

# ENGAGE CNY REGIONAL SCANS INTEREST & PARTICIPATION IN THE ARTS

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Scans for Cortland, Herkimer, Madison, Oneida, Onondaga, and Oswego Counties

Commissioned by CNY Arts

DIANE L. MATARAZA, INC | DECISION SUPPORT PARTNERS INC.

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## I. Introduction

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From June – January 2014, CNY Arts is spearheading an effort called Engage CNY to find more ways for arts, culture, history, and heritage to boost regional vitality by increasing opportunities for all residents and visitors. Engage CNY's aim is to find the answers to these questions:

1. What cultural activities do residents, and visitors want in the six-county region (Cortland, Herkimer, Madison, Oneida, Onondaga, and Oswego)?
2. What resources exist to respond to resident and visitor appetites, and what's needed?
3. How could arts and culture help propel Central New York's priorities including economic growth and quality of life?
4. What would successful regional cultural development require in terms of infrastructure and sustainability?

This regional scan report provides insights and answers to the first question. Using Experian and ESRI data, the project consultant team has provided data enabling Engage CNY's leaders to understand regional and county-by-county arts and cultural participation variables. Detailed information about demographic, lifestyle segmentation, consumer spending, and business data for Cortland, Herkimer, Madison, Oneida, Onondaga, and Oswego counties are provided and will be instrumental in determining what regional cultural development priorities should be.

The first section of this report provides aggregate data about the six county region. County-by-county information follows in Section II, and Section III includes detailed descriptions of each of 19 Experian Mosaic groups located in Central New York.

ESRI consumer index data provides us with a numerical representation of the strength of affiliation between consumers and arts and cultural offerings in Central New York. A score of 100 with indexing is considered the national average consumption rate. By stratifying the block groups in the region by index (120 or higher=1 strong, 80-119=Moderate, and less than 80=weak) this report isolates those "demand areas" and describes the Mosaic characteristics and Census Block demographics of households in those areas.

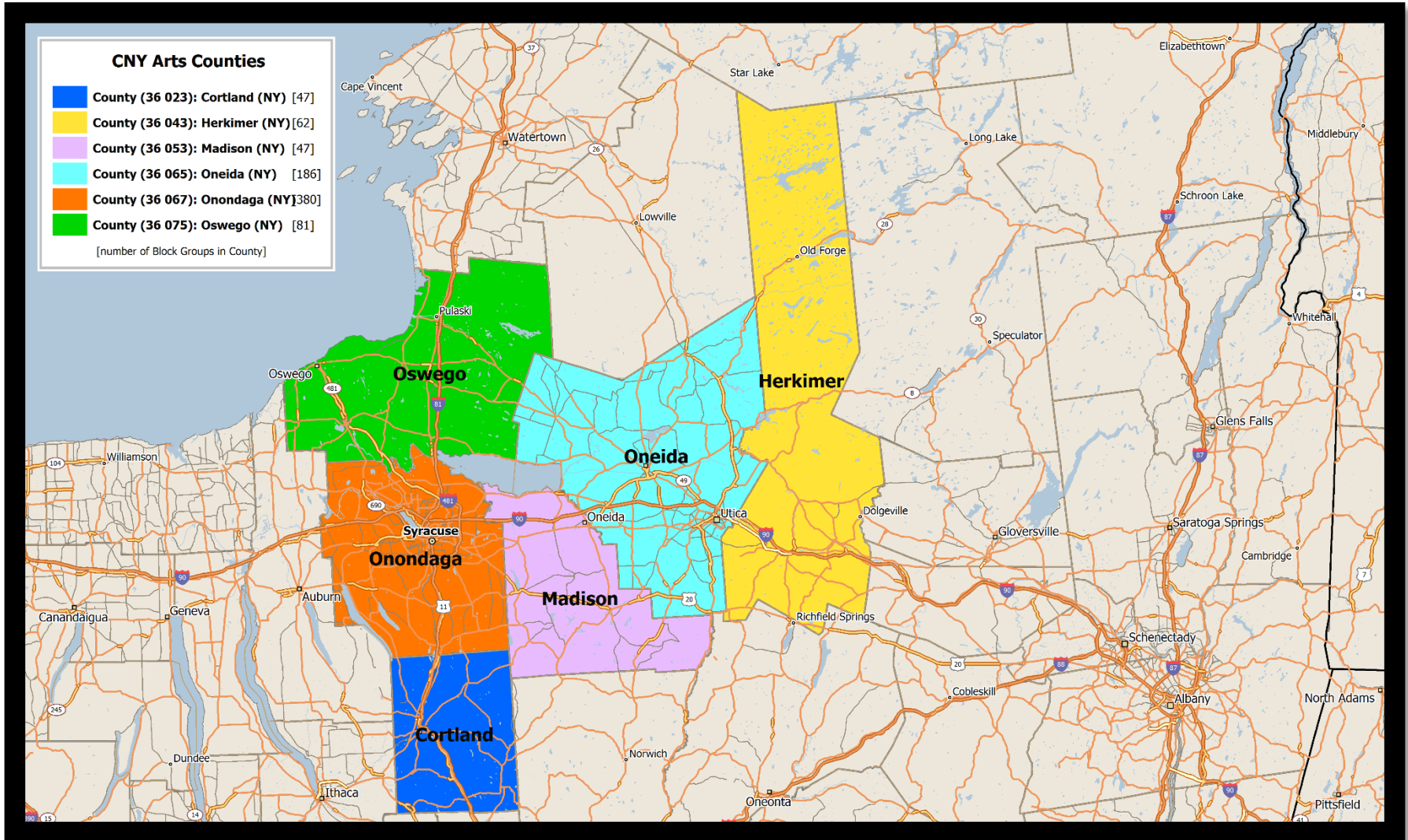
According to 2012 MOSAIC analysis and U.S. Census projections there are 399,416 households in the CNY region with a population of 1,009,537. Detailed description of each Mosaic Census Block begin in Section IV.

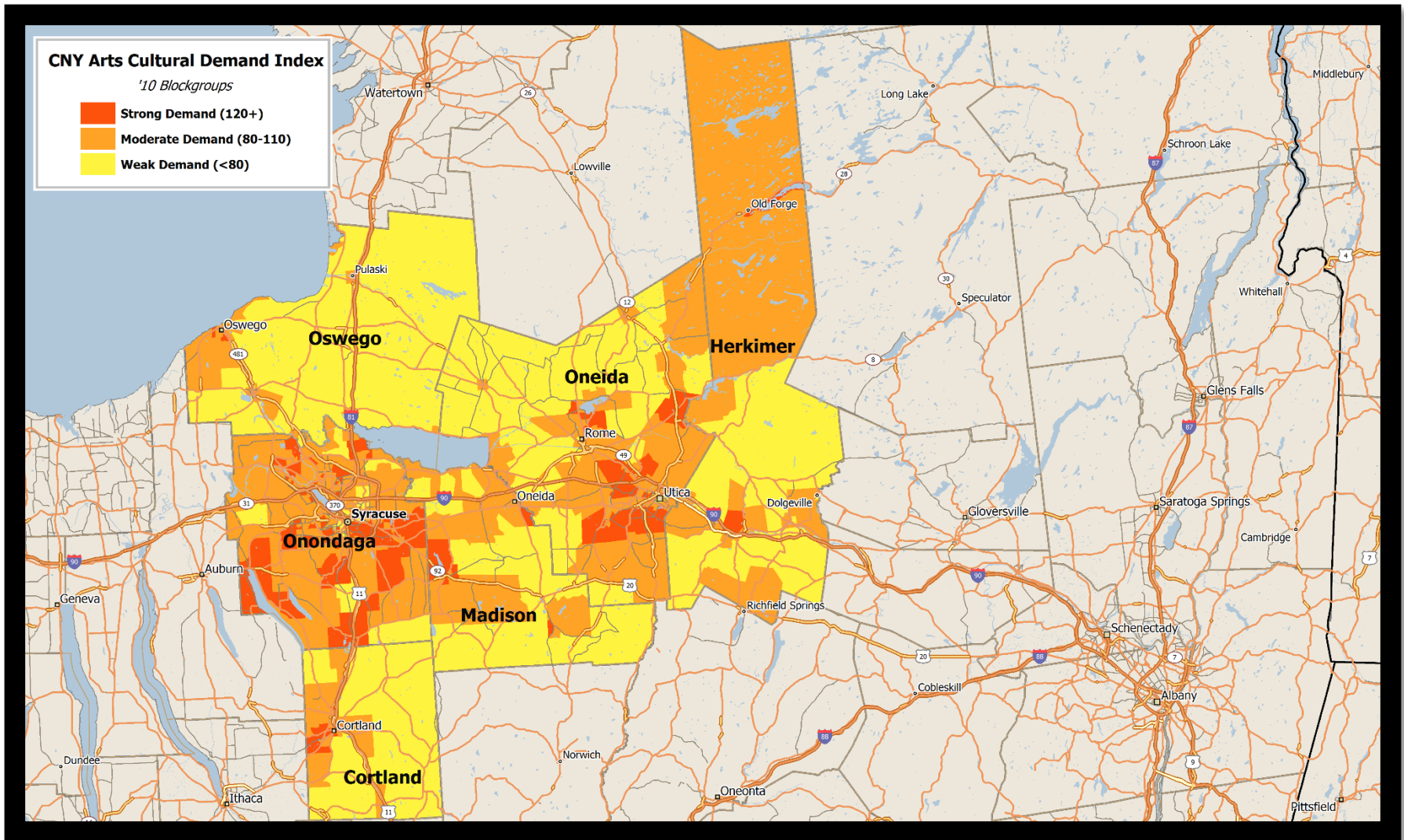
## ENGAGE CNY OBJECTIVES

Engage CNY objectives are to:

- 1) Provide a comprehensive inventory of the arts, culture, history, and heritage delivery system in Central New York (both individual artists and organizations), especially existing local partnerships between arts organizations and their communities (schools, libraries, local festivals, churches, local government, industry, and more)
- 2) More closely integrate cultural development with Central New York agendas such as economic development, community livability, tourism, neighborhood development, and quality of life.
- 3) Cultivate broad-based community thinking, ideas, and enthusiasm as to how Central New York's arts, culture, history, and heritage delivery system could become even more relevant and more vital.
- 4) Determine who in Central New York is being reached by current programming (and what kinds of programming), who is not, and how to expand access.
- 5) Assess CNY Arts' structure, operations, and programming and make recommendations to improve and strengthen its efficiency and effectiveness – especially given expectations of the plan (and CNY Arts once it is completed).
- 6) Provide a comprehensive cultural assessment and plan and a clear road map for CNY Arts' successful plan implementation.

## II. REGIONAL INFORMATION: AREA MAP OF CENSUS BLOCK GROUPS





## Six-County Overview: Cultural Demand Indices

CNY Region	Cultural Demand Index	Cortland	%	Herkimer	%	Madison	%	Oneida	%	Onondaga	%	Oswego	%	Total	%
2012 Mosaic Households		18,705		26,040		27,709		92,692		187,747		46,523		399,416	
2012 Group Quarters (Non-Inset)		3,070		863		4,474		4,991		12,580		4,123		30,101	
(A) Power Elite	143	14	0%	1	0%	400	1%	553	1%	5,796	3%	35	0%	6,799	2%
(B) Flourishing Families	126	162	1%	83	0%	491	2%	1,676	2%	8,699	4%	348	1%	11,459	3%
(C) Booming with Confidence	130	91	0%	9	0%	1,376	4%	1,218	1%	9,935	5%	163	0%	12,792	3%
(D) Suburban Style	99	193	1%	114	0%	775	2%	1,219	1%	3,995	2%	527	1%	6,823	2%
(E) Thriving Boomers	114	855	4%	369	1%	1,457	5%	4,393	4%	8,863	4%	1,556	3%	17,493	4%
(F) Promising Families	95	17	0%	15	0%	192	1%	182	0%	2,370	1%	47	0%	2,823	1%
(G) Young City Solos	143	-	0%	-	0%	-	0%	5	0%	987	0%	-	0%	992	0%
(H) Middle-class Melting Pot	109	76	0%	459	2%	486	2%	461	0%	5,682	3%	193	0%	7,357	2%
(I) Family Union	105	635	3%	412	2%	1,518	5%	3,819	4%	14,975	7%	1,064	2%	22,423	5%
(J) Autumn Years	104	4,289	20%	8,681	32%	4,119	13%	32,045	33%	48,047	24%	7,320	14%	104,501	24%
(K) Significant Singles	107	299	1%	30	0%	110	0%	814	1%	7,126	4%	96	0%	8,475	2%
(L) Blue Sky Boomers	78	4,132	19%	5,929	22%	8,944	28%	11,315	12%	8,604	4%	15,194	30%	54,118	13%
(M) Families in Motion	96	2,315	11%	3,135	12%	2,872	9%	7,502	8%	5,898	3%	8,245	16%	29,967	7%
(N) Pastoral Pride	106	864	4%	1,507	6%	2,050	6%	2,306	2%	933	0%	3,056	6%	10,716	2%
(O) Singles and Starters	119	3,140	14%	382	1%	2,755	9%	1,318	1%	19,631	10%	3,468	7%	30,694	7%
(P) Cultural Connections	98	86	0%	18	0%	60	0%	580	1%	3,871	2%	113	0%	4,728	1%
(Q) Golden Year Guardians	108	1,084	5%	2,349	9%	2,800	9%	7,126	7%	11,153	6%	2,880	6%	27,392	6%
(R) Aspirational Fusion	78	2,696	12%	1,152	4%	826	3%	15,153	16%	23,041	12%	2,957	6%	45,825	11%
(S) Struggling Societies	86	827	4%	2,258	8%	952	3%	5,998	6%	10,721	5%	3,384	7%	24,140	6%

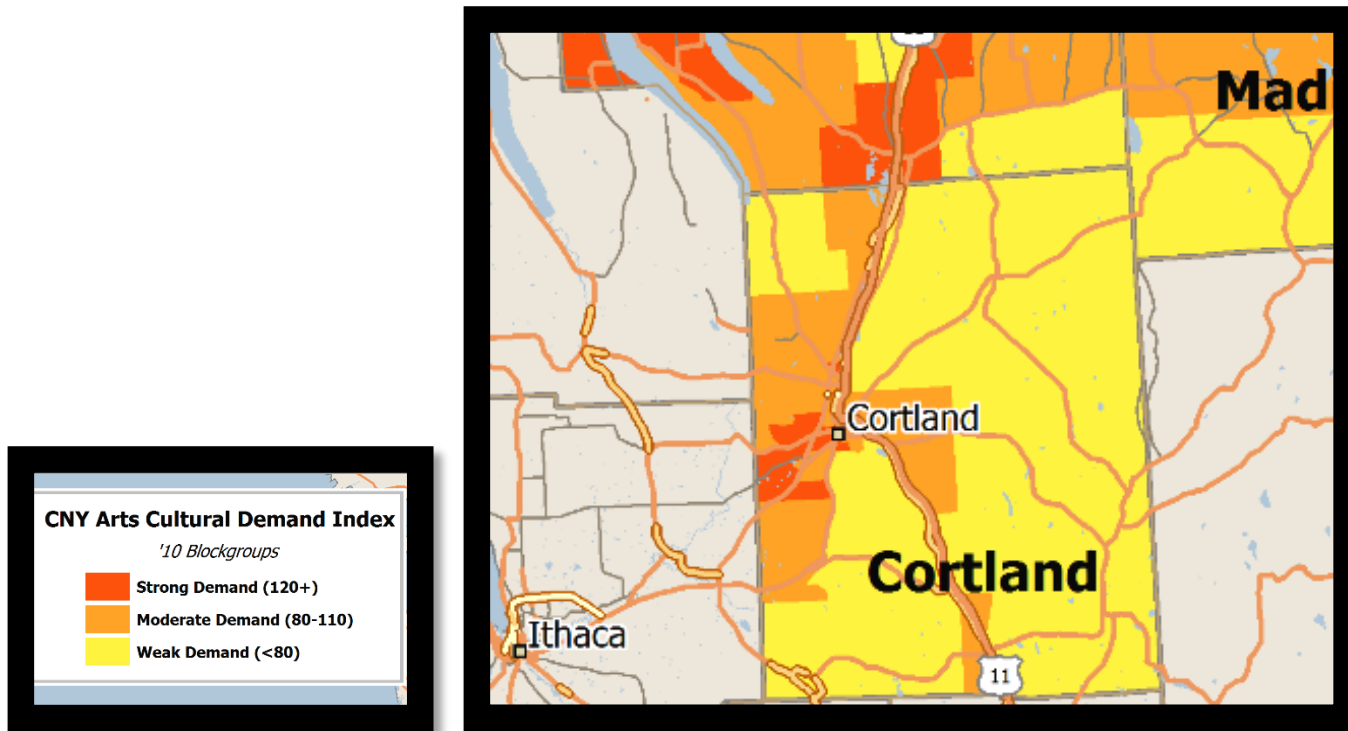


Strong Demand Areas	Cultural Demand Index	Cortland	%	Herkimer	%	Madison	%	Oneida	%	Onondaga	%	Oswego	%	Total	%
	2012 Mosaic Households		3,461		1,027		2,174		14,032		47,053		1,409		69,156
2012 Group Quarters (Non-Inst)		2,742		565		1,460		2,801		8,348		217		16,133	
														-	
(A) Power Elite	143	-	0%	-	0%	275	8%	533	3%	4,646	8%	20	1%	5,474	6%
(B) Flourishing Families	126	22	0%	19	1%	129	4%	1,116	7%	4,340	8%	98	6%	5,724	7%
(C) Booming with Confidence	130	35	1%	-	0%	1,158	32%	1,076	6%	6,568	12%	94	6%	8,931	10%
(D) Suburban Style	99	47	1%	1	0%	87	2%	699	4%	1,162	2%	16	1%	2,012	2%
(E) Thriving Boomers	114	220	4%	64	4%	210	6%	2,508	15%	3,251	6%	78	5%	6,331	7%
(F) Promising Families	95	15	0%	1	0%	18	0%	102	1%	507	1%	-	0%	643	1%
(G) Young City Solos	143	-	0%	-	0%	-	0%	5	0%	727	1%	-	0%	732	1%
(H) Middle-class Melting Pot	109	17	0%	376	24%	106	3%	214	1%	1,153	2%	-	0%	1,866	2%
(I) Family Union	105	124	2%	24	2%	27	1%	963	6%	3,114	6%	43	3%	4,295	5%
(J) Autumn Years	104	766	12%	655	41%	114	3%	5,268	31%	9,404	17%	633	39%	16,840	20%
(K) Significant Singles	107	77	1%	3	0%	-	0%	93	1%	1,117	2%	19	1%	1,309	2%
(L) Blue Sky Boomers	78	188	3%	44	3%	310	9%	704	4%	1,949	4%	39	2%	3,234	4%
(M) Families in Motion	96	210	3%	9	1%	11	0%	204	1%	179	0%	102	6%	715	1%
(N) Pastoral Pride	106	17	0%	198	12%	251	7%	128	1%	24	0%	-	0%	618	1%
(O) Singles and Starters	119	2,967	48%	43	3%	698	19%	431	3%	13,079	24%	105	6%	17,323	20%
(P) Cultural Connections	98	82	1%	-	0%	-	0%	5	0%	275	0%	19	1%	381	0%
(Q) Golden Year Guardians	108	215	3%	150	9%	235	6%	1,840	11%	2,666	5%	55	3%	5,161	6%
(R) Aspirational Fusion	78	1,142	18%	-	0%	-	0%	875	5%	1,085	2%	222	14%	3,324	4%
(S) Struggling Societies	86	59	1%	5	0%	5	0%	69	0%	155	0%	83	5%	376	0%

