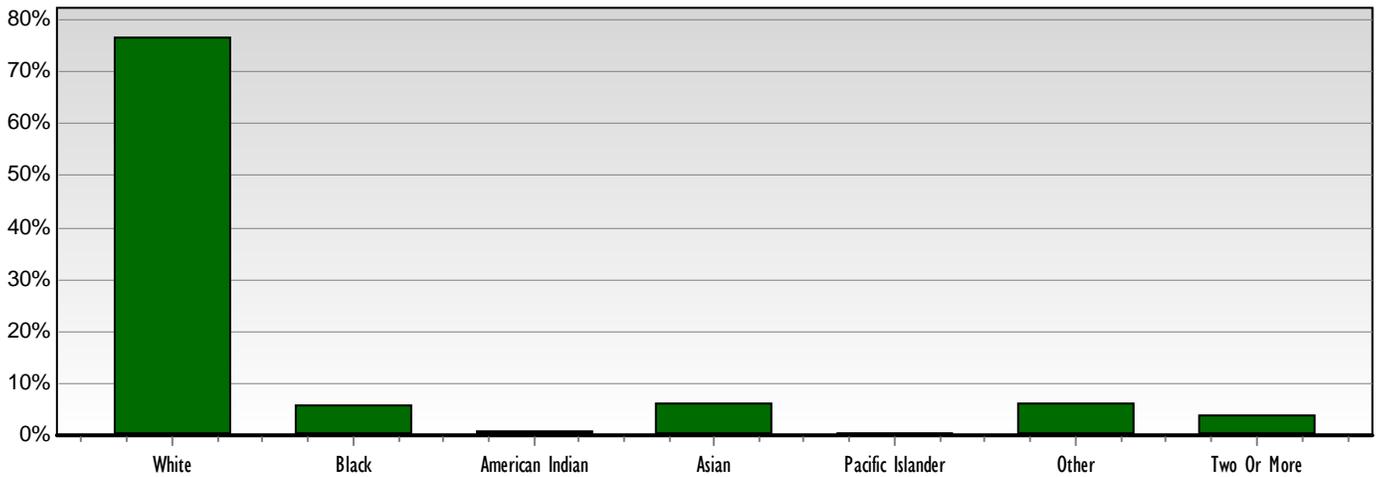
## Population By Race (Current)

White	216,218
Black	16,571
American Indian	1,797
Asian	17,657
Pacific Islander	1,489
Other	17,726
Two Or More	10,857

## Total Population By Race

**282,315**

### Population By Race (Current)



**9 Min Drive  
Time**

## Population By Hispanic Origin (Current)

Hispanic Origin	68,821
Non Hispanic Origin	213,494

**Analysis Geography:** Fletcher Parkway & Baltimore Drive  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive**  
**Time**

## Population By Age (Current)

0 to 4 years	19,053
5 to 9 years	17,410
10 to 13 years	13,150
14 to 17 years	13,520
18 to 19 years	9,096
20 to 24 years	24,792
25 to 34 years	42,050
35 to 44 years	39,147
45 to 49 years	19,167
50 to 54 years	17,872
55 to 59 years	15,584
60 to 64 years	12,304
65 to 74 years	17,711
75 to 84 years	14,485
85+ Years	7,029

