



SONNENBLICK SIX FLAGS HOTEL/WATER PARK





SONNENBLICK SIX FLAGS VALLEJO, LLC

January 29, 2020

Clerk of the Board
County of Solano
675 Texas Street, Suite 6500
Fairfield, CA 94533
Attention: James Bezek, Assistant Director, General Services

Dear Mr. Bezek,

On behalf of Sonnenblick Six Flags Vallejo LLC, Development Team, we are formally submitting our proposal and response to the RFQ issued by the Solano 360 committee.

Enclosed are five (5) hard copies, which include this transmittal letter, an executive summary and accompanying exhibits, the statement of qualifications, a narrative general concept including a proposed concept plan, site plan, and elevation sketches for Solano 360, references, and a confidential financial submission, along with a USB flash drive in PDF format.

We are available with notice to review our credentials, submittal, and proposed uses with you or your selection team at your convenience. Please contact me in furtherance of this response to your RFQ.

Sincerely,

A handwritten signature in cursive script that reads "Robert Sonnenblick".

Mr. Robert Sonnenblick,
Chairman, Sonnenblick Development LLC



Executive Summary

This presentation is being made in response to the RFQ issued by the Solano 360 mixed use site in Vallejo, California, and will address the six objectives outlined on page 6 of the RFQ. The overall site available for development is approximately one hundred and eleven acres, and this response to the RFQ includes a site plan to utilize the entire parcel on a phased development program. We have specifically not included:

- Single family
- Recreational vehicle sale and or storage
- Automobile sales
- Manufacturing
- Hospitals
- Warehouse storage or distribution

The development team for Sonnenblick Six Flags Vallejo LLC, is led by Bob Sonnenblick, Chairman of Sonnenblick Development of Los Angeles, California. His team for the Solano 360 project includes Aquatic Development Group, Swinerton Construction Corp, Lemery Development Group, and Six Flags-Discovery Kingdom; their qualifications are attached as exhibits A-D. With their combined and varied experience in building similar projects, the hospitality industry, and the inclusion of Six Flags as the manager/operator of the hotel/waterpark, is a uniquely qualified team, which has been assembled to build out this site as a mixed use development to include a Hotel water park, destination retail, restaurants, entertainment facilities themed to compliment Six Flags Discovery Kingdom, a residential component, a people mover from Six Flags Discovery Kingdom to the 360 Project venue, water scaping, lakes, walking trails, bike trails, sports facilities, transportation, and parking venues.

Sonnenblick Development is a major hotel, office, retail, and mixed use developer in the USA with a multi generation history of success in both funding and developing real estate projects throughout the USA. (See exhibit C. i. attached hereto.)

Aquatic Development Group (“ADG”) from Cohoes, New York, is a major builder of indoor and outdoor waterparks and is a long time Six Flags vendor. (See exhibit C iii. attached hereto).

Swinerton Construction Corporation is one of Northern California's major general contractors specializing in large hotel construction. Their impressive resume is included in this submission.

Six Flags - Discovery Kingdom is a globally recognized theme park company. (See attached as exhibit C. ii. Six Flag's project portfolio).

Lemery Development Group. John Lemery is a member of the New York state bar, was a Captain in the US Army, and served as Six Flags’ local New York State counsel for several years. Mr. Lemery was the person primarily responsible for the development of Six Flags first hotel/indoor waterpark in Lake George, NY. (Examples Lemery Development Groups projects and development experience is attached as exhibit C. iv.).

Attached as Exhibit B, is an overall view of the entire site plan. The build out of the site would involve two phases. In phase one, we propose constructing a hotel of 350-400 rooms, an 80,000 square foot indoor waterpark, and a 20,000 square foot convention space (see schematic drawing of hotel/waterpark & convention space as Exhibit B). In addition to the hotel/waterpark, the site would include a golfing experience (see diagram of the potential golfing experience as Exhibit D). Phase two would consist of restaurants, retail shopping with a residential component over the shops (Exhibit D), a possible indoor racing facility, and other amenities as described on the site plan. The existing parking as well as the additional 2500 spaces required by Six Flags is highlighted in Exhibit B.

The hotel/waterpark will be managed, operated by, and branded as a Six Flags hotel/waterpark. A direct link between Discovery Kingdom and the site is planned, which may consist of an above-ground gondola, articulated buses, or some other means of conveyance to move the pedestrians from the theme park to the hotel/waterpark and other amenities and parking.

Each phase as described will generate significant income for the city and county. There will be several hundred full-time jobs created – retail, hospitality, and commercial, significant sales tax revenue, bed and ticket tax revenue, increased real estate tax revenue, and whatever other revenue might be customarily available to the city and county. In addition, there will be several hundred construction jobs created during the build out of both phases. Six Flags Discovery Kingdom draws a significant amount of visitors to the area annually. The link between the hotel/waterpark and Discovery Kingdom will provide an opportunity to substantially increase the visitor traffic, and thereby increasing the income and revenue for the city and county residents. The build out of phase one and two as described will surely increase traffic to the fairground during its operating season, exposing these visitors to the rich history of the fair. The increased revenue will aid the county in the redevelopment of the fairground.

The overall plan is to establish a unique place with an unmistakable identity that serves as a large economic hub, a safe environment for visitors and residents, as well as a pedestrian friendly gathering place. See the overall site plan (Exhibit B).

Exhibits:

- A. Letter from Six Flags Corporate
- B. Site Plan & Narrative Concept
- C. Development Group's CVs
 - i. Sonnenblick's project and development experience
 - ii. Six Flag's CV and project portfolio

iii. ADG's project and development experience

iv. Swinerton's project and development experience

v. Lemery Development project and development experience

D. Renderings and pictures of the potential golfing, residential, retail, and restaurant experience and targeted tenant mix.

E. Feasibility study by DBC advisors

F. Statement of Qualifications

EXHIBITS

A	SIX FLAGS LETTER
B	SITE PLAN & NARRATIVE CONCEPT
C	DEVELOPMENT TEAM
i.	SONNENBLICK PROJECT DEVELOPMENT
ii.	SIX FLAGS - HOTEL/WATER PARK
iii.	ADG - AQUATIC DEVELOPMENT GROUP
iv.	SWINERTON CONSTRUCTION CORPORATION
v.	LEMERY DEVELOPMENT
D	PROSPECTIVE TENANTS
E	MARKET RESEARCH - DBJ
F	STATEMENT OF QUALIFICATIONS OF ENGINEER



January 20, 2020

Sonnenblick Development, LLC
1422 Cuesta Linda Drive,
Pacific Palisades CA 90272
Attn: Robert Sonnenblick

Dear Mr. Sonnenblick,

Six Flags Theme Parks Inc. ("Six Flags") is pleased to inform you of our intent to enter into an LOI with Sonnenblick Development, LLC ("SD LLC") regarding the potential development of a hotel and waterpark (the "Property") in close proximity to our Six Flags Discovery Kingdom park. We anticipate entering into the LOI shortly following such time SD LLC is granted the exclusive right to develop the Property known as the Solano360 Mixed-Use Site, Vallejo, CA pursuant to Solano County's Request for Qualifications process. As will be set forth in the definitive documents that both of our organizations will enter into, Six Flags would license its brand and operate the Property.

We are looking forward to working with you in this exciting project.

Kind regards,

A handwritten signature in black ink, appearing to read "Mario Centola". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Mario Centola
Vice President, International Operations & Business Development

Confidential Document

B

SITE PLAN - NARRATIVE CONCEPT



SOLANO • COUNTY

FAIRGROUNDS

Where Solano Celebrates

New Horizons A
Montessori School

FAIR / TRANSIT
USE AREA

Dwight D. Eisenhower Hwy

PEDESTRIAN
BRIDGE

RIVERWALK

Rindler Cr

80

PEDESTRIAN
BRIDGE

- A - CONFERENCE CENTER
- B - LOBBY CORE
- C - HOTEL UNIT WING
- D - FUTURE HOTEL WING EXPANSION
- E - FAMILY ENTERTAINMENT CENTER
- F - INDOOR WATERPARK
- G - OUTDOOR WATERPARK / FUTURE INDOOR
- H - FOOD & BEVERAGE
- I - GOLF EXPERIENCE
- J - RETAIL
- K - INDOOR KARTING/
INTERACTIVE ENTERTAINMENT
- L - SIX FLAGS PARKING



**Architectural Design
Consultants, Inc.**



Narrative Concept for Solano 360



The Sonnenblick Development Six Flags Vallejo LLC proposal responds to the request for a market based development project with a creative vision to meet the objectives of the Solano 360. The goal of this project is to create a unique, enjoyable destination for residents of the area and visitors alike while generating the sufficient sales, bed, and real estate taxes and other revenue to meet the market demand and financial requirements necessary to make the entire project successful.

Our project includes the development of a 350-400 room Hotel/Waterpark, which will complement the existing Six Flags Discovery Kingdom. Members of our development team (previously described) have worked with Six Flags for many years and are very familiar with the needs of the park and its patrons. We anticipate creating longer stays at the destination as visitors enjoy the wide range of activities at the Hotel/Indoor Waterpark, the ancillary restaurants, entertainment, sports facilities, ESports, and destination retail. These extended stays, and return visits, increase the amount of dollars spent and the tax revenue created.

We envision family restaurants and additional entertainment such as a golf venue where families and individuals can utilize a driving range as entertainment as well as a party venue for social functions. Destination retail will include a large sports retailer, thereby creating a regional draw of patrons and families who travel to shop at these venues. The residential component is aimed toward addressing the work, eat, and play concept for both existing and new personnel who would work at the facilities, among others. We envision incorporating walkways, rivers, water scaping, and open space for picnics and family gatherings.

An amphitheater or arena and outdoor entertainment venue will add to the entertainment space already a part of Discovery Kingdom, drawing other local and regional art and music clients for concerts in the park.

The 37 acre Fairground property has been exempted from our plan. The tax revenue from our project will help support the County Fair and the "Fair of the Future". Our hope is with the added visitors to the destination, there will also be an increase to the Fair's visitors, encouraging new people to experience the "Fair of the Future" and adding to their overall enjoyment of the destination.

Land uses are described in the site plan drawing with overall acreage (Exhibit E in the Executive Summary). The site plan is our initial concept after reviewing the enclosed market study recently completed to address the subject's retail and entertainment demographics and the financial quality and quantities of the region. This is our submission in an effort to make Vallejo the Dynamic entertainment destination in Northern California.



Development Team





Bob Sonnenblich

Chairman of Sonnenblich Development LLC with 30 years of real estate development, financing, and management experience in major real estate projects including Hotels, Shopping Malls, Office Buildings and mixed use projects throughout the United States. Bob was also a principal and senior partner in the Sonnenblich Goldman Company, a distinguished investment-banking firm with billions of dollars invested in major real estate projects. Bob's impressive education, background, completed projects, and financing experience is attached hereto. He will lead the team to construct and finance the proposed mixed use Six Flags Hotel/Waterpark and other uses including retail, residential, and entertainment facilities.

Don McCoy

Don is the president of Six Flags Discovery Kingdom in Vallejo, CA and is a part of the Six Flag's President's management team with many years working at Six Flags with various responsibilities. Don was the park president and part of the development team for the Six Flags Great Escape Theme Park/Hotel/waterpark in New York, and has several years experience managing Six Flags Properties. Dons resume and pictures of his successful projects are attached hereto.

Ken Ellis

Ken is the CEO and Chairman of Aquatic Development Group and has a very impressive list of successful projects, which are attached hereto. His role with the team is to design and build the water park portion of the project. The destination Discovery Kingdom Hotel/waterpark should be a significant regional draw, enhancing the overall experience in Vallejo, CA.

Jeff Hoopes

Jeff is the CEO of Swinerton Incorporated. Swinerton traces its roots back to 1888, when a young Swedish immigrant formed a brick masonry and contracting business in Los Angeles to serve the growing city in its post-Gold Rush building boom. The company now has over 3,500 employees from coast to coast. The company still operates under California contractor's license number 92—the one it obtained in 1927 when the state first began issuing licenses. Many Swinerton-built structures now claim a spot on the National Register of Historic Places and other architectural preservation lists.

John Lemery

John is a licensed attorney in New York and Pennsylvania, and was Six Flags local and tax council in NY State for several years. Lemery was principally responsible for the creation of the Hotel/Waterpark at Six Flags Great Escape Theme Park. He also managed the land acquisition, financing, site plan, zoning, and planning. His resume and completed projects are attached.

Dan Cromwell

Dan is the Owner and President of DBC Advisors. He is a Commercial Real Estate Consultant with broad-based experience and expertise in site selection, economic incentive negotiation and demographic/psychographic modeling. His specialties include: Site selection & evaluation, economic incentive negotiation, acquisitions, dispositions, strategic planning, development services, investment and financial analysis

Buck Kamphausen

Buck has been a resident and business leader of Vallejo, CA since 1971 and as such has been a great influence on the progress and spirit of Vallejo. His accomplishments include acting President of the CCRC, the steering committee for downtown Vallejo business development. He is also known for his vision of what is now Six Flags Discovery Kingdom in Vallejo.

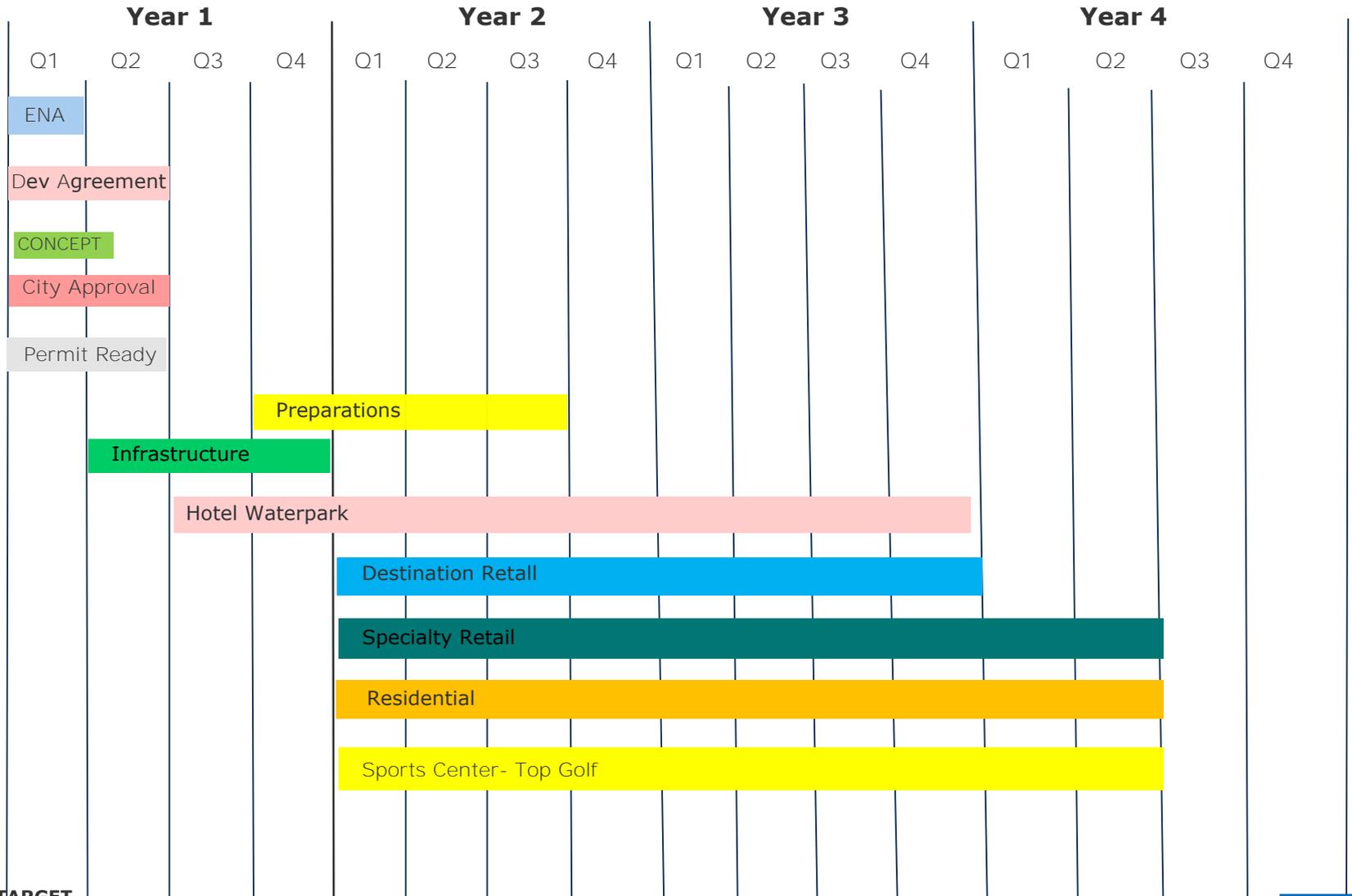
COMPANY ORG CHART

SONNENBLICK - SIX FLAGS VALLEJO, LLC

Hotel/Commercial Development	Water Park Development	Financial Capacity	Hospitality Hotel/Entertainment	Architecture and Engineering	General Contractors & Consultants
 SONNENBLICK DEVELOPMENT Bob Sonnenblick Chairman www.sonndev.com	 ADG AQUATIC DEVELOPMENT GROUP Ken Ellis CEO JJim Dunn President Bruce Quay COO Lemery Development John C. Lemery	 SONNENBLICK DEVELOPMENT Bob Sonnenblick Chairman www.sonndev.com  TRAVELERS Travelers Insurance (Surety/Completion Bond)	 Six Flags GREAT ADVENTURE & SAFARI Six Flags Discovery Kingdom Don McCoy President Lemery Development John C. Lemery Local Law Firm: Favaro Lavezzo Gill Caretti and Heppell PC	 ADG AQUATIC DEVELOPMENT GROUP Smart Solutions for Real Success. Ken Ellis CEO Robert A.Karn Associates Civil Engineers	 SNYDER LANGSTON Building with Mastery Snyder Langston snyderlangston.com  DIRTMASTER DirtMaster Inc. Robert Schafer  NOREAS Noreas Environmental Michael Cowan  JLL Jones LaSalle-Energy  DBC ADVISORS INTEGRATED REAL ESTATE SOLUTIONS Dan Cromwell Buck Kamphausen

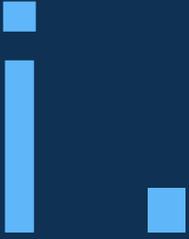
Please see Appendix A for additional Sponsor Team qualifications

Conceptual Development Timeline



OPENING TARGET DATE

Soft Opening



Sonnenblick Development





Bob Sonnenblick



Mr. Robert Sonnenblick, Principal of Sonnenblick, LLC, is a graduate of the Wharton School of Finance of the University of Pennsylvania with more than 30 years of experience in various aspects of real estate and real estate finance. From 1981 to 1991 Mr. Sonnenblick was the driving force and power behind Sonnenblick-Goldman Corporation of California. Mr. Sonnenblick completed over \$1.5 Billion of commercial real estate transactions on the West Coast and as a result is regarded as one of the West Coast's leaders in the field of commercial real estate. Among the more notable projects for which Mr. Sonnenblick personally structured the financing for are The Beaudry Center, Los Angeles, California (\$197 million), the Ritz Carlton Hotel, Pasadena,

California (\$97 million), One Waterfront Plaza, Honolulu, Hawaii (\$100 million), and the Los Angeles World Trade Center, Los Angeles, California (\$55 million).

In 1991 Mr. Sonnenblick was appointed Director of Development for the New Jersey and L.A. MetroMalls, with the responsibility for oversight and direction of the design, financing and leasing programs for two proposed \$250 million enclosed regional malls totaling 1.2 million Sq. Ft. each. Mr. Sonnenblick personally oversaw more than 1 million Sq. Ft. of leases in connection with this position as well as arranging the necessary debt and equity financing. The New Jersey project opened to one of the strongest starts in the history of the United States mall industry. In addition, Mr. Sonnenblick was an original development partner of the Loews Santa Monica Beach Hotel. This 360-room, \$90 million hotel was recently sold for \$125 million.

Prior to forming Sonnenblick Development, LLC, Mr. Sonnenblick was the senior partner in a Los Angeles-based real estate development firm (Sonnenblick Del Rio Development) which specialized in public-private partnerships, specifically the development of four major government-leased office buildings throughout the Los Angeles basin. During this tenure, Mr. Sonnenblick successfully developed nearly 1 million square feet of government leased buildings, occupied by such tenants as U.S. Department of Homeland Security, Federal

Bureau of Investigation (FBI), Los Angeles County Sheriff's Department, Los Angeles County Department of Public Social Services and Los Angeles County Department of Children and Family Services.

Mr. Sonnenblick is a frequent speaker at various real estate-related functions, such as those hosted by Deloitte Touche, ICSC, Value Retail News, Crittenden, USC, UCLA Real Estate Program, IMN Real Estate Conferences and the Institute for International Research, The Opal Group, iGlobal Forum Group, Globe Street/Realshare Conferences and Bloomberg Conferences.

Mr. Sonnenblick is a member of the Advisory Board of the Golf Development Institute, a member of the Board of Real Estate Council of the Century City Chamber of Commerce and is a published author on subjects ranging from architecture to general real estate market conditions. In addition to Mr. Sonnenblick's expertise in development, finance, joint ventures and equity structuring, Mr. Sonnenblick has also been certified as an expert in the area of real estate bankruptcy/foreclosure. Mr. Sonnenblick is a qualified expert witness in the area of Commercial Real Estate Finance and Interest Rates for the United States Federal Court System in numerous jurisdictions.

1976 to 1980	Wharton Business School at the University of Pennsylvania, B.S. in Economics and Finance
1980 to 1982	Real estate financier, Sonnenblick-Goldman Corp., New York NY
1983 to 1992	Real estate financier, Sonnenblick-Goldman Corp., Los Angeles CA
1993 to 1998	Co-developer and Director of Leasing and Finance, NJ Metromall (now "Jersey Gardens") a 1.2 million square foot factory outlet mall located on the NJ Turnpike in Elizabeth NJ
1986 to 1998	Development Partner and Director of Finance, The Loews Santa Monica Beach Hotel, a 360 room luxury oceanfront 4-star hotel
1987 to 1997	Equity Partner, The Boca Raton Resort Hotel, a luxury 4- star, 1000 room resort hotel
1999 to 2001	Developed DPSS El Monte #1 (a \$39 million class-A office building 100% leased to the County of Los Angeles)
2001 to 2003	Developed DPSS West LA (a \$36 million class-A office building 100% leased to the County of Los Angeles)

2003 to 2005

Developed DPSS – El Monte #2 (a \$46 million Class-A office building 100% leased to the County of Los Angeles)

2006 to 2007

Developed Flair Plaza Shopping Center in Los Angeles on the I-10 freeway at the Rosemead Blvd. off-ramp

2007 to present

Redeveloped Norwalk Government Center, a 500,000 sq. ft. Class-A office building on Imperial Highway, anchor tenants are State of California (Board of Equalization, Small Business Administration), the County of Los Angeles (Dept. of Public Social Services, Dept. of Children & Family Services, Mental Health Dept., Sheriffs' Dept.), and the Federal Government (the FBI, Social Security Administration, and Dept. of Homeland Security – Los Angeles County Headquarters)

2011 to present

Established Sonnenblick Development LLC, a multi-faceted real estate development company specializing in 4-star oceanfront resort hotel developments across the United States, with a particular focus on high-end golf resorts. The company also has a secondary focus on development of airport on-property limited service hotels. Bob Sonnenblick is a featured speaker at many global development, hospitality and funding conferences. [Click for upcoming events]

SonnDev Developer



Founder of Sonnenblick, LLC, Mr. Robert Sonnenblick, is a graduate of the Wharton School of Finance of the University of Pennsylvania with decades of experience in various aspects of real estate and real estate finance. From 1981 to 1991 Mr. Sonnenblick was the driving force and power behind Sonnenblick-Goldman Corporation of California. Mr. Sonnenblick completed over \$1.5 Billion of commercial real estate transactions on the West Coast and as a result is regarded as one of the West Coast's leaders in the field of commercial real estate. Among the more notable projects for which Mr. Sonnenblick personally structured the financing for are The Beaudry Center, Los Angeles, California (\$197 million), the Ritz Carlton Hotel, Pasadena, California (\$97 million), One Waterfront Plaza, Honolulu, Hawaii (\$100 million), and the Los Angeles World Trade Center, Los Angeles, California (\$55 million). **Together, the principals of Sonnenblick Development have a combined 29 years of experience in real estate, construction, finance and development in excess of \$2.5 Billion in closed transactions.**

Team

Bob Sonnenblick

In 1991 Mr. Sonnenblick was appointed Director of Development for the New Jersey and L.A. MetroMalls, with the responsibility for oversight and direction of the design, financing and leasing programs for two proposed \$250 million enclosed regional malls totaling 1.2 million Sq. Ft. each. Mr. Sonnenblick personally oversaw more than 1 million Sq. Ft. of leases in connection with this position as well as arranging the necessary debt and equity financing. The New Jersey project opened to one of the strongest starts in the history of the United States mall industry. In addition, Mr. Sonnenblick was an original development partner of the Loews Santa Monica Beach Hotel. This 360-room, \$90 million hotel was recently sold for \$125 million.

SonnDev Experience



The Los Angeles-based real estate development firm, Sonnenblick Development LLC, is a highly recognized developer of office facilities for state, county and municipal public agencies throughout the nation. In addition, the firm has developed Major Retail, Residential and Hotel Resort projects.

For governmental/public agencies, our goal has always been to provide high quality, state of the art facilities at long-term, flat rental rates that are often significantly below prevailing market rates. To accomplish this, we have developed unique and innovative lease and financing structures.