Moderate Demand Areas	Cultural Demand Index	Cortland	%	Herkimer	%	Madison	%	Oneida	%	Onondaga	%	Oswego	%	Total	%
2012 Mosaic Households		9,830		15,457		16,898		56,942		117,183		18,028		234,338	
2012 Group Quarters (Non-Inst)		323		197		2,338		1,884		3,160		3,754		11,656	
(A) Power Elite	143	14	0%	-	0%	124	1%	20	0%	1,134	1%	15	0%	1,307	1%
(B) Flourishing Families	126	140	1%	33	0%	361	2%	558	1%	4,279	4%	188	1%	5,559	2%
(C) Booming with Confidence	130	56	1%	7	0%	218	1%	142	0%	3,365	3%	51	0%	3,839	2%
(D) Suburban Style	99	123	1%	51	0%	559	3%	452	1%	2,566	2%	200	1%	3,951	2%
(E) Thriving Boomers	114	554	5%	203	1%	1,005	5%	1,662	3%	5,451	5%	1,029	5%	9,904	4%
(F) Promising Families	95	-	0%	5	0%	174	1%	79	0%	1,734	1%	25	0%	2,017	1%
(G) Young City Solos	143	-	0%	-	0%	-	0%	-	0%	260	0%	-	0%	260	0%
(H) Middle-class Melting Pot	109	53	1%	38	0%	335	2%	199	0%	4,433	4%	86	0%	5,144	2%
(I) Family Union	105	406	4%	255	2%	1,248	6%	2,579	4%	11,566	10%	491	2%	16,545	7%
(J) Autumn Years	104	3,217	32%	6,451	41%	3,345	17%	25,259	43%	37,771	31%	5,147	24%	81,190	33%
(K) Significant Singles	107	222	2%	27	0%	110	1%	720	1%	5,987	5%	54	0%	7,120	3%
(L) Blue Sky Boomers	78	1,057	10%	1,620	10%	3,767	20%	5,310	9%	6,214	5%	1,838	8%	19,806	8%
(M) Families in Motion	96	1,073	11%	1,786	11%	1,699	9%	4,560	8%	5,134	4%	2,948	14%	17,200	7%
(N) Pastoral Pride	106	302	3%	411	3%	780	4%	983	2%	744	1%	406	2%	3,626	1%
(O) Singles and Starters	119	121	1%	213	1%	1,961	10%	614	1%	6,134	5%	3,124	14%	12,167	5%
(P) Cultural Connections	98	4	0%	6	0%	54	0%	448	1%	2,904	2%	75	0%	3,491	1%
(Q) Golden Year Guardians	108	571	6%	1,381	9%	1,813	9%	4,624	8%	8,071	7%	1,428	7%	17,888	7%
(R) Aspirational Fusion	78	1,554	15%	1,112	7%	826	4%	6,290	11%	7,186	6%	2,281	10%	19,249	8%
(S) Struggling Societies	86	686	7%	2,055	13%	857	4%	4,327	7%	5,410	4%	2,396	11%	15,731	6%

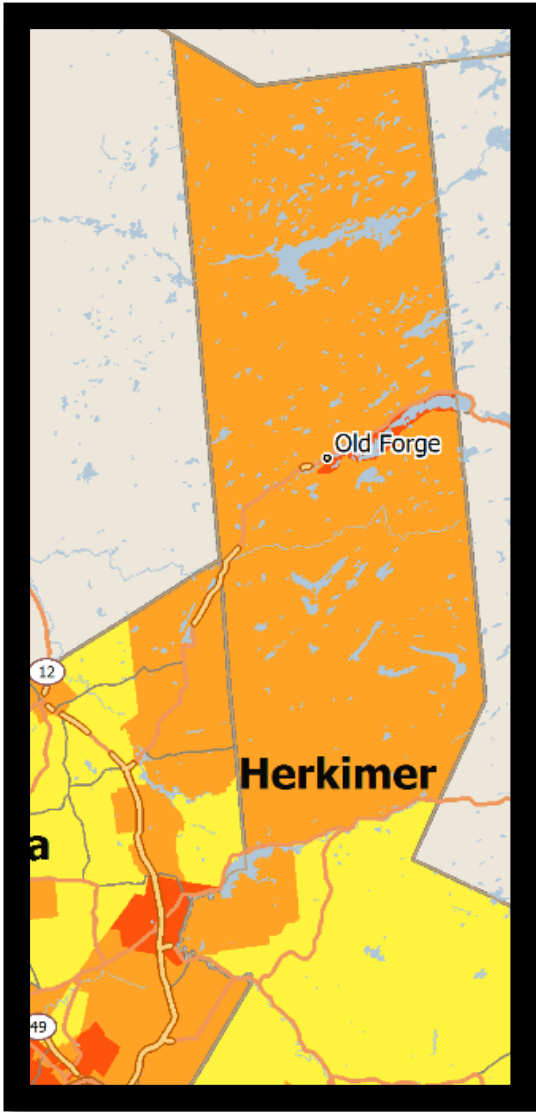
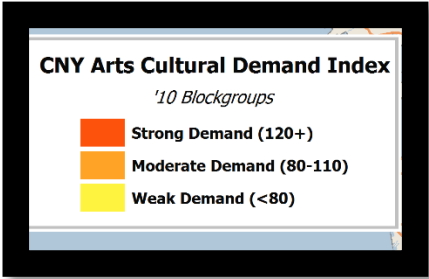
Weak Demand Areas	Cultural Demand Index	Cortland	%	Herkimer	%	Madison	%	Oneida	%	Onondaga	%	Oswego	%	Total	%
2012 Mosaic Households		5,414		9,556		8,637		21,718		23,511		27,086		95,922	
2012 Group Quarters (Non-Inst)		5		101		676		306		1,072		152		2,312	
(A) Power Elite	143	-	0%	1	0%	1	0%	-	0%	16	0%	-	0%	18	0%
(B) Flourishing Families	126	-	0%	31	0%	1	0%	2	0%	80	0%	62	0%	176	0%
(C) Booming with Confidence	130	-	0%	2	0%	-	0%	-	0%	2	0%	18	0%	22	0%
(D) Suburban Style	99	23	0%	62	1%	129	1%	68	0%	267	1%	311	1%	860	1%
(E) Thriving Boomers	114	81	1%	102	1%	242	3%	223	1%	161	1%	449	2%	1,258	1%
(F) Promising Families	95	2	0%	9	0%	-	0%	1	0%	129	1%	22	0%	163	0%
(G) Young City Solos	143	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%	-	0%
(H) Middle-class Melting Pot	109	6	0%	45	0%	45	0%	48	0%	96	0%	107	0%	347	0%
(I) Family Union	105	105	2%	133	1%	243	3%	277	1%	295	1%	530	2%	1,583	2%
(J) Autumn Years	104	306	6%	1,575	16%	660	7%	1,518	7%	872	4%	1,540	6%	6,471	7%
(K) Significant Singles	107	-	0%	-	0%	-	0%	1	0%	22	0%	23	0%	46	0%
(L) Blue Sky Boomers	78	2,887	53%	4,265	44%	4,867	52%	5,301	24%	441	2%	13,317	49%	31,078	32%
(M) Families in Motion	96	1,032	19%	1,340	14%	1,162	12%	2,738	12%	585	2%	5,195	19%	12,052	12%
(N) Pastoral Pride	106	545	10%	898	9%	1,019	11%	1,195	5%	165	1%	2,650	10%	6,472	7%
(O) Singles and Starters	119	52	1%	126	1%	96	1%	273	1%	418	2%	239	1%	1,204	1%
(P) Cultural Connections	98	-	0%	12	0%	6	0%	127	1%	692	3%	19	0%	856	1%
(Q) Golden Year Guardians	108	298	5%	818	8%	752	8%	662	3%	416	2%	1,397	5%	4,343	4%
(R) Aspirational Fusion	78	-	0%	40	0%	-	0%	7,988	36%	14,770	60%	454	2%	23,252	24%
(S) Struggling Societies	86	82	2%	198	2%	90	1%	1,602	7%	5,156	21%	905	3%	8,033	8%

### III. County-By-County Data



Cortland County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
<b>2012 Population</b>	11,291	23%	23,814	48%	14,285	29%	49,390	5%
<b>Households</b>								
Households	3,461	19%	9,830	53%	5,414	29%	18,705	5%
Average Household Size	2.47		2.34		2.64		2.41	
<b>Race</b>								
White	10,487	93%	22,585	95%	13,922	97%	46,994	95%
Black	276	2%	402	2%	65	0%	743	2%
Native American	21	0%	74	0%	41	0%	136	0%
Asian	152	1%	209	1%	47	0%	408	1%
Hawaiian/Pacific Islander	3	0%	2	0%	0	0%	5	0%
Multiple Races/Other	352	3%	542	2%	210	1%	1,104	2%
<b>Hispanic Population</b>								
Hispanic Population	489	4%	568	2%	247	2%	1,304	3%
<b>Age</b>								
< 5 yrs	405	4%	1,363	6%	776	5%	2,544	5%
5-9 yrs	366	3%	1,409	6%	945	7%	2,720	6%
10-14 yrs	419	4%	1,437	6%	1,023	7%	2,879	6%
15-19 yrs	2,154	19%	1,515	6%	1,126	8%	4,795	10%
20-24 yrs	2,992	26%	1,896	8%	683	5%	5,571	11%
25-34 yrs	1,030	9%	3,155	13%	1,580	11%	5,765	12%
35-44 yrs	859	8%	2,753	12%	1,737	12%	5,349	11%
45-54 yrs	1,001	9%	3,356	14%	2,379	17%	6,736	14%
55-64 yrs	1,020	9%	3,152	13%	2,003	14%	6,175	13%
65-74 yrs	564	5%	1,857	8%	1,313	9%	3,734	8%
75-84 yrs	330	3%	1,220	5%	540	4%	2,090	4%
85+ yrs	151	1%	701	3%	180	1%	1,032	2%
<b>12 Median age</b>								
12 Median age	33.50		39.30		41.19		40.19	
<b>Households, w/persons &lt;18</b>								
Households, w/persons <18	820	24%	2,888	29%	1,846	34%	5,554	30%

Cortland County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
<b>Household Income</b>								
< 10T	401	12%	799	8%	287	5%	1,487	8%
10T-14.9T	280	8%	673	7%	227	4%	1,180	6%
15T-19.9T	169	5%	425	4%	179	3%	773	4%
20T-24.9T	224	6%	616	6%	309	6%	1,149	6%
25T-29.9T	133	4%	528	5%	331	6%	992	5%
30T-34.9T	136	4%	584	6%	354	7%	1,074	6%
35T-39.9T	218	6%	629	6%	407	8%	1,254	7%
40T-44.9T	138	4%	621	6%	313	6%	1,072	6%
45T-49.9T	144	4%	530	5%	407	8%	1,081	6%
50T-59.9T	252	7%	743	8%	538	10%	1,533	8%
60T-74.9T	330	10%	960	10%	729	13%	2,019	11%
75T-99.9T	423	12%	1,251	13%	587	11%	2,261	12%
100T-124.9T	256	7%	658	7%	365	7%	1,279	7%
125T-149.9T	86	2%	325	3%	127	2%	538	3%
150T-199.9T	73	2%	219	2%	88	2%	380	2%
200T+	198	6%	269	3%	166	3%	633	3%
Average household income	\$ 62,730		\$ 58,022		\$ 59,333		\$ 63,309	
Median household income	\$ 50,121		\$ 46,909		\$ 48,397		\$ 52,473	
<b>Education</b>								
12 Population, age 25 yrs+	4,955	44%	16,194	68%	9,732	68%	30,881	63%
no HS diploma	517	10%	1,707	11%	1,146	12%	3,370	11%
HS diploma	1,229	25%	5,775	36%	4,205	43%	11,209	36%
College, no diploma	1,073	22%	2,441	15%	1,684	17%	5,198	17%
Associate degree	311	6%	2,141	13%	1,137	12%	3,589	12%
College degree	1,046	21%	2,651	16%	914	9%	4,611	15%
Graduate/prof degree	779	16%	1,479	9%	616	6%	2,874	9%
Population Change 12-17	(26)		66		40		(4,119)	

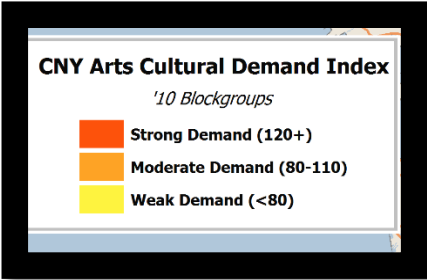
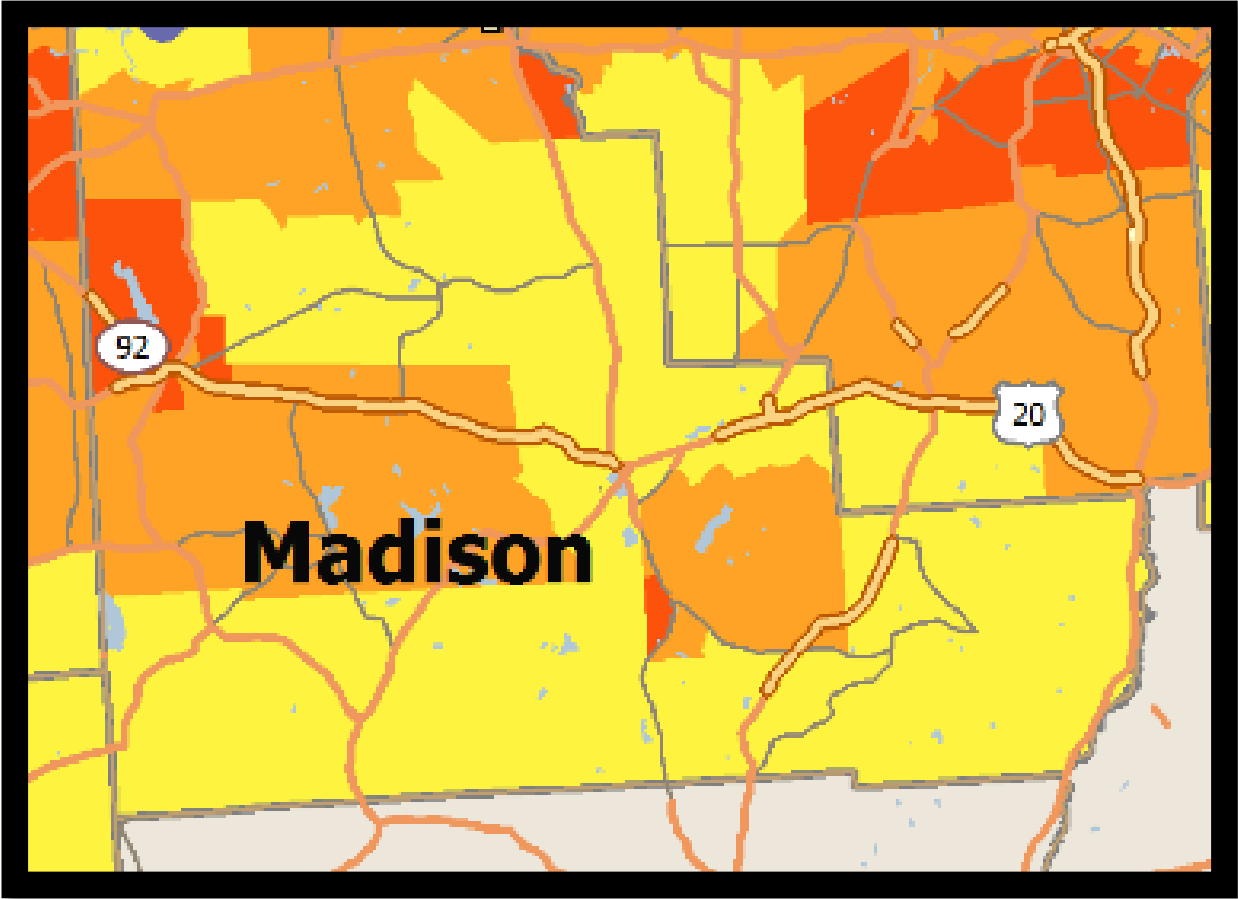