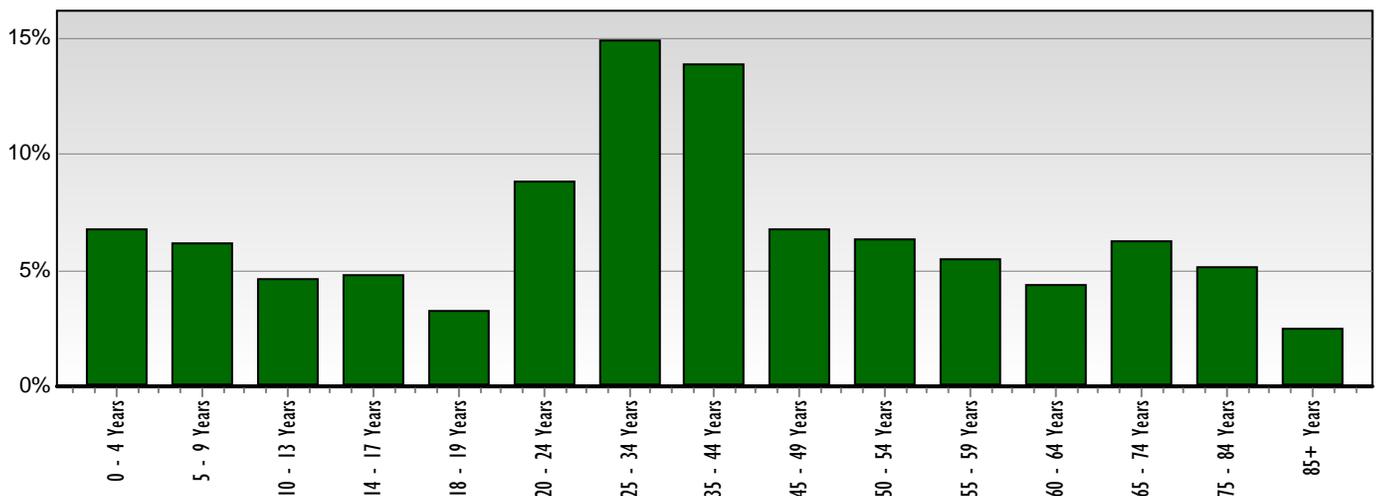
## Total Population By Age

**282,315**

Median Age

**36.2**

## Population By Age (Current)



**Analysis Geography:** Fletcher Parkway & Baltimore Drive  
La Mesa, CA

**Date:** 3/30/2011

**9 Min Drive**  
**Time**

## Households By Income (Current)

Under \$15,000	12,540
\$15,000 to \$24,999	12,240
\$25,000 to \$34,999	12,606
\$35,000 to \$49,999	18,478
\$50,000 to \$74,999	21,956
\$75,000 to \$99,999	14,152
\$100,000 to \$149,999	12,670
\$150,000 to \$249,999	4,930
\$250,000 to \$499,999	1,242
\$500,000 +	1,207