L.A. County Building
Department of Social Services
El Monte, California



L.A. County Building Phase 2
Department of Children's Services
El Monte, California



Department of Homeland Security
L.A. Headquarters Building
Norwalk, California



L.A. County Building
Department of Social Services
West L.A., California

SonnDev Experience

The Mills at Jersey Gardens



The Mills at Jersey Gardens is a two-level indoor outlet mall in Elizabeth, New Jersey. The mall opened on October 21, 1999, and is the largest outlet mall in New Jersey. **The mall was built on a former landfill**, which required remediation prior to the mall development. Today, the former landfill is one of the largest multi-use shopping mall on the East coast and one of the most successful outlet malls in America

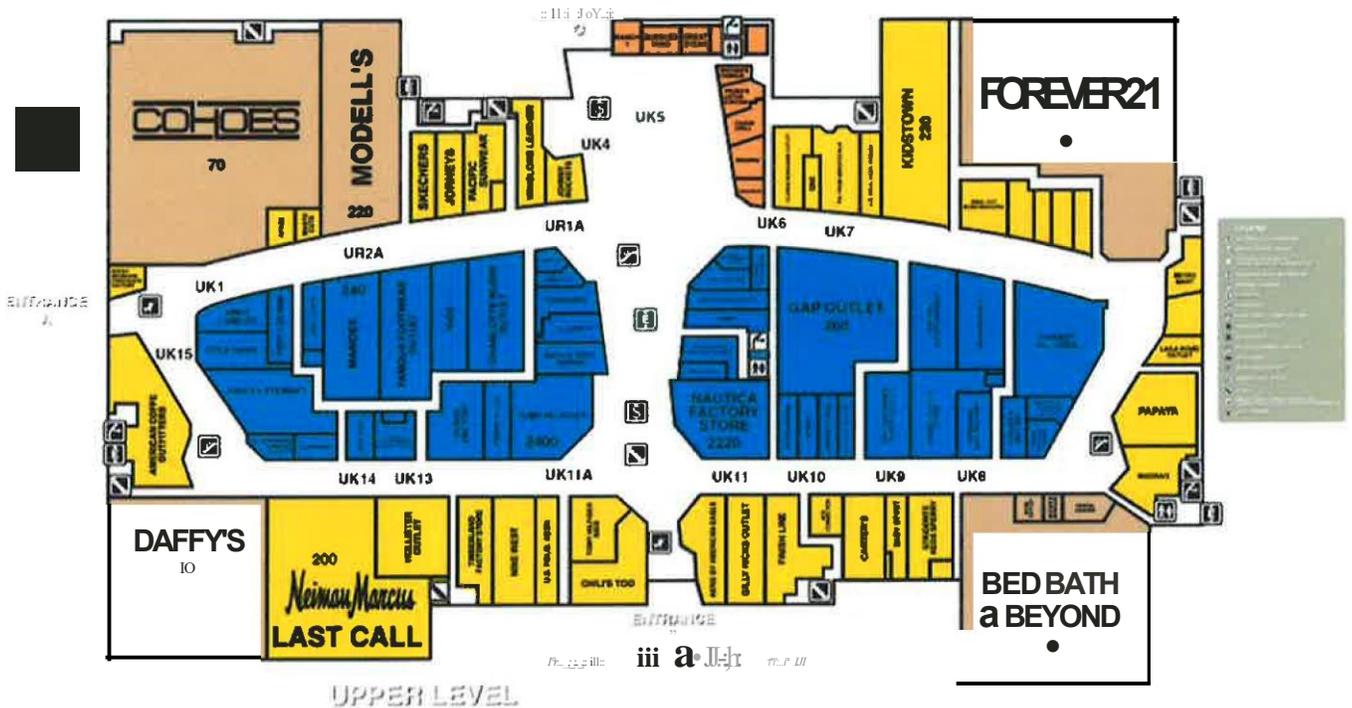
Highlights:

- 1.2 mill feet of outlet mall surrounded by airport, hotels and additional retail
- 170 acres of landfill, which was remediated and deep dynamic compacted to allow 4000 piles to be driven 120 feet average to build the mall.
- The environmental work took 14 months to complete, and the methane gas recovery system was installed over the cap and under the slab to eliminate any methane gas from the land filltrash.
- \$400 million flyover the 95 tollway was also designed and bonded to gain access to the mall from the interstate
- Financing of this mall and the anchor tenants took about 24 months to complete and 24 additional months to open the facility to the public.



SonnDev Experience

The Mills at Jersey Gardens



SonnDev Financed Projects

Securitized
First Mortgage Financing
The Beaudry Center
Los Angeles, California
\$197,000,000



First Mortgage Financing
The Fairmont Hotel
San Francisco, California
\$51,000,000



Take-out and
Construction Financing
One Waterfront Plaza
Honolulu, Hawaii
\$100,000,000



First Mortgage Financing
The Meridien Hotel
San Francisco, California
\$63,000,000



SonnDev Financed Projects

Take-out Financing
Hawthorne Plaza
San Francisco, California
\$72,000,000



Construction Financing
One Shoreline Drive
Corpus Christi, Texas
\$61,000,000



SonnDev Financed Projects

Construction Financing
San Francisco Centre
San Francisco, California
\$86,000,000



First Mortgage Financing
Santa Monica Beach Hotel
Santa Monica, California
\$61,000,000



Construction and
Permanent Financing
Fairmont Hotel
San Jose, California
\$76,000,000



Permanent and
Construction Financing
Village on Canon
Beverly Hills, California
\$33,250,000 & \$30,850,000



SonnDev Financed Projects

Securitized Fixed-Rate
Mortgage Bonds
**300 River Place
Office Building**
Detroit, Michigan
\$69,000,000



Cornerstone Plaza
1990 Bundy Avenue
Los Angeles California
Sale



First Mortgage Financing
Valley Plaza Shopping Mall
Bakersfield, California
\$65,000,000



First Mortgage Financing
Dana Point Resort Hotel
Dana Point, California
\$53,000,000



SonnDev Financed Projects

First Mortgage Financing
Hyatt on Union Square
San Francisco, California
\$70,000,000



Leasehold
First Mortgage Financing
LA World Trade Center
Los Angeles, California
\$55,000,000



Line of Credit Financing
Los Angeles Lakers
Los Angeles, California
\$22,500,000



First Mortgage and J.V./
Equity
AT&T Gateway Tower
Seattle, Washington
\$165,000,000 &
\$35,000,000



SonnDev Financed Projects

Leasehold First and Second
Mortgage Financing

Pier 39

San Francisco, California

\$86,000,000



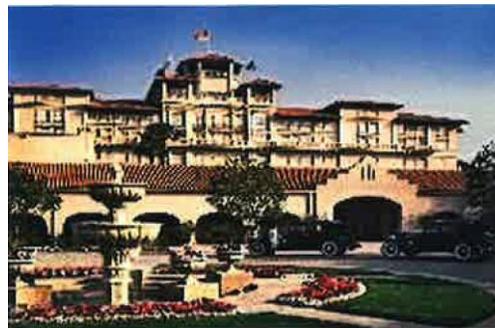
First Mortgage and J.V./
Equity

The Ritz-Carlton

Huntington Hotel

Pasadena, California

\$86,250,000 & \$10,000,000



Development Cost and J.V./
Equity

The Parkshore Club

Chicago, Illinois

\$83,500,000 & \$11,000,000



Sale of Leasehold Interest

The J-W Marriott Hotel

Century City, California

\$85,000,000



SonnDev Financed Projects

Sale of Leasehold Interest
ABC Entertainment Center
Century City, California
\$54,100,000



Leasehold
First Mortgage Financing
The Hyatt Islandia Hotel
San Diego, California
\$33,000,000



Leasehold
First Mortgage Financing
Broadway Market
Seattle, Washington
\$21,000,000



First Mortgage Financing
The Academy
No. Hollywood, California
\$36,200,000



SonnDev Financed Projects



First Mortgage Financing
**Holiday Inn Union
Square Hotel**
San Francisco, California
\$27,000,000



Leasehold
Construction Financing
Hyatt Regency Hotel
San Diego, CA
\$140,000,000



J.V./Equity and
Construction Financing
111 Capitol Mall Building
Sacramento, CA
\$55,000,000



SonnDev Financed Projects

Leasehold
Permanent Financing
Seaport Village Shopping
San Diego, CA
\$40,000,000



Participating
First Mortgage Financing
Warner Financial Center
Woodland Hills, CA
\$18,300,000



Construction
Mini-Perm Financing
Paladion Shopping Mall
San Diego, CA
\$32,000,000



Sale
Fair Plaza Shopping Center
Los Angeles, CA
\$14,000,000



SonnDev Financed Projects



Acquisition/Renovation
Mortgage Financing
**Sheraton Newport
Beach Hotel**
Newport Beach, CA
\$20,500,000



First Mortgage Financing
Scripps Corporate Plaza
San Diego, CA
\$21,000,000



First Mortgage Financing
R Street Office Building
Sacramento, CA
\$18,500,000



SonnDev Owned Projects



COUNTY OF LOS ANGELES - PHASE I DEPARTMENT OF PUBLIC SOCIAL SERVICES

- 120,000 Rentable Sq. Ft.
- Six-story Structure with One Floor Subterranean
- Project Developer and Owner



COUNTY OF LOS ANGELES - PHASE II DEPARTMENT OF CHILDREN & FAMILY SERVICES

- 120,000 Rentable Sq. Ft.
- The Building Sits Next to Phase I of the El Monte DPSS Campus that Includes an 834-Car, Seven-Story Parking Garage that has Granite Highlights.
- Incorporates a 10,000 Square Foot Day Care Facility (2,500 Interior and 7,500 Exterior), 120,000 Rentable Sq. Ft.
- Six-story Structure with One Floor Subterranean
- Project Developer and Owner

SonnDev Owned Projects



COUNTY OF LOS ANGELES PHASE III DEPARTMENT OF PUBLIC SOCIAL SERVICES

- Located in West Los Angeles, CA
- 70,000 Rentable Sq. Ft.
- Four Story Structure
- Project Developer and Owner



IMPERIAL NORWALK CENTRE IMPERIAL NORWALK CENTREIMPERIAL NORWALK CENTRE

- **Norwalk, CA**
- L.A. Headquarters of the Dept of Homeland Security
- 500,000 Sq. Ft.
- 7-Story Office Building
- Tenants Include the County Of Los Angeles and The State Of California
- Project Developer and Owner
- Tenants Include:
- Homeland Security/USA
- The FBI/USA
- LA County Sheriff Dept.
- LA County Dept of Social Services
- LA County Mental Health
- State of Calif Board of Equalization
- Accenture Inc.
- The Social Security Administration



SonnDev Projects



THE LOEWS SANTA MONICA HOTEL

- Beach Front Hotel
- 360 Rooms
- 5 years to Entitle Project
- Built for \$90,000,000
- Sold for \$125,000,000
- Co-Developer & Equity Investor



BOCA RATON RESORT THE WALDORF ASTORIA COLLECTION

- 356 Acres in South Florida
- 1000 Hotel Rooms
- 30 Tennis Courts
- Equity Investor
-



WALDORF ASTORIA COLLECTION (HILTON CORP) PALM BEACH COUNTY, FLORIDA

- Proposed Waterfront Hotel
- 325 Hotel Rooms
- \$100,000,000
- Project Developer

Limited Service Hotel

Hotels offering mid-range or otherwise 3 to 4 star hotels service appeal the largest segment of the travelling public.

This kind of hotels does not provide elaborate service and have a adequate staffing. They also provide uniformed service , food and beverage room service, in room entertainment's and also Wi-Fi etc.



SONNENBLICK DEVELOPMENT LLC

L.A. County- El Monte Phase #1

\$39,300,000

(Construction Cost)



Mr. Robert Sonnenblick

SONNENBLICK DEVELOPMENT LLC



Tel: (310) 230-1200 • Fax: (310) 230-1263
E-mail: Bob@SonnDev.com
www.SonnDev.com

SONNENBLICK DEVELOPMENT LLC

L.A. County- El Monte Phase #2

\$52,700,000

(Construction Cost)



Mr. Robert Sonnenblick

SONNENBLICK DEVELOPMENT LLC



Tel: (310) 230-1200 • Fax: (310) 230-1263
E-mail: Bob@SonnDev.com
www.SonnDev.com

SONNENBLICK INDUSTRIES LLC GOVERNMENT ACQ. FUND I \$49,250,000



**Norwalk Government Center
12440 Imperial Highway
Norwalk, California**

A 7- Story 500,000 sq. ft. Office Complex

Anchored by:

- The County of Los Angeles**
- The State of California**
- The U.S. Govt./GSA/FBI**
- U.S. Dept. of Homeland Security**

Mr. Robert Sonnenblick

SONNENBLICK INDUSTRIES LLC

1422 Cuesta Linda Drive • Pacific Palisades, California 90272

Tel: (310) 230-1200 • Fax: (310) 230-1263

E-mail: Bob@SonnDev.com • www.SonnDev.com

SONNENBLICK DEVELOPMENT LLC

L.A. County- Rancho Park Bldg.

\$43,000,000

(Construction Cost)



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SONNENBLICK DEVELOPMENT LLC



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E-mail: Bob@SonnDev.com
www.SonnDev.com



LOEWS
SANTA MONICA BEACH HOTEL



SONNENBLICK
DEVELOPMENT



Sonnenblick Dev Co
Wyndham Miami

\$185,000,000

Sonnenblick-Goldman Corp. of California

CONTINUING TO BE THE WEST COAST'S LEADER
IN MAJOR COMMERCIAL REAL ESTATE TRANSACTIONS

\$197,000,000

The Beaudry Center
Los Angeles, California

Securitized
First Mortgage Financing

\$51,000,000

The Fairmont Hotel
San Francisco, California

First Mortgage Financing

\$100,000,000

One Waterfront Plaza
Honolulu, Hawaii

Take-out and
Construction Financing

\$63,000,000

The Meridien Hotel
San Francisco, California

First Mortgage Financing

\$72,000,000

Hawthorne Plaza
San Francisco, California

Take-out Financing

\$61,000,000

One Shoreline Drive
Corpus Christi, Texas

Construction Financing

Sonnenblick-Goldman Corp. of California

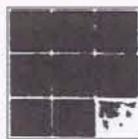
1901 Avenue of the Stars
Century City, CA 90067
(310) 277-0600

445 Park Avenue
New York, NY 10022
(212) 980-7600

Sonnenblick-Goldman Corp. of California

CONTINUING TO BE THE WEST COAST'S LEADER
IN MAJOR COMMERCIAL REAL ESTATE TRANSACTIONS

<p>\$86,000,000 Construction Financing San Francisco Centre San Francisco, California</p>	<p>\$61,000,000 First Mortgage Financing Santa Monica Beach Hotel Santa Monica, California</p>	<p>\$69,000,000 Securitized Fixed-Rate Mortgage Bonds 300 River Place Office Building Detroit, Michigan</p>	<p>SALE OF CORNERSTONE PLAZA 1990 Bundy Avenue Los Angeles, California SALE OF THE PINNACLE (Hillside-Fuller Apts.) Los Angeles, California</p>
<p>\$65,000,000 First Mortgage Financing Valley Plaza Shopping Mall Bakersfield, California</p>	<p>\$53,000,000 First Mortgage Financing Dana Point Resort Hotel Dana Point, California</p>	<p>\$50,000,000 Leasehold First Mortgage Bonds ABC Entertainment Center Century City, California</p>	<p>\$76,000,000 Construction and Permanent Financing Fairmont Hotel San Jose, California</p>
<p>\$33,250,000 and \$30,850,000 Permanent and Construction Financing Village on Canon Beverly Hills, California</p>	<p>\$70,000,000 First Mortgage Financing Hyatt on Union Square San Francisco, California</p>	<p>\$55,000,000 Leasehold First Mortgage Financing Los Angeles World Trade Center Los Angeles, California</p>	<p>\$22,500,000 Line of Credit Financing Los Angeles Lakers Los Angeles, California</p>



**Sonnenblick-Goldman
Corp. of California**

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Sonnenblick-Goldman Corp. of California

CONTINUING TO BE THE WEST COAST'S LEADER
IN MAJOR COMMERCIAL REAL ESTATE TRANSACTIONS

<p>\$165,000,000 and \$35,000,000 First Mortgage and J.V./Equity AT&T Gateway Tower Seattle, Washington</p>	<p>\$86,000,000 Leasehold First and Second Mortgage Financing Pier 39 San Francisco, California</p>	<p>\$86,250,000 and \$10,000,000 First Mortgage and J.V./Equity The Ritz-Carlton Huntington Hotel Pasadena, California</p>	<p>\$83,500,000 and \$11,000,000 Development Cost and J.V./Equity The Parkshore Club Chicago, Illinois</p>
<p>\$85,000,000 Sale of Leasehold Interest The J.W. Marriott Hotel Century City, California</p>	<p>\$54,100,000 Sale of Leasehold Interest ABC Entertainment Center Century City, California</p>	<p>\$33,000,000 Leasehold First Mortgage Financing The Hyatt Islandia Hotel San Diego, California</p>	<p>\$21,000,000 Leasehold First Mortgage Financing Broadway Market Seattle, Washington</p>
<p>\$36,200,000 First Mortgage Financing The Academy No. Hollywood, California</p>	<p>\$27,000,000 First Mortgage Financing Norwalk Square Norwalk, California</p>	<p>\$20,000,000 First Mortgage Financing Holiday Inn- Union Square Hotel San Francisco, California</p>	<p>\$24,600,000 First Mortgage Financing Hall Properties Hayward, California</p>



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SONNENBLICK-GOLDMAN COMPANY

CONTINUING TO BE THE WEST COAST'S LEADER
IN MAJOR COMMERCIAL REAL ESTATE TRANSACTIONS

<p>\$140,000,000</p> <p>Leasehold Construction Financing</p> <p>THE SAN DIEGO HYATT REGENCY HOTEL</p> <p>San Diego, CA</p>	<p>\$55,000,000</p> <p>Joint Venture Equity and Construction Financing</p> <p>111 CAPITOL MALL OFFICE BUILDING</p> <p>Sacramento, CA</p>	<p>\$40,000,000</p> <p>Leasehold Permanent Financing</p> <p>SEAPORT VILLAGE SHOPPING CENTER</p> <p>San Diego, CA</p>
<p>\$75,000,000</p> <p>Permanent First Mortgage Financing</p> <p>THE LOEWS SANTA MONICA BEACH HOTEL</p> <p>Santa Monica, CA</p>	<p>\$18,300,000</p> <p>Participating First Mortgage Financing</p> <p>THE WARNER FINANCIAL CENTER</p> <p>Woodland Hills, CA</p>	<p>\$32,000,000</p> <p>Construction/ Mini-Perm Financing</p> <p>THE PALADION SHOPPING MALL</p> <p>San Diego, CA</p>
<p>\$20,500,000</p> <p>Acquisition/Renovation Mortgage Financing</p> <p>THE SHERATON NEWPORT BEACH HOTEL</p> <p>Newport Beach, CA</p>	<p>\$21,000,000</p> <p>First Mortgage Financing</p> <p>THE SCRIPPS CORPORATE PLAZA</p> <p>San Diego, CA</p>	<p>\$18,500,000</p> <p>First Mortgage Financing</p> <p>R STREET PLAZA OFFICE BUILDING</p> <p>Sacramento, CA</p>



SONNENBLICK-GOLDMAN COMPANY

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Century City, California 90067
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Six Flags - Hotel and Water Park





GO
Six Flags®

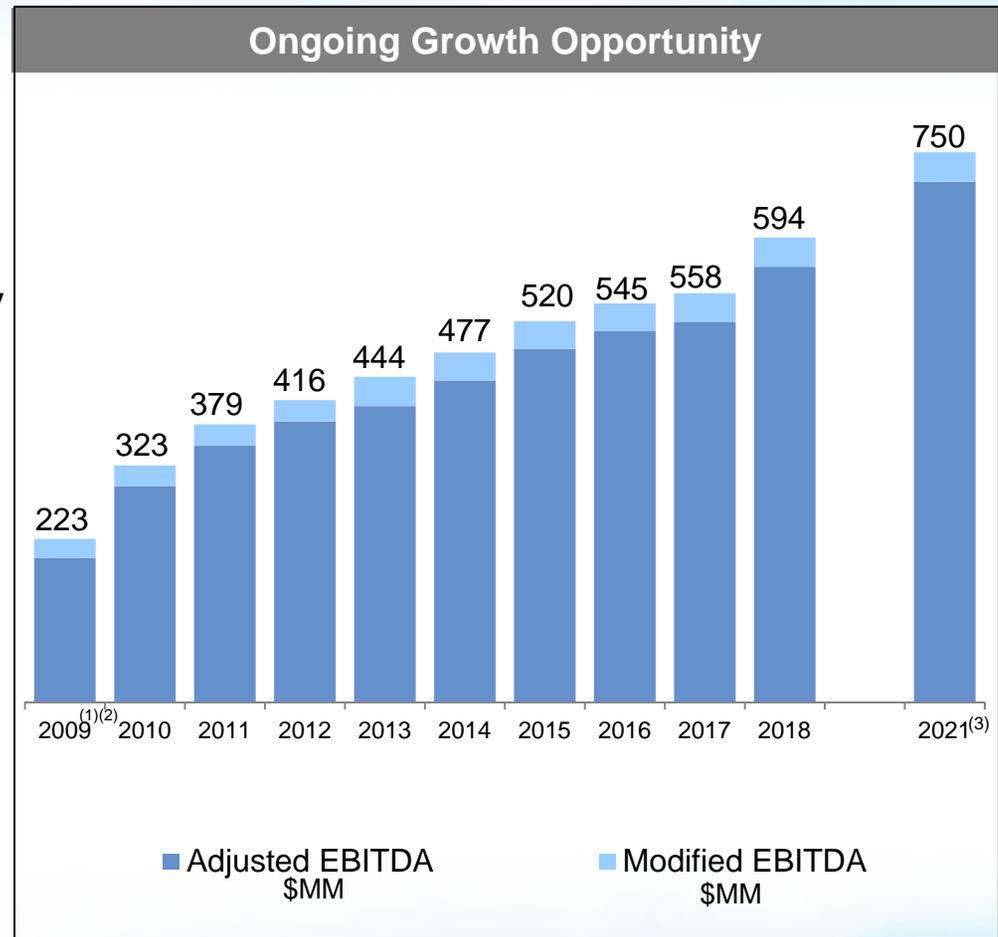
*Investor Presentation
October 2019*

Presentation is subject to safe harbor laws

- Presentation includes forward looking statements about events and financial results
- Actual events or results may be materially different
- Risks are described in the company's filings with the SEC
- Statements are made subject to "safe harbor" provisions of Private Securities Reform Act of 1995
- Full disclaimer and reconciliation of Non-GAAP financial measures to GAAP measures are at the end of this presentation

Global leader in an attractive industry

- Exceptional brand & business foundation
- Substantial growth opportunities
 - Base business
 - North American expansion strategy
 - International licensing
- Strong, recurring cash flow
 - Industry-leading EBITDA and EBITDA less CAPEX margins
 - Efficient CAPEX
- Excellent Growth and Yield stock
 - ~8% Mod. EBITDA CAGR from YE 2018 through 2021
 - >6% Dividend yield (>3x S&P 500)



⁽¹⁾ Excludes SFKK as discontinued operation

⁽²⁾ 2009 Modified EBITDA calculation includes revenue from Six Flags Great Escape Lodge and Indoor Water Park so it is consistent with future periods

⁽³⁾ Reflects late achievement of Project 750, an aspirational goal set by the company in October 2016 to achieve \$750MM of Modified EBITDA expected by 2021

Global leader in an attractive industry

Attractive industry

- Stable in a weak economy
- High barriers to entry



• Exceptional brand and business foundation

- Focused strategy
- Expansive array of entertainment & services

• Substantial growth opportunities

- Innovative products and programs
- Membership / Season Pass penetration
- Pricing and ticket yield management
- In-park revenue initiatives
- North American expansion strategy
- International agreements

• Financial Excellence

- Strong recurring revenue and cash flow
- Industry-leading margin
- Favorable capital allocation strategy
- NOL carry forward

• Employees closely aligned with shareholders



Stable industry with high barriers to entry

- Stable in normal economy – resilient in a weak one
- Compelling value relative to other forms of entertainment
 - Consumers focused on experiences
- High recurring revenue
- High barriers to entry
 - \$500-700MM investment; 3+ years development
 - Key North American markets already served



Global leader in an attractive industry

- **Attractive industry**

- Stable in a weak economy
- High barriers to entry



- **Exceptional brand and business foundation**

- Focused strategy
- Expansive array of entertainment & services



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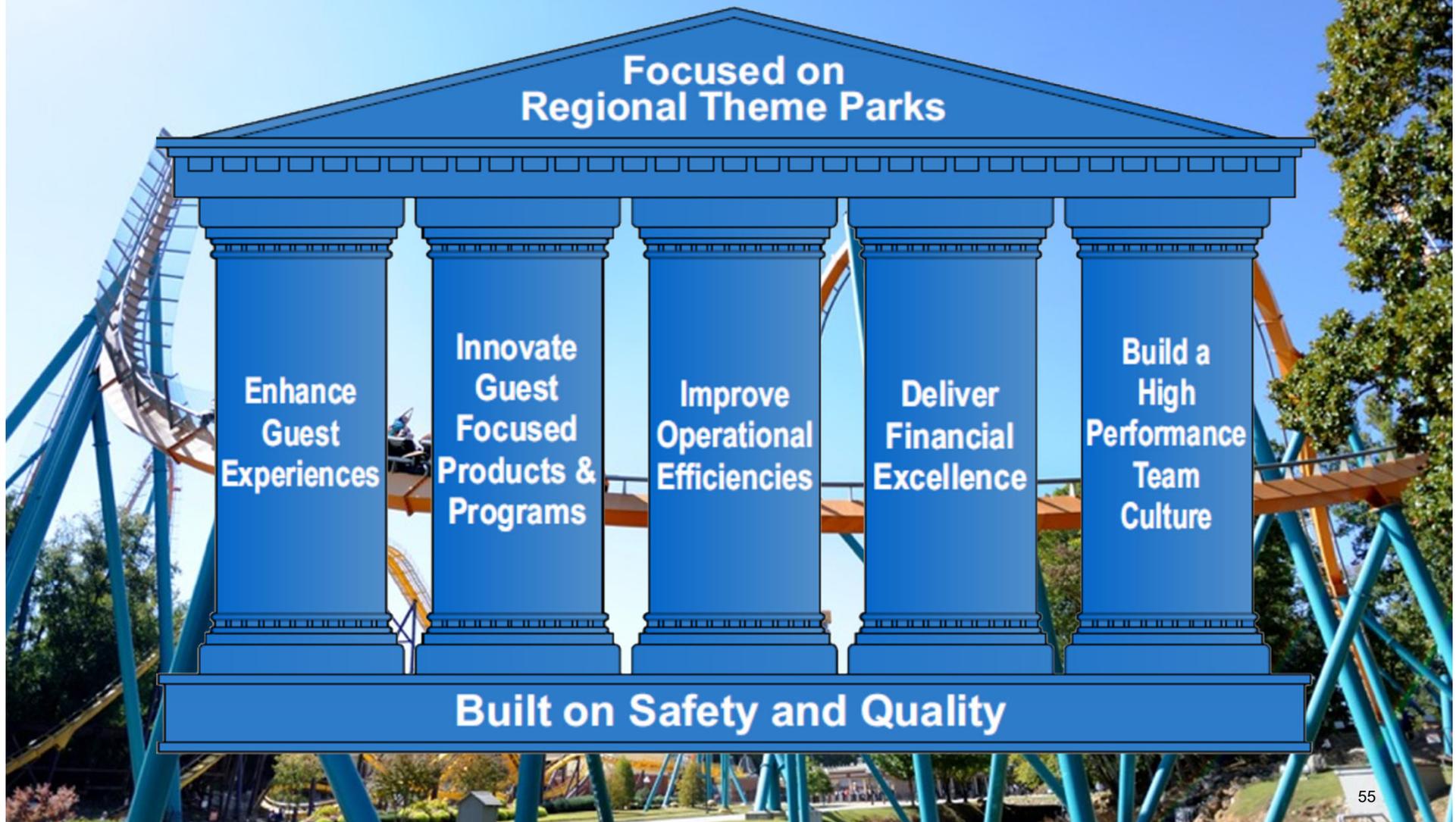
- **Financial Excellence**