Herkimer County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
2012 Population	3,043	5%	36,384	57%	24,376	38%	63,803	6%
<b>Households</b>								
Households	1,027	4%	15,457	59%	9,556	37%	26,040	7%
Average Household Size	2.28		2.31		2.54		2.40	
<b>Race</b>								
White	2,803	92%	35,051	96%	23,827	98%	61,681	97%
Black	155	5%	404	1%	110	0%	669	1%
Native American	3	0%	85	0%	66	0%	154	0%
Asian	32	1%	206	1%	79	0%	317	0%
Hawaiian/Pacific Islander	-	0%	7	0%	4	0%	11	0%
Multiple Races/Other	50	2%	631	2%	290	1%	971	2%
Hispanic Population	83	3%	734	2%	331	1%	1,148	2%
<b>Age</b>								
< 5 yrs	96	3%	2,075	6%	1,366	6%	3,537	6%
5-9 yrs	98	3%	2,082	6%	1,511	6%	3,691	6%
10-14 yrs	12	0%	2,169	6%	1,681	7%	3,862	6%
15-19 yrs	537	18%	2,386	7%	1,627	7%	4,550	7%
20-24 yrs	327	11%	2,359	6%	1,388	6%	4,074	6%



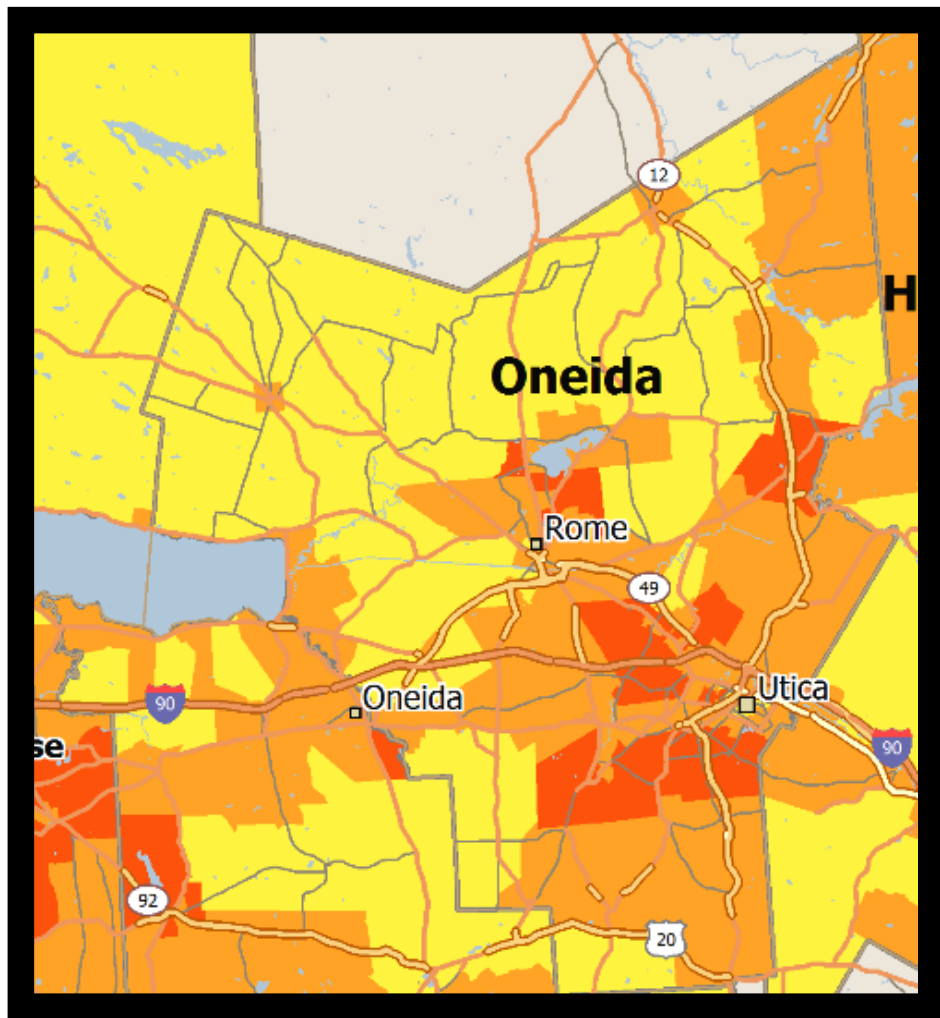
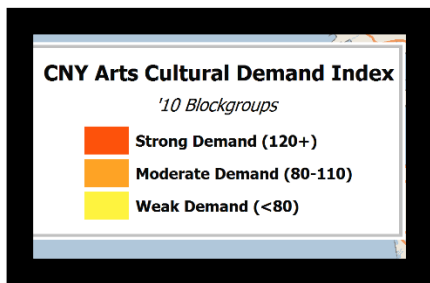
Herkimer County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
25-34 yrs	193	6%	4,222	12%	2,401	10%	6,816	11%
35-44 yrs	212	7%	4,090	11%	2,974	12%	7,276	11%
45-54 yrs	366	12%	5,308	15%	3,997	16%	9,671	15%
55-64 yrs	426	14%	5,141	14%	3,612	15%	9,179	14%
65-74 yrs	327	11%	3,223	9%	2,218	9%	5,768	9%
75-84 yrs	202	7%	2,077	6%	1,171	5%	3,450	5%
85+ yrs	139	5%	1,252	3%	430	2%	1,821	3%
12 Median age	44.30		42.05		42.57		42.4	
Households, w/persons <18	221	22%	4,316	28%	3,035	32%	7,572	29%
<b>Household Income</b>								
< 10T	70	7%	1,465	9%	432	5%	1,967	8%
10T-14.9T	37	4%	1,050	7%	539	6%	1,626	6%
15T-19.9T	69	7%	892	6%	515	5%	1,476	6%
20T-24.9T	66	6%	1,148	7%	636	7%	1,850	7%
25T-29.9T	25	2%	967	6%	490	5%	1,482	6%
30T-34.9T	30	3%	1,182	8%	584	6%	1,796	7%
35T-39.9T	31	3%	1,096	7%	710	7%	1,837	7%
40T-44.9T	78	8%	715	5%	505	5%	1,298	5%
45T-49.9T	105	10%	747	5%	536	6%	1,388	5%
50T-59.9T	76	7%	1,316	9%	882	9%	2,274	9%
60T-74.9T	122	12%	1,610	10%	1,137	12%	2,869	11%
75T-99.9T	101	10%	1,719	11%	1,270	13%	3,090	12%
100T-124.9T	99	10%	758	5%	661	7%	1,518	6%
125T-149.9T	57	6%	312	2%	267	3%	636	2%

Herkimer County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
150T-199.9T	39	4%	172	1%	161	2%	372	1%
200T+	22	2%	308	2%	231	2%	561	2%
Average household income	\$ 66,224		\$ 50,247		\$ 58,237		\$ 53,810	
Median household income	\$ 52,879		\$ 41,556		\$ 48,956		\$ 43,697	
<b>Education</b>								
12 Population, age 25 yrs+	1,865	61%	25,313	70%	16,803	69%	43,981	69%
no HS diploma	413	22%	3,739	15%	1,833	11%	5,985	14%
HS diploma	483	26%	9,368	37%	6,356	38%	16,207	37%
College, no diploma	400	21%	4,616	18%	2,961	18%	7,977	18%
Associate degree	117	6%	3,371	13%	2,327	14%	5,815	13%
College degree	158	8%	2,722	11%	1,877	11%	4,757	11%
Graduate/prof degree	294	16%	1,497	6%	1,449	9%	3,240	7%
Population Change 12-17	(66)		(1,010)		(683)		(1,759)	



Madison County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
<b>2012 Population</b>	6,976	10%	43,355	59%	22,957	31%	73,288	7%
<b>Households</b>								
Households	2,174	8%	16,898	61%	8,637	31%	27,709	7%
Average Household Size	2.52		2.41		2.55		2.46	
<b>Race</b>								
White	6,347	91%	41,329	95%	21,980	96%	69,656	95%
Black	181	3%	667	2%	471	2%	1,319	2%
Native American	133	2%	261	1%	128	1%	522	1%
Asian	153	2%	337	1%	78	0%	568	1%
Hawaiian/Pacific Islander	-	0%	11	0%	6	0%	17	0%
Multiple Races/Other	162	2%	750	2%	294	1%	1,206	2%
<b>Hispanic Population</b>								
Hispanic Population	242	3%	971	2%	395	2%	1,608	2%
<b>Age</b>								
< 5 yrs	186	3%	2,185	5%	1,157	5%	3,528	5%
5-9 yrs	268	4%	2,368	5%	1,321	6%	3,957	5%
10-14 yrs	371	5%	2,713	6%	1,533	7%	4,617	6%
15-19 yrs	702	10%	4,176	10%	1,948	8%	6,826	9%
20-24 yrs	1,974	28%	2,983	7%	1,460	6%	6,417	9%
25-34 yrs	356	5%	4,626	11%	2,408	10%	7,390	10%
35-44 yrs	489	7%	4,963	11%	2,731	12%	8,183	11%
45-54 yrs	869	12%	6,855	16%	3,700	16%	11,424	16%
55-64 yrs	806	12%	5,901	14%	3,316	14%	10,023	14%
65-74 yrs	462	7%	3,646	8%	1,988	9%	6,096	8%
75-84 yrs	334	5%	2,012	5%	1,014	4%	3,360	5%
85+ yrs	159	2%	927	2%	381	2%	1,467	2%
<b>12 Median age</b>								
12 Median age	35.05		41.42		41.35		40.2	
<b>Households, w/persons &lt;18</b>								
Households, w/persons <18	569	26%	5,250	31%	2,773	32%	8,592	31%
<b>Household Income</b>								

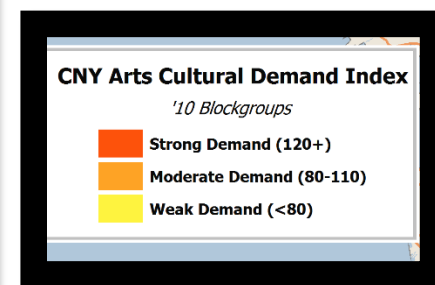
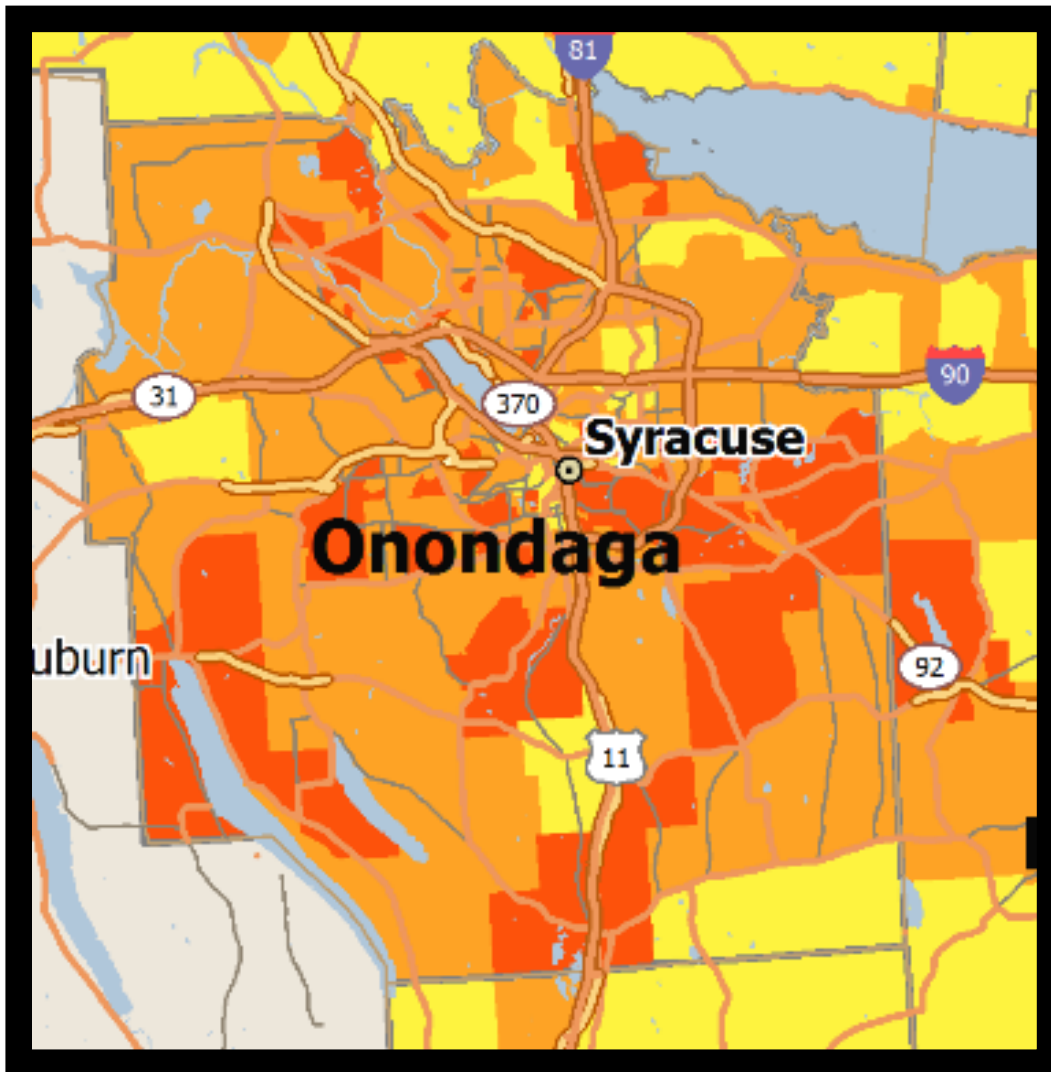
Madison County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
< 10T	87	4%	951	6%	537	6%	1,575	6%
10T-14.9T	99	5%	690	4%	407	5%	1,196	4%
15T-19.9T	44	2%	787	5%	345	4%	1,176	4%
20T-24.9T	48	2%	941	6%	447	5%	1,436	5%
25T-29.9T	66	3%	750	4%	477	6%	1,293	5%
30T-34.9T	77	4%	951	6%	617	7%	1,645	6%
35T-39.9T	109	5%	1,196	7%	623	7%	1,928	7%
40T-44.9T	79	4%	877	5%	432	5%	1,388	5%
45T-49.9T	106	5%	788	5%	497	6%	1,391	5%
50T-59.9T	171	8%	1,487	9%	745	9%	2,403	9%
60T-74.9T	196	9%	2,081	12%	1,036	12%	3,313	12%
75T-99.9T	310	14%	2,338	14%	1,130	13%	3,778	14%
100T-124.9T	292	13%	1,508	9%	655	8%	2,455	9%
125T-149.9T	75	3%	522	3%	348	4%	945	3%
150T-199.9T	57	3%	368	2%	187	2%	612	2%
200T+	358	16%	663	4%	154	2%	1,175	4%
Average household income	\$109,199		\$ 63,579		\$ 58,829		\$ 65,677	
Median household income	\$ 74,814		\$ 53,963		\$ 49,387		\$ 53,785	
<b>Education</b>								
12 Population, age 25 yrs+	3,475	50%	28,930	67%	15,538	68%	47,943	65%
no HS diploma	122	4%	3,478	12%	1,913	12%	5,513	11%
HS diploma	590	17%	10,092	35%	6,050	39%	16,732	35%
College, no diploma	521	15%	4,645	16%	2,897	19%	8,063	17%
Associate degree	340	10%	4,105	14%	1,846	12%	6,291	13%
College degree	1,007	29%	3,977	14%	1,600	10%	6,584	14%
Graduate/prof degree	895	26%	2,633	9%	1,232	8%	4,760	10%
Population Change 12-17	(31)		(233)		(123)		(387)	



Oneida County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
<b>2012 Population</b>	38,564	16%	137,532	59%	57,722	25%	233,818	23%
<b>Households</b>								
Households	14,032	15%	56,942	61%	21,718	23%	92,692	23%
Average Household Size	2.45		2.26		2.63		2.38	
<b>Race</b>								
White	36,137	94%	123,640	90%	44,217	77%	203,994	87%
Black	761	2%	7,606	6%	6,141	11%	14,508	6%
Native American	58	0%	313	0%	229	0%	600	0%
Asian	953	2%	1,978	1%	3,546	6%	6,477	3%
Hawaiian/Pacific Islander	7	0%	38	0%	24	0%	69	0%
Multiple Races/Other	648	2%	3,957	3%	3,565	6%	8,170	3%
Hispanic Population	889	2%	5,832	4%	4,956	9%	11,677	5%
<b>Age</b>								
< 5 yrs	1,582	4%	7,073	5%	4,111	7%	12,766	5%
5-9 yrs	2,064	5%	7,227	5%	4,172	7%	13,463	6%
10-14 yrs	2,330	6%	7,641	6%	4,165	7%	14,136	6%
15-19 yrs	3,360	9%	8,547	6%	4,513	8%	16,420	7%
20-24 yrs	3,136	8%	9,274	7%	4,045	7%	16,455	7%
25-34 yrs	3,147	8%	17,255	13%	7,014	12%	27,416	12%
35-44 yrs	7,208	19%	16,061	12%	7,227	13%	30,496	13%
45-54 yrs	5,762	15%	20,364	15%	8,597	15%	34,723	15%
55-64 yrs	5,593	15%	16,761	12%	6,925	12%	29,279	13%
65-74 yrs	3,546	9%	12,191	9%	4,065	7%	19,802	8%
75-84 yrs	2,352	6%	8,150	6%	2,028	4%	12,530	5%
85+ yrs	1,484	4%	4,988	4%	860	1%	7,332	3%
12 Median age	44.97		42.75		35.79		41.2	
Households, w/persons <18	4,153	30%	15,337	27%	7,886	36%	27,376	30%
<b>Household Income</b>								
< 10T	384	3%	4,379	8%	2,478	11%	7,241	8%
10T-14.9T	371	3%	3,097	5%	1,515	7%	4,983	5%
15T-19.9T	392	3%	3,080	5%	1,317	6%	4,789	5%
20T-24.9T	728	5%	4,069	7%	1,738	8%	6,535	7%
25T-29.9T	614	4%	3,256	6%	1,432	7%	5,302	6%