## Total Households By Income

**112,021**

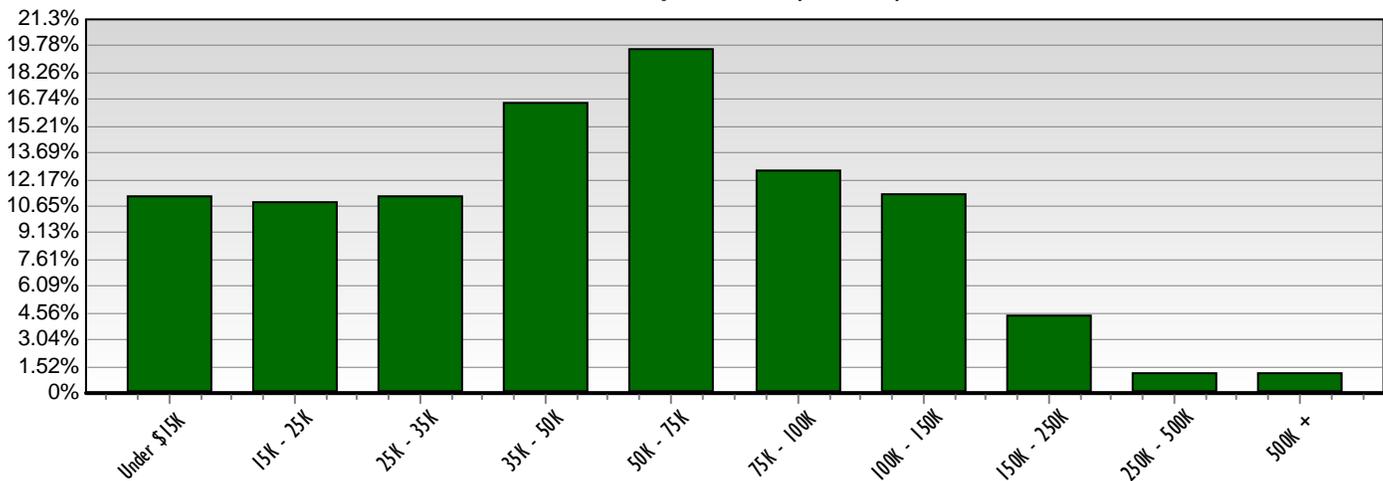
Average Household Income

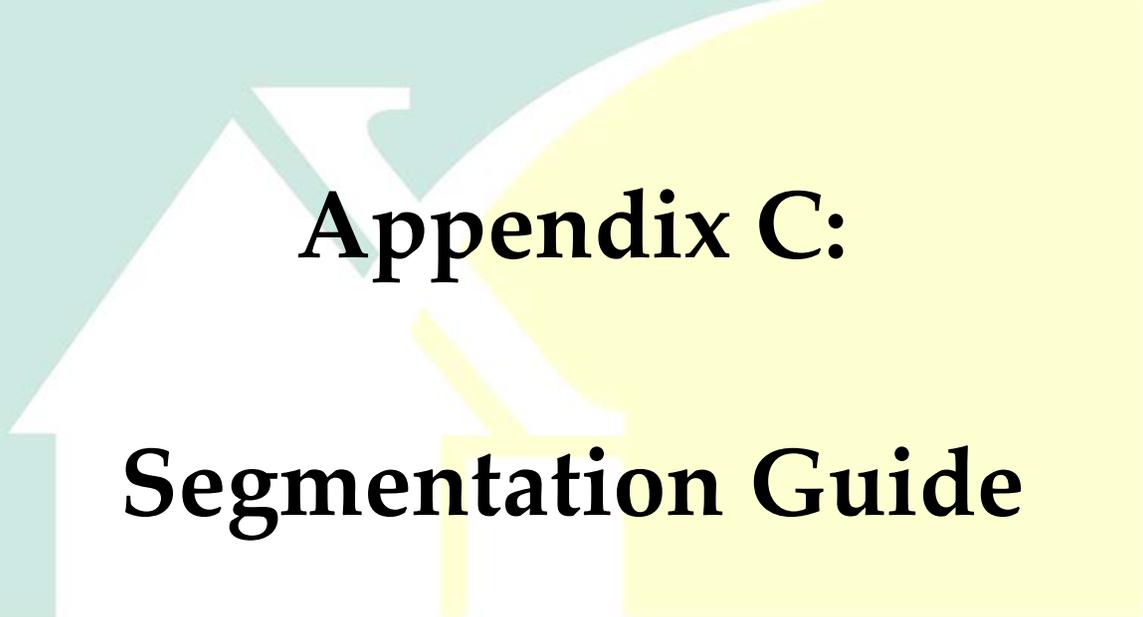
**\$68,451**

Median Household Income

**\$54,383**

## 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 B: Upscale America

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

---

*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 C01: Second City Homebodies

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*Financially conservative, dual working, middle-aged couples and families living in small, satellite cities along the East and West coasts*

### **Demographics**

Most likely to be found in a variety of small, satellite cities along both coasts such as Virginia Beach, VA, Ft. Lauderdale, FL, and Portland, OR. Second City Homebodies inhabit a prosperous world where middle-aged couples and families lead flourishing lifestyles. Most of the households are well educated, with an almost an even split between college graduates and those who have completed only some college. Many have achieved wellpaying, white-collar jobs in retail, real estate, education and public administration. With above-average numbers of both whites and Asians, these Baby Boomers have settled into established homes built around 1975. Regardless of the background, the households in this segment typically need two wage earners to meet the needs of their upscale lifestyles.

### **Lifestyles**

Mature and financially secure, members of Second City Homebodies like to relax at home but also enjoy leisurely and outdoor activities. They like to visit museums, attend concerts and dance performances, and prefer to travel abroad for vacations. When it comes to the outdoors and sports, they have an inclination for camping, backpacking, bicycling, golf and tennis. At the supermarket, they stock up on fat-free products, sparkling water and fresh fish. They're the kind of consumers who like to be first on the block to buy new tech gadgets at stores like Best Buy, P.C. Richard and Circuit City. However, they're more likely to go to smaller specialty retailers for the designer fashions they prefer. Financially conservative, they save their money for college and retirements plans, investing in a variety of stocks, corporate bonds and mutual funds.

### **Media**

The residents of Second City Homebodies are eclectic media consumers, demonstrating above-average rates for reading newspapers, watching TV, listening to the radio and going online. Their favorite TV shows tend to be comedy, sports and arts programs on cable channels like ESPN, HBO, Showtime and Bravo. On network TV, they regularly watch "Scrubs," "Will & Grace" and "Seinfeld"—no matter if they are re-runs. Their intellectual interests are wide-ranging as seen in their fondness for newspaper sections that cover science, travel and entertainment. They like to go online to keep up with the latest trends in fashion and technology. Among their favorite Internet activities include surfing newspaper websites, gathering shopping information and listening to online radio stations that play contemporary hits.