- Strong recurring revenue and cash flow
- Industry-leading margin
- Favorable capital allocation strategy
- NOL carry forward

- **Employees closely aligned with shareholders**

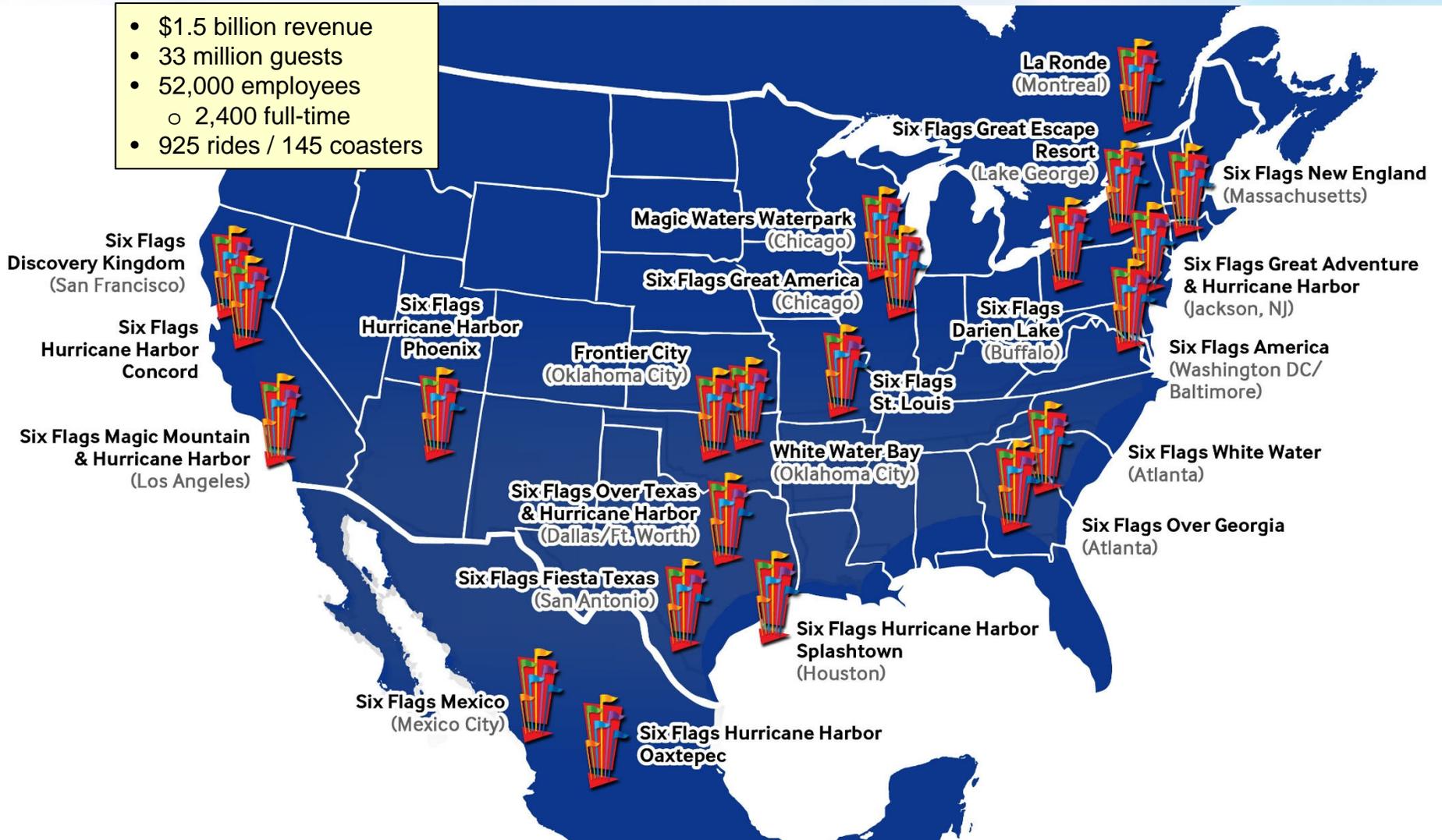


Delivering excellence in all we do



Prime locations; economic and weather diversity; limited direct competition

- \$1.5 billion revenue
- 33 million guests
- 52,000 employees
 - 2,400 full-time
- 925 rides / 145 coasters



Home to many of the **top coasters and rides**



USA Today Best New Attraction



World's tallest, fastest roller coaster
41 story drop at 91 miles per hour



Industry's Best New Attraction 2015
Immersive interactive ride



World's tallest and steepest wooden coaster



World's First 4D Free Fly Coaster
Flip head over heels



World's Tallest Swing Carousel Ride
400 ft. aerial swing ride

More than coasters... we provide **thrills and entertainment** for all ages

Waterparks



Games



Concerts & Shows



Family Coasters



Animals



Events



Global leader in an attractive industry

- **Attractive industry**
 - Stable in a weak economy
 - High barriers to entry
- **Exceptional brand and business foundation**
 - Focused strategy
 - Expansive array of entertainment & services



Substantial growth opportunities

- Innovative products and programs
- Membership / Season Pass penetration
- Pricing and ticket yield management
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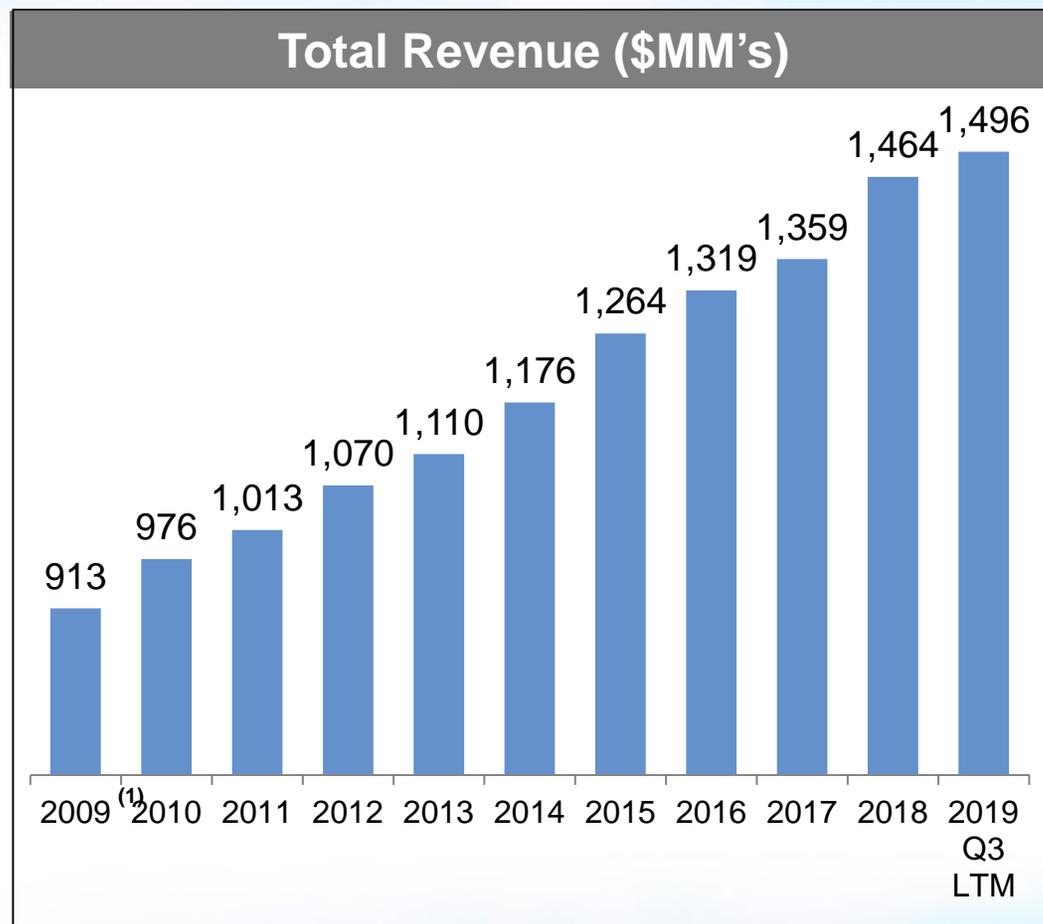


- **Financial Excellence**
 - Strong recurring revenue and cash flow
 - Industry-leading margin
 - Favorable capital allocation strategy
 - NOL carry forward
- **Employees closely aligned with shareholders**



Five strategic growth initiatives driven by industry-leading innovation

- Membership / Season Pass penetration
- Pricing and ticket yield management
- In-park revenue initiatives
- North American expansion strategy
- International agreements



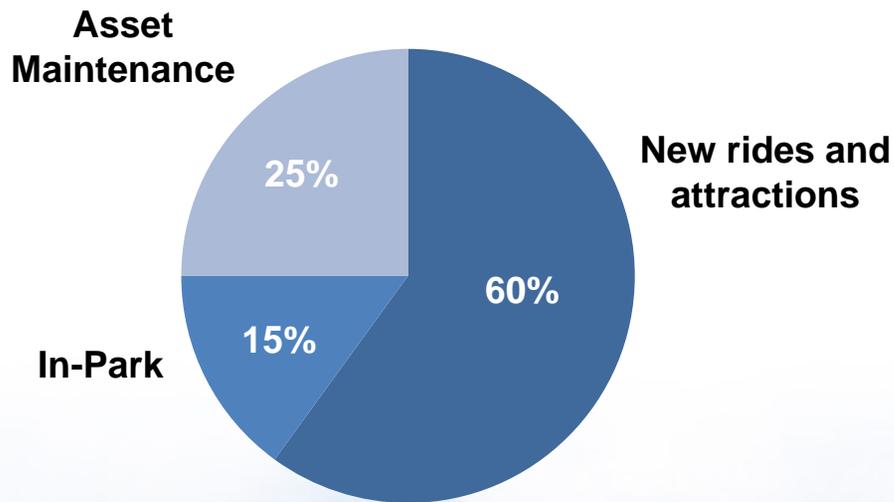
⁽¹⁾ 2009 Revenue restated to include Six Flags Great Escape Lodge and Indoor Water Park, which was consolidated for reporting purposes beginning January 1, 2010

Leading the industry in innovation

Recent Innovations

- First-of-Kind Rides
- All Season Dining
- News in Every Park, Every Year
- Virtual Reality Rides

Disciplined Capital Spending: 9% of Revenue





2020 NEW ATTRACTIONS

The map displays the following Six Flags locations and their associated new 2020 attractions:

- California:** Hurricane Harbor Concord (Six Flags Magic Mountain)
- Arizona:** Hurricane Harbor Phoenix (Six Flags Magic Mountain)
- Texas:** Hurricane Harbor City (Six Flags Over Texas), Hurricane Harbor Arlington (Six Flags Over Texas), Hurricane Harbor Splashtown (Six Flags Over Texas)
- Florida:** Six Flags Over Georgia (Six Flags Over Georgia)
- Illinois:** Six Flags St. Louis (Six Flags St. Louis)
- Indiana:** Six Flags White Water (Six Flags White Water)
- Michigan:** Six Flags Great Escape Resort (Six Flags Great Escape Resort)
- Minnesota:** Six Flags New England (Six Flags New England)
- Missouri:** Six Flags America (Six Flags America)
- North Carolina:** Six Flags Darien Lake (Six Flags Darien Lake)
- Ohio:** Six Flags Great Adventure (Six Flags Great Adventure)
- South Carolina:** Six Flags America (Six Flags America)
- Virginia:** Six Flags America (Six Flags America)
- Washington:** Hurricane Harbor Rockford (Six Flags Discovery Kingdom)
- Wisconsin:** Hurricane Harbor City (Six Flags Over Texas)
- Other:** Six Flags Mexico (Six Flags Mexico)

Additional attractions shown in the collage include: Tsunami Surge Water Coaster, Tidal Wave, Wahoo Wave, Outlaw, Vipere, Supergirl Sky Flyer, Jersey Devil Coaster, Harley Quinn Spinsanity, Python Plunge, Poison Ivy Twix Twister, Catwoman Whip, Banzai Pipeline, Aquaman Power Wave, Dare Devil Dive, Crazi Family, Paradise Island, Six Flags Fright Fest Snickers Expanded!, and Hurricane Harbor Oaxtepec.

SIX FLAGS: TM & © 2019 Six Flags Theme Parks Inc. ©2019 Mars or Affiliates. JUSTICE LEAGUE and all related characters and elements © & TM DC Comics. (\$19)



Membership & Season Pass Penetration



Growing Active Base of members and season pass holders – up 2% as of September 30, 2019

- Generate more annual revenue and cash flow than single day visitors
- Build recurring revenue
- Visit during off-peak periods
- Provide weather hedge
- Only about 40% of our unique visitors have a pass



Premium-tiered Membership Program

Grows contractual, recurring revenue stream

- Offers up to 50 exclusive benefits
- Creates Members, our most loyal and profitable guests
 - Higher retention rates
 - 3-4x lifetime revenue of Season Pass holder
- Provides three revenue sources
 - Higher annual prices w/auto-renewal
 - Easy upgrades / add-ons
 - Member Dining
 - Member THE FLASH Pass
 - Incremental in-park spending

Gold Plus Membership	Platinum Membership	Diamond Membership	Diamond Elite Membership
GOLD PLUS MEMBERSHIP	PLATINUM MEMBERSHIP	DIAMOND MEMBERSHIP	DIAMOND ELITE MEMBERSHIP
AS LOW AS \$7.85 PER MONTH	AS LOW AS \$9.85 PER MONTH	AS LOW AS \$12.85 PER MONTH	AS LOW AS \$18.85 PER MONTH
<i>Every Member gets ALL of the benefits of a Gold Season Pass. Gold Plus Members also get:</i>	<i>In addition to all of the Gold Season Pass and Gold Plus Membership benefits, you'll also receive:</i>	<i>You'll get all Gold Season Pass, Gold Plus and Platinum Membership benefits PLUS the following:</i>	<i>You'll get all Gold Season Pass, Gold Plus, Platinum and Diamond Membership benefits PLUS:</i>
Unlimited Visits all year!	Unlimited Soft Drinks Every Visit	Diamond Preferred Parking Every Visit	Diamond Priority Preferred Parking Every Visit
Gold Plus Season Parking on Every Pass	Save up to 25% off on Almost Everything	Skip One Major Ride Line Every Visit	Skip Two Major Ride Lines Every Visit
Save up to 20% off on Almost Everything	Save 15% on most Food & Beverages	Save up to 35% off on Almost Everything	Save up to 50% off on Almost Everything
Priority Member Entry via Member Gate	One-Time Diamond Preferred Parking	Exclusive Waterpark Diamond Area Access	Fright Fest Wristband and Holiday Treats
	Premium Free Upgrades and Bonuses	Incredible Diamond Upgrades and Surprises	Exclusive Waterpark Diamond Area Access
		Unlimited Soft Drinks Every Visit	Exclusive Diamond Elite Seating at Shows
			Our Very Best Bonuses, Upgrades and Surprises
			Unlimited Soft Drinks Every Visit

MEMBER DINING

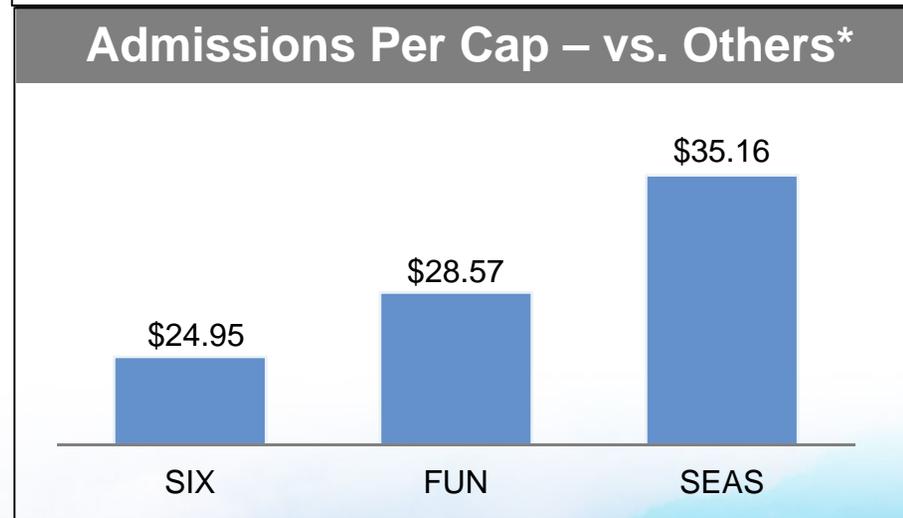
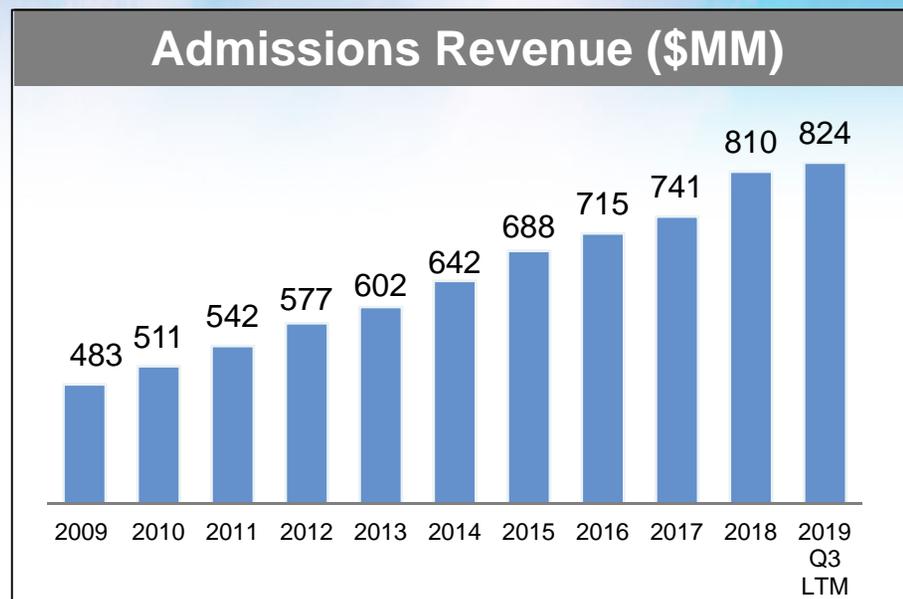
Never pay at the park for food as long as you're a Member! Numerous restaurants, entrées and snacks to choose from. All plans are valid at EVERY Six Flags park you visit.

ADD DINING WHEN YOU SIGN UP FOR MEMBERSHIP AND SAVE UP TO 50%

GOLD PLUS: 20% OFF
PLATINUM: 25% OFF
DIAMOND: 35% OFF
DIAMOND ELITE: 50% OFF

A multi-year approach to improve ticket yields

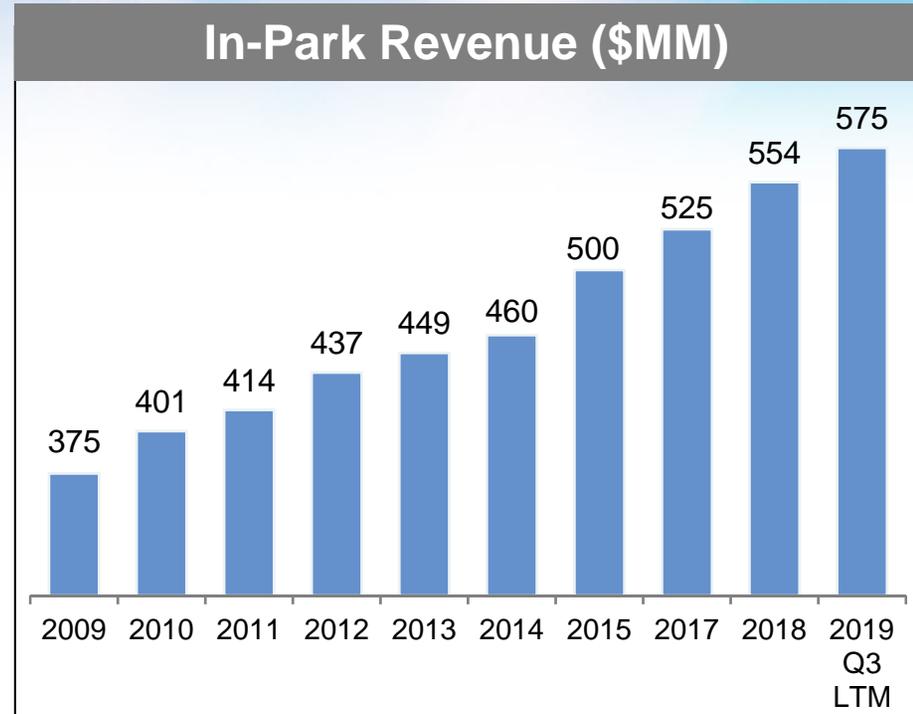
- Increase ticket prices
- Drive membership penetration
- Execute dynamic pricing
- Continue to raise guests' value-for-the-money ratings
- Close / surpass pricing gap vs. others
 - SIX parks serve top 10 US markets



*SIX LTM 9/30/19; FUN and SEAS LTM 6/30/19

Highly profitable businesses within the business

- More than 2,500 locations
- New products and programs
 - All Season Dining Pass
 - Broader offerings
 - Enhanced venues



PAY ONCE, EAT ALL YEAR!
LUNCH, DINNER & SNACK EVERY VISIT

GO PREMIUM TODAY!

CONVENIENCE
With every visit to the park get lunch, dinner and snack loaded directly on your season pass card.

VARIETY
Many of your favorite items to choose from.

VALUE
FREE 2017 Sport Bottle
DRINK FREE
ALL SEASON LONG!
20% OFF SHOPPING
ALL SEASON LONG!