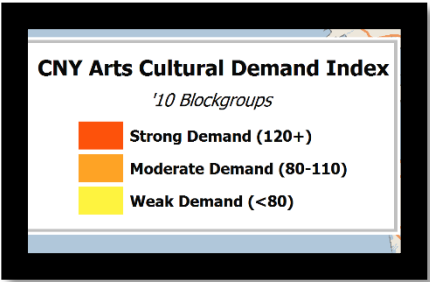
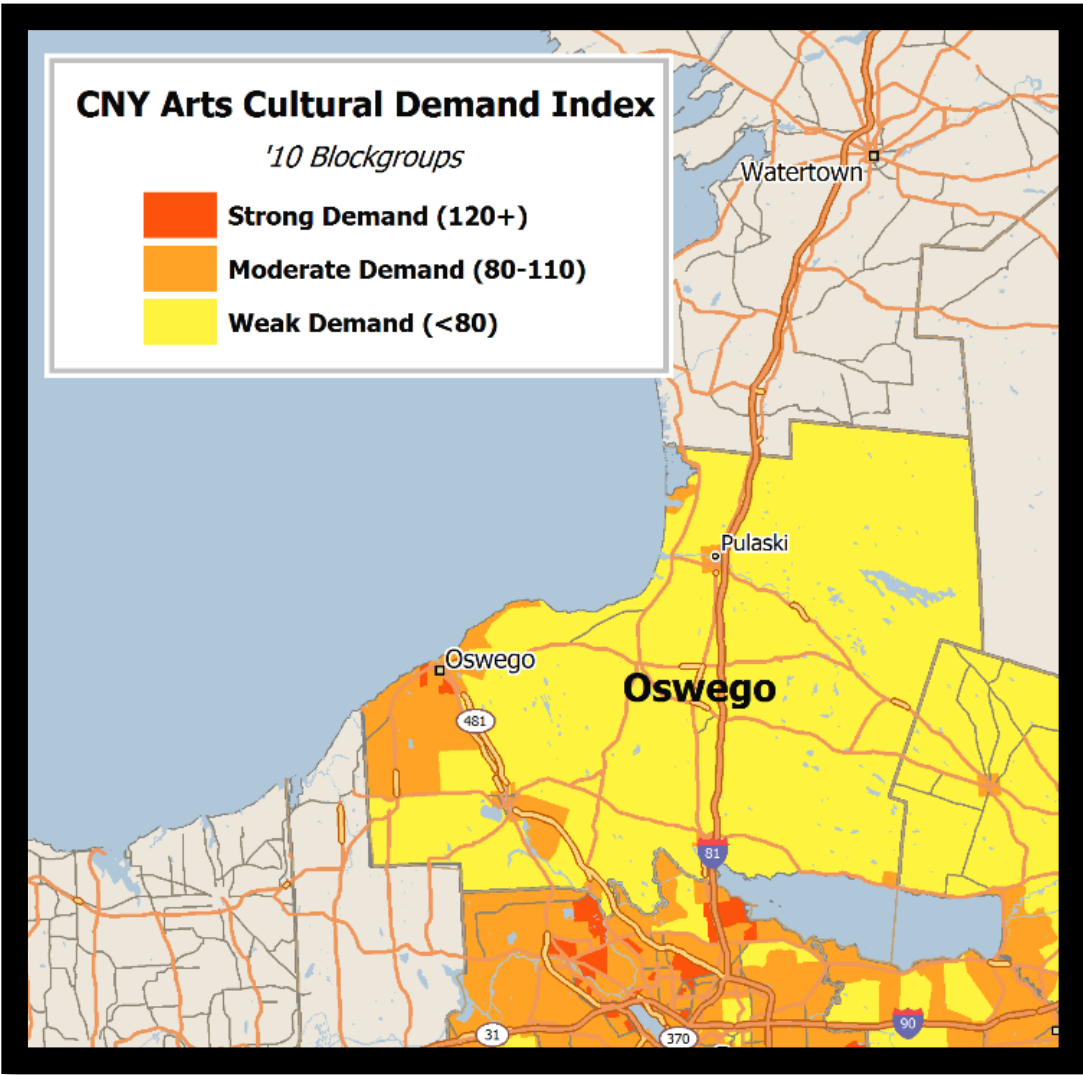
Oneida County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
30T-34.9T	541	4%	3,243	6%	1,383	6%	5,167	6%
35T-39.9T	652	5%	3,404	6%	1,367	6%	5,423	6%
40T-44.9T	497	4%	2,718	5%	998	5%	4,213	5%
45T-49.9T	682	5%	3,321	6%	1,027	5%	5,030	5%
50T-59.9T	1,116	8%	5,018	9%	1,748	8%	7,882	9%
60T-74.9T	1,400	10%	6,347	11%	1,969	9%	9,716	10%
75T-99.9T	2,030	14%	6,907	12%	2,232	10%	11,169	12%
100T-124.9T	1,677	12%	3,934	7%	1,290	6%	6,901	7%
125T-149.9T	853	6%	1,738	3%	534	2%	3,125	3%
150T-199.9T	783	6%	1,139	2%	2,736	13%	4,658	5%
200T+	1,312	9%	1,292	2%	417	2%	3,021	3%
Average household income	\$ 92,802		\$ 56,505		\$ 48,322		\$ 60,083	
Median household income	\$ 71,933		\$ 47,689		\$ 41,114		\$ 47,543	
<b>Education</b>								
12 Population, age 25 yrs+	26,092	68%	97,770	71%	36,716	64%	160,578	69%
no HS diploma	1,797	7%	13,583	14%	7,063	19%	22,443	14%
HS diploma	6,687	26%	34,286	35%	13,743	37%	54,716	34%
College, no diploma	4,907	19%	18,999	19%	7,049	19%	30,955	19%
Associate degree	3,156	12%	11,205	11%	3,656	10%	18,017	11%
College degree	5,206	20%	11,776	12%	3,644	10%	20,626	13%
Graduate/prof degree	4,339	17%	7,921	8%	1,561	4%	13,821	9%
Population Change 12-17	(367)		(1,367)		(604)		(2,338)	





Onondaga County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
2012 Population	123,974	27%	279,155	60%	63,763	14%	466,892	46%
<b>Households</b>								
Households	47,053	25%	117,183	62%	23,511	13%	187,747	47%
Average Household Size	2.43		2.33		2.66		2.40	
<b>Race</b>								
White	107,914	87%	244,646	88%	26,743	42%	379,303	81%
Black	6,377	5%	18,152	7%	26,384	41%	50,913	11%
Native American	850	1%	2,039	1%	924	1%	3,813	1%
Asian	5,668	5%	5,455	2%	3,216	5%	14,339	3%
Hawaiian/Pacific Islander	39	0%	85	0%	23	0%	147	0%
Multiple Races/Other	3,126	3%	8,778	3%	6,473	10%	18,377	4%
<b>Hispanic Population</b>								
Hispanic Population	3,638	3%	9,195	3%	8,058	13%	20,891	4%
<b>Age</b>								
< 5 yrs	5,362	4%	15,959	6%	6,191	10%	27,512	6%
5-9 yrs	6,603	5%	15,738	6%	5,469	9%	27,810	6%
10-14 yrs	7,702	6%	17,046	6%	5,243	8%	29,991	6%
15-19 yrs	11,593	9%	18,432	7%	5,530	9%	35,555	8%
20-24 yrs	13,458	11%	17,137	6%	4,926	8%	35,521	8%
25-34 yrs	11,865	10%	37,224	13%	8,779	14%	57,868	12%
35-44 yrs	12,868	10%	34,063	12%	7,612	12%	54,543	12%
45-54 yrs	18,268	15%	42,652	15%	8,336	13%	69,256	15%
55-64 yrs	17,341	14%	37,210	13%	6,005	9%	60,556	13%
65-74 yrs	9,809	8%	21,552	8%	3,231	5%	34,592	7%
75-84 yrs	5,971	5%	14,206	5%	1,701	3%	21,878	5%
85+ yrs	3,134	3%	7,936	3%	740	1%	11,810	3%
<b>12 Median age</b>								
12 Median age	42.43		41.01		30.07		38.8	
<b>Households, w/persons &lt;18</b>								
Households, w/persons <18	13,555	29%	34,191	29%	9,676	41%	57,422	31%
<b>Household Income</b>								

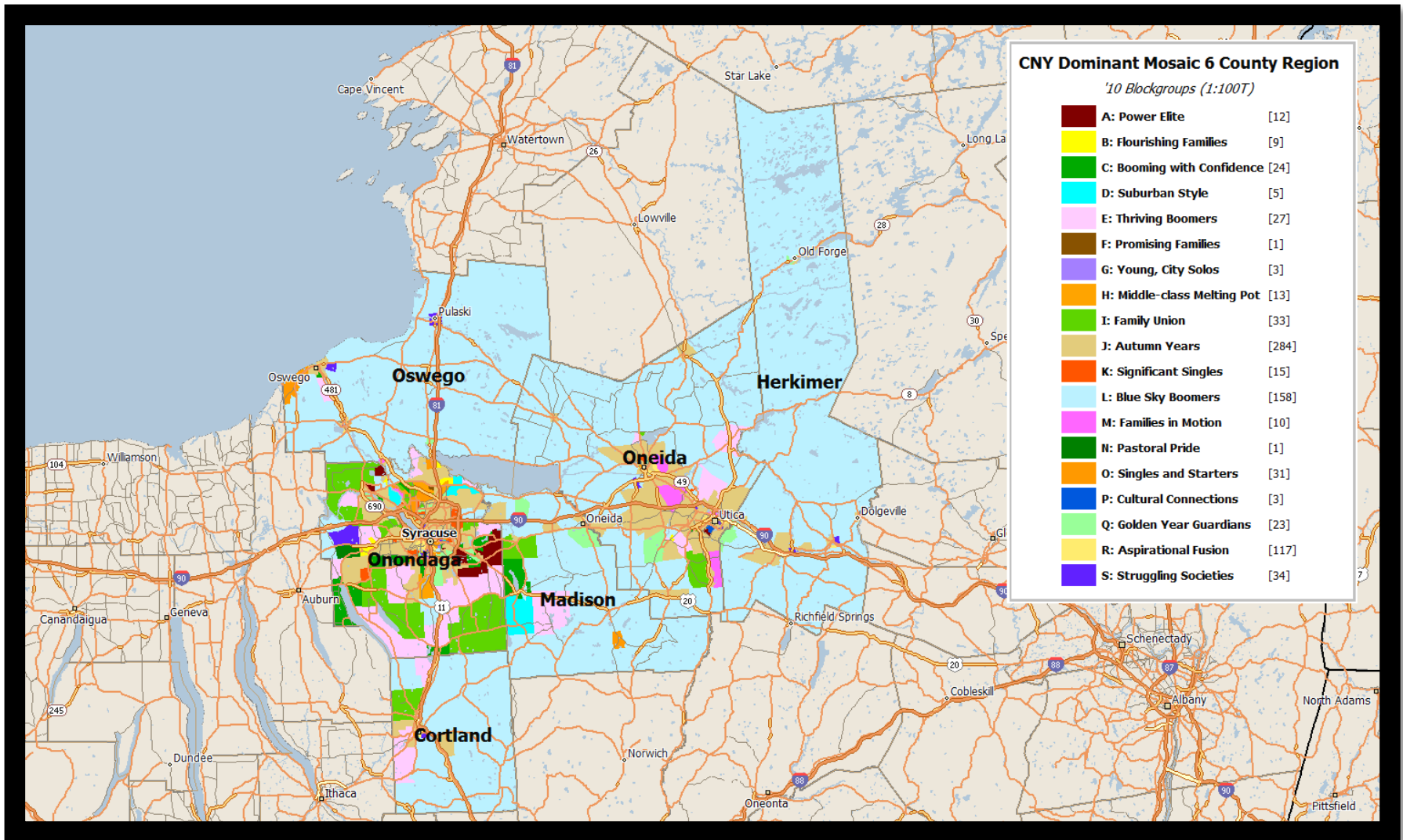
Onondaga County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
< 10T	3,046	6%	7,577	6%	4,422	19%	15,045	8%
10T-14.9T	1,605	3%	5,648	5%	2,155	9%	9,408	5%
15T-19.9T	1,582	3%	4,843	4%	1,944	8%	8,369	4%
20T-24.9T	1,915	4%	6,723	6%	2,146	9%	10,784	6%
25T-29.9T	1,683	4%	6,291	5%	1,514	6%	9,488	5%
30T-34.9T	1,934	4%	6,740	6%	1,599	7%	10,273	5%
35T-39.9T	2,052	4%	7,365	6%	1,703	7%	11,120	6%
40T-44.9T	1,582	3%	5,711	5%	1,176	5%	8,469	5%
45T-49.9T	1,917	4%	6,026	5%	957	4%	8,900	5%
50T-59.9T	2,684	6%	10,217	9%	1,267	5%	14,168	8%
60T-74.9T	4,497	10%	13,100	11%	1,566	7%	19,163	10%
75T-99.9T	6,358	14%	14,927	13%	1,382	6%	22,667	12%
100T-124.9T	5,650	12%	10,357	9%	884	4%	16,891	9%
125T-149.9T	2,734	6%	4,387	4%	283	1%	7,404	4%
150T-199.9T	2,559	5%	2,927	2%	150	1%	5,636	3%
200T+	5,255	11%	4,344	4%	363	2%	9,962	5%
Average household income	\$ 93,327		\$ 63,259		\$ 37,736		\$ 67,599	
Median household income	\$ 75,020		\$ 53,999		\$ 30,358		\$ 51,451	
<b>Education</b>								
12 Population, age 25 yrs+	79,256	64%	194,843	70%	36,404	57%	310,503	67%
no HS diploma	3,590	5%	19,317	10%	10,278	28%	33,185	11%
HS diploma	14,887	19%	60,032	31%	11,647	32%	86,566	28%
College, no diploma	12,876	16%	37,475	19%	6,096	17%	56,447	18%
Associate degree	8,356	11%	23,462	12%	3,180	9%	34,998	11%
College degree	20,710	26%	32,601	17%	3,275	9%	56,586	18%
Graduate/prof degree	18,837	24%	21,956	11%	1,928	5%	42,721	14%
Population Change 12-17	(83)		(214)		(59)		(356)	



Oswego County								
	<b>Strong Demand</b>	<b>% of Area</b>	<b>Moderate Demand</b>	<b>% of Area</b>	<b>Weak Demand</b>	<b>% of Area</b>	<b>Total</b>	<b>% of Total</b>
<b>2012 Population</b>	3,773	3%	46,790	38%	71,783	59%	122,346	12%
<b>Households</b>								
Households	1,409	3%	18,028	39%	27,086	58%	46,523	12%
Average Household Size	2.44		2.35		2.64		2.52	
<b>Race</b>								
White	3,534	94%	44,549	95%	69,877	97%	117,960	96%
Black	59	2%	597	1%	275	0%	931	1%
Native American	14	0%	152	0%	354	0%	520	0%
Asian	78	2%	414	1%	211	0%	703	1%
Hawaiian/Pacific Islander	1	0%	13	0%	2	0%	16	0%
Multiple Races/Other	87	2%	1,065	2%	1,064	1%	2,216	2%
Hispanic Population	170	5%	1,680	4%	1,034	1%	2,884	2%
<b>Age</b>								
< 5 yrs	169	4%	2,601	6%	3,900	5%	6,670	5%
5-9 yrs	167	4%	2,495	5%	4,569	6%	7,231	6%
10-14 yrs	175	5%	2,628	6%	4,994	7%	7,797	6%
15-19 yrs	201	5%	4,554	10%	5,355	7%	10,110	8%
20-24 yrs	1,010	27%	5,373	11%	3,807	5%	10,190	8%
25-34 yrs	376	10%	5,498	12%	8,004	11%	13,878	11%
35-44 yrs	330	9%	4,740	10%	9,503	13%	14,573	12%
45-54 yrs	458	12%	6,404	14%	12,357	17%	19,219	16%
55-64 yrs	409	11%	5,616	12%	10,122	14%	16,147	13%
65-74 yrs	235	6%	3,394	7%	5,758	8%	9,387	8%
75-84 yrs	145	4%	2,185	5%	2,554	4%	4,884	4%
85+ yrs	98	3%	1,302	3%	860	1%	2,260	2%
12 Median age	31.10		38.33		40.54		39	
Households, w/persons <18	348	25%	5,408	30%	9,606	35%	15,362	33%

Oswego County								
	Strong Demand	% of Area	Moderate Demand	% of Area	Weak Demand	% of Area	Total	% of Total
<b>Household Income</b>								
< 10T	285	20%	1,748	10%	1,908	7%	3,941	8%
10T-14.9T	63	4%	1,290	7%	1,284	5%	2,637	6%
15T-19.9T	78	6%	975	5%	1,150	4%	2,203	5%
20T-24.9T	144	10%	1,259	7%	1,640	6%	3,043	7%
25T-29.9T	95	7%	1,073	6%	1,396	5%	2,564	6%
30T-34.9T	37	3%	1,036	6%	1,605	6%	2,678	6%
35T-39.9T	56	4%	1,079	6%	1,942	7%	3,077	7%
40T-44.9T	66	5%	855	5%	1,438	5%	2,359	5%
45T-49.9T	29	2%	882	5%	1,564	6%	2,475	5%
50T-59.9T	27	2%	1,305	7%	2,242	8%	3,574	8%
60T-74.9T	63	4%	1,968	11%	3,439	13%	5,470	12%
75T-99.9T	116	8%	2,025	11%	3,258	12%	5,399	12%
100T-124.9T	160	11%	1,195	7%	2,156	8%	3,511	8%
125T-149.9T	73	5%	575	3%	802	3%	1,450	3%
150T-199.9T	61	4%	348	2%	514	2%	923	2%
200T+	56	4%	415	2%	748	3%	1,219	3%
Average household income	\$ 62,798		\$ 54,994		\$ 59,680		\$ 57,958	
Median household income	\$ 43,797		\$ 44,218		\$ 49,782		\$ 46,422	
<b>Education</b>								
12 Population, age 25 yrs+	2,051	54%	29,139	62%	49,158	68%	80,348	66%
no HS diploma	259	13%	4,259	15%	6,471	13%	10,989	14%
HS diploma	555	27%	11,571	40%	22,113	45%	34,239	43%
College, no diploma	461	22%	5,361	18%	9,191	19%	15,013	19%
Associate degree	224	11%	2,645	9%	4,680	10%	7,549	9%
College degree	209	10%	3,059	10%	4,430	9%	7,698	10%
Graduate/prof degree	343	17%	2,244	8%	2,273	5%	4,860	6%







## Mosaic® USA

### Group A: Power Elite

The wealthiest households in the US, living in the most exclusive neighborhoods, and enjoying all that life has to offer

#### Overview

America's wealthiest households belong to Power Elite, a group of six segments concentrated in the nation's largest metropolitan areas. Predominantly white with a high rate of Asians, many have risen to the top thanks to advanced educations and lucrative careers as lawyers, doctors and corporate leaders. Today, these middle-aged and older executives (half are empty-nesting couples) enjoy lives of luxury in the nation's most fashionable and exclusive areas in the country.