Group C: Small-town Contentment

## **Segment C03: Suburban Optimists**

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*A portrait of middle-class diversity containing middle-aged couples and families living in older suburban homes, duplexes and apartments located in coastal states*

### **Demographics**

With its concentration of Asian, Hawaiian and white residents, Suburban Optimists presents a portrait of middleclass diversity. Most of the households contain middle-aged couples and families living in older suburban homes, duplexes and apartments located in coastal states and Hawaii. There's an even distribution of residents who have graduated from high school or completed some college, resulting in a job market for both blue-collar and white-collar positions in transportation, retail, food services and public administration. With their above-average incomes, these households have two or more cars—typically imported SUVs and mid-sized sedans—which are used for dual commutes to work.

### **Lifestyles**

Regardless of their age, these diverse households enjoy vibrant, on-the-go lifestyles. Suburban Optimists residents have high rates for going to movies, nightclubs, billiards halls and comedy clubs. Sports are mixed between team sports as hockey and softball and individual activities as skateboarding and motorcycling. They consider shopping as another sport, relishing the challenge of finding the latest fashions at bargain prices at stores such as Loehmann's, Target and Marshall's. However, these consumers have a tendency to spend their disposable income on technology products, buying the latest video game players, laptops and home theater systems. They describe themselves as early adopters and influential leaders when it comes to consumer electronics. They like to travel for pleasure mostly to domestic destinations, especially along the Pacific coast. When it comes to their finances they are not big savers and exhibit low rates for owning investment and insurance products.

### **Media**

Suburban Optimists residents have youthful, entertainment-minded media tastes. They frequently watch cable TV networks such as MTV, VH1 and Spike TV. They enjoy watching network dramas, comedies and reality shows like "American Idol," "E.R." and "That '70s Show." They listen to the radio mostly for music rather than news listening to their favorite classic rock, contemporary hits and adult contemporary music stations. This is a strong market for young men's magazines like FHM and Maxim as well as music titles such as Spin and Rolling Stone. They are big fans of the Internet, going online for entertainment like audio streaming and for utilitarian uses like exchanging email, getting local news and finding shopping information.

Group D: Blue-collar Backbone

## **Segment D01: Nuevo Hispanic Families**

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*Young and lower income Latino family households living, in working-class neighborhoods of large cities*

### **Demographics**

Centered in the nation's big cities, Nuevo Hispanic Families is a cluster of young Hispanic family households living in working-class neighborhoods. Nearly eight in ten residents are Hispanic. About two-thirds of the households are under 45 years old and many contain large families with mixed-aged children that have settled into comfortable bungalows and low-rise apartments. Education attainment is low, with one-third having less than a high school education. They earn lower-middle incomes from jobs as construction laborers, retail clerks and food service workers. A fairly mobile group, many express the hope that they'll be trading up soon to better jobs and bigger homes.

### **Lifestyles**

With their modest educations and salaries, households in Nuevo Hispanic Families pursue economical lifestyles. They lack the discretionary income for many leisure activities or vacation travel as they support family members. They're avid fans of outdoor sports, especially soccer, basketball and baseball. As a family, they are frequent shoppers who like to browse stores patronizing retailers that sell athletic attire, such as Nike, Finish Line and Footlocker. These typical bi-lingual consumers claim that they can afford to buy designer clothes, and many like to clothes shop at specialty stores where they can converse with knowledgeable clerks. Nuevo Hispanic Families households want to stand out in a crowd, and many concede that they need more money to look the part. They own relatively few cars or financial investments at above-average rates.

### **Media**

What Nuevo Hispanic Families may lack in money, they more than make up in their passion for various media. They have high rates for watching network and cable television, listening to the radio and reading newspapers and magazines. Their favorite cable channels feature family-friendly fare: Disney, Nickelodeon and Cartoon Network are among the most popular. They tune in to Spanish and Mexican music stations at more than eight times the national average. Their top-rated magazines are all Spanish oriented—Hispanic Magazine, Urban Latino and Latina Style—in addition to several English language titles on fashion and gaming. Their Internet activity is low which can be linked to a low propensity to own desktop and laptops computers.