HURRY UP!
OFFER ENDS MARCH 31st
while supplies last

... Add it at the register and start enjoying your benefits today!
MUST HAVE A VALID MEMBERSHIP OR SEASON PASS TO USE



Seeking to own or operate parks in markets adjacent to our theme parks

- Largest waterpark operator in North America
- Added 8 parks in two years
- Dozens of potential targets
- Strategy will:
 - Expand active pass reach to adjacent markets
 - Create demand for membership and season passes by providing additional value
 - Leverage significant active pass base to sell combo upgrades





Long-term strategy to license brand outside North America

- Twelve parks signed in China and Saudi Arabia
- Strong global brand recognition – seeking additional partners
- Growing middle class, disposable income, and demand for entertainment
- Zero capital investment
- Fees related to design & development, licensing, and management services
 - \$5-10MM EBITDA per park per year pre-opening
 - \$10-20MM EBITDA per park per year post-opening
 - Small parks earn \$2-4MM pre-opening and \$4-6MM post-opening

Global leader in an attractive industry

- **Attractive industry**
 - Stable in a weak economy
 - High barriers to entry
- **Exceptional brand and business foundation**
 - Focused strategy
 - Expansive array of entertainment & services
- **Substantial growth opportunities**
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Financial Excellence

- Strong recurring revenue and cash flow
- Industry-leading margin
- Favorable capital allocation strategy
- NOL carry forward



- **Employees closely aligned with shareholders**

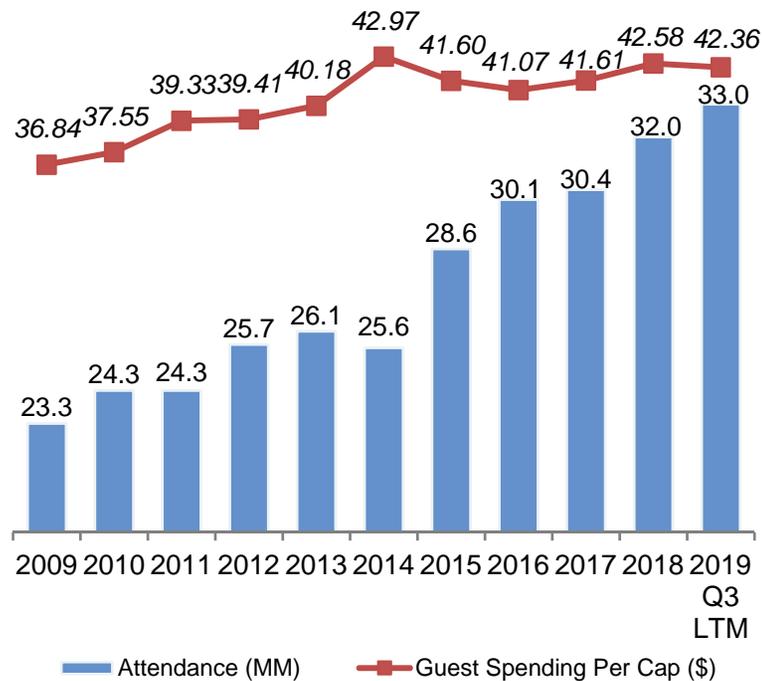




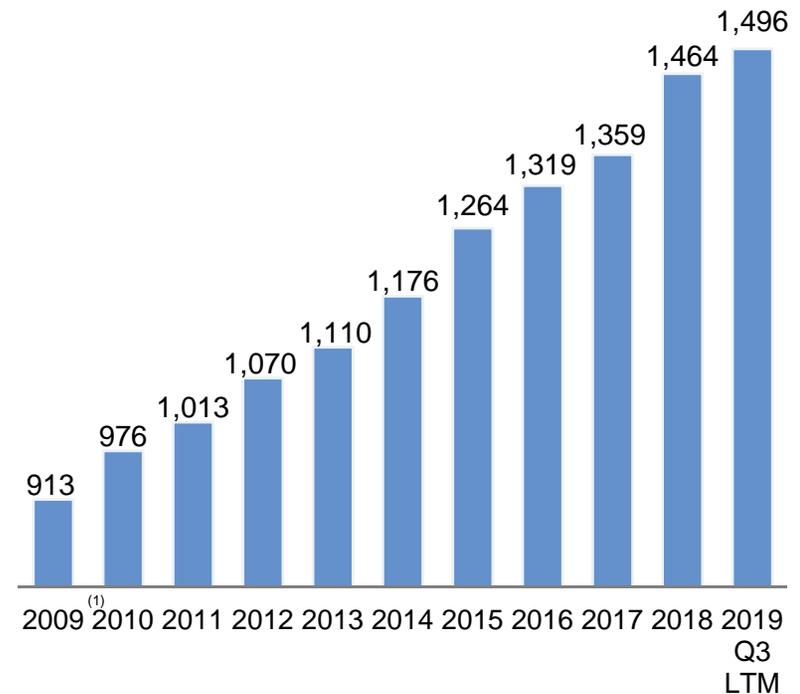
Strong Recurring Revenue

Higher ticket pricing and strong attendance fuel revenue

Attendance / Guest Spending Per Capita



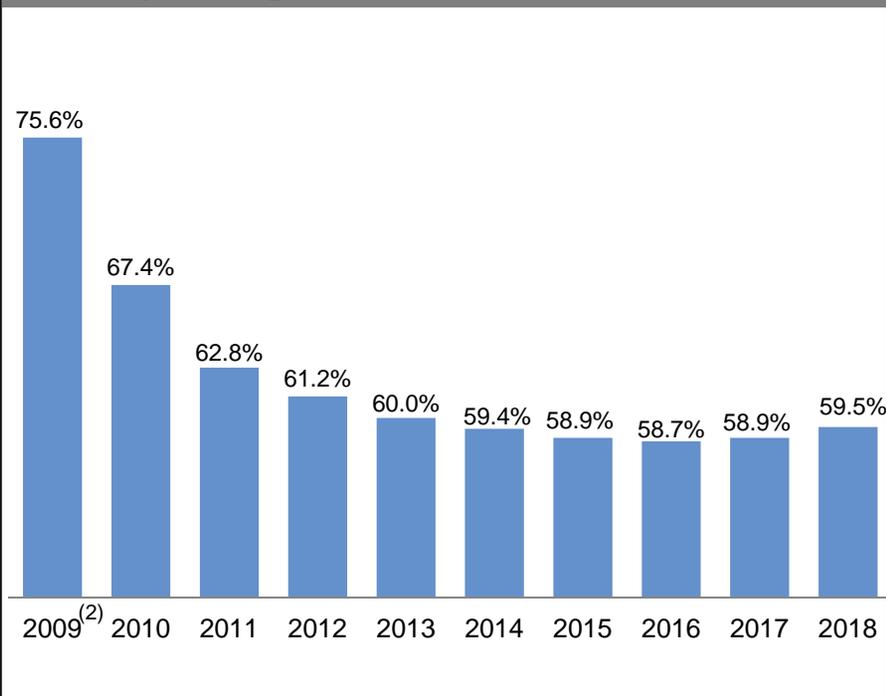
Revenue (\$MM)



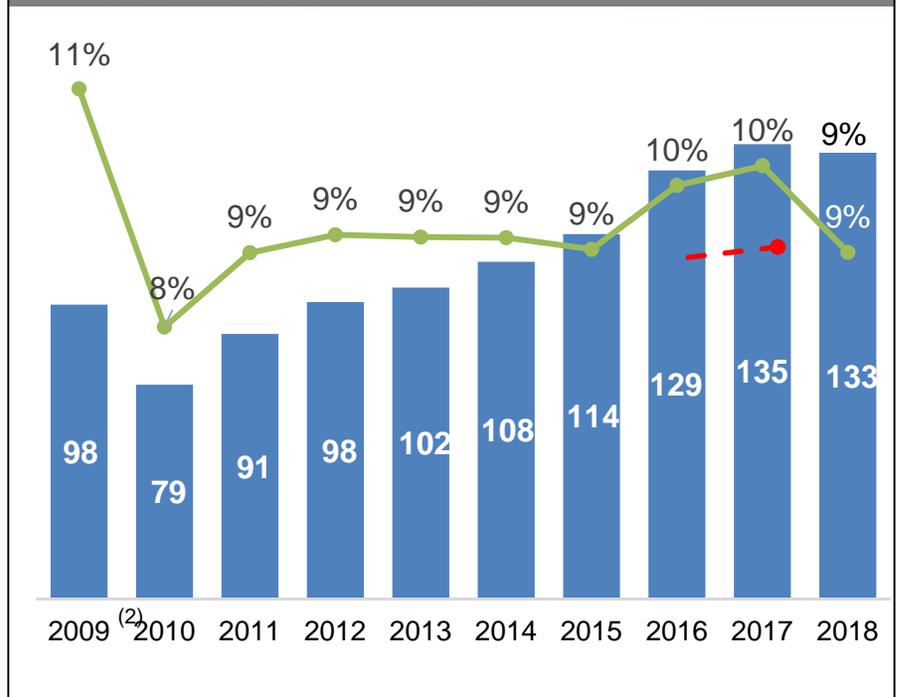
⁽¹⁾2009 Revenue restated to include Six Flags Great Escape Lodge and Indoor Water Park, which was consolidated for reporting purposes beginning January 1, 2010

Continued focus on costs and effective management of capital investment

Cash Operating Costs⁽¹⁾ as a % of Revenue



Cash Capex as a % of Revenue



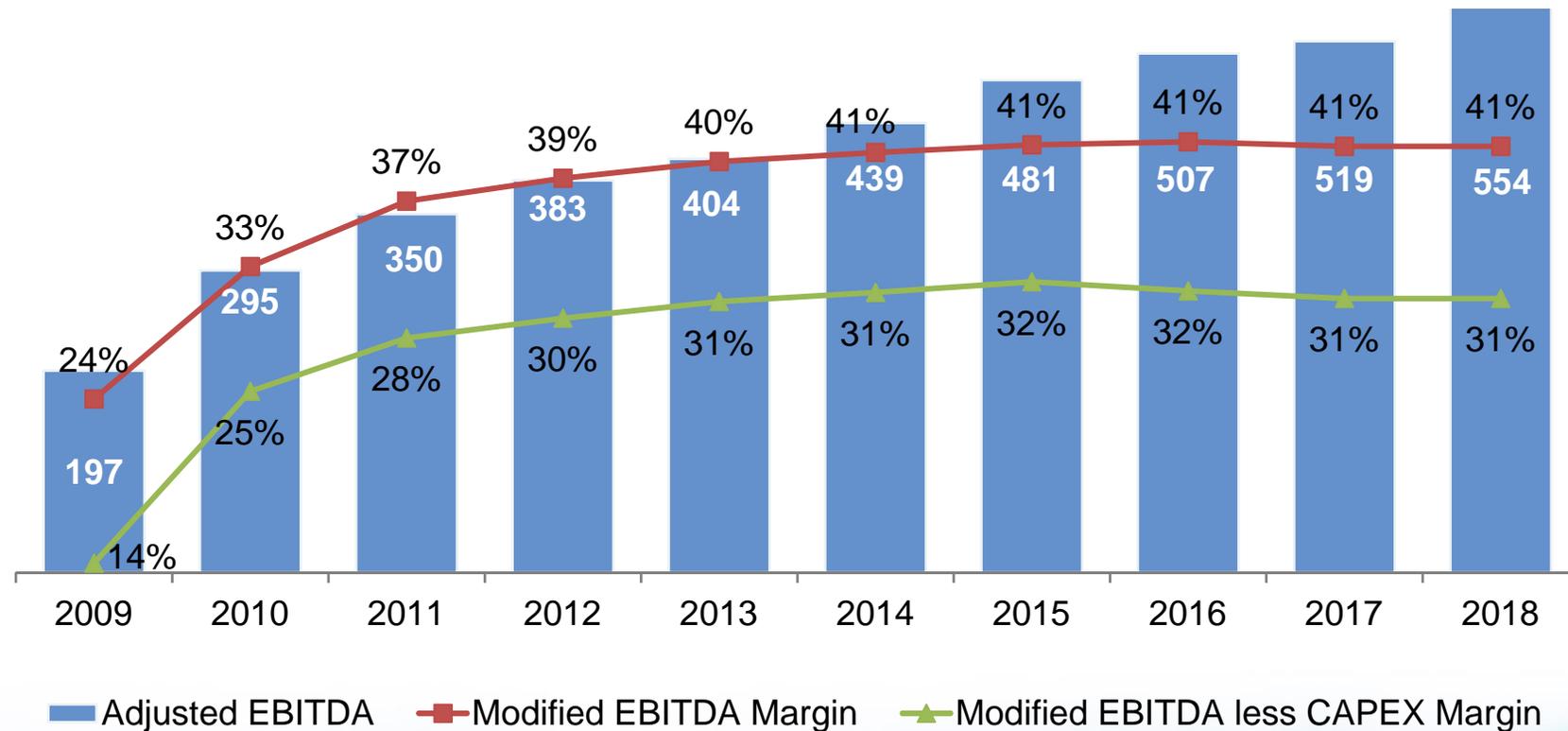
■ Capital Spend —●— % of Revenue
- - - % excludes investment in Mexico waterpark

⁽¹⁾ Includes Cash Operating Expenses, SG&A and Cost of Goods Sold

⁽²⁾ 2009 adjusted to include Six Flags Great Escape Lodge and Indoor Water Park, which was consolidated for reporting purposes beginning January 1, 2010

Growing earnings with industry-leading margin

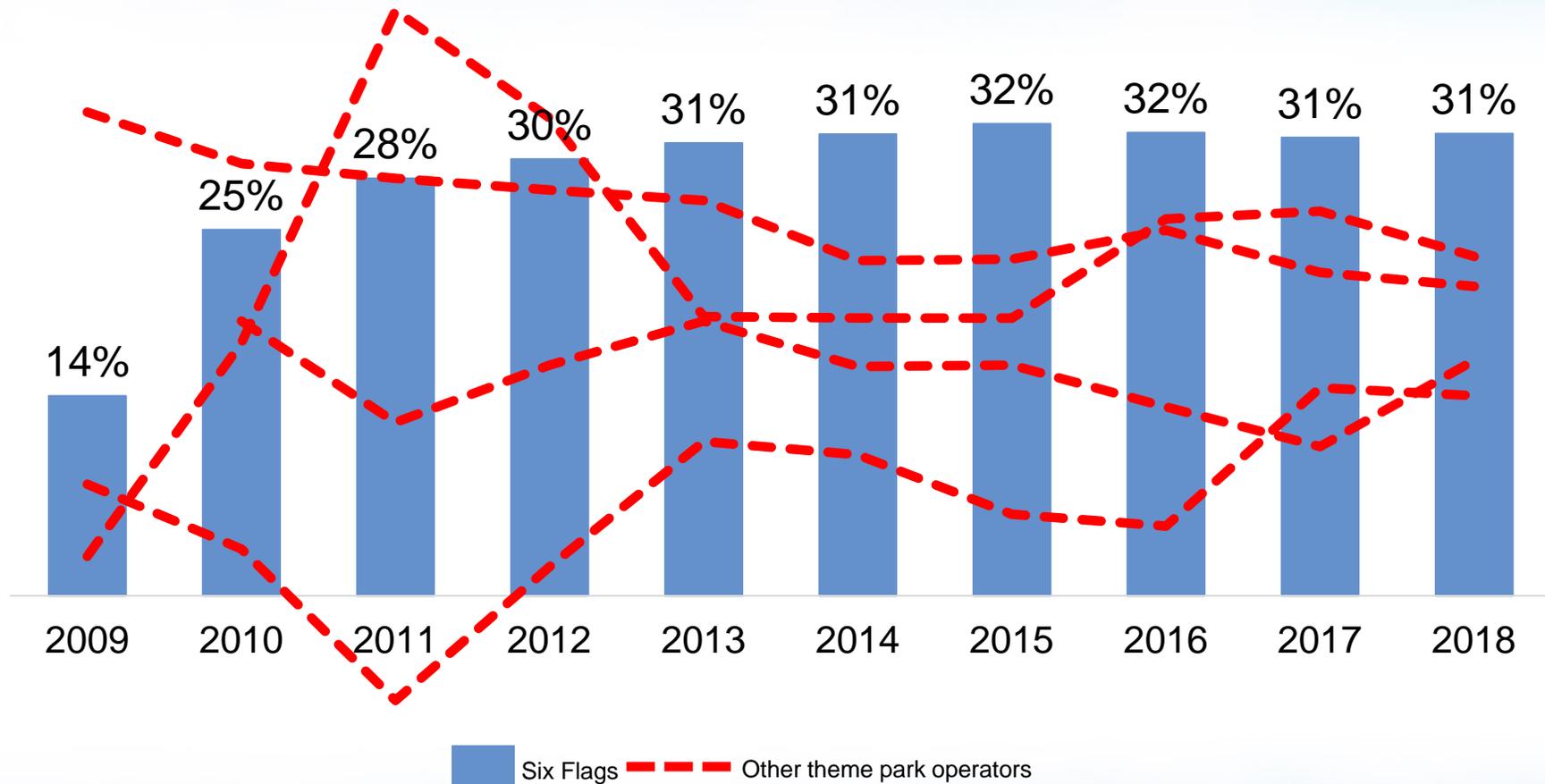
Adjusted EBITDA (\$MM's)⁽¹⁾ and Modified EBITDA Margin⁽¹⁾⁽²⁾



⁽¹⁾ Excludes SFKK as discontinued operation

⁽²⁾ 2009 Modified EBITDA Margin calculation includes revenue from Six Flags Great Escape Lodge and Indoor Water Park so it is consistent with future periods

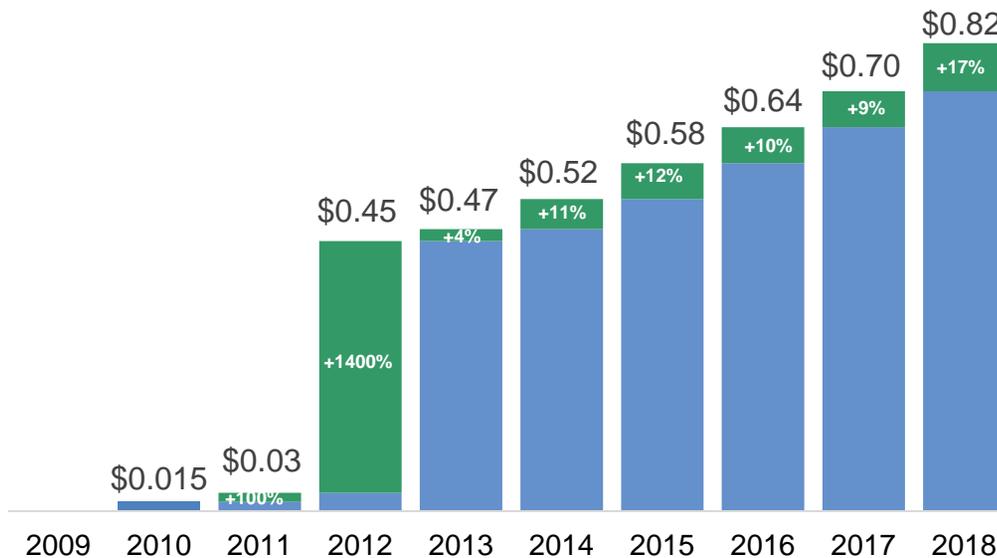
Industry-high Modified EBITDA less CAPEX margin



Eight consecutive years of dividend increases; excellent dividend yield >6%

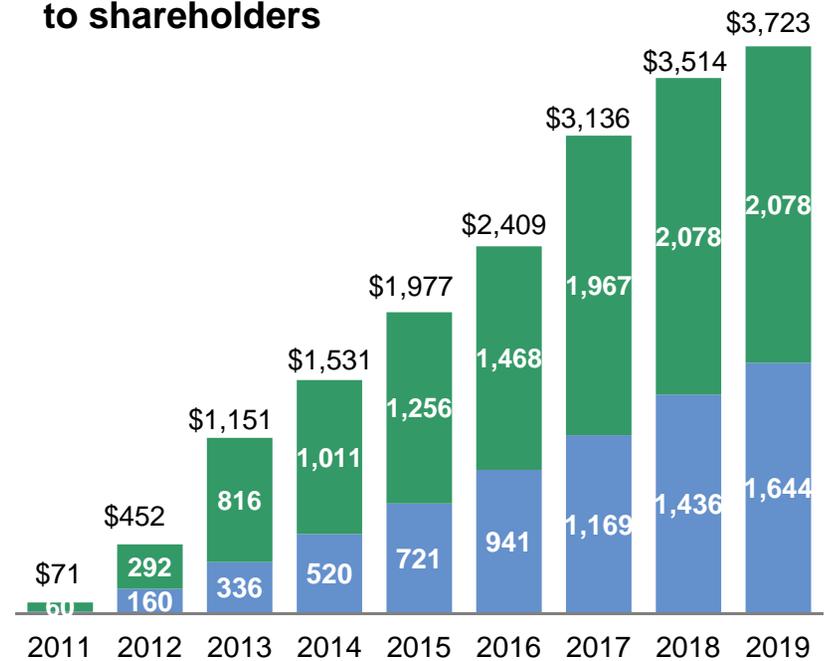
Quarterly Dividend

\$3.28 annualized dividend
Yield >3X S&P 500



Cumulative Distributions (\$ Millions)

>\$3.7 Billion excess cash returned to shareholders



	Dividend Yield									
SIX	0.4%	0.6%	5.9%	5.1%	4.8%	4.8%	4.2%	4.2%	5.9%	(1)
S&P500	1.8%	2.1%	2.2%	1.9%	1.9%	2.1%	2.0%	2.0%	1.9%	

■ Dividends ■ Share Repurchases

(1) Dividend yield as of December 31, 2018

Global leader in an attractive industry

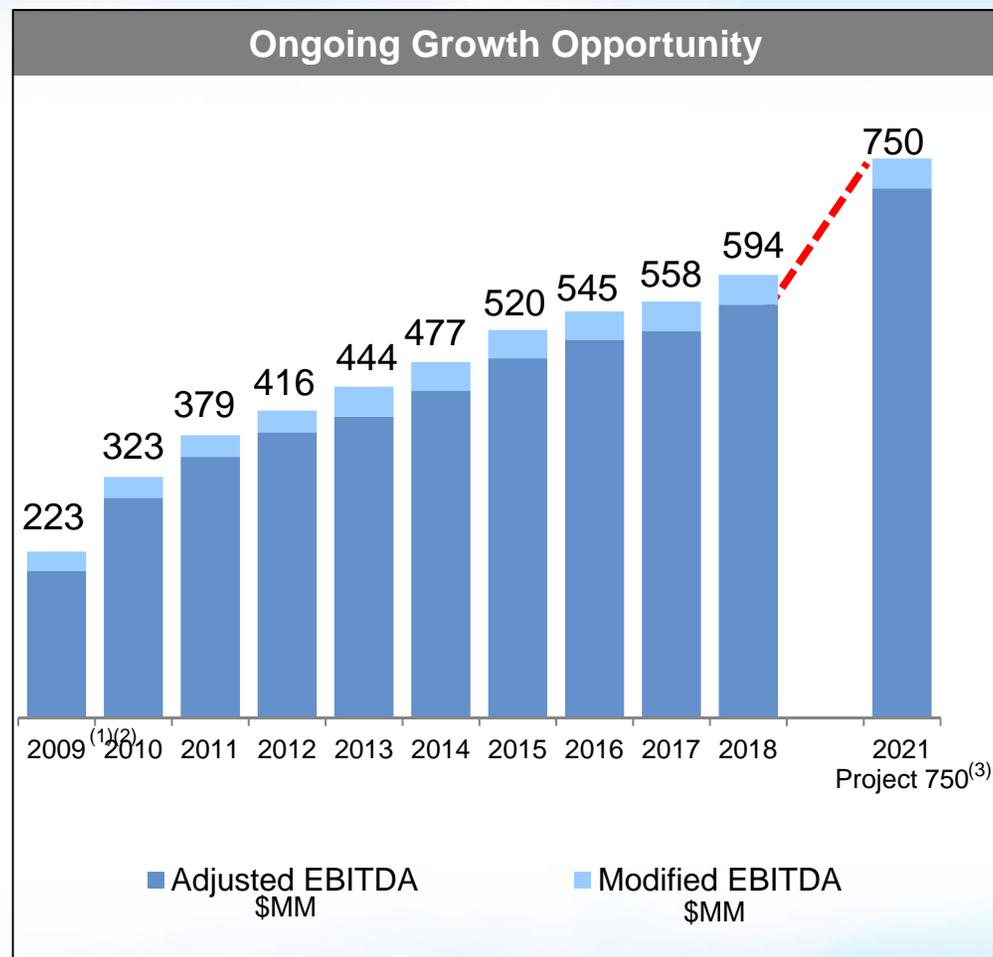
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 - Favorable capital allocation strategy
 - NOL carry forward

Employees closely aligned with shareholders



Aspirational goal to deliver \$750MM of Modified EBITDA by 2021

- Will create significant shareholder value
- Represents ~8% Adjusted EBITDA CAGR from YE 2018
- Closely aligns employees with shareholders



⁽¹⁾ Excludes SFKK as discontinued operation

⁽²⁾ 2009 Modified EBITDA calculation includes revenue from Six Flags Great Escape Lodge and Indoor Water Park so it is consistent with future periods

⁽³⁾ Reflects late achievement of Project 750, an aspirational goal set by the company in October 2016 to achieve \$750MM of Modified EBITDA expected by 2021

***Sufficient cash flow to maintain and grow dividend annually;
Tax reform added \$40-50MM to the bottom line***

	<u>2018</u>	<u>Project 750⁽¹⁾</u>
Modified EBITDA	594	750
Minority Interest	(40)	(40-45)
Adjusted EBITDA	554	705 – 710
CAPEX	(133)	(135 – 150)
Cash Interest	(98)	(100 – 110)
Cash Taxes	(30)	(60 - 80)
Adjusted Free Cash Flow	293	365 - 415

- Minimal federal cash taxes at least through 2020
- Ongoing assessment of tax planning strategies

⁽¹⁾Reflects late achievement of Project 750, an aspirational goal set by the company in October 2016 to achieve \$750MM of Modified EBITDA expected by 2021



Delivering shareholder value

- + Delighting our guests
- + Building brand equity
- + Leveraging brand outside of North America
- + Maximizing revenue and cash flow
- + Generating strong returns for our shareholders





Reconciliation of Non-GAAP Measures

(\$MM; Share amounts in 000's)	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019 Q3 LTM
Net (Loss) Income	(196)	634	13	403	157	114	193	157	313	316	310
Loss (Income) from Discontinued Operations	34	(9)	(1)	(7)	(1)	(1)	-	-	-	-	-
Income Tax Expense (Benefit)	3	124	(8)	(184)	48	47	70	77	16	96	107
Reorganization Items, Net	102	(812)	2	2	-	-	-	-	-	-	-
Restructure Costs	-	37	25	-	-	-	-	-	-	-	-
Other Expense, Net	17	-	-	1	1	-	-	2	-	4	1
Loss on Debt Extinguishment	-	18	47	1	1	-	7	3	37	-	6
Equity in (Income) Loss or (Gain) on Sale of Investee	(4)	1	3	(65)	-	(10)	-	-	-	-	(1)
Interest Expense, Net	109	128	65	47	74	73	76	82	99	107	113
Loss on Disposal of Assets	11	14	8	8	9	6	10	2	4	2	2
Amortization	1	12	18	16	14	3	3	3	2	2	2
Depreciation	143	152	151	132	114	105	105	104	109	113	116
Stock-based Compensation	3	19	54	63	27	140	56	116	(23)	(47)	(66)
Impact of Fesh Start Valuaion Adjustments	-	5	2	1	1	-	-	-	-	-	-
Modified EBITDA	223	323	379	416	444	477	520	545	558	594	592
Third Part Interest in EBITDA of Certain Operations	(26)	(28)	(28)	(34)	(40)	(38)	(38)	(38)	(39)	(40)	(41)
Adjusted EBITDA	197	295	350	383	404	439	481	507	519	554	551
Adjusted EBITDA	197	295	350	383	404	439	481	507	519	554	551
Capital Expenditures (net of insurance proceeds)	(98)	(79)	(91)	(98)	(102)	(108)	(114)	(129)	(135)	(133)	(143)
Cash Interest	(86)	(79)	(58)	(42)	(51)	(67)	(71)	(69)	(95)	(98)	(109)
Cash Taxes	(5)	(8)	(8)	(9)	(14)	(17)	(15)	(17)	(14)	(30)	(30)
Adjusted Free Cash Flow	8	128	193	233	237	248	282	292	275	293	269
Shares Outstanding (weighted average, basic)	109,556	110,600	110,150	107,684	96,940	94,477	93,580	92,349	86,802	84,100	84,242

⁽¹⁾ 2009 includes the results of Six Flags Great Escape Lodge and Indoor Water Park so it is consistent with future periods

⁽²⁾ Reflects June 2011 and June 2013 stock splits

Note About Forward-Looking Information

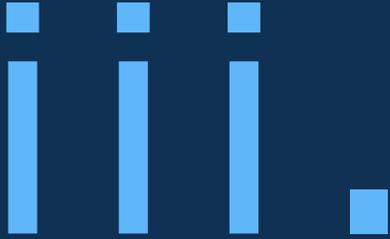
- The information contained in this presentation, other than purely historical information, contains "forward-looking statements" within the meaning of Section 27A of the Securities Act and Section 21E of the Exchange Act. These statements may involve risks and uncertainties that could cause actual results to differ materially from those described in such statements.
- We caution you that you should not rely on any of these forward-looking statements as statements of historical fact or as guarantees or assurances of future performance. These risks and uncertainties include, but are not limited to, statements we make regarding: (i) the adequacy of cash flows from operations, available cash and available amounts under our credit facilities to meet our future liquidity needs, (ii) our ability to roll out our capital enhancements and planned initiatives in a timely and cost effective manner, (iii) our ability to improve operating results by implementing strategic cost reductions, and organizational and personnel changes without adversely affecting our business, (iv) our dividend policy and ability to pay dividends on our common stock, (v) the effect of and cost and timing of compliance with newly enacted laws, regulations and accounting policies, (vi) our ability to realize future growth and execute and deliver on our strategic initiatives, (vii) our expectations regarding uncertain tax positions, (viii) our expectations regarding our deferred revenue growth, (ix) our operations and results of operations, and (x) the risk factors or uncertainties listed from time to time in the company's filings with the Securities and Exchange Commission ("SEC"). Additional important factors that could cause actual results to differ materially from those in the forward-looking statements include regional, national or global political, economic, business, competitive, market and regulatory conditions and include, but not limited to, the following: (i) factors impacting attendance, such as local conditions, natural disasters, contagious diseases, events, disturbances and terrorist activities; (ii) accidents occurring at our parks or other parks in the industry and adverse publicity related thereto; (iii) adverse weather conditions; (iv) general financial and credit market conditions; (v) economic conditions; (vi) competition with other theme parks and other entertainment alternatives; and (vii) pending, threatened or future legal proceedings and the significant expenses associated with litigation.
- Reference is made to a more complete discussion of forward-looking statements and applicable risks contained under the caption "Cautionary Note Regarding Forward-Looking Statements" and "Risk Factors" in our Annual Report on Form 10-K for the year ended December 31, 2017 that is available on our website at www.investors.sixflags.com.
- Any forward-looking statement made by us in this presentation, or on our behalf by our directors, officers or employees related to the information contained herein, speaks only as of the date of this presentation. Factors or events that could cause our actual results to differ may emerge from time to time, and it is not possible for us to predict all of them. We do not intend to update any forward-looking statement, whether as a result of new information, future developments or otherwise.