With their deep pockets, they own property in some of America's most sought-after addresses - from the contemporary mansions of Beverly Hills, Calif. to the sprawling waterfront estates of Old Greenwich, Conn . Many paid more than a million dollars for their dream homes. While many have settled in the greener-belt suburbs of big cities, significant numbers also enjoy private, in- town residences, their homes protected by iron gates and well-tended shrubbery, the backyards dominated by swimming pools and tennis courts.

With nearly half the adults holding advanced degrees, Power Elite reflect a society of white- collar and entrepreneurial types, as well as dual-earners who have worked their way to the top. They're nearly twice as likely as average Americans to have jobs in business, law, science and technology. Nearly a third of this group's households earn more than \$250,000 annually. Now at the peak of their careers, many are starting to contemplate comfortable life investments, as more than half already own secondary or vacation homes.

As consumers, the Power Elite have regal tastes. They're philanthropic supporters of the arts who go to plays, classical music concerts, dance performances and museums. With many of their kids grown, they're free to go out to dinner, watch a movie or take in another evening event. Weekends are reserved for trying to catch up with life, with such activities as antiquing, gardening or gathering with friends at parties. These are also health-conscious households who set aside regular time to exercise at a health club or with a private trainer; no group has more golf or tennis enthusiasts.

Power Elite have the highest level of investments (stocks, bonds and mutual funds), buying real estate and carrying credit cards - typically the gold and platinum varieties. As the nation's strongest market for luxury goods, many drive luxury imports, outfitting their vehicles with satellite radio and GPS systems. Some collect cars like paintings; nearly two-thirds own three or more vehicles. Given their passion for anything cutting-edge, it's not surprising that they stay current with the latest fashion, buying designer labels at high-end retailers and boutiques. With their busy lifestyles, they also purchase items from mail-order catalogs and luxury Websites. Unsurprisingly, they are adopters of all the latest and greatest technology.

To satisfy their curiosity about the world, they travel widely in the U.S. and abroad, visiting virtually every country that can be reached by plane, train or cruise ship. They travel in style; they're more than twice as likely as average Americans to have spent more than \$5,000 on their last trip, whether it involved hitting ski slopes, wandering island beaches or teeing off at exclusive golf courses. These are the Americans who sport the envied glow of a winter tan.

Power Elite make a strong media audience. They have above-average interest in watching TV and reading magazines, especially business, epicurean, literary and news titles. They're fans of TV and radio, though not the advertising; they mute the audio or change the channel when a commercial comes on. They spend a relatively large amount of time on the Internet managing their financial affairs and shopping at premium retail Websites. However, they're not only about being acquisitive; they also give away a lot of money to charitable causes to support education, the arts, political parties and public broadcasting. For many, their engagement calendars are studded with philanthropic dinners, political fundraisers and charity balls.

As for their political leanings, these active voters are mostly right-of-center. The highest concentration belongs to the Republican Party, but there are also pockets of limousine liberals, and nearly a third call themselves Democrats. No matter their politics, many share an interest in international events.

#### Digital behavior

The educated and wealthy households in this group are among the nation's more prodigious users of digital media. These early tech adopters have large appetites for high-speed modems, wireless technology and accessing the Internet through their cell phones, handheld devices and other mobile devices. The Internet is a major source of information as well as a tool to shop, bank, trade stocks and book travel arrangements. They also go online to read business articles, research products, get the latest news and weather report, and share their own views through blogs. Among their favorite Websites: msnbc.com, expedia.com, finance.yahoo.com, wsj.com, cnn.com and drudgereport.com.

## Group B: Flourishing Families

Affluent, middle-aged families and couples earning prosperous incomes and living very comfortable, active lifestyles

### Overview

Typically found in communities located a short drive from malls and giant warehouse clubs, the four segments in Flourishing Families contain prosperous parents and children of all ages living life in suburban comfort. Most of the adults are married, in their 30s and 40s, college-educated and predominantly white with a large presence of Asians. Nearly two-thirds of households consist of married couples with children, whose ages range from pre-school to post-graduate. With high incomes and diversified assets, many parents have attained a level of financial stability that allows them to kick back and enjoy their quiet residential neighborhoods. Nearly one in five households contain a young adult, while some are still coping with the challenges, and high costs, of childrearing.

Scattered across the country in the bedroom suburbs of large cities from New York, N.Y. to San Francisco, Calif., Flourishing Families tend to live in spacious homes where they've built up significant equity. Many of the homes, which were built between 1970 and 2000, are starting to show some age. They're still valued on average at more than \$300,000 thanks to their well-groomed yards, coveted locations and spacious interiors that can accommodate the young adults still living at home.

In Flourishing Families, most of the adults have turned their college educations into lucrative positions in management, law, education, public administration or scientific professions, and most households contain dual earners, resulting in a healthy six-figure income. The money supports a car-dependent culture where commuting to city jobs is a fact of life. For these family households, their vehicles of choice for cruising from the office to ball fields to grocery stores are SUVs and minivans from Japanese automakers known for their well-designed and reliable vehicles.

With kids of all ages in this group, their leisure activities revolve around family-friendly fun. These households are big on sports of all sorts. Some are outdoor sport enthusiasts and like cycling, skiing, ice skating, mountain biking and backpacking. Others focus on a round of golf or playing a match of tennis. They like to take their families on warm-weather vacations to Hawaii and the Bahamas. To keep their youngsters occupied on weekends, they head to museums, zoos and aquariums. The parents get some me-time while dining out, going to movies and enjoying cultural offerings like plays and classical concerts. Fitness buffs, they like weight training, aerobics and yoga classes.

There's money in Flourishing Families, and these households are willing to spend it on their children. This is the prime market for toys, sporting goods and digital games; they regard shopping at Sports Authority, GameStop, Michaels and A.C. Moore as entertainment. While the members of this group have the income to spend, many of the parents are also looking for bargains at Kohl's, Costco and T.J. Maxx. Many prefer the ease and convenience of shopping through catalogs and Websites. These households rarely go on a major shopping expedition without first planning their trip over the Internet.

The multitasking Flourishing Families have little time to devote to traditional media. They're only average fans of TV, radio, newspapers and magazines; much of their news-gathering now takes place on the Internet. However, they do like watching sitcoms, dramas and reality programs; their favorite cable networks include ESPN, DIY and Cartoon Network. Their taste in magazines runs toward Entertainment Weekly, Real Simple and Road & Track. They no longer enjoy most TV

commercials, noting that they think advertising to children is wrong. They're more receptive to online ads, however; they're willing to click on email ads, use sponsored Websites and check out links. These active families also notice ads in movie theaters.

Somewhat more conservative than other family groups of their age, the segments in Flourishing Families are more Republican than Democratic. They're progressive on immigration and the arts and they put politics aside when it comes to philanthropy, giving to health, welfare, environmental, arts and religious groups.

#### Digital behavior

The well-educated members of Flourishing Families take their digital media seriously. The Internet is the first place they go to get the latest news, do their banking, research products and shop for a wide range of goods. They also like to go online for family entertainment, whether it's making digital photo albums, downloading music or watching TV programs. While they try to steer their children to educational Websites, their kids also spend hours looking at sites selling games, toys and music. They frequent media sites that reflect their interest in news and commentary: abcnews.com, msnbc.com and foxnews.com. It's difficult to find a computer accessory that they don't buy at high rates: DVD burners, video controllers, microphones and webcams all come standard with these families.

## Group C: Booming with Confidence

Prosperous, established couples in their peak earning years living in suburban homes

### Overview

The four segments in Booming with Confidence contain married couples in their peak earning years and approaching retirement. Many of the households have dual incomes and few children, allowing them to afford fashionable homes on small, manicured yards in city and suburban neighborhoods. Having made a conscious effort to distance themselves from the noise and chaos of the urban core, they've retreated to the quiet and predominantly white homogeneity of desirable neighborhoods only a short commute from their jobs.

Most households in Booming with Confidence are found in relatively new subdivisions in the West and Northeast on tree-lined streets worth more than \$330,000. With a majority having lived at the same address for more than 15 years, many have built up equity in their homes that supports their comfortable lifestyles and leisure activities. Their houses are also large enough to accommodate the quarter of households that have a young adult still living at home.

With six-figure incomes, Booming with Confidence are at the peak of their careers in white-collar professions in business, law, public administration, education and science. Given their college degrees and foreign travel, there's a cultured air to these segments. If they fly a flag above their front door, it's rarely an American flag; one depicting flowers, pets, or their college alma mater is much more common.

Booming with Confidence tend to have sophisticated tastes. With their well-appointed homes, solid incomes and diversified portfolios, they can afford to live the good life. They like to spend on nightlife, going to plays, concerts, movies and restaurants. On weekends, they can be seen touring museums and antique shops, always on the lookout for objects to add to their collections. They travel widely, taking getaways to Caribbean beaches and visiting nearly every country in Europe at more than twice the national average. At home, they like to relax by reading, gardening and entertaining friends and family. Their end tables are stacked with old copies of Smithsonian, The New Yorker, Gourmet and Metropolitan Home.

As consumers, Booming with Confidence have conservative tastes; they're attracted to classic fashions that have stood the test of time and mid-range sedans from both domestic and foreign automakers. With many still in the workforce or volunteering for charitable causes, they wear smart styles and designer labels they find at favorite mall retailers like Nordstrom, Talbots, Anne Taylor and Chico's. Many patronize local shops they've frequented for years when stocking up on wine, gourmet food and books. They'd never qualify as early adopters, but they like to equip their homes with the latest flat-screen TVs and carry new smartphones. These folks pride themselves on quiet good taste rather than ostentatious display.

Despite their busy lifestyles, Booming with Confidence make time for traditional media. They watch an average amount of TV, enjoying the programming on cable networks like A&E, CNN, ESPN, History, National Geographic, TCM and the Travel Channel. Radio is popular among these daily commuters, especially the stations that offer news, sports, classic hits, golden oldies and classical music. Among Booming with Confidence segments, though, nothing compares to their obsession

with traditional print media. They read daily newspapers from cover to cover and subscribe to science, travel and news magazines. No fans of advertising, they will, nevertheless, read ads in print media and are receptive to the messages that appear in movie theaters.

Booming with Confidence are active in their communities, and they frequently belong to arts groups, veterans' clubs and churches and synagogues. Politically, they tend to be moderates with a disproportionate number affiliated with the Republican Party. However, these centrists rarely take strong stands on many social issues and only a small percentage will ever be seen marching in a protest. That doesn't mean they're unwilling to donate money to causes that take tough stands on contentious issues, though. Indeed, many members of this group say they support a variety of charitable organizations because, intellectually and morally, it's the right thing to do.

#### Digital behavior

The older couples in this group make a solid audience for digital media. They use the Internet for utilitarian purposes: to trade stocks, get news, book airline tickets and follow the leaders on the PGA tour. Increasingly, these silver surfers are going online to shop, both gathering information about products and making purchases. Although they're still not comfortable using social networks, they do go online to stay in touch with family and friends by sending emails and photographs to loved ones.

## Group D: Suburban Style

Middle-aged, ethnically-mixed suburban families and couples earning upscale incomes

### Overview

The four segments in Suburban Style are filled with ethnically-mixed, middle-aged couples and families with children enjoying upscale lifestyles. Concentrated in suburban neighborhoods, these households are in the middle childrearing phase of their lives, coping with growing families, mid-level careers and monthly mortgage payments. Despite incomes nearing six figures, these 30- and 40-somethings still face high transportation costs in their suburban neighborhoods. However, they're happy to be bringing up their children in these middle-ring suburbs known for quiet streets and short commutes to in-town jobs.

Suburban Style aspired to live in a leafy suburb with a nice garden and fresh air. Their homes, often surrounding big cities in the Northeast and South, are well-preserved homes on curvy streets built in the last half of the 20th century. Housing values are slightly above average. Many homes have a basketball goal in the driveway or a Weber grill out back. On weekends, the sidewalks are filled with teens skateboarding, biking, in-line skating and shooting hoops.

With their slightly above-average educations - more than half have gone to college - parents in Suburban Style work at white-collar jobs in business, public administration, education and technology. Many are raising families on upscale incomes thanks to two or even three workers in the household; nearly 20 percent have a young adult living at home. Their solid incomes and built-up equity allow them to qualify for home equity and car loans; two-thirds of households own three or more vehicles. Among these segments, the highest concentration of homeowners has lived at the same address for over a decade.

Suburban Style have rich leisure lives. They spend a lot of their free time engaged in sports like baseball, basketball, swimming and biking. Thanks to older children still at home, this group also enjoys sports, including scuba diving, karate and water skiing. For a night out, adults head to movies, restaurants, plays, comedy clubs and rock concerts. With excursions to zoos, aquariums, bowling alleys and theme parks as well as regularly scheduled piano lessons and hockey practice, it's not uncommon for parents to put 50 miles on their car every weekend. Many fret that their children are over-programmed and need more unstructured playtime. When they get home, they're often too tired to care and they end up collapsing in front of the TV. With friends they might play cards or computer games - anything to take their minds off the next bout of activities, errands and appointments.

With their mix of solid incomes and educations, Suburban Style tend to be fashion-forward consumers who like to check out new styles and products. Children influence the marketplace patterns, as seen in the group's embrace of people-moving vehicles like SUVs and minivans and their tendency to patronize big-box discounters, toy stores and sporting goods retailers. With gadgets galore, these tech-savvy consumers also purchase all manner of electronic devices - smartphones, laptops and MP3 players - and can practically download music, games and TV shows in their sleep. They're happy to shop online or use catalogs to avoid the traffic jams in mall parking lots.

The busy families in Suburban Style make only an average market for most media. However, they watch premium TV channels like Speed, IFC, BET and TV Land. They spend a lot of time in their cars listening to radio stations that air news, sports and classic and modern rock. Though their interest in most print media seems

to be waning, they still like to read magazines that cover parenting, health, food, entertainment and the African-American community. More and more, they're getting their news and entertainment from the Internet. While they're ambivalent about advertising on most traditional channels, they do respond to email ads, sponsored Websites and links.

With their strong attachment to their local communities - they belong to unions, churches and PTA groups - Suburban Style are also active politically. They tend to be right-of-center moderates who are slightly more Republican than Democrat in their party affiliation. However, there are few causes that they advocate at high rates. On election night, it's often a toss-up on how they will vote.

#### Digital behavior

The Gen Xers who make up most of the adults in Suburban Style represent the first generation to make the Internet part of their daily lives. Now fluent in high-speed wireless and cellular technology, they're active users of digital media for a wide variety of applications. They go online to bank, telecommute, get stock information, bid on auctions, listen to Internet radio stations and get movie reviews. They often visit electronics, fashion, business and children's sites. Many are comfortable making purchases via online retailers.



## Group E: Thriving Boomers

Upper-middle-class baby boomer-age couples living comfortable lifestyles settled in town and exurban homes

### Overview

The three segments in Thriving Boomers feature empty-nesting couples in their 50s and 60s who long ago fled the cities for quiet towns and upper middle-class resort communities. Most of the households contain childless couples who've lived at the same address for over a decade and are now beginning to contemplate their retirement. Others are more recent arrivals who've left large homes in bedroom suburbs to downsize to more manageable houses and condos. While some of their peers have migrated to active retirement communities, these folks are content to live in their mixed-age neighborhoods, not to mention their mixed-aged households: one-quarter has an aged parent or young adult living at home.

Thriving Boomers are concentrated in small cities and towns, including popular vacation destinations like Santa Fe, N.M., Berkeley, Calif., Vail, Colo., and Nantucket, Mass. Their housing stock varies from older ranches to mountainside bungalows and beachfront condos. Although they're nearly twice as likely as average Americans to live on large properties of up to four acres, they also enjoy a change in scenery from time to time, as seen in the many who own vacation homes.

An educated group, a majority of households has at least one member with a college degree; these couples typically have white-collar jobs in public administration, law, education and sales. Their mid-level positions provide above-average incomes, though nearly a quarter of adults are retired. With their strong earnings over the course of many years, they've managed to build diversified 401(k)s and IRAs to ensure a comfortable retirement. These fiscal conservatives also like to buy long-terms CDs and invest in money markets to protect their portfolios from the vagaries of the stock market.

Half of Thriving Boomers may be grandparents, but they've hardly retired to a rocking chair. Many are much different than preceding generations at the same point in life. They exercise regularly, enjoying biking, hiking, hunting, snorkeling and golf. These educated Americans frequent the theater, museums and classical music concerts, and many like nightlife activities like going to bars, nightclubs and comedy clubs. They dine out often at steakhouses and chains and have a soft spot for restaurants like Bob Evans and Cracker Barrel that offer home-style fare. They travel often, visiting Caribbean beaches, taking Mediterranean cruises and driving RVs to parks and tourist sites across America. To relax at home, they like to garden, read books, cook and do woodworking.