Group E: American Diversity

## Segment E03: Professional Urbanites

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*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 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.

Group F: Metro Fringe

## **Segment F02: Moderate Conventionalists**

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*Highly mobile, middle-class singles and childless couples living in modest homes, semidetached houses and apartments scattered throughout second-tier cities*

### **Demographics**

With many key demographic measures close to the national average—including age, income and education— members of Moderate Conventionalists epitomize average Americans. Scattered throughout second-tier cities in the Midwest and West Coast, these singles and couples tend to live in modest homes, semi-detached houses and apartments. Most have completed high school or some college and parlayed well-paying blue-collar and white-collar jobs into middle-class status. These predominantly childless households have low rates of homeownership and above-average rates of mobility. Moving vans are a frequent sight in this cluster, as young singles move into their first apartments and empty-nesting couples leave their homes for smaller retirement rentals.

### **Lifestyles**

Members of Moderate Conventionalists lead active social lives. With the majority of residents unattached, these areas present an active social scene. Their favorite activities include dancing, bar hopping, bowling and playing pool. They're avid exercise buffs who like to play softball, tennis and volleyball. They travel frequently for business and pleasure, though their destinations are frequently to ocean beaches. They're big consumers for products that help them look their best such as cosmetics, toiletries and athletic gear. With their midscale incomes, these childless households have discretionary cash to spend on clothes and the latest tech gear. However, they can't be too extravagant since many are carrying plenty of debt with education and car loans.

### **Media**

Despite all their socializing, Moderate Conventionalists find time to enjoy a variety of media—from newspapers and TV to movies and the Internet. They like to watch reality shows, sitcoms and evening animation such as "CSI," "King of the Hill," "E.R." and "Malcolm in the Middle." They read a lot of gaming, celebrity and sports magazines, such as Entertainment Weekly, Us, Sports Illustrated and GamePro. This is only a moderate market for radio programming, with country music and contemporary hit radio stations faring the best. Many of the young residents would rather spend their free time on the Internet, downloading games, looking for better jobs, surfing to sports websites and participating in chat forums.

Group H: Aspiring Contemporaries

**Segment H03: Stable Careers**

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*Young and ethnically diverse singles residing in low- and high-rise apartment buildings and living comfortable lifestyles in big-city metropolitan areas*

**Demographics**

Stable Careers is a collection of young and ethnically diverse singles living in big-city metros as Los Angeles, CA, Philadelphia, PA and Miami, FL. A quarter of the households are of Hispanic and Asian and are slightly less affluent than others dominated by Generation Y residents. More than half of households have gone to college and most have landed white-collar jobs in retail, health services and professional offices. Without the financial responsibilities of children, these singles and couples stretch their incomes into comfortable lifestyles. Most of the households live in relatively new apartments—in both low- and high-rise buildings—and pay above-average rents for the in-town real estate.

**Lifestyles**

The households in Stable Careers enjoy urbane lifestyles. They take advantage of their urban settings to go to bars, restaurants, concerts and comedy clubs. These young singles are body conscious and spend a fair portion of their free time jogging, lifting weights and doing aerobic exercises at nearby health clubs. Often on the go, they rarely set foot inside banks, preferring ATM machines to pick up cash for shopping trips to stores like Target, Old Navy, Gap and Best Buy. Although they're drawn to the clearance racks when shopping for clothes, they're willing to spend extra money for electronic devices such as MP3 players, digital cameras and laptop computers. In Stable Careers, these budget-conscious consumers enjoy traveling as often as they can, but their trips are typically to U.S. cities and staying with friends and family.

**Media**

The media tastes skew young in Stable Careers. The households make a strong market for a variety of network TV offerings including reality shows, sitcoms, music and late-night programs, including TV shows such as "Saturday Night Live," "American Idol" and "Fear Factor." Most residents prefer compact cars, but they make a point of having high-end radios to play alternative rock, urban contemporary and contemporary hit music. Their taste in magazines reflects their pop sensibilities, with favorite publications such as Rolling Stone, Vanity Fair and Entertainment Weekly. As early tech adopters, the members of Stable Careers are computer literate, and they go online frequently to search for jobs, chat, download music and check out the local personal ads.