Non-GAAP Financial Measures

- The non-GAAP financial measures defined herein are used throughout this presentation and a reconciliation to GAAP has been included in the appendix of this presentation. We believe that these non-GAAP financial measures provide important and useful information for investors to facilitate a comparison of our operating performance on a consistent basis from period to period and make it easier to compare our results with those of other companies in our industry. We use these measures for internal planning and forecasting purposes, to evaluate ongoing operations and our performance generally, and in our annual and long-term incentive plans. By providing these measures, we provide our investors with the ability to review our performance in the same manner as our management.
- However, because these non-GAAP financial measures are not determined in accordance with GAAP, they are susceptible to varying calculations, and not all companies calculate these measures in the same manner. As a result, these non-GAAP financial measures as presented may not be directly comparable to a similarly titled non-GAAP financial measure presented by another company. These non-GAAP financial measures are presented as supplemental information and not as alternatives to any GAAP financial measures. When reviewing a non-GAAP financial measure, we encourage our investors to fully review and consider the related reconciliation as detailed below.
- Modified EBITDA, a non-GAAP measure, is defined as our consolidated EBITDA (loss) from continuing operations: excluding the cumulative effect of changes in accounting principles, discontinued operations gains or losses, income tax expense or benefit, restructure costs or recoveries, reorganization items (net), other income or expense, gain or loss on early extinguishment of debt, equity in income or loss of investees, interest expense (net), gain or loss on disposal of assets, gain or loss on the sale of investees, amortization, depreciation, stock-based compensation, and fresh start accounting valuation adjustments. Modified EBITDA as defined herein may differ from similarly titled measures presented by other companies. Management uses non-GAAP measures for budgeting purposes, measuring actual results, allocating resources and in determining employee incentive compensation. We believe that Modified EBITDA provides relevant and useful information for investors because it assists in comparing our operating performance on a consistent basis, makes it easier to compare our results with those of other companies in our industry as it most closely ties our performance to that of our competitors from a park level perspective and allows investors to review performance in the same manner as our management.
- Adjusted EBITDA, a non-GAAP measure, is defined as Modified EBITDA minus the interests of third parties in the Adjusted EBITDA of properties that are less than wholly owned (consisting of Six Flags Over Georgia, Six Flags White Water Atlanta and Six Flags Over Texas). Adjusted EBITDA is approximately equal to "Parent Consolidated Adjusted EBITDA" as defined in our secured credit agreement, except that Parent Consolidated Adjusted EBITDA excludes Adjusted EBITDA from equity investees that is not distributed to us in cash on a net basis and has limitations on the amounts of certain expenses that are excluded from the calculation. Adjusted EBITDA as defined herein may differ from similarly titled measures presented by other companies. Our board of directors and management use Adjusted EBITDA to measure our performance and our current management incentive compensation plans are based largely on Adjusted EBITDA. We believe that Adjusted EBITDA is frequently used by all our sell-side analysts and most investors as their primary measure of our performance in the evaluation of companies in our industry. In addition, the instruments governing our indebtedness use Adjusted EBITDA to measure our compliance with certain covenants and, in certain circumstances, our ability to make certain borrowings. Adjusted EBITDA, as computed by us, may not be comparable to similar metrics used by other companies in our industry.
- Management uses Adjusted Free Cash Flow, a non-GAAP measure, in its financial and operational decision making processes, for internal reporting, and as part of its forecasting and budgeting processes as it provides additional transparency of our operations. Management believes that Adjusted Free Cash Flow is useful information to investors regarding the amount of cash that we estimate that we will generate from operations over a certain period. Management believes the presentation of this measure will enhance the investors' ability to analyze trends in the business and evaluate the Company's underlying performance relative to other companies in the industry. A reconciliation from net cash provided by operating activities to Adjusted Free Cash Flow is presented in the table above. Adjusted Free Cash Flow as presented herein may differ from similarly titled measures presented by other companies.
- Cash taxes represents statutory taxes paid, primarily driven by Mexico and state level obligations. Based on our current federal net operating loss carryforwards, we believe we will continue to pay minimal federal cash taxes for the next two years.
- Cash Operating Expenses include cost of goods sold, SG&A and operating expenses excluding, depreciation, amortization, stock-based compensation, and gain/loss on disposal of assets.

Market and Industry Data

- This presentation includes market, industry and competitor data, forecasts and valuations that have been obtained from independent consultant reports, publicly available information, various industry publications and other published industry sources. Although we believe these sources are reliable, we have not independently verified the information and cannot make any representation as to the accuracy or completeness of such information.



Aquatic Development Group - ADG





Ken Ellis Experience

CEO, Aquatic Development Group



Ken Ellis

Aquatic Development Group, CEO
Camelback resort, Co-Owner



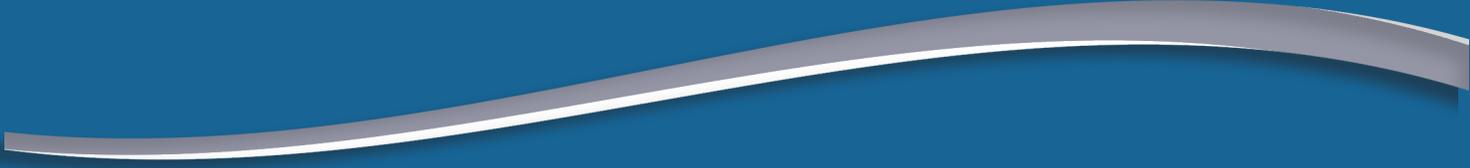
In addition to CEO of Aquatic Development Group, I have had the fortunate opportunity to expand my role and, for 15 years, act as the co-owner and operator of **Camelback Resort (PA)**. Through the partnership of my two organizations, I oversaw the design, development and operations of the \$163 million Camelback Lodge & Aquatopia Indoor Waterpark that opened in the spring of 2015, as well as multiple renovations and expansions of the outdoor water and adventure parks.

During my tenure with Camelback we also developed additional properties. Once again in conjunction with ADG, we developed, designed and built **H2OBX Waterpark** in the Outer Banks region of NC, as well as **The Kartrite Resort & Indoor Waterpark** located in Upstate NY.

Together, these three properties represent some of the most ground-breaking, world class amenities and attractions found anywhere in the resort waterpark industry and I am extremely proud to be able to associate my name and ADG with their creation. Currently, I co-own and operate H2OBX Waterpark, having recently divested my interest in both Camelback and The Kartrite.



FEATURED PROJECTS



Camelback Lodge

Page 1

The Kartrite

Page 17



AQUATOPIA INDOOR WATERPARK

TANNERSVILLE, PA

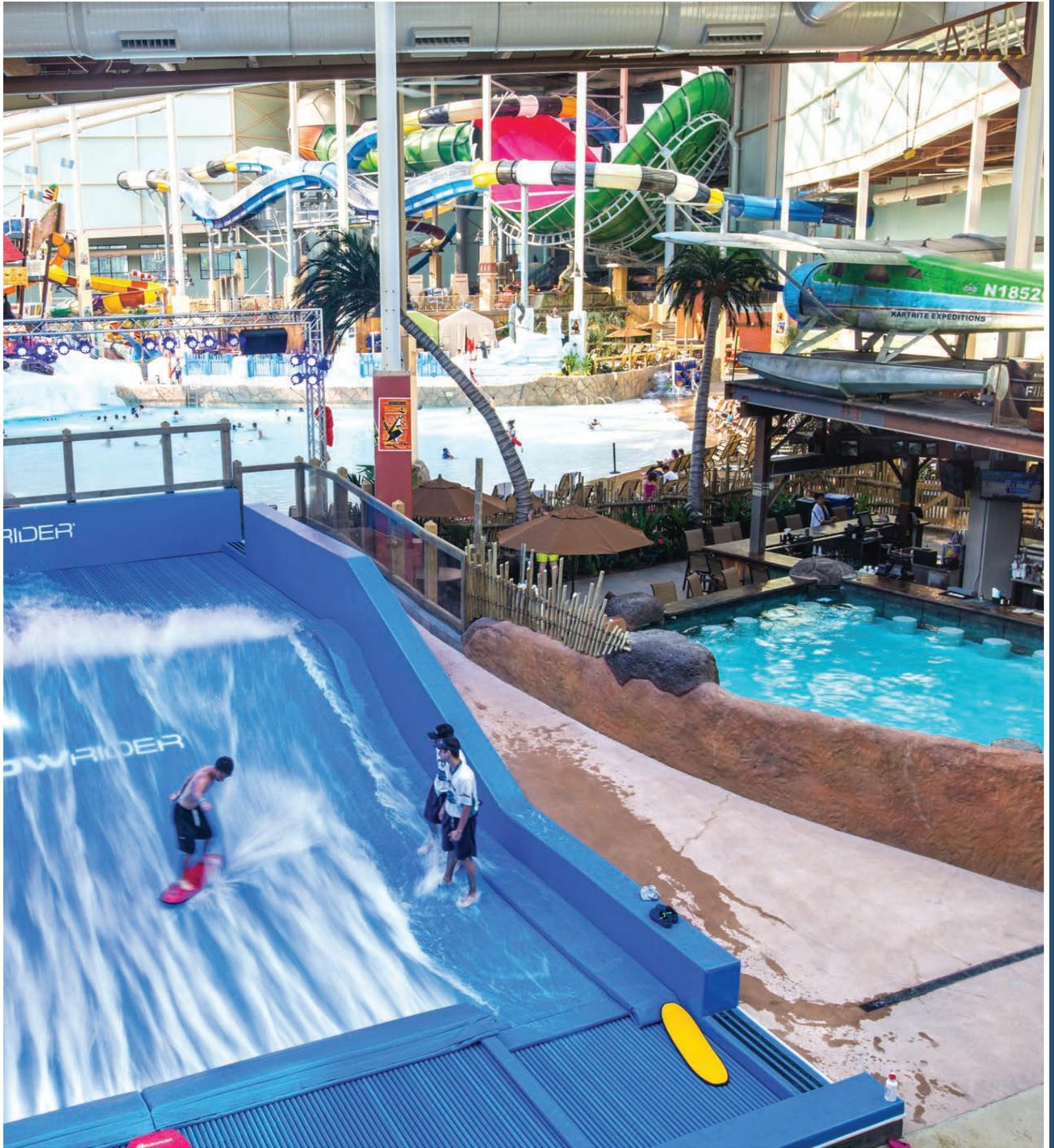


- 125,000 square foot indoor waterpark
- 4,500 feet of slides
- Seven multi-level pools
- 55,000 square feet of Texlon® transparent roofing
- 450+ room hotel developed by ADG

AQUATOPIA



AQUATOPIA



WAVE POOL



FLOWRIDER



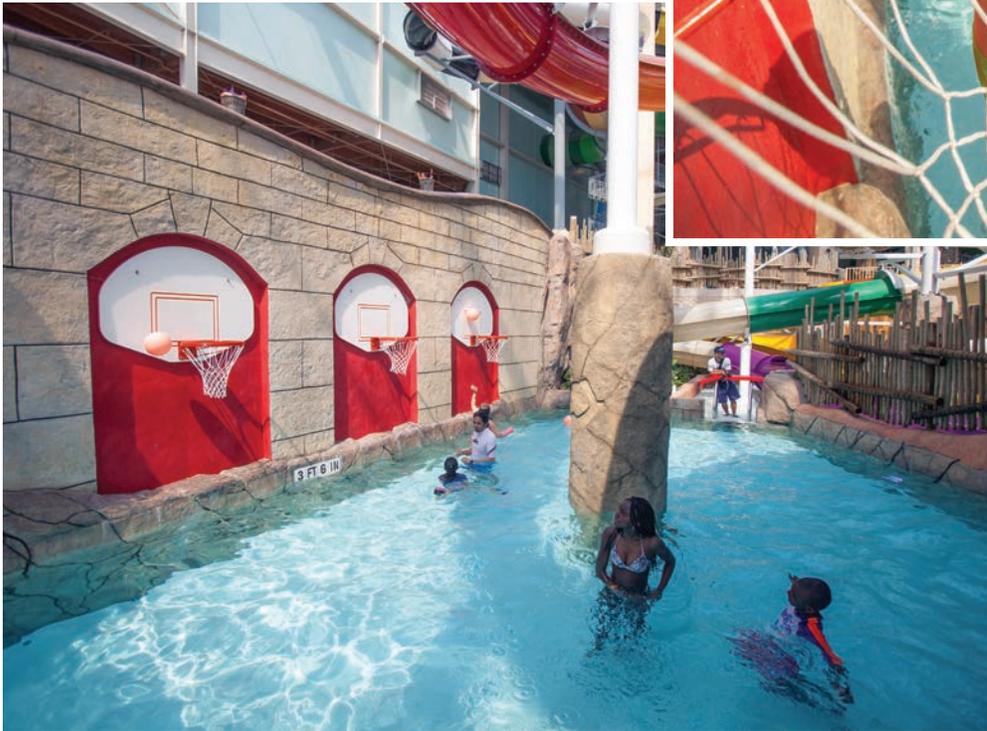
ACTION RIVER



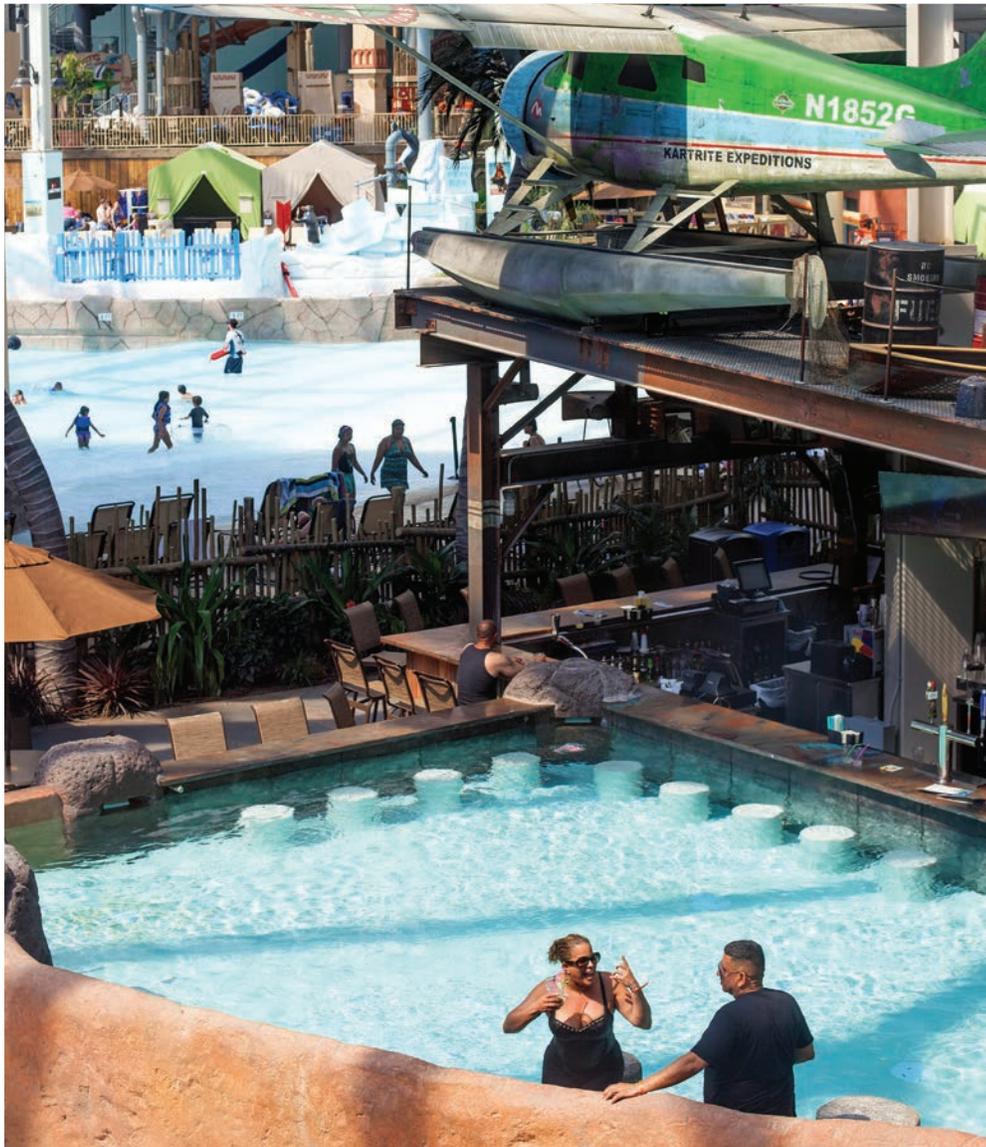
MULTI-LEVEL PLAY STRUCTURE



ACTIVE PLAY AREA



ADULT POOL



WATER SLIDES



TEXLON ROOFING



KID'S AREA



LOUNGE & RETAIL



HOTEL DESIGN



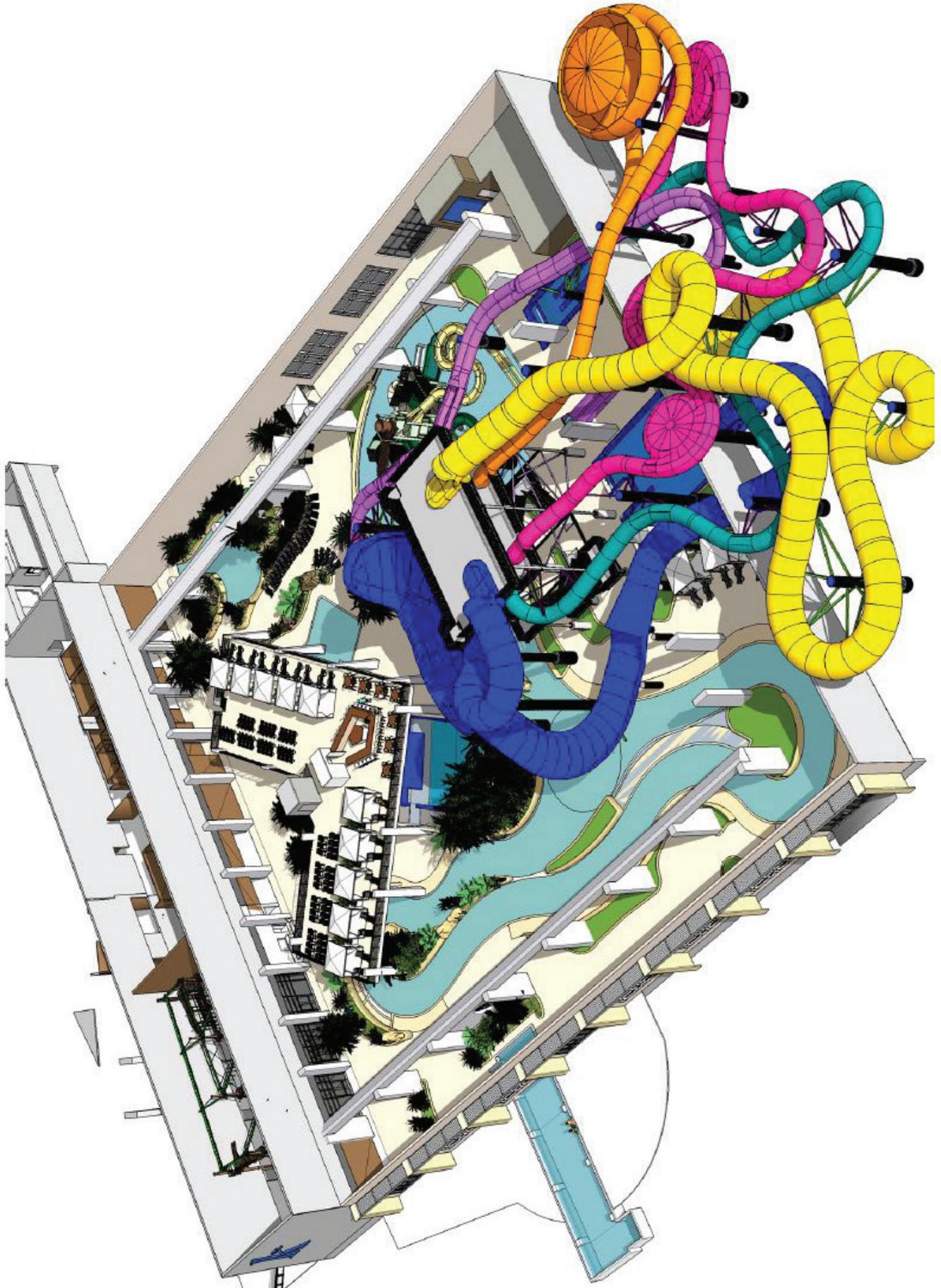
HOTEL DESIGN





- 324 room hotel
- 2 acre indoor waterpark
- 60,000 sqft Texlon® barrel shaped roof
- Action river, kid's activity pool with basketball
- Multi-level play structure
- Indoor/Outdoor pool
- Mezzanine with bar & grill