As consumers, Thriving Boomers tend to be practical shoppers who like functional clothes at good prices. They rarely buy products to make a statement, and they patronize a wide variety of retailers - from discounters like Dress Barn and Sam's Club to retail chains such as Chico's and Coldwater Creek. They're late adopters when it comes to technology, with below-average rates for owning smartphones and MP3 players, but they're willing to splurge on a flat-screen TV.

Though few have flashy cars, many own late-model trucks made in Detroit. American-made products, they declare, set the standard.

Thriving Boomers are selective media consumers, though they embrace both traditional and new media. They're among the top readers of newspapers, especially the travel, science, movie and editorial sections. These outdoorsy folks like to read fishing and hunting magazines along with newsweeklies and automotive

publications. They listen to the radio fairly often, tuning in to golden oldies, classic rock, adult contemporary and news talk stations. They're especially fond of TV news, documentaries, history programs, dramas and how-to programs aired on cable channels like History, HGTV, TCM, the Travel Channel and Fox News. They're no fans of TV commercials - or most advertising for that matter - but they respond to billboards and links on the Internet.

The Americans who launched the counterculture revolution continue to be activists. Many are rooted in their communities and they often belong to veterans' clubs, arts groups and unions. Politically, they're ideologically split, with about equal numbers belonging to the Democratic and Republican parties. However, they tend to be more liberal on social issues and advocate corporate ethics. On issues they feel strongly about, they're willing to join a protest march.

#### Digital behavior

Thriving Boomers are active users of the Internet, comfortable going online to shop, telecommute and bid on auctions. They access the Internet for a variety of activities: booking flights, trading stocks, following political events and looking up health and medical information. They frequently surf to Websites like huffingtonpost.com, fidelity.com, craigslist.org and tripadvisor.com. They mostly go online from the comfort of their desktop or laptop computers; they're only half as likely as the general population to access the Internet using their cell phones.

## Group F: Promising Families

Young couples with children in starter homes living child-centered lifestyles

### Overview

Promising Families consist mainly of Generation Yers who've married, moved into their first homes and started families. With three-quarters under the age of 35, these predominantly white households live in small homes in affordable new subdivisions. In the two segments that make up this group, most of the adults are recently married, new to the workforce and raising young children, who are mostly of pre-school age. In this group, the American dream is characterized by a computer in the family room, a trampoline in the backyard and an SUV and multiple bikes in the garage.

Promising Families are found in the rapidly-growing towns and small cities of the West and South; and one segment has a high concentration living in military base communities like Quantico, Va., Camp Lejeune, N.C., and Colorado Springs, Colo. Most of their homes are modern ranches, bungalows and split-foyer houses that were built since 2000. However, because of their locations on the outer edge of the urban sprawl, the housing is affordable, with below-average values. While they've typically been at their current address for fewer than five years, these young families have quickly come to appreciate their safe subdivisions, new schools, abundant ball fields and convenient discount retailers.

The educational achievements among Promising Families members are above average, with one-third of household heads having either bachelor's or graduate degrees. That level of schooling translates to a wide variety of occupations - from business, technology and the military to science and homemaking. Though most of the adults are earning only entry-level pay, the dual-income households have enough disposable cash to lead rich leisure lives.

In Promising Families, life revolves around young and active families. It's hard to find a team sport - especially baseball, basketball, soccer or football - which they don't like. They keep fit by jogging, roller skating, yoga and doing aerobics. These parents are still young enough to enjoy nightlife and - after getting a babysitter - often go out to restaurants, bars, nightclubs, movie theaters and billiards halls. Many keep their kids occupied on weekends by taking them to a bowling alley, swimming pool, aquarium or pool. Casual dining restaurants are popular among these families. At home, they spend their leisure time on the Internet, playing games, listening to music or working on their hobbies (such as photography). During school breaks they travel frequently to domestic beaches, theme parks and the campgrounds where they enjoy boating and hiking.

Promising Families like to shop, though they're price-sensitive. They like to stretch their money, typically waiting for sales, patronizing factory outlets and heading right to the clearance racks. These shoppers are a strong market for electronics; they buy all manner of video and audio equipment. To chauffeur their kids to extracurricular activities and family outings, they rely on large cars like CUVs, minivans and SUVs. New or used, it doesn't matter - as long as it's an import.

Promising Families have only selective interest in media, with most of their program choices reflecting their preoccupation with childrearing. They seem to have given up on subscribing to newspapers and they have below-average interest in magazines. However, they will make an exception for parenting, sports and men's magazines such as Baby Talk, ESPN, Maxim and Parents. They listen to the radio, especially during drive-time, to stations that offer sports, modern rock, adult

contemporary and contemporary hit songs. On TV, they're big fans of sitcoms, reality programs and animation, especially shows that appear on Nickelodeon, Disney, Cartoon Network and Comedy Central. In this group, the parents enjoy watching "SpongeBob SquarePants" almost as much as their kids.

Politically, Promising Families are somewhat conservative and care deeply about family values. They describe themselves as Republicans. Relative newcomers to their community, they belong to few groups other than the PTA and their local church or synagogue.

#### Digital behavior

The tech-savvy families in Promising Families are active users of digital media. They go online for a variety of utilitarian purposes - to buy toys and hobby items, bank, make travel arrangements, trade stocks and get the weather report - and to keep their children entertained at home with music, videos, games and Internet radio. Technology also helps them juggle work and childcare: they're twice as likely as average Americans to use their personal computers for telecommuting. These busy parents also go online to get information about products and services available near their new subdivisions. Among their favorite Websites are those that focus on sports (espn.com, sportline.com), classifieds (craigslist.org, usajobs.opm.org) and child-oriented amusement (clubpenguin.com, toysrus.com).

## Group G: Young City Solos

Younger and middle-aged singles living active and energetic lifestyles in metropolitan areas

### Overview

The two segments in Young City Solos contain younger and middle-aged singles living in city neighborhoods. More than 90 percent are unmarried. Most are in their 30s and 40s, white and childless, part of a demographic trend of delaying marriage while living alone or cohabitating with a partner. While economic insecurity is one reason some singles avoid marriage and having children, these young professionals report above-average incomes topping \$75,000 a year, and they seem to be thoroughly enjoying their unattached status.

Young City Solos are concentrated in the nation's largest cities, in housing that caters to the increasing proportion of one-person households of homeowners or renters. Many live in well-appointed condos or apartments built during the last century. The homes, whether Victorian or postmodern in style, fetch above-average prices thanks to their in-town locations.

Young City Solos boast above-average educations, with most having at least some college or a bachelor's degree. They work at a mix of professional, technical, sales and service-sector jobs, typically working for the government, a university, hospital or a large company. In these progressive segments, there's equality between the sexes at home and on the job. Even among cohabitating couples, their dual incomes support upper middle-class lifestyles.

Young City Solos lead fast-paced and active lifestyles. These unmarried folks devote a lot of their discretionary cash to nightlife activities, often going to bars, nightclubs, plays, dance performances, concerts and rock shows. They keep their healthy lifestyles by staying fit and joining a health club to make use of the cardio machines, weights and yoga classes. They like to jog, play tennis, bike, hike and swim. They dine out often at white-tablecloth restaurants, where they like gourmet food and dishes presented like art. Although they travel as much as the average, many have gone abroad in the last three years to visit Europe, Asia and the Caribbean. They like visiting places that allow them to meet new people and experience different cultures.

As a result of their typically small homes and even smaller closets, Young City Solos would hardly qualify as shopaholics. They're infrequent consumers who prefer local boutiques to national chains, though they will go to discount retailers. Despite their youth, they're financially experienced and have started building a retirement nest egg filled with a variety of stocks, preferred stocks and mutual funds. With many commuting to work by public transit, they're a relatively weak market for cars, especially large American vehicles. However, these early adopters make up for it in their passion for new electronics: they own smartphones and MP3 players, the better to indulge their passion for music. Many like listening to jazz, pop, reggae, hard rock and traditional soul.

Multitasking Young City Solos don't have much time for traditional media. They rarely subscribe to newspapers. They're often too busy to sit down to watch TV. They don't often listen to the radio, though they do like tuning in to stations that offer news, talk, and hot adult contemporary

music, classic hits and contemporary hits. Though they're not big on print media, they will subscribe to magazines such as Fortune, Food & Wine, The New Yorker, Marie Claire and Men's Health. They prefer the Internet for entertainment and they note that they're spending less time with other media because of it.

Young City Solos are staunch liberals who volunteer for social causes, vote Democratic and march in protests to protect the environment. They belong to arts groups that support dance, symphonic music and opera. Globally-minded, they're interested in other cultures and champion human rights abroad. While they want to succeed economically, they don't want to work for organizations with weak ethical reputations.

#### Digital behavior

The most web-savvy of the groups, Young City Solos are nearly twice as likely as average Americans to use the Internet. They go online for business and pleasure: to look for jobs and homes, get the news and weather, and bank and make travel arrangements. They also regard the Internet as their main source of entertainment; they play games, listen to Internet radio and check out potential matches - popular Websites include eharmony.com and linkedin.com. They've made the Web part of their daily life, and they're comfortable going online at home, work, the library or a hotel. These mobile Americans are no longer tied to desktop machines; they access the Internet on their Wi-Fi-enabled laptops and mobile phones. They're always on the lookout for new and unusual Websites.

## Group H: Middle-class Melting Pot

Mid-scale, middle-aged and established couples living in suburban and fringe homes

### Overview

Middle-class Melting Pot are mostly married, middle-aged people without children living in suburban neighborhoods. Many of their homes were built during the postwar baby boom, but these couples aren't the original owners. Most Middle-class Melting Pot have lived at their current address for fewer than five years, having moved to their comfortable homes to ease quietly into middle age. Nearly two-thirds are between the ages of 35 and 50. More than 80 percent have no children at home. These predominantly white households include above-average concentrations of divorced and widowed individuals. Most are empty-nesting couples concentrating on their careers and relaxed lifestyles.

Middle-class Melting Pot are found in the older neighborhoods of small towns and cities across the country. The highest concentrations live in the West and Northeast, but some also have moved to resort communities like Hilton Head, S.C., Lake Arrowhead, Calif., and Warren, Vt. With a majority of the homes built before 1960, housing values are below average. However, most of the homes are well-maintained and set on quarter-acre lots. These residents find comfort in their stable neighborhoods filled with overgrown trees, top-of-the-line grills and recent, imported sedans.

Middle-class Melting Pot have middling educational backgrounds. However, they've managed to turn high school diplomas and some college classes into a mix of skilled blue-collar, sales and service-sector jobs. Although they have middle-class incomes, many have a tenuous hold on the American dream. Most have below-average levels of investments and a comfortable retirement is hardly assured. In this group, many worry about maintaining their standard of living and their present level of comfort.

In their stable neighborhoods, the Middle-class Melting Pot pursue low-stress, unpretentious lifestyles. They like to read books, watch TV, garden, do woodworking and display their collections of Hummel figurines and Precious Moment porcelains. They're the casual folks whose idea of nightlife is to go to a bowling alley, movie theater or home-style restaurant. They're not big on strenuous outdoor exercise, but many belong to a health club where they like to use the rowing and cardio machines. When they take a vacation, which they do as often as average Americans, it's often to a destination within the U.S.

As shoppers, Middle-class Melting Pot are both price-conscious and brand-loyal. They like to shop at brick-and-mortar stores that offer large selections of merchandise and mainstream brands. Many patronize nationally-known department stores and warehouse clubs such as Target, Costco, Sears and Macy's. They drive to these stores in sedans and luxury cars - typically used imports from Honda, Toyota and Mitsubishi. Though they rarely buy through mail-order or over the Internet, they do respond to TV.

Middle-class Melting Pot are average media fans, following the general population in their appreciation of traditional and new media. They're middling fans of newspapers, turning first to the news, entertainment and sports sections. Many like to relax with a magazine, subscribing to publications like Self, Men's Health and Motor Trend. They often listen to, tuning in to adult contemporary, golden oldies, modern rock and classic hits music. While the Internet has siphoned away some

of their attention, they remain true to TV, their first love - particularly movies and dramas found on premium cable channels like HBO, Showtime and Starz. Although many proclaim that they're TV addicts, that perspective doesn't extend to commercials. Most find TV ads annoying, preferring ads on billboards and in movie theaters.

Politically, Middle-class Melting Pot are left-of-center. They're more likely than average to vote Democratic on Election Day. They do worry about the environment and air pollution caused by cars. Many of these one-time activists are willing to march in a protest if they feel strongly about an issue. However, because they've only recently moved to their neighborhoods, they are only modestly involved in community organizations.

#### Digital behavior

Middle-class Melting Pot are only average users of digital media. They're late adopters of most technology and have yet to give up their desktop computers for smartphones and laptops in order to access the Internet. Many use the Internet as a communications tool, going online for chat forums, message boards, podcasts and instant messaging. They also frequent Websites that provide news, business classifieds, real estate listings and sports information of all stripes: fishing, football, car racing or fantasy baseball. They haven't completely embraced online shopping yet, exhibiting only an average tendency to research products and make purchases over the Internet.



## Group I: Family Union

Mid-scale, middle-aged and somewhat ethnically-diverse families living in homes supported by solid blue-collar occupations

### Overview

In Family Union, a mix of Hispanic and white families live in middle-class comfort within the sprawl of major metropolitan areas. Many of the households contain older, Mexican immigrants and their children who have worked hard, settled in modest houses and established a comfortable lifestyle for their families. They tend to live in multi-ethnic and multi-lingual neighborhoods, some speaking Spanish in shops and cafes, driving used American sedans and minivans, and filling their homes with food and decorations that remind them of their homeland.

The four segments of Family Union are found across the country, especially in the West and Midwest in cities like El Paso, Texas, Albuquerque, N.M., and Los Angeles, Calif. Members of this group typically own small ranch and revival-style houses valued at below-average levels. Compared to past generations who clustered in downtown apartments, almost all of these residents are homeowners and live in established, inner-ring suburbs. On neat streets with landscaped lawns are the signs of middle-class status: boats, motorcycles and recreational vehicles. Half of all households have lived at the same address for more than a decade.

Family Union have only average educations, with one-quarter of household heads having failed to finish high school and about 15 percent having college diplomas. But they earn mid-scale incomes thanks to multiple workers - nearly one in five households contain a young adult living at home - who hold jobs in blue-collar and service-sector occupations, such as construction, manufacturing, transportation and food services. Despite their working-class jobs, they've managed to achieve middle-class status through determination and a yearning for personal achievement. They're most likely to say, "I'm willing to give up time with my family to advance".

Family Union are vibrant and active. At home, many of the Hispanic families speak Spanish, celebrate Latin holidays and keep up with Latin news and music. They go out to movies, bars, comedy clubs and dance performances, and they engage in plenty of sports with their families, including soccer, baseball, basketball and boxing. When they go out to eat, they're more likely to go to a local eatery or a fast-food chain like KFC, El Pollo Loco, Del Taco or Little Caesar's. Nearly half have traveled to a foreign country in the last three years, typically Mexico, Cuba or the Dominican Republic.

Family Union like to shop. They like to keep up with the latest fashion and make a unique statement with their apparel. They tend to frequent neighborhood stores where they know the clerks and feel comfortable. However, if they want something with a designer label, they head to discount department stores. With a tendency to buy MP3 players and flat-panel TVs, these family-centered households like to equip their homes with the latest appliances - even if they end up buying discount brands.

Family Union thrive on traditional media. They listen to the radio, especially stations that play salsa, Latin ballads, Mexican music, modern rock and classic rock. They like joining their children to watch Disney, Nickelodeon and MTV2. Though they have subscription rates for newspapers, they do enjoy reading Spanish and English magazines such as American Baby, Cosmopolitan, Hot Rod, Maxim and Popular Mechanics. These households like advertising - whether it appears on buses, in movie theaters or in magazines - to learn about the products in the marketplace.

Family Union belong to informal community networks centered on family and friends. But few are members of more formal organizations like PTAs, unions or arts associations. They have below- average rates for registering to vote, but those households that are politically involved tend to be Democratic, though of a conservative stripe. On economic issues, however, they're liberal and want few barriers to challenge their desire for upward mobility.

#### Digital behavior

Family Union make only modest use of the Internet. They tend to go online using their mobile phones or desktop computers, and those who can't afford home Internet access log on at their local schools or libraries. Many go online to communicate, participating in chat forums and message boards and sending instant messages and electronic greetings to their friends and relatives. They also use the Internet to download music, watch videos, visit children's Websites, shop for cars and check out job classifieds. Favorite Websites include craigslist.org, univision.com, gaiaonline.com and webkinz.com. However, they're not yet comfortable with shopping online.

## Group J: Autumn Years

Established, ethnically-diverse and mature couples living gratified lifestyles in older homes

### Overview

One of the nation's older groups, Autumn Years contains mostly mature couples retired in the same house where they've lived for much of their lives. Nearly two-thirds are over 65 years old. About the same proportion are married couples with grown children; about three-quarters are already grandparents. Predominantly white and lower middle-class, they've decided to stay in the old neighborhood rather than move to a retirement community. Proud members of the Greatest Generation, these couples are rooted in their communities, often belonging to local art groups, veterans' clubs, unions, churches and temples.

Autumn Years are living the American dream of home ownership. Some 97 percent own a single-family home, typically in small towns or older industrial cities in the Northeast and Midwest-places like Buffalo and Syracuse, N.Y., as well as Pittsburgh and McKeesport, Pa. Many couples raised their children in these modest homes, which were built between 1950 and 1970. With their mortgages close to being paid off, they are now taking out home equity loans to add a second story or backyard deck. Comfortable in their tight-knit communities, nearly half have lived at the same residence for more than 20 years.

Autumn Years often came from humble beginnings; nearly two-thirds never went beyond high school. While more than half are retired, those who are still in the workforce hold jobs in farming, blue-collar professions or the service industry. These working-class jobs only provide below-average incomes. However, with their modest expenses and children out of the house, these couples enjoy easy-going and home-centered lifestyles that don't require high-powered salaries.