Group H: Aspiring Contemporaries

## **Segment H04: Aspiring Hispania**

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*Young, married and single Hispanic households earning lower-middle-class incomes and living in urban gateway communities*

### **Demographics**

A cluster of urban gateway communities, Aspiring Hispania is the first stop for many relatively young Hispanics striving for better lives in America. More than half the residents are Hispanic and split fairly evenly between married and single households. Many of these newcomers have large families and feel squeezed between high rents and lower-middle-class incomes. With their modest educations—more than one-quarter have not completed high school—the cluster’s residents typically work in low-paying service industries including food services, retail and transportation. Their housing choices are also limited with a majority living in small apartment buildings or semi-detached houses. Reflecting economic challenges combined with ambitions to improve their living conditions and opportunities, two out of three households have multiple workers in the family.

### **Lifestyles**

Aspiring Hispania households tend to have low-key lifestyles. They lack discretionary income to spend on many leisure activities, but they do enjoy playing sports like soccer, baseball and basketball. When they can, they will splurge on their kids, taking them to theme parks and buying an array of games, toys, dolls and action figures. They outfit their homes and apartments with furnishings from Ikea and Levitz Furniture. Even with their limited financial resources, they are also willing to spend money on the latest photography equipment including digital camcorders and cameras to capture their new experiences. Although they may not be able to afford frequent trips home—they’re more likely to take domestic car trips than travel abroad—they do send money to relatives at high rates. Aspiring for a better life in America, many would like to own their own business. They want to get to the top in their career give and will give up time with the family in order to do so.

### **Media**

Aspiring Hispania represents one of the few Mosaic segments with above-average usage rates for every kind of media—TV, radio, magazines and movies. They’re big fans of television, especially news shows, animation programs and the music videos on MTV, VH1 and E! Entertainment. They listen to a mix of urban contemporary and Mexican and Spanish music on their compact car radios. Their taste in magazines reflects their varied passions for fashions (Vogue), family (Parenting), music (FHM) and their Hispanic heritage (Latin Style). When online they use instant messaging, frequent chat rooms, watch streaming video and visit sports sites.

Group J: Struggling Societies

**Segment J02: Latino Nuevo**

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*Primarily young, un-educated, but large-family Hispanic households concentrated in the barrios of border states like Texas and California earning very low incomes as laborers and service workers*

**Demographics**

In Latino Nuevo, the American Dream lives in young, recent immigrants looking for better lives. Concentrated in the barrios of border states as Texas and California, the populace is more than 90 percent Hispanic and more than three-quarters of adults are under the age of 45. These households are filled with child-rearing families—no cluster contains more large families—and they tend to live in old apartments and homes valued at half the national average. With half of the residents never completing high school, the vast majority of adults work as laborers or service workers. Although their incomes are one of the lowest in the country—household income is 40 percent below the U.S. average—many residents may have come from countries where economic conditions are worse. For them, Latino Nuevo holds the promise of opportunity.

**Lifestyles**

Latino Nuevo households are typically living paycheck to paycheck. Residents are unable to afford many leisure activities, so they gravitate to sports that can be played in public parks including soccer, basketball, baseball and volleyball. They support large families and manage to buy infant toys, dolls, video games and Disney related products. To stretch their budgets, residents frequent stores like Toys R Us, Foot Locker and Ross Dress for Less. They're above-average purchasers of many inexpensive grocery items—such as dry soup, Jell-o, powdered soft drinks—in addition to Mexican food, cheese and fresh chicken. They mostly pay in cash since many don't have bank accounts or the creditworthiness to qualify for credit cards, debit cards and loans. While they're off the radar for many traditional banking services, they are frequent users of money transfer companies using them most likely to send money to support relatives in their home countries.

**Media**

The households of Latino Nuevo are traditional media fans who seek out Spanish-language formats wherever they can find them. Their favorite radio stations play Tejano, ranchera and other forms of Mexican and Spanish music. Their preferred magazines are targeted to Hispanic readers including Latin Style, Latina Style, Hispanic Magazine, Urban Latino and Hispanic Business. Few can afford cable packages, but many homemakers keep their TV sets on all day, watching a variety of ethnic-oriented sitcoms, talk shows and animation like "The Simpsons." Newspapers are another popular source of information, especially news related to the Hispanic community. A small percentage of households are exploring the Internet to download music, gamble and visit chat rooms.

Group K: Urban Essence

**Segment K04: Urban Diversity**

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*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.