KARTRITE INDOOR WATERPARK



KARTRITE INDOOR WATERPARK



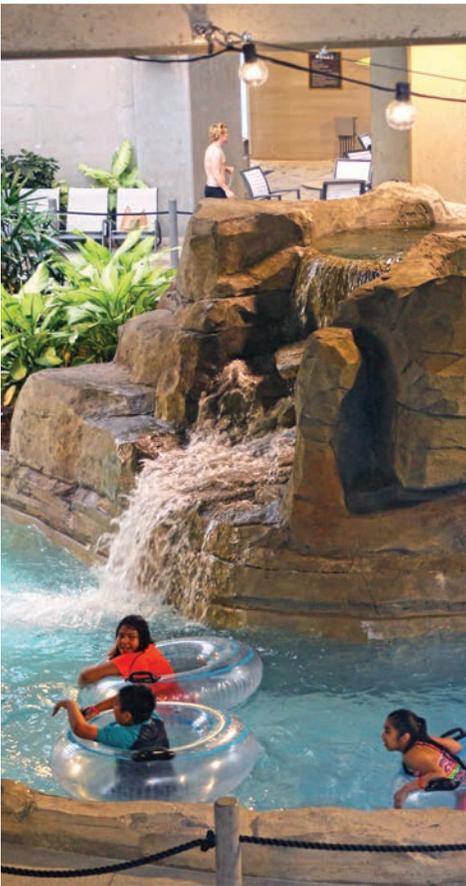
FLOWRIDER®



ACTION RIVER



RIVER ROCK WORK



RIVER FEATURES



MULTI-LEVEL PLAY STRUCTURE



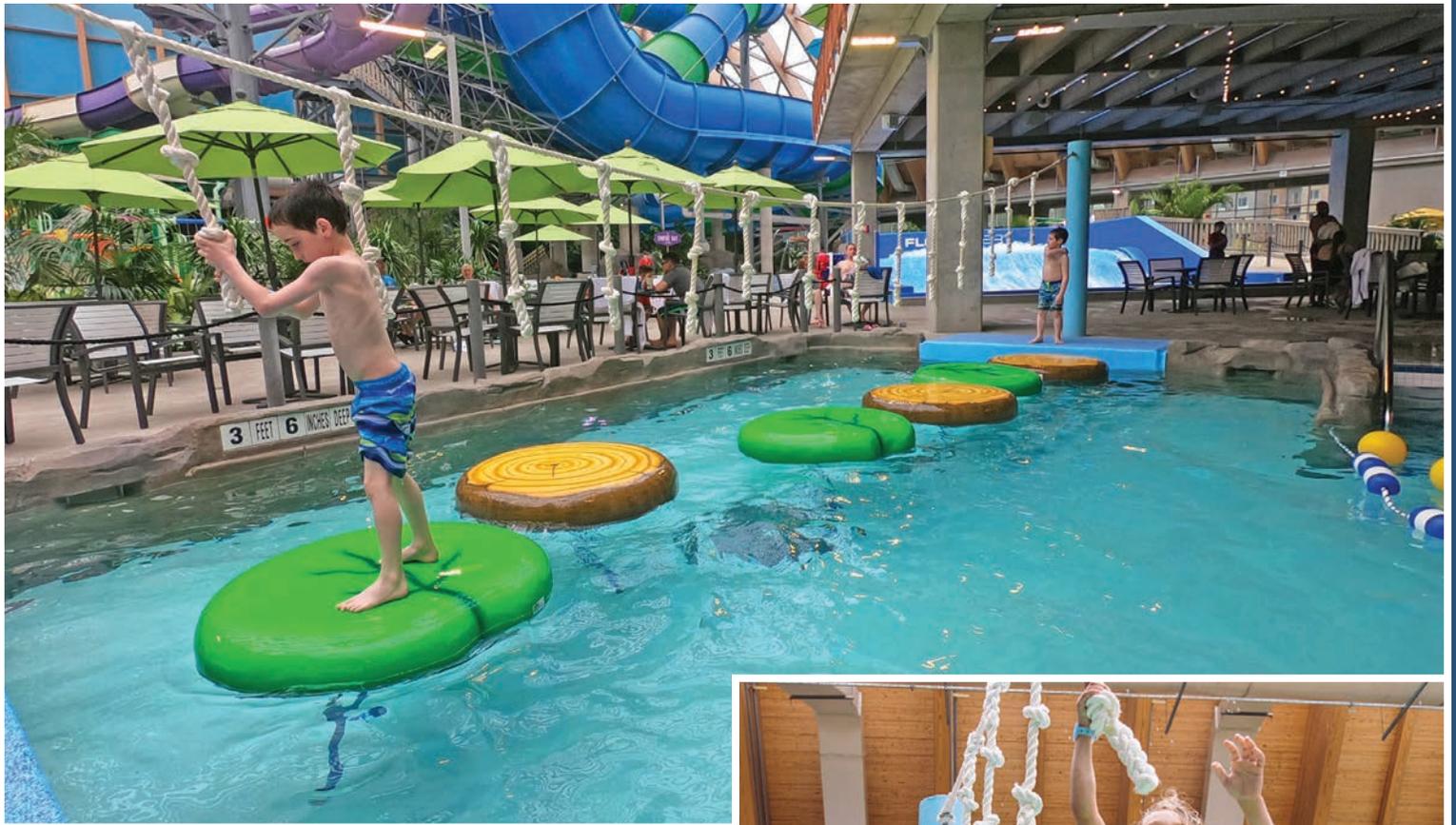
APA POOL



POOL BASKETBALL



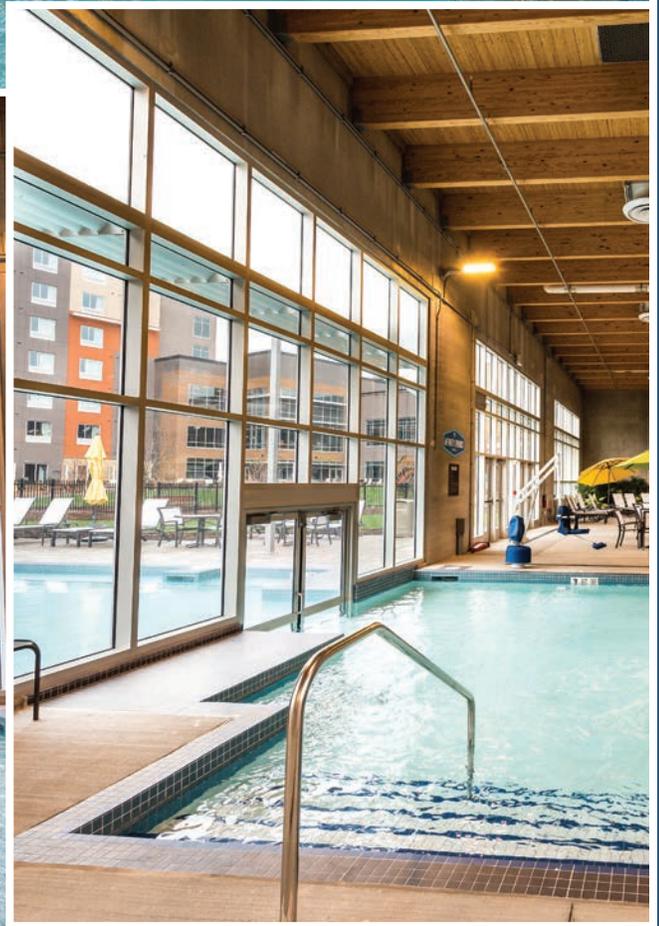
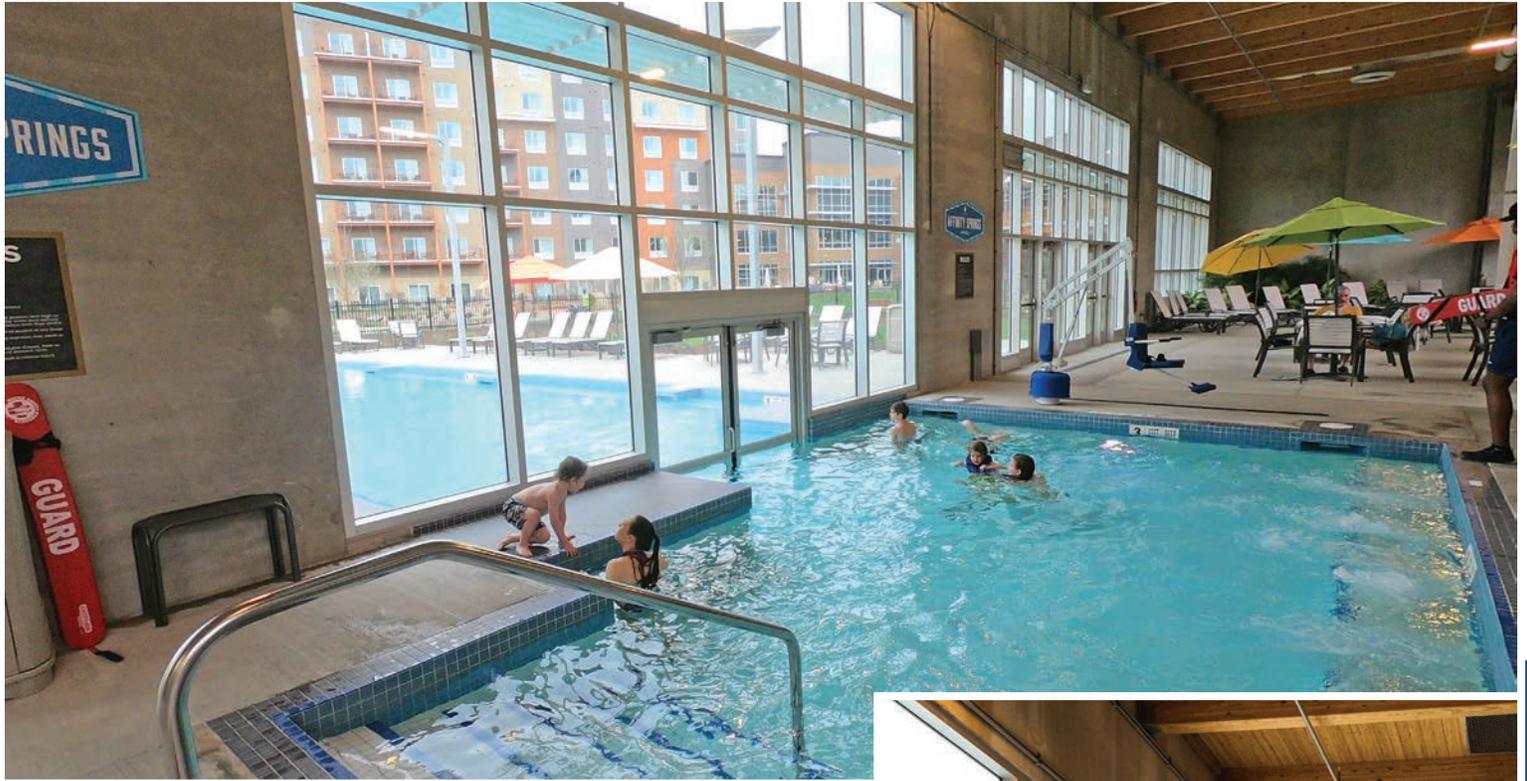
CROSSING



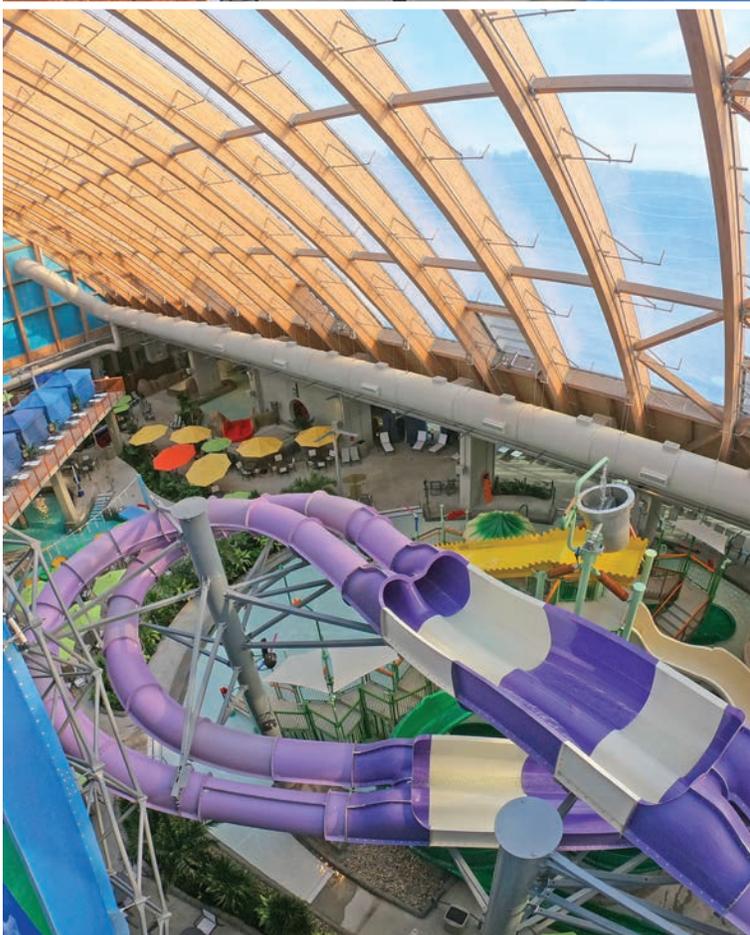
KID'S AREA



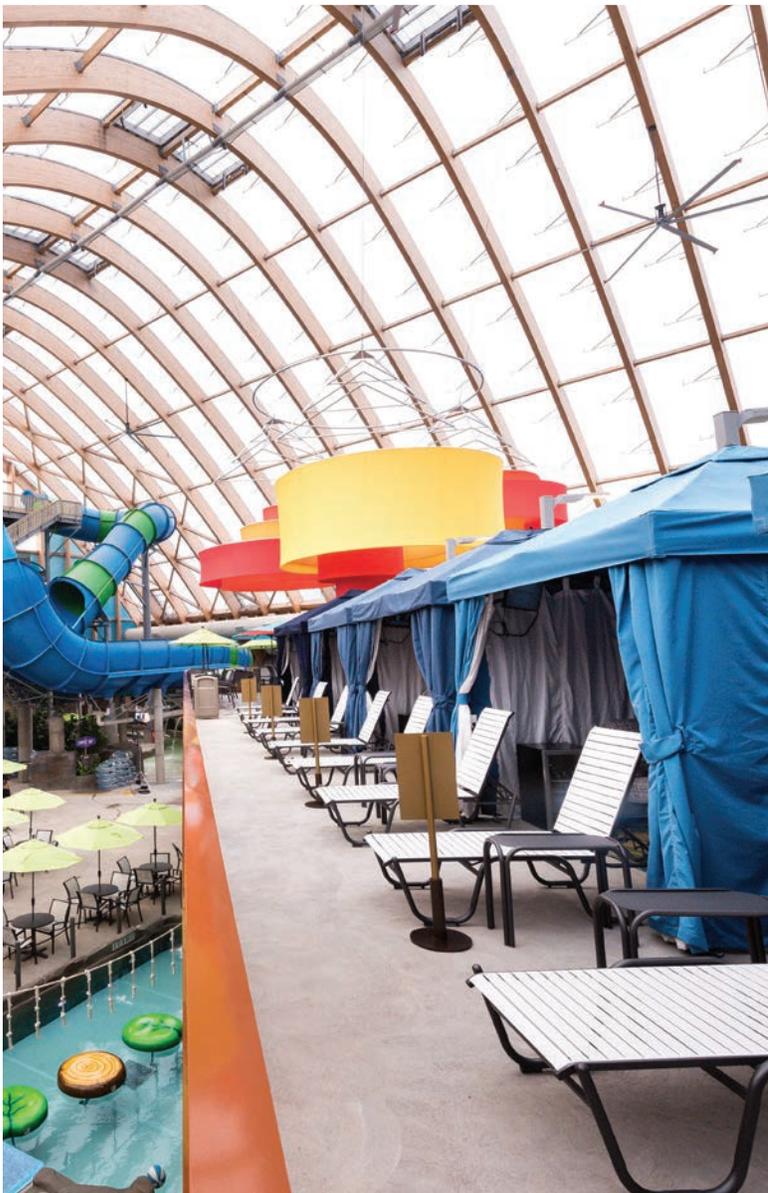
IN/OUT POOL



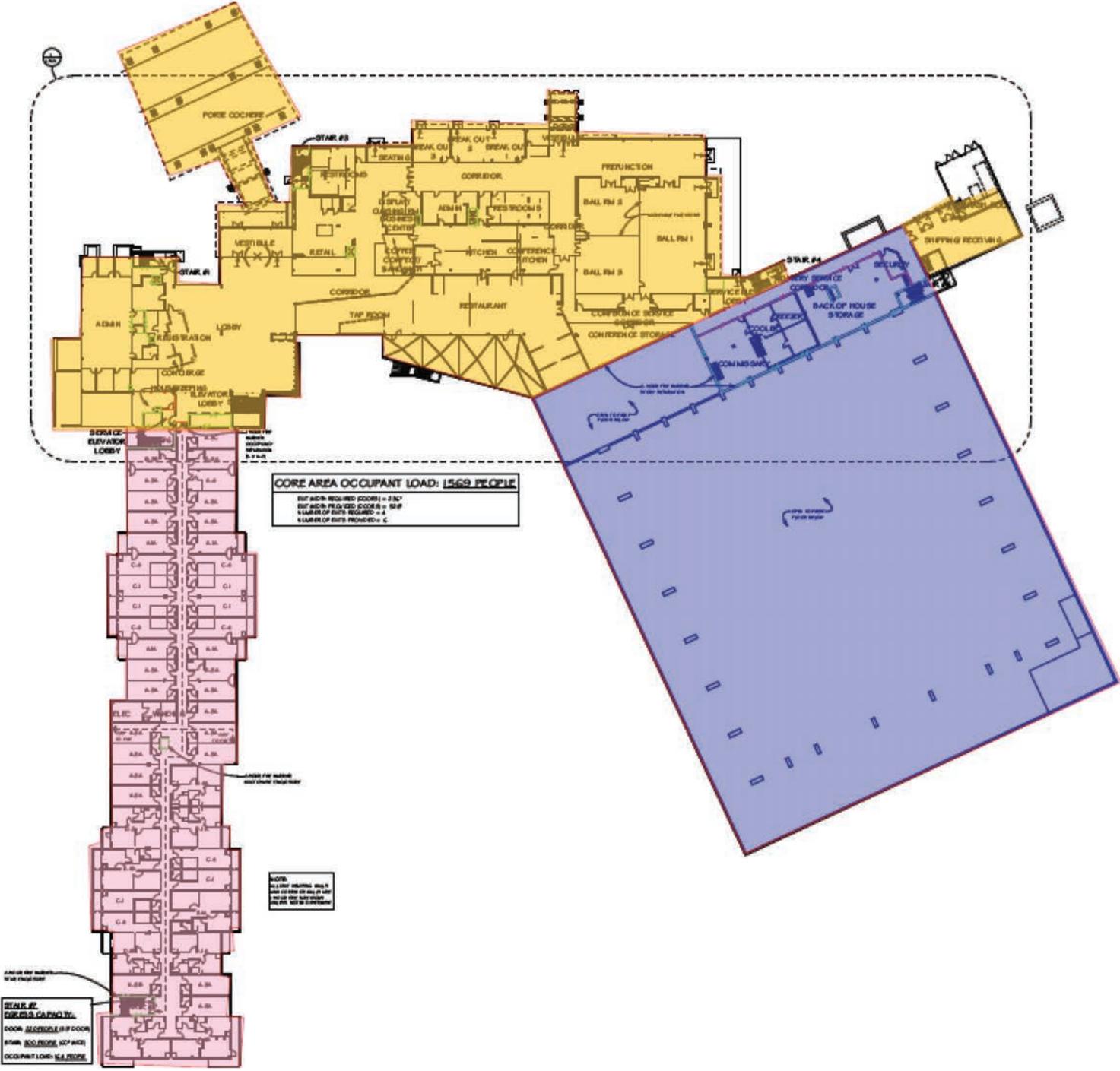
WATER SLIDES



MEZANNINE



HOTEL DESIGN - FLOOR PLAN



HOTEL DESIGN



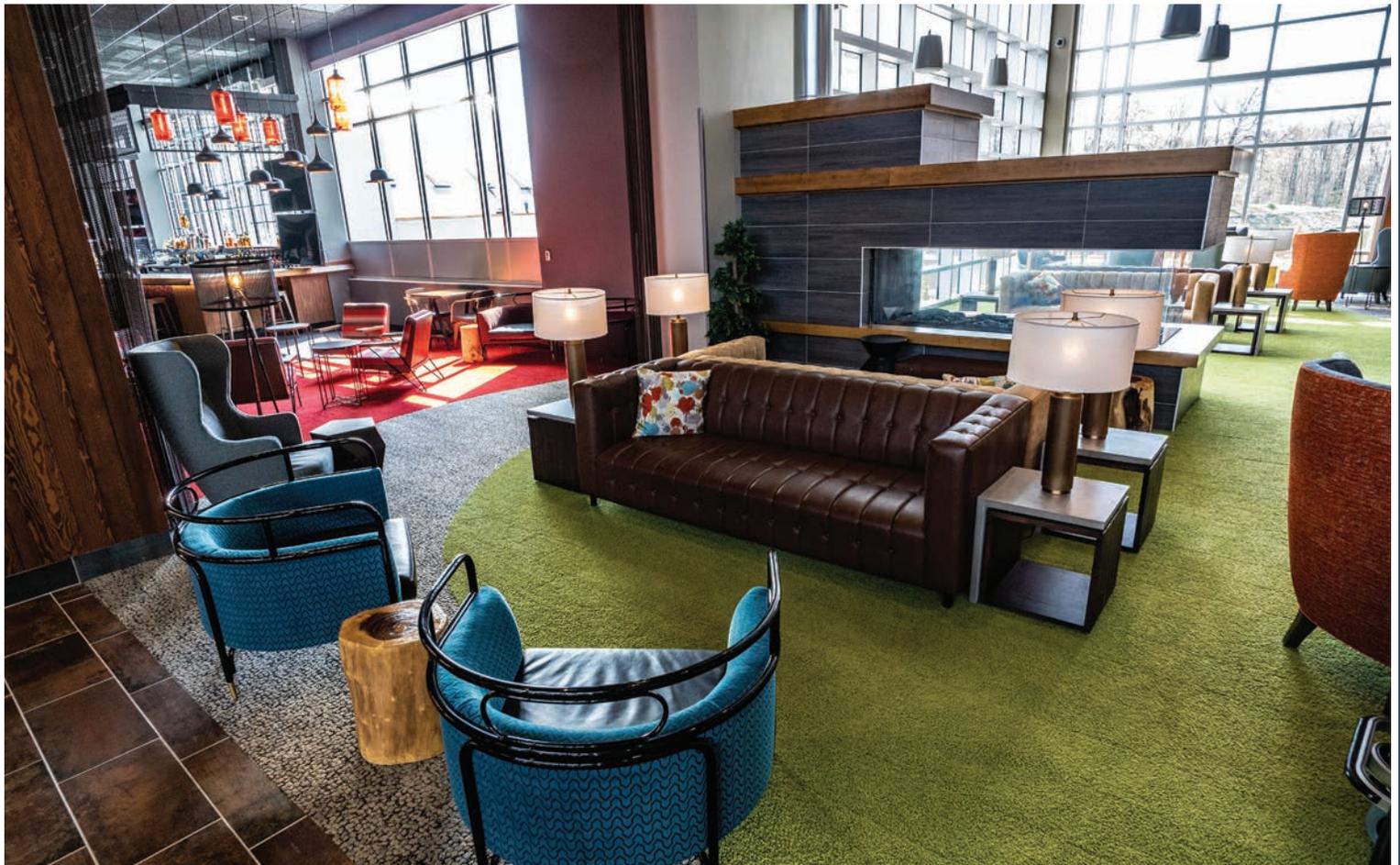
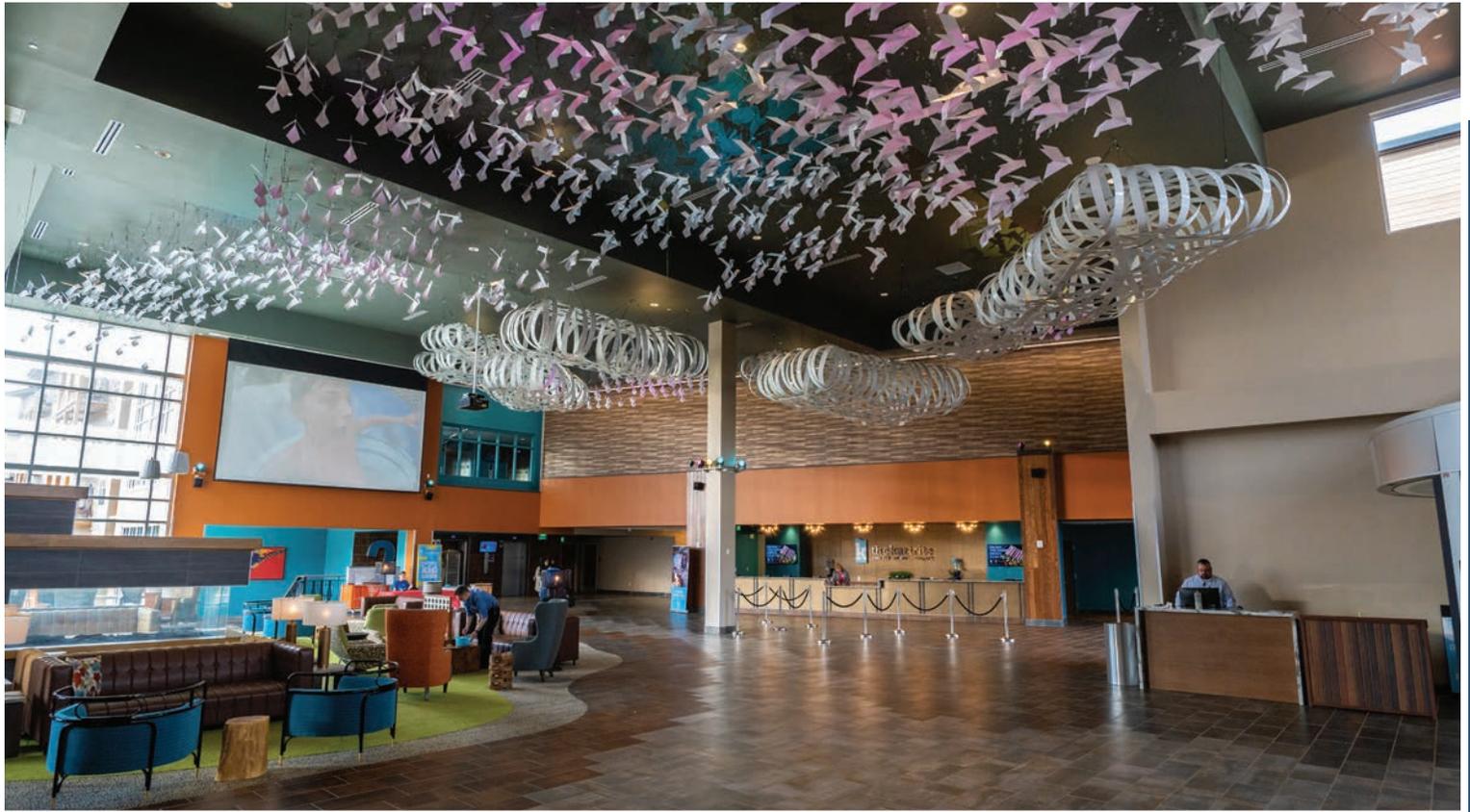
OUTDOOR