The members of Autumn Years enjoy their quiet leisure time. They tend to like to stick around the house to watch TV, read books, garden or pursue hobbies like needlework and woodworking. They have enough money from their regular investments in stocks and savings bonds to splurge on attending plays, classical concerts and country music performances. They make a prime audience for home-style restaurants, hitting the early-bird specials. Although they rarely engage in aerobic activities, they do like outdoor activities such as fishing and hunting. They're not big on foreign travel, but many will save up for a cruise to Alaska or an RV trip to national parks out west.

As consumers, Autumn Years admit that they're not very adventurous. They have a conservative fashion sense and are loyal to their favorite brands, patronizing mid-market and discount chains such as Sears, Kmart, Meijer and BJ's Wholesale Club. While they like to buy a new car every few years - typically a sedan or luxury car made in America - they resist new technology and the latest electronics. Even their car choices are staid nameplates like Buick, Chrysler and Mercury.

These older couples make a strong market for traditional media. Many subscribe to a daily newspaper, typically reading it from cover to cover. They listen to the radio during the day, particularly to stations that feature adult contemporary music, news, classic hits and classical music. They call TV their main source of entertainment, arranging their schedules around favorite TV programs like news, documentaries, how-to and game shows on cable channels like TCM, GSN, Hallmark and the History Channel. These seniors also appreciate women's and outdoors magazines that have been around for decades - titles such as Family Circle, Field & Stream, Reader's Digest and Good Housekeeping. They're not big fans of most forms of advertising.

Politically, this group consists of conservatives who actively support the Republican Party and favor traditional family values. Philanthropy is popular among these households, and many contribute to religious, health, environmental and political organizations. They're not too worried about their own status; many say that they're happy with their current lives and confident about the future.

#### Digital behavior

Most Autumn Years are not active users of digital media. They're less than half as likely as average Americans to use the Internet at home or work. They rarely go online using a cell phone, laptop or wireless connection; among those with an Internet connection, a disproportionate number use dial-up access. However, this group does contain many Web surfers who like to go online to bank, download games, get the weather report and check out lottery sites. Online shopping is only moderately popular, but these consumers will research products and make occasional purchases at sites like [samsclub.com](http://samsclub.com), [kbb.com](http://kbb.com) and [ebaymotors.com](http://ebaymotors.com).

## Group K: Significant Singles

Middle-aged singles and some couples earning mid-scale incomes supporting active city styles of living

### Overview

Significant Singles reflect the recent trend of Americans staying single longer and the growing acceptance of individuals remaining unmarried well into middle age or longer. This group contains four segments and consists mainly of singles between the ages of 36 and 65 living in rental apartments in city neighborhoods. Nine out of ten households are childless. While nearly half have never married, another quarter is starting over as divorced or widowed individuals. Members of this group are predominantly white with an above-average presence of Asians. Most enjoy an active singles scene with plenty of nightlife, progressive values and robust leisure lives.

Significant Singles are drawn to large and second-tier cities that offer the promise of affordable apartments and a lively atmosphere. Many live in garden-style apartments and duplexes concentrated in the Northeast and West Coast, in cities like Brooklyn, N.Y., San Antonio, Texas, Las Vegas, Nev. and Sacramento, Calif. More than three-quarters are renters. Some are sharing a unit in order to save on housing costs. These singles are not known for staying long: nearly half have lived at the same residence for fewer than three years.

Significant Singles tend to have solid educations - a majority has been to college - but most work at low-level sales and service-sector jobs in health care, education and food services. Even with multiple workers in their households, their total income is below average, providing little extra money for savings and investments. Only half have a car, typically an older subcompact or sedan from Ford or Honda. Forget about options - households here rarely own GPS systems, satellite radios, or DVD players.

Despite their modest incomes, Significant Singles enjoy active, urbane lifestyles. Many of these middle-age men and women long ago gave up on the singles bar scene but they still like to take advantage of their city settings and mingle with other singles at health clubs, adult-education classes and comedy clubs. Many are body-conscious and try to keep fit by pursuing a number of aerobic activities: jogging, swimming, soccer, tennis and in-line skating. When they're not out and about, they're happy to stay home and listen to music, read books, paint and entertain friends with their cooking. They confess that they like to eat gourmet cuisine whenever they can.

As consumers, Significant Singles seem to have champagne tastes on beer budgets. They tell researchers that they like to buy new fashion every season in order to make a unique statement with their outfits. However, they also admit that they're price-sensitive shoppers who go to discount and mid-market retailers like Marshalls, Macy's, Gap and Nike. They head right to the clearance racks when they walk in the door. Although they like technology and want to buy new gadgets, they usually can't afford to and rarely own anything other than MP3 players and Blu-ray consoles.

Most media garner only moderate interest among Significant Singles. These households listen to the radio, typically tuning in stations that play modern rock and contemporary hits. They have below-average interest in TV, though they prefer cable channels such as AMC, Oxygen, Style, BET and CNBC. They're more likely

than average to read newspapers, mostly for the entertainment, fashion, movies and classified sections. They declare that magazines are their main source of entertainment, noting they're especially fond of gaming, computing, music and epicurean titles. On their living room coffee tables, back issues of Self, Shape, Vogue and Vanity Fair form neat stacks next to their laptops, coffee mugs and free weights.

As mobile Americans, Significant Singles are not fertile ground for charities or political parties. Although they describe themselves as liberal Democrats, they are only as likely as the average to be registered to vote. They have strong feelings on many social issues and if they do feel strongly enough about a cause, these Americans are willing to march in a protest.

#### Digital behavior

Significant Singles use digital media often. Although they're unlikely to access the Internet for e-commerce transactions - few have interest in online shopping, banking and booking travel plans they do enjoy going to the Web for news and entertainment. They visit Websites that offer auctions, gambling, celebrity news and New Age information. Many use the Internet for utilitarian and relationship-building purposes, helping them locate a date, a used car or purchase movie tickets.

## Group L: Blue Sky Boomers

Lower- and middle-class baby boomer-aged households living in small towns

### Overview

In Blue Sky Boomers, older, empty-nesting couples and singles have settled in small towns and waterfront resorts in anticipation of their retirement years. The three segments in this group are about evenly divided between married couples and widowed and divorced individuals. More than 80 percent are between the ages of 50 and 65. Most are white and have high-school educations and working-class sensibilities. These households tend to work in sales and service-sector jobs, supporting a resort economy in towns that offer weekend getaways and longer summer vacations for wealthier city dwellers.

Blue Sky Boomers are found in small towns and waterfront resorts - both seaside beaches and lakefront communities - from California to Florida. Many households are concentrated in the South, with the warmer weather favored by retirees. These Boomers are homeowners who tend to live in modestly-priced ranch houses, cottages and mobile homes. With childrearing days behind them, they have the discretionary cash to purchase adult toys like boats, campers and pickup trucks. While vacationers may swell the streets of their towns every summer, most of these year-round locals have lived at the same address for over a decade.

Most Blue Sky Boomers are high-school educated and work at a mix of sales, service-sector, professional and blue-collar jobs, though nearly one-quarter of households contains a retiree. Unlike their seasonal neighbors, they earn lower-middle-class incomes, averaging about

\$55,000. However, because their expenses are low and their mortgages mostly paid off, many enjoy casual and comfortable lifestyles in their bucolic settings.

Located in surroundings like theirs, no one would fault Blue Sky Boomers for spending much of their leisure time outdoors. These households enjoy fishing, boating, hiking, hunting and gardening. However, they also have enough money - thanks, in part, to conservative investments - to travel regularly by car and RV to domestic locations. Their social lives typically revolve around their churches, clubs and unions. For a splurge, they'll go out to home-style and casual restaurants, take in a music concert or head to a weekend NASCAR race. When they want to relax, they like to read books, listen to music - from bluegrass to soul to classical music - do woodworking and needlework or have friends over for cards. These are the households that haven't forgotten the art of baking from scratch.

Blue Sky Boomers are no shopaholics. They keep their clothes as long as possible and shop only when they need to - preferably at local stores. When they go on a big shopping run, these price-sensitive consumers typically head to discount department stores to stretch their money like Walmart, Dollar General, Family Dollar and Big Lots. Many are late adopters of new products, especially consumer electronics. They don't often acquire the latest audio and digital devices: their living rooms are still outfitted with DVD players and traditional tube TVs. In this "buy American" group, residents look for domestically-made pickups and cars - and lots of them. More than half the households in this group own three or more vehicles.

In Blue Sky Boomers, traditional media still reigns supreme. To keep up with local news, many subscribe to a daily newspaper and read it from cover to cover. They also read magazines, especially those that reflect their down-home lifestyle, including titles like Country Living, Family Handyman, Ladies' Home Journal and

Reader's Digest. This aging generation never lost their interest in music, listening to radio stations that play country music, golden oldies and classic rock. However, many consider TV their chief form of entertainment, tuning in to newscasts, game shows, dramas, how-to shows and history programs. They dislike most forms of advertising, opting out of direct-mail lists and avoiding TV commercials as much as possible. Many tend to be okay with the billboard advertising tucked into the landscape near their homes, though.

Politically, Blue Sky Boomers are a moderate lot: self-described Republicans with a right-of-center tilt. They're also progressive on environmental issues and protective of any threats to their rustic communities. While most wouldn't think of marching in a protest, they support causes financially, often backing arts, political, environmental and public broadcasting organizations.

#### Digital behavior

Still relative newcomers to digital media, Blue Sky Boomers are becoming increasingly comfortable with the Internet. The majority has a desktop computer at home, and they use the Web like a virtual library, visiting sites for information on subjects that are near to their hearts: cars, cruises, fishing and medical information. They also go online for business purposes, including banking, trading stocks and shopping. Though they're not completely comfortable with new technology - they're more likely to go online using dial-up access than a wireless connection or a mobile phone - they've made [gunbroker.com](http://gunbroker.com), [ebaymotors.com](http://ebaymotors.com), [seniorpeoplemeet.com](http://seniorpeoplemeet.com) and [theanimalrescuesite.com](http://theanimalrescuesite.com) some of their favorite sites.



## Group M: Families in Motion

Younger, working-class families earning moderate incomes in smaller residential communities

### Overview

The two segments in Families in Motion are dominated by young families living in small towns scattered across the eastern half of the country. Most of the households contain married couples between 25 and 45 years old. Half have families with two or more children. Many of these predominantly white households moved into their towns years ago to raise their children in safe surroundings and affordable homes. Today their towns are neither industrial centers nor high-tech boomtowns, but quiet communities with an employment base consisting of skilled manual workers in construction, manufacturing and the trades.

Families in Motion are found in older, working-class towns that have managed to weather the nation's transformation to a high-tech economy. Most of the housing stock is old and home values are low, at less than half the national average. But almost all of the members of this group are homeowners of single-family homes. In their remote settings, a disproportionate number have large lots between two and four acres - plenty of room to park their power boats, campers and motorcycles.

In these heartland communities, most families get by on modest educations. Three-quarters have either a high school diploma or some college, but only 10 percent have earned a college degree. With this level of schooling, the majority of adults work at blue-collar jobs - the highest rate in the nation - though some hold low-level positions in sales and the service-sector. While the pay may be below average, these dual-income couples make enough to support outdoorsy, child-centered lifestyles.

Life in Families in Motion looks a lot like it did a half-century ago. These young families enjoy a lot of outdoor activities, including swimming, fishing, camping, hunting and hiking. On weekends many take their kids to movies, bowling alleys and fast-food restaurants. At their homes, the adults like to gather together to play cards and games after enjoying a home-cooked meal. For vacations, they pile their kids into their trucks, SUVs and RVs and head to family-friendly motels and campgrounds near a theme park, state fair, zoo or aquarium. If there's a NASCAR racetrack nearby, so much the better.

Families in Motion are conservative shoppers who are loyal to brands and stores that provide them the most value. They prefer local retailers to national chains but, when they need a large selection of clothing or housewares, they're willing to drive an hour to a discount department store like Walmart, Kmart, Dollar General and Sam's Club. They'd hardly qualify as early tech adopters, but they still make a strong market for DVD players, DVRs, Blu-ray devices and MP3 players. These households are also proud gearheads: more than half own three or more vehicles, though they tend to buy used cars with American nameplates like Pontiac, Dodge, Plymouth and Chrysler.

With their busy leisure lives, these households have selective media tastes. They like to stay informed listening to radio, tuning in to stations that offer news as well as golden oldies, country, religious and adult contemporary music. They're average fans of TV, though they often watch programs with their kids on children's cable channels like Disney, Nickelodeon, ABC Family and the Cartoon Network. While they're not big on print media, they do subscribe to a number of magazines,

including American Baby, Outdoor Life, ESPN and Family Handyman. Some have little patience for advertising, but many are receptive to messages on billboards, in movie theaters and over the Internet - whether as email, sponsored searches or links.

Politically, this is conservative territory. Families in Motion are almost evenly divided between Democrats and Republicans, but their political outlook is far to the right. They're religious, patriotic, and against big government. They rarely join organizations other than the PTA and their local unions, and they donate to relatively few causes. However, most are active in their local churches and they're always willing to contribute to a church project.

#### Digital behavior

The young families in Families in Motion often use digital media. They go online to communicate through instant messages, emails and message boards and chat forums. Many set up their desktop computers to entertain their children, and these households also use the Internet to play games, download music and watch videos. However, the grownups here are also Web-savvy, and they like visiting sites for social networking ([facebook.com](http://facebook.com)), motorsports ([nascar.com](http://nascar.com)), researching products ([kmart.com](http://kmart.com)) and gaming ([zynga.com](http://zynga.com)).

## Group N: Pastoral Pride

Eclectic mix of lower middle-class widowed and divorced individuals and couples who have settled in country and small town areas

### Overview

The four segments in Pastoral Pride are concentrated in small, country towns and characterized by ethnically-mixed, modestly-educated middle-aged couples and divorced and widowed individuals. Few households have children still at home. Having settled in remote villages and towns far from the urban centers, they enjoy their homes, their sleepy country communities and their steady, blue-collar and service-sector jobs. In their communities where solitude and self-reliance are cherished, they've managed to fashion a simple, unpretentious lifestyle.

Pastoral Pride are scattered across America's rural landscape, although most are found in isolated communities in the South and Midwest. Eight out of ten households own their homes, which tend to be modest ranch houses, farmhouses and mobile homes built during the last century. While their lots tend to be large, their properties are valued at only half the national average. Most have lived at the same address for over six years, and they show little desire to move on. With their low mortgages and limited expenses, many can devote more money to fancier trucks or muscle cars, typically bought used and retrofitted to handle the rugged roads.

Getting a college education is not a priority in Pastoral Pride. In high school, sports are bigger than academics. Most household heads earned a high school diploma, but only 10 percent have gone on to receive a college degree. That level of education is sufficient to land a blue-collar or service-sector job in construction, transportation, public administration or health care. Wages are below average and household incomes typically are less than \$50,000; members of this group stretch their grocery budgets the old-fashioned way, by hunting, fishing and gardening.

With households located far away from malls and movie theaters, Pastoral Pride like to spend their leisure time enjoying the outdoors as well as getting together with friends at social clubs, church groups and union halls. Entertainment typically involves playing cards, attending a potluck dinner or watching a game on TV while warming a seat at a local bar. When they take a vacation, most travel by car or truck and stay within the U.S. It's a big event when everyone heads to a state fair, country music concert or NASCAR race. For Sunday supper, families will go from church to a home-style restaurant or steakhouse like Cracker Barrel, Perkins or Sizzler.

Like other older, small-town consumers, Pastoral Pride are price-sensitive and brand-loyal. They tell researchers that discount department stores are just as good as upscale chains and they are perfectly happy shopping for clothes and household goods at Walmart, Kmart, Family Dollar and Dollar General. These consumers concede they're typically late adopters, limiting most of their electronics purchases to TV technology: DVD players, Blu-ray consoles and DVR devices. Smartphones and MP3 players might as well be gadgets from Mars, especially for this crowd that prefers to buy American.

In their remote communities, Pastoral Pride are average media fans. Many subscribe to newspapers and pay particular attention to the front page, editorial and classified sections. They describe magazines as a main source of entertainment, reading a mix of entertainment, women's and home-based titles that reflect their

down-home lifestyle: Redbook, Country Living, Ebony, Family Circle, Woman's World and Hot Rod. They listen to radio stations that offer news as well as traditional country, album-oriented rock, gospel and bluegrass music. On TV, they tune in cable networks like CMT, Hallmark, DIY, truTV and the Lifetime Movie Channel. They find most advertising annoying, but ads on billboards, in movie theaters and in emails are less so. While the Internet hasn't changed their lives, they do recognize its potential for communicating with friends, family and strangers; some have discovered Websites like myspace.com and myyearbook.com.

#### Digital behavior

With their low educations and old-fashioned ways, most Pastoral Pride have little interest in digital media. Many concede that computers confuse them. They don't often use the Internet and are much more likely than average to use dial-up access from their home desktop computers. Those who do go online typically do so for business purposes, to bank, shop, participate in auctions and check out real estate classifieds. They also visit Websites about dating, families, pets, motorsports, wrestling and games. Many have also discovered the addictive quality of surfing the Internet: a high number expect to increase their Internet use over the next year.

## Group O: Singles and Starters

Young singles starting out, and some starter families, in diverse urban communities

### Overview

The six segments in Singles and Starters contain downscale Generation Yers with upwardly mobile aspirations. Concentrated in small cities across the country, these households tend to be young (nearly three-quarters are under the age of 35), ethnically-mixed and unattached (half are single while a quarter are single parents). Most are on their own and starting to build independent lives in apartments with other young singles. They're college-educated, though not necessarily college graduates, and many are toiling away at entry-level positions in service-sector jobs. These self-described workaholics share a desire to move up in status and they realize that every career journey starts with a first step.