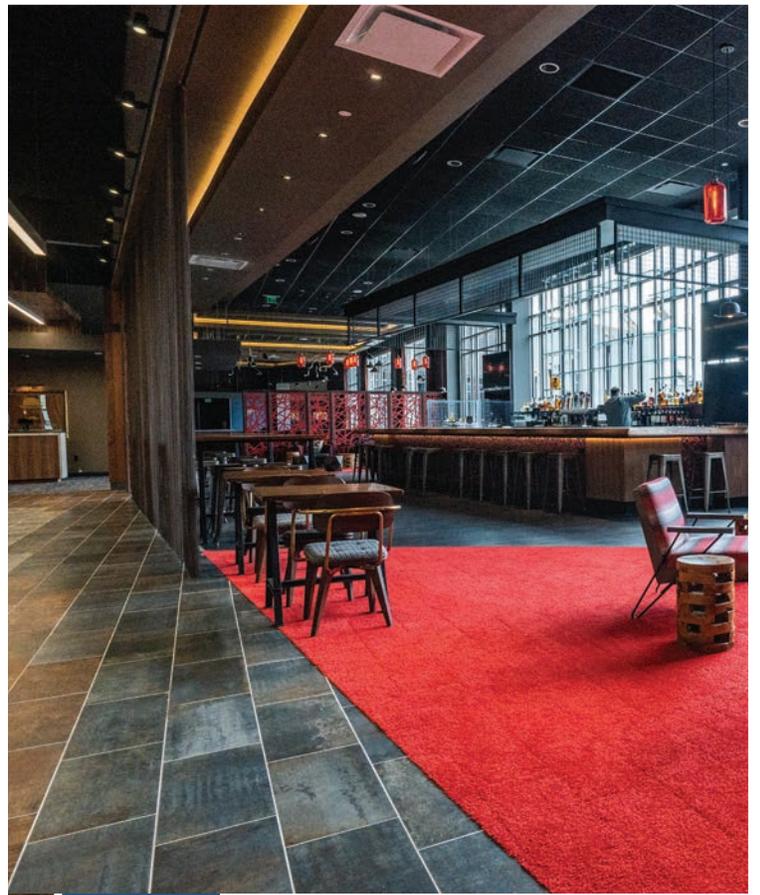
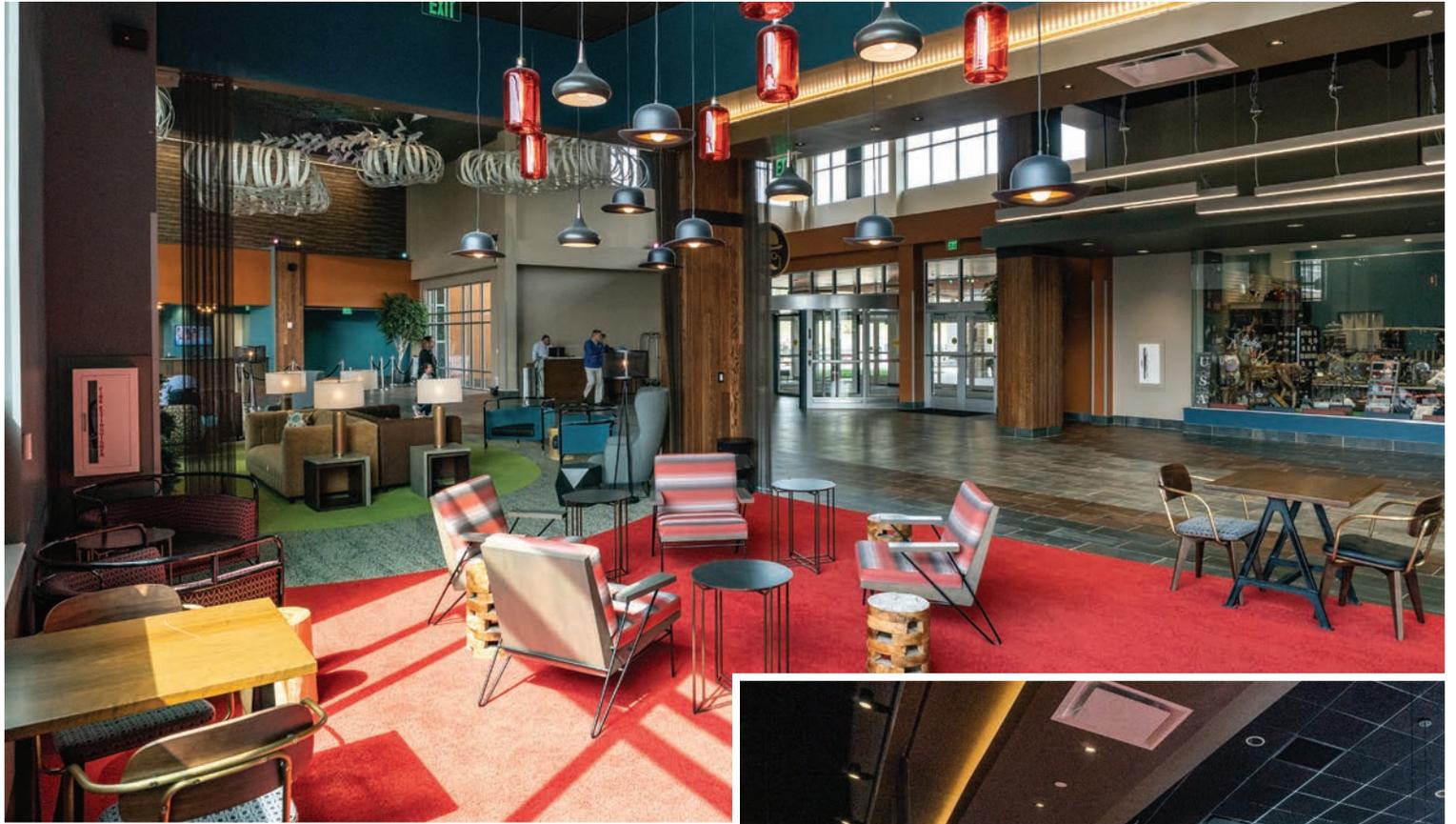
OUTDOOR



LOBBY & UPSTAIRS DINING



LOBBY & UPSTAIRS DINING

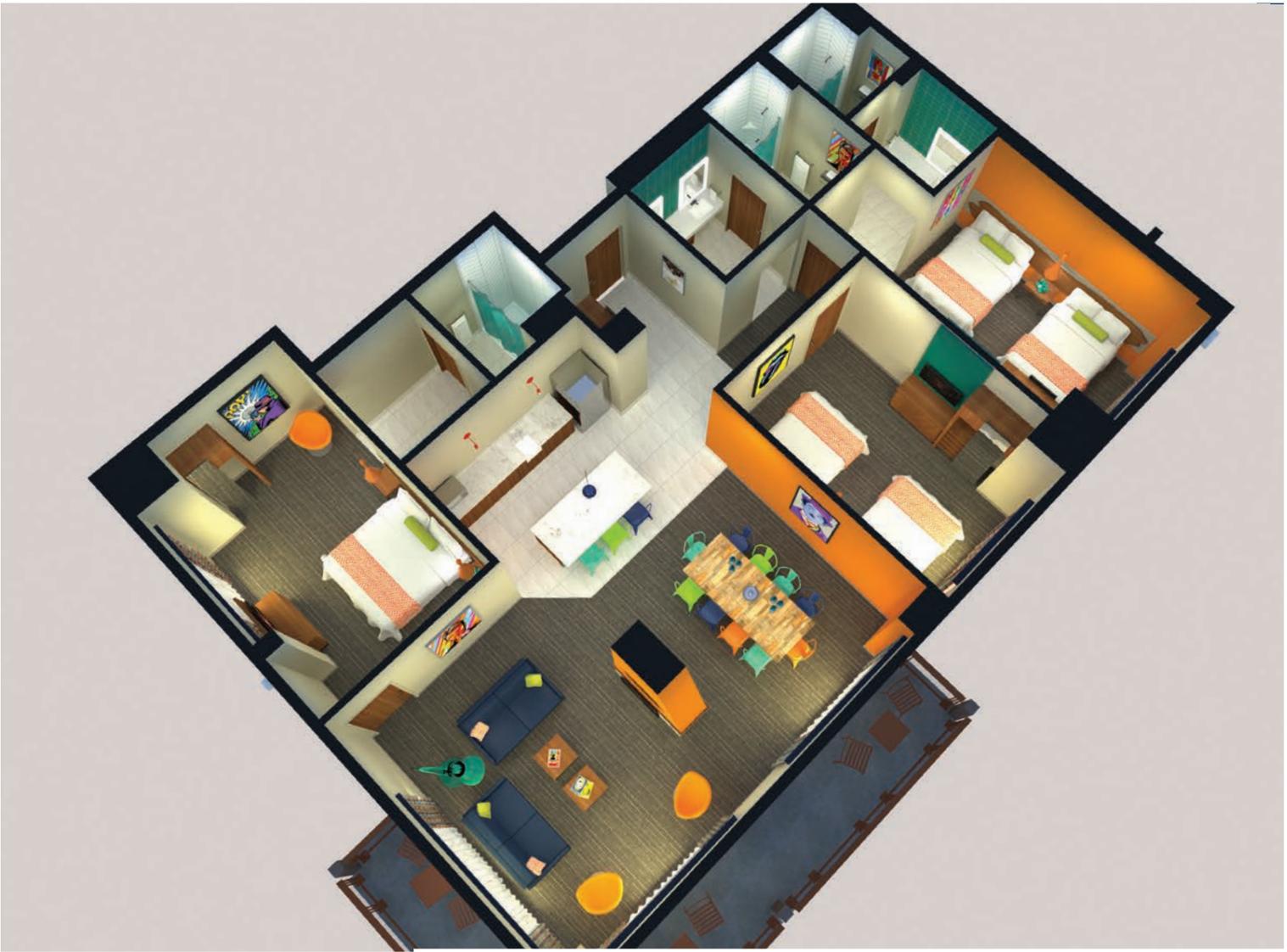




DOWNSTAIRS ACTIVITIES



ROOMS

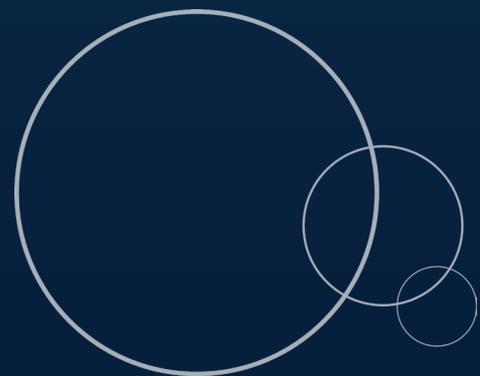


ROOMS





PO BOX 648
13 Green Mountain Drive
Cohoes, NY 12047
518.783.0038
sales@aquaticgroup.com
aquaticgroup.com





ADG

QUALIFICATIONS PACKAGE





ADG

AQUATIC DEVELOPMENT GROUP
QUALIFICATIONS PACKAGE

OVER 100 WATERPARK PROJECTS INCLUDING

- 19 design/build indoor waterparks
- 15 full-scope design/build outdoor waterparks
- 28 major waterpark expansions
- 9 major waterpark renovations
- 10 international waterparks

450+ WAVETEK® WAVE SYSTEMS (IN OVER 90% OF U.S. WATERPARKS)

100+ FLOWRIDER'S® INSTALLED IN NORTH AMERICA

LARGEST OUTDOOR DESIGN/BUILD WTRPK

- Six Flags Great Adventure at 25+ acres (single phase)

LARGEST INDOOR DESIGN/BUILD WTRPK

- Single Phased: Aquatopia at 126,000 sf
- Dual Phased: Kalahari Ohio at 160,000 sf

PROGRAM ADVISOR ON 7 INDOOR WTRPRKS

focus on adjacent to spaces (lobby, F&B, FEC, Rooms)

- Aquatopia Indoor Waterpark, Camelback Resort (PA)
- Kartrite Resort (NY)
- Kalahari Indoor Waterpark (OH)
- Red Jacket Resort & Indoor Waterpark (NH)
- Massanutten Resort (VA)
- Silver Mountain Resort (ID)
- Six Flags Great Escape Indoor Waterpark (NY)

DISTINCTIVE ARCHITECTURE & DESIGN

- SoundWaves at The Gaylord Opryland
- Kartrite Resort & Indoor Waterpark

10 PROJECTS USING ETFE® TRANSPARENT ROOFING SYSTEM

OVER 75% REPEAT CLIENT PROJECTS

- Year-over-year contracted work, both indoor & outdoor

The ADG Way

ADG is driven by great projects and even better relationships. The reason that our company has cultivated an **75% repeat client base** is due to our our ability to look at a project from a 'bigger-picture' perspective - not just selling a product or service, but tailoring the project to **your specific goals, needs, budget and time-line.**

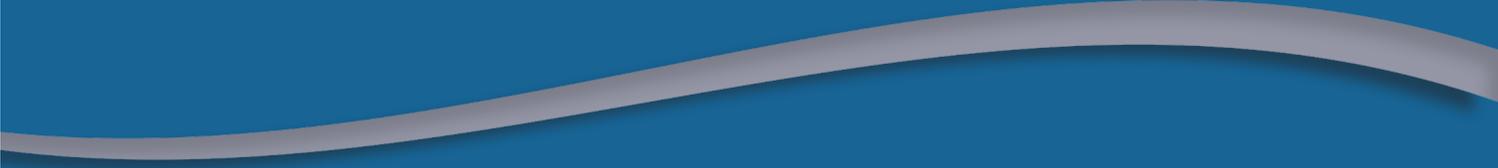
Our experience in the industry has given us the ability to manage every project **from concept to completion**, delivering real solutions for real success.

Simply put - we deliver projects that work.

Jim Dunn, President
Aquatic Development Group



TABLE OF CONTENTS



THE ADG INDEPTH™ APPROACH	SECTION I
CLIENT REFERENCES	SECTION II
OUR WORK	SECTION III

AQUATIC DEVELOPMENT GROUP (ADG)

is one of the world's most respected water park and recreational design, construction and manufacturing firms. With a comprehensive range of services all under one roof, and products that set the industry standard for innovation and creativity, we offer our clients a complete package when it comes to designing, engineering and building their projects.

ADG is committed to providing smart solutions for real success. Our InDepth™ approach to project planning and development ensures that every step of the process, from a complete water park design/build to a single product install, is carried out in the best interest of your business — designed to maximize return, enhance guest experience, and constructed in a time frame to meet your financial goals and time constraints.

Making your vision a reality is what inspires the dedicated team at ADG. Our products and services have been utilized in over 4,000 facilities worldwide spanning six continents. We have designed, engineered and built more than 100 indoor and outdoor water parks and resort waterfronts™, and over 450 wave pools and rivers around the world.

Our client list is long and our experience is broad. Our products and projects can be seen at these and many other great properties across the globe.

SEA WORLD

DISNEY

SIX FLAGS

WET N' WILD

DOLLYWOOD

MARRIOTT

HYATT

GAYLORD

RIPLEY'S

RITZ CARLTON

20TH CENTURY FOX

KALAHARI

GREAT WOLF

WILDNERNESS

MIRAMAX STUDIOS

WESTIN

OUTDOOR WATERPARKS



HOTELS & RESORTS



INDOOR WATERPARKS



WAVE POOLS & RIVERS



SMART SOLUTIONS for REAL SUCCESS

AN INDEPTH™ PROCESS

At ADG we understand that every project deserves a custom approach. All of our projects are developed with a thorough understanding of the end-user experience and are designed to anticipate and satisfy the needs of your guests.

It's an in depth approach that consists of a **comprehensive analysis of all project drivers** - budget and timing parameters, the desired guest experience, and revenue generation goals - to ensure success.

This process serves as the foundation for a **true partnership that enables us to go beyond the edge of the pool** and evaluate every project in the context of your business as a whole, weighing design, function and cost aspects to arrive at the optimal result, not only for the experience of your guests, but for your bottom line as well.





ADG'S INDEPTH™ APPROACH

synergy

The true value of ADG as a Design Build partner lies in the synergy we foster with the owner, GC, and architect. The real value here is the TIME SAVING BENEFIT we provide as our team brings design sense, estimating, operational awareness, and specialty construction services together under a single umbrella, providing the answers needed to keep the design team productive.

optimization

We understand that capacity & overall perceived guest value are the prime drivers of design. The individual components – water, rides, decking, food & beverage – must be well designed and considered as a whole, in order to optimize capacity and project costs against the guest's overall perceived value.

up-front planning

Working with the design team during concept and schematic design, we react to and participate in developing the concept with the knowledge that all decisions have construction and cost implications. The key benefit here is that construction documents for the building and site can continue knowing that the water features meet the budget allocation

up-front costing

Upon completion we provide a lump sum design-build proposal for the water features and ride package. Structural and MEP designs are developed based on the real-world project – No surprises!

Design-Build delivery for portions of a traditional project is not unique – especially where specialized work is needed. Your water play features, and the areas around them, are special and therefore need more consideration than that of traditional flat-water pools.

THE ADG WAY

	TRADITIONAL APPROACH	THE ADG APPROACH
CONCEPT	Architect or landscape architect develops a concept that is driven by aesthetics without the benefit of a thorough understanding of how guests, of varying ages and sizes, use water amenities and rides.	ADG has specialized in creative water design since 1983. Our team either prepares the concept or works alongside the lead designer to en-sure that all the waterplay, leisure and on-deck needs meet overall project demands.
SCHEMATIC DESIGN	Design decisions are advanced by the team without having a true picture of the costs and program needs of the various elements. An 'aquatic engineer' will be included on the team.	ADG provides the necessary coordination of information to the team to allow for informed advancement of the design – support space needs, mechanical room sizes, and all-important deck and water shapes to maximize guest capacity.
DESIGN DEVELOPMENT	The team's aquatic engineer will provide engineering data and begin to refine pool shells. There will be a reliance on information provided from ride vendors to further develop the design. Aquatic engineer's function in a similar fashion as electrical or mechanical consultants – they follow design decisions from the architect or landscape architect. While the design may look good the team is not balanced.	ADG's experience with all facets of water design allows for a more complete refinement of the overall design. Our years of experience allow us to comment on operational needs, safety, furniture arrangements, accurate construction costs and answers to questions that the team may have. We are a specialist that provides insight beyond just engineering.
CONSTRUCTION DOCUMENTS	In the traditional approach the team will fully complete the entire design before knowing what the project will cost. If the area is overbudget redesign affects all design team members.	ADG's approach brings design-led decisions and costing to specialty work that architects, landscape architects and cost consultants don't have the background to provide. We save the project time and costly re-design , enabling the designers to focus on innovative ideas and brand aesthetics.
CONSTRUCTION	Traditional team members do not have in-depth experience with this type of construction.	ADG specializes in this type of construction. Our project managers will provide needed sequencing, scheduling and methods that will assist in a more integrated workflow for the entire project.

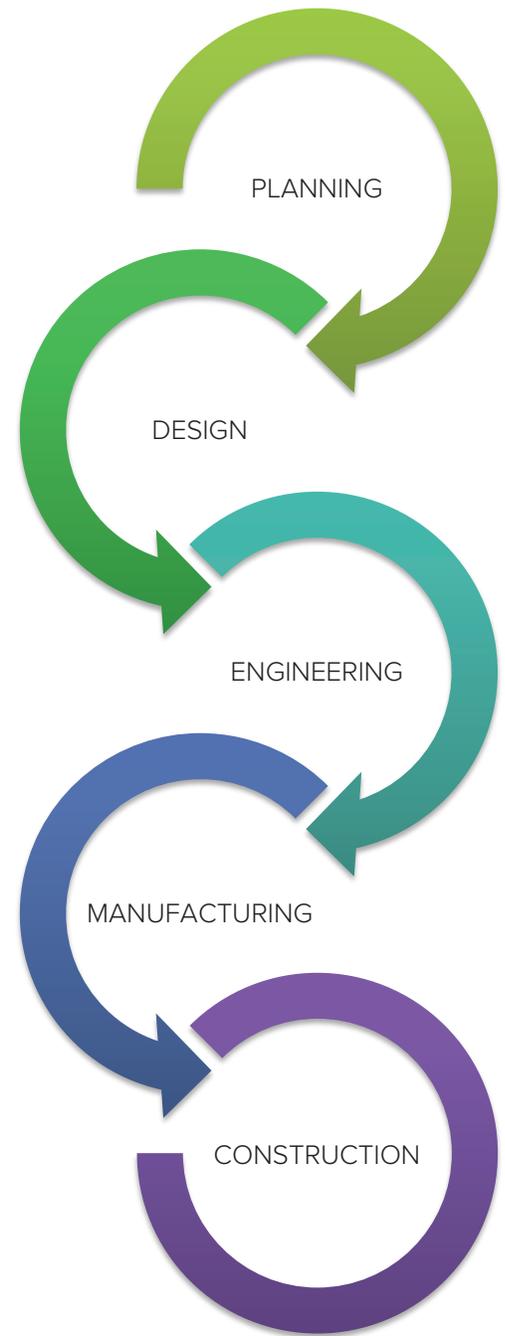
A FULLY INTEGRATED APPROACH

INNOVATIVE. EXPERIENCED. SMART. FLEXIBLE. COMMITTED.

With our InDepth™ approach, vertical integration and in-house manufacturing resources, we can complete projects in a time frame that no other company in the industry can match.

We are a fully integrated firm that manufactures its own equipment and develops its own technologies, taking special pride in developing unique solutions when existing products do not meet project needs.

No other company in the industry offers greater flexibility with project planning and follow-through, from concept to completion, than ADG.



ADG Projects & Services

- Design/Build Indoor & Outdoor Waterparks
- Resort Waterfronts
- Project Planning & Engineering
- Water Rides & Attractions
- WaveTek Wave Generation Systems
- FlowRider Surf Attractions
- Mountain Coasters & Slides
- Transparent Roofing for Indoor Waterparks
- Commercial Pool & Filtration Equipment

KEY PERSONNEL

CREATING SMART SOLUTIONS FOR REAL SUCCESS

ADG's leadership team comprises some of the most experienced and innovative experts in the industry. Forming the cornerstone of what we do and who we are, they have pioneered our InDepth™ philosophy which governs our commitment to consistently deliver the highest quality products, exemplary service, and expert design and management to our clients.

KEN ELLIS CEO

Leading ADG for the last two decades, Ken has taken the lead in driving industry standards for mountain, waterpark and aquatic design solutions. His vision and expertise has contributed to the success of some of the most highly attended indoor and outdoor attractions in the U.S. Ken has been integral in bringing to market game-changing advances in wave generation, including the introduction of the FlowRider® surf simulator, and in servicing the ski mountain industry when ADG became the sole U.S. manufacturer of mountain coasters and slides.

Ken has sat on the board of the World Waterpark Association and is also a co-owner of H2OBX waterpark in NC.



JIM DUNN President



Jim is an industry-leading designer and builder. His passion for creating innovative products and design solutions that build business has resulted in ADG's InDepth™ process. A registered architect with over 30 years' experience specializing in aquatics, Jim has received numerous awards including an Aquatics International's Dream Designs award, WWA Executive Award, and multiple WWA Leading Edge and IAAPA Brass Ring awards on his projects.

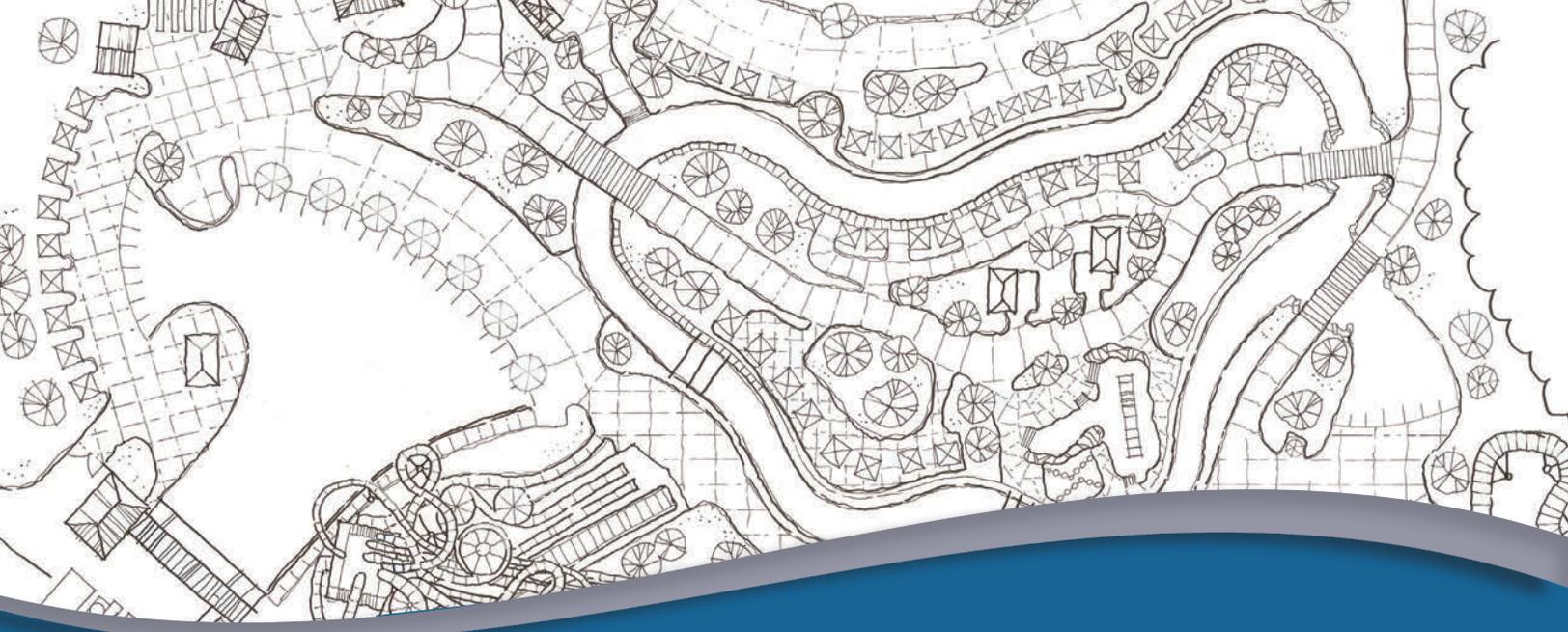
Jim has been named to Aquatics International's "Power 25," a prestigious roster of industry influencers working to establish a standard Model Aquatic Health Code (CMAHC).

BRUCE QUAY COO

For over 30 years, Bruce has been leading and growing businesses in the manufacturing, distribution, and commercial services sectors, working with such companies as GE and Cookson Group PLC. As CEO of Cookson Plastic Molding, Bruce transformed the Recreational Products Division into North America's premier swimming pool products manufacturer via innovative customer support programs, new product development and globalization.

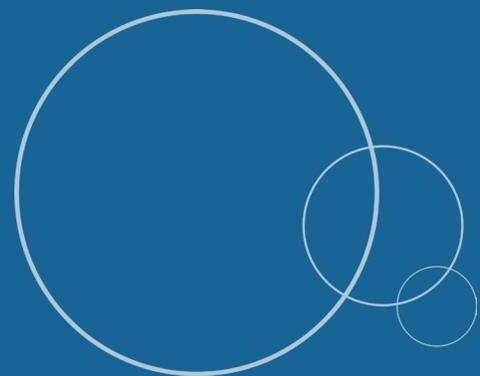
Bruce was previously EVP of ADG in the early 2000's leading the company's manufacturing division, helping spur growth within the organization and industry as a whole, including the introduction of FlowRider® to the North American market.





CLIENT REFERENCES

SECTION II





September 15, 2017

Dear Sir or Madam,

I am pleased to offer my recommendation on behalf of Aquatic Development Group.

My partnership with ADG has spanned over the last twenty years, from my role as Chairman and CEO of Six Flags to my current position as Owner and President of Premier Parks, LLC. I continue to turn to ADG for any new water park developments or expansion project needs, knowing that I can count on them to provide designs, concepts, and construction services that work not only for our guests but for our bottom line as well.

ADG's concepts take an in depth approach that go beyond any other company in the industry, taking into consideration not only the aquatic attractions and all that goes into building and operating them, but they look at the amount of landscaping and parking we will need, guest flow and access to amenities and F&B, plus signage, theming, staffing needs and more. In sum, they produce a comprehensive plan that delivers on every level and allows us to get a complete picture of what is truly involved in developing a project.

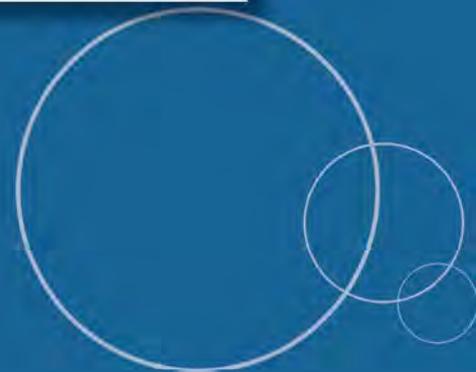
ADG has always been, and continues to be, committed to offering us the right solutions to ensure we are successful not just in providing the utmost in guest experiences, but in our operational functionality as well.

Sincerely,

A handwritten signature in black ink that reads "Kieran Burke". The signature is fluid and cursive.