Singles and Starters live in satellite cities across the country, including a number of college towns like Madison, Wis., Austin, Texas, Bloomington, Ind., and Tallahassee, Fla. Housing costs are low - the price of a house is a third below the national average - but most residents rent units in low- and high-rise apartment buildings that were built during the last three decades. Many are attracted to the college-town atmosphere of their communities with their commercial landscape of boutiques, pizza joints, cinemas and bookstores. However, these Americans are typically living in their first apartments, and they're hardly committed to staying in their neighborhoods for any length of time. Three-quarters have lived at the same address for fewer than three years.

In Singles and Starters, education levels are below-average even though the highest concentration of householders, 42 percent, has completed some college. Slightly more than 10 percent work at white-collar jobs in the professions or sciences, while nearly two-thirds work in low-level sales and service-sector jobs in retail, health care and food services. Nearly 20 percent are unemployed - the highest rate in the nation. On average, income in this group is about a third below the general population, but these households often are taking classes to qualify for better jobs.

Singles and Starters have active leisure lives. Because so many live in relatively small apartments, they spend a lot of time outside their units going to bars, nightclubs, movies and billiards halls. Still in the dating scene, these 20-somethings like to stay fit by jogging, in-line skating and playing sports like basketball, baseball and football. When they finally relax at their apartments, they're likely to read books, listen to a wide range of music and pursue hobbies like painting and playing a music instrument. Many prefer to spend time with friends in activities that take advantage of their city amenities. A high percentage declares, "people say my enthusiasm is contagious".

Singles and Starters are active and aspirational consumers. They like to wear the latest styles and search for designer labels they can afford at mid-market retailers and discount chains like Burlington Coat Factory, Express and Banana Republic. Their interest in the latest styles extends to home design; they fill their condos and apartments with furnishings from Williams-Sonoma and IKEA. This group provides a good marketing opportunity for the makers of electronics, given their tendency to buy new and emerging technology devices like MP3 players, handheld devices and Blu-ray players. Singles and Starters like to be plugged in - literally and figuratively- to the latest trends.

Singles and Starters are too busy for most traditional media. They're too young to have acquired the habit of reading a daily newspaper, and they don't often read most magazines, though they will make an exception for music, ethnic and entertainment publications like Rolling Stone, Jet, Cosmopolitan and Entertainment Weekly. On the rare occasions when they switch on their TVs, they typically watch sitcoms, reality programs, movies and game shows; their favorite cable channels include MTV, BET, Comedy Central and FX. They like having a rock 'n' roll soundtrack to their activities, keeping their radios tuned to stations that play classic rock, contemporary hits and adult contemporary music. Increasingly, they spend their free time online chatting, blogging and checking out social networking sites, to keep up with their real and virtual friends.

Politically, Singles and Starters are liberals who most often align themselves with the Democratic Party. Though they're willing to march for a cause, they rarely donate money to political or social charities. Their below-average voter registration rates also undercut their impact as a constituency.

#### Digital behavior

The young members of Singles and Starters are relatively active online, using the Internet less for transactions than for communication (joining blogs and chat forums and instant-messaging friends) - and entertainment (downloading games, listening to Internet radio and watching video streaming). Job and car sites are popular, as well as sites offering social media ([blackpeoplemeet.com](http://blackpeoplemeet.com)) and sports information ([fantasy.nfl.com](http://fantasy.nfl.com)). These Americans have integrated the Internet into their lifestyles, going online with their cell phones or desktop machines, whether from home, school or when out and about.

## Group P: Cultural Connections

Diverse, mid- and low-income families in urban apartments and residences

### Overview

Cultural Connections are first- and second-generation Americans who are striving to improve their lives. The six segments in this group have one of the highest proportions of adoptive citizens in the U.S. More than half the households are Hispanic - more than four times the national average - and most consist of middle-aged couples with children and single-parent families. Many face enormous challenges: modest educations, low wages, uncertain jobs and language barriers. In these segments, 40 percent of residents were born in Mexico and mostly speak Spanish inside and outside their homes. While that may produce tight-knit Hispanic communities, it also hampers assimilation and advancement in American society.

The migration patterns of Cultural Connections reflect one of the nation's latest demographic changes. Instead of clustering in large metropolitan neighborhoods, many new Latinos now settle in small cities along the nation's southern border, from Texas to California, as well as Northeastern states like New York, where there is a ready market for blue-collar and service-sector workers. They live in older neighborhoods where the housing stock was built before 1950 and values today are only half the national average. They typically rent older apartments and houses, and their living situation can be somewhat transient. More than two-thirds have lived at the same address for fewer than three years, with many in a constant search for better jobs and nicer apartments.

Cultural Connections have below-average educations. More than half never finished high school; fewer than 10 percent have college degrees. Given this low educational achievement, many struggle with lower-paying service-sector and blue-collar jobs in construction and food services; their household income is 40 percent below average and many are unemployed. With fewer than half owning cars, they rely on public transportation. Yet for all their economic challenges, many would admit that their current lifestyle is an improvement over what they experienced in their homelands.

Cultural Connections pursue active, sports-intensive lifestyles. They often play team sports like soccer, basketball, baseball and football; they also enjoy more urban-associated activities like boxing and skateboarding. On weekends, they'll go to local establishments, nightclubs, a bingo game or dance performance, or they'll take their kids to family-friendly venues like zoos, theme parks, skating rinks and horse stables. At home, they like to pursue hobbies like painting, playing music and needlework. These young families don't seem to spend much time relaxing.

Despite their limited budgets, these households enjoy shopping and like to experiment with styles. They also like stores that offer lots of brands, especially discount stores such as Marshalls. A majority are unable to afford cars, but those who do tend to drive subcompacts, sedans and minivans, mostly used and imported. They find it hard to resist consumer electronics, often buying MP3 players, DVD players and videocams. With low rates for using credit cards and ATM machines, they typically pay for everything with cash.

Cultural Connections make a mixed audience for most media. Most like to keep up with Latin news, music and sports and they say that radio is their chief form of entertainment, especially stations that feature Mexican, Tejano, Latin ballads and salsa music. They rely on magazines to stay informed and they read English-

language publications like Parents, Allure, Glamour and Maxim. Though they have little interest in watching most U.S. TV stations, they do like watching programs with their kids on MTV, Nickelodeon and VH1. Perhaps because they receive fewer ad messages than more upscale groups, they're receptive to a variety of ad channels: billboards, movie theaters, buses, trains and taxis. These consumers say that they're loyal to companies that advertise in Spanish.

While Cultural Connections mostly identify themselves as liberal Democrats, voting rates are low almost 40 percent below average. Only a small percentage is actively involved in the political process. They rarely donate money to political or other causes and fewer than 15 percent have ever marched in a protest.

#### Digital behavior

The middle-aged members of this group do not often go online, and relatively few access the Internet for transactional activities like banking, shopping and looking for work. They mainly use the Internet for entertainment and communication, often to stay in touch with family and friends living outside the U.S. Many join chat forums, post bulletin board messages and download music. They also use the Internet like a virtual encyclopedia to learn more about music, books, mobile phones and games.



## Group Q: Golden Year Guardians

Retirees living in settled residences and communities

### Overview

With more than 90 percent of members over 65 years old, Golden Year Guardians are the oldest group. The seniors in these four segments are predominantly white, poorly-educated and living on extremely modest retirement funds. Nearly two-thirds are widowed and living alone; the remainder are empty-nesting married couples. Many now reside in active retirement communities after having uprooted themselves from their family homes so they could live among people of similar ages and incomes. These members of the Greatest Generation typically came from humble origins and now enjoy unpretentious lifestyles.

Golden Year Guardians are scattered throughout the nation, though they're centered in Sun Belt suburban retirement communities like Sun City, Ariz., Delray Beach, Fla., and Laguna Woods, Calif. Many are still living the American dream of home ownership, though their modest cottages and bungalows are valued at three-quarters of the national average. A quarter live in apartments which are a mix of condos, garden-style apartments and older retirement homes, located in larger cities where they've lived for many years. Many have sought out communities where they could live free of urban concerns like crime and rush-hour traffic. Others have moved to new locations for a chance to establish new friendships and engage in new leisure activities.

With incomes half the national average, many Golden Year Guardians households face financial challenges as they struggle to get by on their Social Security checks and pensions. Only a small percentage has a substantial nest egg or investment portfolios. When they were growing up, many had few educational opportunities, and more than two-thirds failed to go beyond high school. They typically held jobs in the blue-collar and service sectors. Today, more than 80 percent are retired and living on fixed incomes. While many have paid off their mortgages - one-third has lived at the same address for over two decades - they still lack the discretionary cash to enjoy a carefree retirement.

Golden Year Guardians tend to lead quiet lifestyles. Their social life revolves around various community groups, and they belong to churches and synagogues as well as veterans' clubs and arts groups. They spend a lot of their time in their residences reading books, gardening and doing needlework. For fun, they like to play cards, see a play, try their luck at bingo, or go out to dinner at home-style restaurants like Bob Evans, Cracker Barrel and Old Country Buffet. Foreign travel is outside their budgets, but many enjoy a trip to Maine or North Dakota by train, excursion bus or RV. A big trip is a cruise along the Alaskan coast or around the Caribbean.

Golden Year Guardians tend to be conservative, whether the subject is politics or shopping. They stick to favorite brands when it comes to fashion, patronizing mid-market stores like Bealls, Stein Mart and Dillard's. While they like to buy new cars every few years - sedans or luxury models preferably made in America - they're more reticent about acquiring consumer electronics. They describe themselves as tech-shy, and buy no new electronic gadgets more than the average.

Golden Year Guardians are a strong market for traditional media. They subscribe to daily newspapers to stay informed and like listening to newscasts on the radio. They describe TV as their main source of entertainment; they watch news, movies, game shows and sitcoms. Many arrange their schedules around favorite TV

programs, typically shows on cable networks like AMC, CNBC, the Golf Channel, Hallmark Channel and Movie Channel. These seniors are a prime market for women's and home magazines such as Martha Stewart Living, Family Circle, Country Living and Better Homes & Gardens. Most are still shy about the Internet, telling researchers that computers leave them baffled.

At the ballot box, it comes as no surprise that this group of seniors is solidly Republican. They have high rates for voting and describe their political outlook as "very conservative". Though they're not big on demonstrating over an issue, they will donate to political, environmental and health causes.

#### Digital behavior

Golden Year Guardians are not active in digital media. They have little high-speed Internet access, and they are late adopters of smartphones and handheld devices. However, they are discovering the Internet in increasing numbers, and recent research shows that they go online to browse sites that offer banking, insurance, travel and legal services. They enjoy sending e- greetings to friends and relatives. They're discovering the Internet as an information tool for news, political affairs and sports highlights involving golf, horse racing, baseball and motorsports. Among their favorite Websites are those related to health, illnesses and caregiving.

## Group R: Aspirational Fusion

Multi-cultural, low-income singles and single parents living in urban locations and striving to make a better life

### Overview

Aspirational Fusion are a transient group, with younger, ethnically-mixed singles and single parents in low-income neighborhoods. Concentrated in older, industrial areas, members of this group are drawn to the affordable, fixer-upper apartments where housing values are 40 percent below average. In the group's two segments, nearly three-quarters are under the age of 45, and nine out of ten households contain unmarried individuals. With nearly two-thirds of these households containing single parents, this group reflects the recent lifestyle trend of unmarried couples living together, especially among younger people who feel they are not ready for the financial commitment expected in marriage. Many are trying to raise families on low incomes and tight budgets.

Aspirational Fusion mostly live in satellite cities throughout the Midwest and Northeast, typically in densely packed apartment complexes in places like Tulsa, Okla., Muncie, Ind., and Schenectady, N.Y. The housing stock is old - half the homes were built before 1925 - and often located within an atmosphere of factory noise, litter-strewn streets and industrial odors. Any fancy restaurants, nightclubs or movie theaters left these areas a long time ago; they were replaced by corner grocers, carry-outs and hair salons. These low-rise apartments and brownstone row houses often serve as an entry point for those who are just starting out or starting over.

Education has not been a priority of many members of Aspirational Fusion. Nearly 45 percent never completed high school; only 6 percent have college degrees. Most adults work at low-level service-sector and blue-collar jobs in health care, food services and manufacturing, though unemployment is nearly twice the national average. Even many households having multiple workers, their income is less than half the national average. Clearly these workers struggle to get by and are always looking to improve their circumstances with a better job or apartment. Nearly half have lived at the same address for under a year, three-quarters for fewer than three years.

For Aspirational Fusion, their active social lives ease some of the burden of their economic challenges. Despite their low incomes, they manage to take advantage of many city amenities. They go to local establishments, nightclubs, movie theaters, plays and comedy clubs. They play a lot of sports in nearby parks and playgrounds, including basketball, baseball, soccer and football. Those with young children enjoy taking their kids to theme parks, aquariums and state fairs. Many like to wind down at home by listening to music, cooking and reading gaming magazines.

Despite their tight budgets, Aspirational Fusion are big on shopping, keeping up with the latest fashion and trying to make a unique statement with their clothes. They prefer to shop at discount stores near their apartments, but they also patronize national chains like Marshalls, Abercrombie & Fitch, Chico's and Fashion Bug. While only a third can afford to buy cars, many own electronic devices like DVD players and big-screen TVs. These households are serious music fans who don't mind splurging on the latest MP3 player to listen to reggae, soul, hip hop and rhythm and blues.

These households barely register when it comes to consuming most media. They rarely subscribe to newspapers or magazines other than parenting, food and entertainment titles. They don't often watch TV, other than cable channels such as BET, Cinemax, Disney, Lifetime, Oxygen and VH1. Notwithstanding their fondness for music, they have little tendency to listen to the radio. With many taking public transit to work, they're more likely to get their tunes from ear buds than car radios.

Politically, Aspirational Fusion are a mostly apathetic group. They have below-average rates for registering to vote, joining community groups or donating money to political and social causes. A majority align themselves with the Democratic Party, but many insist that their political outlook is more conservative than liberal.

#### Digital behavior

With their modest incomes and educations, Aspirational Fusion represent only a moderate digital market. However, many of these city-based minorities are big fans of telephony and access the Internet through their cell phones. They tend to go online for practical purposes, such as finding a job, an educational program or a car. Many also use the Internet for entertainment and social networking, and their favorite Websites include facebook.com, myspace.com and blackplanet.com.

## Group S: Struggling Societies

Economically challenged mix of singles, divorced and widowed individuals in smaller cities and urban areas looking to make ends meet

### Overview

The four segments in Struggling Societies reflect the nation's least affluent group. These households contain economically-challenged singles and divorced and widowed individuals living in isolated towns and cities. With modest educations and lower-echelon jobs, many struggle to make ends meet. Many of their communities face endemic problems associated with poverty and crime. As a group, the households are older (ages range from 45 to 75), ethnically-mixed, without children and transient. Half have lived at the same address for fewer than five years. Many of these unmarried and unattached singles have moved into these rundown communities with few resources other than a hope of starting over.

Struggling Societies are scattered across the U.S., but are found especially in small city markets in the South and Midwest. Even though home values are low, about two-thirds of the national average, only 40 percent own houses. Roughly half rent their residences, a mix of older ranch houses and crowded apartment buildings. One in ten lives in mobile homes. In their mixed-use neighborhoods, homes are often surrounded by commercial businesses and buildings.

Struggling Societies are not well-educated. Nearly half failed to finish high school. Almost 40 percent are unemployed. The majority work in mostly low-paying, entry-level jobs in health care, social services and the wholesale and retail trades. Advancement is difficult. With household incomes 60 percent below the national average, these Americans can only afford to lead unpretentious lifestyles.

Their small-city locations afford members of Struggling Societies some low-cost entertainment options. They go to local establishments, nightclubs, billiards halls and the occasional play or concert. However, most activities are home-based, whether it's listening to music, watching TV, doing needlework or reading gaming magazines. These older adults pursue few athletic activities other than rooting for home-town teams playing professional basketball, football or baseball. For excitement, they regularly try their luck gambling, playing bingo or buying lottery tickets.

Even at the bottom of the socioeconomic ladder, Struggling Societies have a need for status recognition. Many of these households like to make a statement with their fashion, and they try to keep up with the latest styles - admittedly, sometimes spending more than they can afford. Most are price-sensitive shoppers who patronize discount department stores like Walmart, Kmart, Burlington Coat Factory and Payless Shoe Source. These consumers, however, regularly splurge for lingerie at Victoria's Secret and pricier outfits at Talbots. They have similar aspirational tastes in cars: they like to drive fast cars with lots of options, yet the majority can't afford to own a vehicle. Those who can usually settle for used subcompacts or tame sedans.

Struggling Societies have selective media tastes. Self-described TV addicts, many keep their TV sets on most of the day to watch sitcoms, movies, reality programs and game shows. They enjoy a variety of cable networks, including Soapnet, Lifetime, Oxygen, AMC, BET and Cinemax. This is a group filled with music fans, and they tune their radios to stations that play soul, gospel, rhythm and blues and salsa. While many of these households pick up a newspaper, they typically only read the classifieds, food and news sections. Group members say that most magazines are worth the money, and they like to read Harper's Bazaar, Popular Science,

Prevention and Ebony. A high number concede that they like advertisements, especially those they see on TV, at movie theaters and on buses and subways. They're particularly fond of entertaining ads and, unlike more jaded consumers, they say that they remember ads when shopping and find them helpful.

They may be lower-income and transient, but Struggling Societies are politically engaged. They have solid rates for voter registration, are strong supporters of the Democratic Party and are centrists on many issues. Though they belong to few community groups other than veterans' clubs, they're willing to volunteer for a good cause and protest an issue that they feel strongly about. These are the Americans who don't mind taking a stand - even if it upsets people.

#### Digital behavior

With their low incomes and advancing ages, Struggling Societies have relatively little interest in digital technology. While a few have dial-up access to the Internet at home, most tend to go online using computers in libraries and local schools. They like Websites that offer games, lottery results, basketball scores and educational courses. Many of these single adults now frequent social media sites like myspace.com, mocospace.com and blackpeoplemeet.com. However, many also tell researchers that they're confused by computers and claim that the Internet has had no impact on their lives.