Kieran Burke

Owner & President
Premier Parks, LLC





7777 RIVERSIDE DRIVE, P.O. BOX 400
POWELL, OH 43065-0000
(614) 449-3400

July 7, 2018

Mr. Jim Dunn, EVP
Aquatic Development Group, Inc.
13 Green Mountain Drive
Cohoes, New York 12047

Dear Jim,

Hello Jim, I hope your summer is going great. We are off to a very good start here at Zoombezi Bay in Columbus, Ohio. If our current trend continues, we will have a record year of over 430,000 guests.

I wanted to take this opportunity to thank-you and your team for designing and building Otter Banks – in record time. Although our industry is probably always building attractions in the last hour, I think what your team did here in 2018 was remarkable. Design plans were not completed until early January. Local authority approval was not given until late February. The first hole was not dug until mid-March. Despite all that we opened to guests on May 26, Memorial Day weekend.

I took the Zoo CEO and CFO on a tour of the construction site on May 8th. They looked at me and said I was crazy that we would be operating on May 26th. I think everyone may have thought that way. Somehow your team got it done. Don Gilbert worked significant days and hours to hit the goal. I can't thank him enough for the effort that was put forth. He had help from your office, especially at the end from Steve Baginski and Tom Lampron. There were workman that showed up from other locations to help get the facility opened by Memorial Day weekend. It was a huge effort and greatly appreciated.

Not only was it completed in an amazing time frame, it looks outstanding. We are very proud of it, and I hope your team is also. More importantly, our guests love it. The developed site helped us achieve the busiest day in our eleven year history on June 30th – 11,746 guests. We could not have done it without the additional space the Otter Banks allowed.

This was the fourth significant project that we have worked on with Aquatic Development Group. With great partnership and success such as this, it surely will not be the last.

Sincerely,

John P Gannon
SVP and General Manager



Brett Krafft
Hotel Manager

September 14, 2017

Jim Dunn
Executive Vice President
Aquatic Development Group
13 Green Mountain Drive
Cohoes, NY 12047

Dear Jim,

The partnership between your team and ours, from day one, has been a pleasure. From the onset, you provided us with a creative concept that fit into our overall scope and touched on all bases, from finding creative ways to tie in the theming and architecture of the hotel, to incorporating a blend of attractions that achieved our goal of appealing to both our transient and business guests alike.

The interaction and collaborative nature in which you worked with our development team, architect, and landscape architect was seamless, and better as a result of the information and expertise you brought to the table in terms of developing resort and recreation water settings that work in the real world.

We continue to receive rave reviews from our guests and as a result, have seen a positive effect on our business. I look forward to working with your team once again as we look to expanding JadeWaters and continue to grow our resort business as a result.

Sincerely,

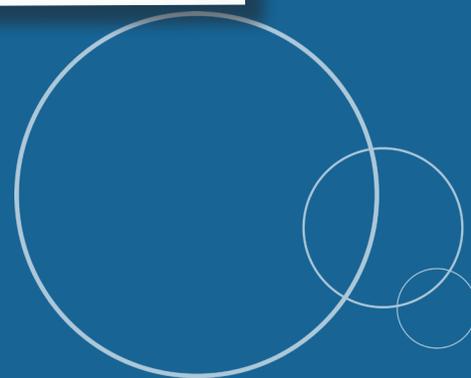
Brett Krafft
Hotel Manager

HILTON ANATOLE

2201 N Stemmons Freeway | Dallas, TX 75207 | USA

T: +1 214 761 7270 | F: +1 214 761 7535 | E: brett.krafft@hilton.com

AMERICAS • EUROPE • MIDDLE EAST • AFRICA • ASIA • AUSTRALASIA





September 14, 2017

To Whom It May Concern,

It is my pleasure to recommend ADG as a resort designer for all your recreational aquatic needs. Having worked with them on both the original development and expansion phases of multiple Gaylord Properties, I am confident in saying that both their process, and final product, are of the highest level.

From the initial concepts on both our indoor and outdoor settings, they carefully evaluated every aspect of the project from the ground up, taking into consideration not just the water features and attractions, but the underlying construction issues and operational functionality of the resort as well. From the placement of every lounge chair around our pools, to landscaping needs, theming, and color palettes, ADG provided a comprehensive plan that accounted for every aspect of our guest experience.

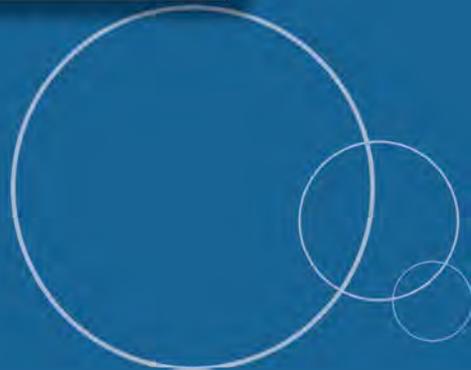
ADG is truly a unique company to work with in that they fill in all the holes that individual architects and landscape designers don't see. Working collaboratively with our development teams, ADG made the process more streamlined and efficient as they were able to address any potential design concerns before any actual work commenced. We feel confident in knowing that ADG leaves no stone unturned when it comes to the details of designing and building a successful resort waterfront setting.

Sincerely,

A handwritten signature in blue ink, appearing to read "James Chamblin".

James Chamblin
Vice President, Design & Construction
Ryman Hospitality Properties

Ryman Hospitality Properties, Corporate Design & Construction,
One Gaylord Drive, Nashville, TN 37214
Telephone 615-316-6849



CLIENT APPRECIATION

"ADG is truly a unique company to work with in that they fill in all the holes that individual architects and landscape designers don't see. Working collaboratively with our development teams, ADG made the process more streamlined and efficient as they were able to address any potential design concerns before any actual work commenced. We feel confident in knowing that ADG leaves no stone unturned when it comes to the details of designing and building a successful resort waterfront setting."

RYMAN HOSPITALITY PROPERTIES, INC.

James Chamblin, VP of Design & Construction

"ADG's vision of seeing beyond the debris at the original Wild Water Kingdom and comprehending the potential of the park was truly an asset. We've seen the exceptional work ADG has done, time and time again, making it an easy choice for us to pick a designer, builder and construction manager for our projects."

WET 'N' WILD, TORONTO

Hue Eichelberger, COO, Premier Parks

"ADG's concepts take an in depth approach that go beyond any other company in the industry, taking into consideration not only the aquatic attractions and all that goes into building and operating them, but they look at the amount of landscaping and parking we will need, guest flow and access to amenities and F&B, plus signage, theming, staffing needs and more. In sum, they produce a comprehensive plan that delivers on every level and allows us to get a complete picture of what is truly involved in developing a project."

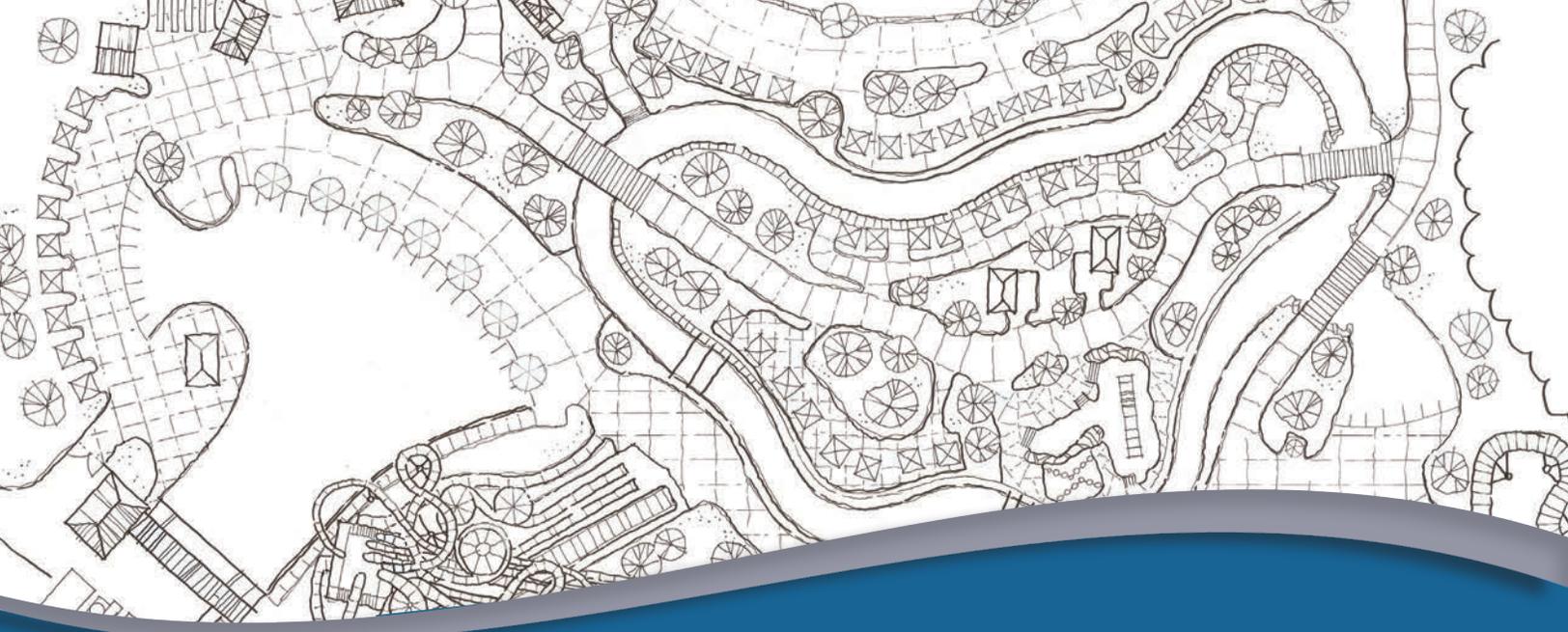
PREMIER PARKS, LLC

Kieran Burke, Owner & President

"I wanted to take this opportunity to thank-you and your team for designing and building our project in record time. I think what your team did here in 2018 was remarkable. Not only was it completed in an amazing time frame, it looks outstanding. We are very proud of it, and I hope your team is also. More importantly, our guests love it. The developed site helped us achieve the busiest day in our eleven year history!"

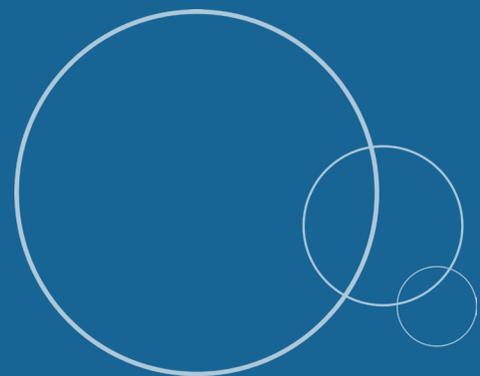
ZOOMEBEZI BAY @ COLUMBUS ZOO, OH

John Gannon, SVP & General Manager



OUR WORK

SECTION III





ISLAND H2O LIVE! Orlando, Florida

CHALLENGE

Island H2O Live!, was looking to design and build Central Florida’s newest waterpark, as a way to give guests more to do at the brand new Margaritaville Resort. To differentiate from the strong Orlando waterpark competition, Island H2O Live! utilized technological advances, innovative attractions and affordable pricing to attract guests of all ages.

SOLUTION

Situated on 12 acres, Island H2O Live! is the focal point of the new Margaritaville Resort in Orlando. Key highlights of the park include a 24,000 sqft dual-beach wave pool which is powered by ADG’s Wavetek® wave generation system and features a marquee video screen; a 1,300 ft lazy river with a 500 sqft apron beach entry; an activity pool with basketball and a river crossing; an interactive multi-level play structure; and a shallow kids activity pool with play features and nine water slides.

The waterpark also features an adults-only area with a 2,500 sqft formal pool, ample deck space and lounge area situated next to the park’s “Tag Shack” bar and grill, making this the perfect place for adult guests to grab a drink and “chill.” Island H2O Live! is also the first park to feature interactive wearable technology designed to enhance the guest experience through social interaction and the ability to personalize your stay at the park.

RESULT

Island H2O Live! opened for the 2019 season to great media coverage and guest reviews. In addition to multitudes of exciting rides, copious amounts of landscaping & beach themed elements put the finishing touches on this waterpark, ensuring an optimal guest experience that stands out in the Orlando market.

“ADG incorporated an incredible variety of attractions into their design at Island H2O Live! including water coasters, family raft rides, a wave pool, lazy river, kid-friendly experiences and more.”

-Island H2O Live! General Manager, Jim Kunau





COLUMBUS ZOO Powell, OH

CHALLENGE

In 2006, Columbus Zoo entered an agreement with Six Flags to purchase Wyandot Lake waterpark in Columbus, OH for \$2 million. Shortly after purchasing the property, the Zoo announced plans to invest \$22 million to substantially re-develop and renovate the former Wyandot Lake property in order to incorporate zoo theming throughout, update existing amenities and introduce state-of-the-art attractions.

SOLUTION

2008 Columbus Zoo chose ADG, to renovate, design and build a newly branded “Zoombezi Bay” waterpark. Featuring \$20 million worth of new attractions including: three new water slide complexes, a new 544,000 gallon “Wild Tides” wave pool, and a 1.5 million gallon action river called “Roaring Rapids”.

2011 After three successful seasons of operation at Zoombezi Bay, park operators decided to expand the waterpark. ADG designed and built the new area to include two new slides, a 45’ uphill water coaster, and the first Boomerango Express half-pipe tube slide.

2014 Zoombezi Bay wanted to replace an old AquaPlay RainFortress that was carried over from Wyandot waterpark with a \$4.5 million “Baboon Lagoon” children’s area. ADG designed and built the expansion to feature nine children’s water slides, 90+ interactive water play features, and a giant 1,000 gallon dumping bucket, earning “Best New Product in Themed Exhibit Design” from IAAPA.

2018 Looking to further expand capacity with more place to relax, more slides and more interactive play, Columbus Zoo called upon ADG for the fourth time to create “Otter Banks” active play area. ADG designed Otter Banks around their Adventure Lagoon® water ride which features a 2,500 sqft activity pool with basketball area, 3 waterfalls, in-water seating, a 1,800 sqft obstacle course and two 26’ drop slides.

RESULT

Zoombezi Bay, a 22.7 acre waterpark currently ranks as one of the Midwest’s most popular water parks, attracting more than 400,000 visitors annually.



“We have been pleased to work with ADG when we have looked for ways to expand our water park. We are very excited about the new Otter Banks expansion to our park and are also proud of the other projects’ successes.”

-John Gannon, General Manager



H2OBX WATERPARK Powell's Point, NC

CHALLENGE

Design and build a unique waterpark with a classic coastal theme and resort-style feel. Include new innovative rides in a themed environment designed to create the optimal waterpark experience for guests of all ages.

SOLUTION

Drawing on decades of experience ADG's team designed H2OBX with exceptional attention to detail and distinctive features that guests of every age and interests could enjoy in a relaxing, resort-style setting. The many first-to-market attractions at H2OBX offer cutting-edge innovation and rider excitement for all ages.

Twin Tides™ Wave Pool delivers an ocean-simulated current, featuring dual beachfront entrance points on opposite ends. Deep Six Adventure Lagoon™, a skill based attraction by ADG, features climb, crawl and balance soft mat obstacles and swim zones. Additional attractions include a FlowRider®, multiple slide complexes, a fusion waterslide with aqua-lucent lighting, river rides, and Calico Jack's Cove, an immersive, multi-level, pirate-themed, play structure.

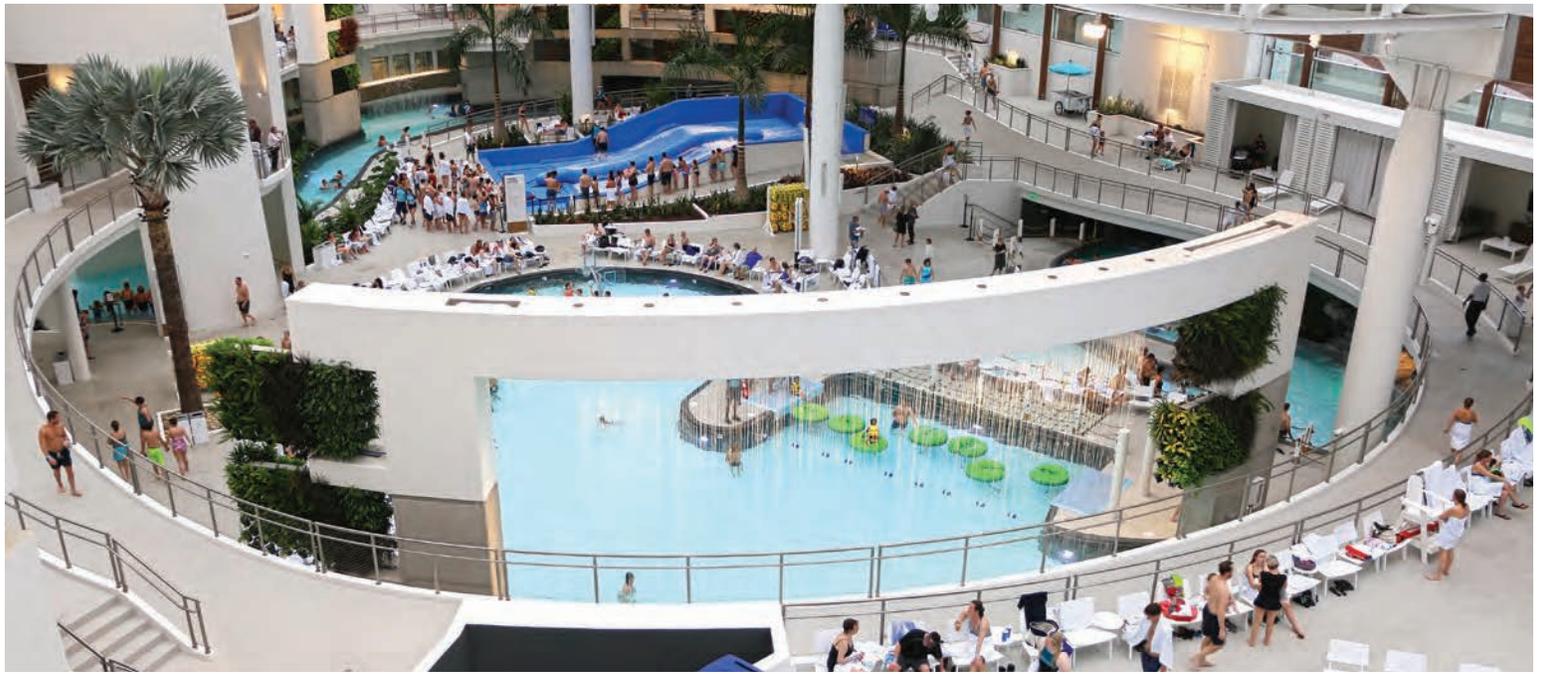
RESULT

Built by ADG in under 6 months, H2OBX debuted in June 2017, and has received rave reviews for its innovative mix of resort-style layout and thrilling attractions. The park will be open through Labor Day and is expecting to draw guests from all over the east coast.

"I'm extremely proud of the talented and diligent team at ADG and the work put forth by so many others who have created such a unique waterpark. H2OBX is incredibly innovative because we had the full force of the industry's best people behind it."

-Ken Ellis, Co-Owner of H2OBX





GAYLORD OPRYLAND Nashville, TN

CHALLENGE

The Gaylord Opryland Resort was seeking to expand its offerings with the addition of an upscale indoor-outdoor water experience tailored to their wide demographic of guests. To bring this vision to life, Gaylord Opryland called upon ADG to design and build the featured water attractions at their resort, marking the fifth time the Gaylord brand has partnered with ADG.

SOLUTION

SoundWaves was designed as a four-acre, 3-level upscale indoor/outdoor water experience with dedicated recreation zones for adults, young children and families. Year-round indoor attractions feature 110,000 sqft of upscale water activities including a slide tower, Double FlowRider®, a lazy river, and a fast action waveriver, plus an activity pool with rock climbing, basketball, and obstacle course sections. Multiple restaurants, an exclusive adults-only indoor pool, bar & lounge, and private cabana rentals on the mezzanine round out the offerings.

The outdoor water experience, designed with spacious seating for 866 guests, creates a relaxed feel the entire family can enjoy. Attraction highlights include a 315,000-gallon wave pool with giant LED movie screen, a 45' slide tower, and kids pool with multi-level play structure. Multiple dining options, bars, lounging areas, an exclusive adults-only pool, and private cabana rentals provide the high-end resort experience that is synonymous with the Gaylord brand.

RESULT

The Soundwaves water experience at the Gaylord Opryland Resort marks a distinctive turn in the design and build of upscale resort water areas. Soundwaves has been recognized by publications, like Thrillist's list of "The Coolest New Things Coming to America This Year," as well as made headlines for the opening of the outdoor portion in May 2019.

"SoundWaves is the fifth project we have worked on with ADG. They are one of those partners we return to time and time again for our resort projects because of their innovative products, high service levels and unique approach to the design-build process."

– James Chamblin, VP of Design and Construction for Ryman Hospitality Properties





KARTRITE INDOOR HOTEL & WATERPARK Monticello, NY

CHALLENGE

The Kartrite Resort & Indoor Waterpark was built as part of the \$90 million Resorts World Campus located in the midst of 1,600 acres of wilderness in the Catskill Mountains. This brand-new luxury hotel experience includes a state-of-the-art four-season two-acre indoor waterpark that is family-focused in its thrills and amenities. The accommodations include 324 exquisitely designed guest suites.

SOLUTION

ADG designed the Kartrite indoor waterpark with a unique upscale, tropical flare that is reflected through an abundance of premium deck space and cabanas, capped off with copious amount of lush landscaping underneath a state-of-the-art, barrel-shaped Texlon® transparent roof that will ensure a balmy 80 degrees every day of the year, especially appealing in the middle of those Upstate New York winters!

Highlights of the many water park attractions include a FlowRider®, lazy river, activity kid's pool & multi-level play structure, five waterslides from ProSlide, and a Mezzanine with cabanas and a bar and grill.

RESULT

The Kartire Resort & Indoor Waterpark opened in the spring of 2019 to much acclaim. Since its debut, the Kartrite has recieved high levels of reviews online and has had several nights filled to occupancy, as well as numerous industry accolades.

"As you can see from this beautiful property, as well as with their portfolio of other successful properties, we know we made the right choice in choosing ADG as our partner. They are first class, best in the country and that's the quality of a product we were looking to deliver here at the Kartrite."

– Greg Silver, President & CEO, EPR.R





SIX FLAGS OVER GEORGIA Atlanta, GA

CHALLENGE

Design and build the largest expansion in Six Flag Over Georgia's 47-year history – on budget and within a 6 month time frame, while incorporating revenue generating amenities, enhancing the customer experience through park layout and design and provide one-of-a-kind thrill rides.

SOLUTION

An expansive Caribbean themed getaway, Six Flags Over Georgia's newest Hurricane Harbor is an enticing combination of thrill rides and relaxing family fun. A beach paradise with lush surroundings, the park's staple attraction, the impressive Calypso Bay, features a 38,000 sf custom pool outfitted with ADG's exclusive Wave Generation system, delivering 4ft waves breaking in eight different patterns.

ADG incorporated the world's first hybrid zero-gravity slide into the design, along with a multi-slide complex and Paradise Island, an interactive water playground. Hundreds of lounge chairs and luxury cabanas situated near beach-themed eateries and retail outlets provide easily accessible sources of revenue generating activities for the park.

RESULT

ADG built the park on-time and on-budget despite a record-breaking cold and snowy southeast winter. Since its' opening in 2014, the water park has skyrocketed to fame as one of the new "must-visit" attractions in the Southeast, featured on MSNBC, The Travel Channel's Xtreme Waterparks, and The Weather Channel.

"Our entirely new water park further supports our goal of delivering a world-class destination for all ages. This multi-million dollar investment is a 'must-do' experience for anyone living in or visiting Metro Atlanta and our plan is to expand Hurricane Harbor in the coming years..."

-Dale Kaetzel, Six Flags Over Georgia Park President





KALAHARI RESORT Sandusky, OH

CHALLENGE

Building on the wave of success of the Kalahari resort in the Wisconsin Dells, Kalahari wanted to design and build a second indoor waterpark for its newest location in Sandusky, OH. ADG was hired to utilize existing 80,000 sf footprint and incorporate spaces for revenue generation through retail and F&B with a practical design plan for future expansion.

SOLUTION

ADG designed and built the original Kalahari waterpark to ensure not only a positive customer experience but future expansion needs as well. Enhanced with African theming woven throughout, a series of unique ride attractions were incorporated including the world's first indoor Double Flowrider® and the world's only "Zip Coaster" indoor water ride.

Expanding on their original design, ADG began phase two with the f&b area, adding a mezzanine with two waterslides to maximize volume and increase capacity. Other innovative additions included ADG's Texlon® Transparent Roofing System and a 14,000sf indoor wave pool with zero-depth beach entry and six foot waves. A second indoor double Flowrider® was also added to meet growing demand. Exciting new slide complexes, swim-up bars and cabana areas completed the updated resort.

RESULT

Over the years, Kalahari Resort has continued to add guest rooms, making it the largest hotel in Ohio at 884 rooms. Featured nationally in publications like Business Week, USA Today, NBC's "The Today Show," ABC's "Good Morning America" and CNBC's "Mike on the Money," Kalahari continues to garner press and enjoy the success as an in-demand customer destination.

"It takes a tremendous amount of commitment, ingenuity and funding to create an exciting waterpark and we believe consumers will continue to choose resorts that make their getaway experience an exciting event."

-Todd Nelson, President





GAYLORD PALMS Orlando, FL

CHALLENGE

Facing stiff competition in the Orlando area, the Gaylord Palms Hotel & Resort needed to enhance their existing aquatic recreational amenities to provide a solid market differentiation from other competing properties. In order to stand out from the competition, The Palms needed a setting with multiple demographic appeal, all while increasing their ROI with F&B, rentals and event opportunities.

SOLUTION

ADG's design blends two distinct recreational areas, "Cypress Springs", a kid-friendly adventure water play, and "South Beach", a more formal style resort pool setting for adults. Separating the two areas is a centrally located outdoor bar and restaurant providing easy access to F&B with service to cabanas and guest chairs.

An abundance of outdoor entertainment options were incorporated into the design to host events and provide entertainment to guests. From large outdoor movie screenings overlooking the pool in Cypress Springs, to poolside cocktails and dancing at the South Beach location the property offers multiple options for events and desired guest experiences. A Phase II expansion was complete in 2016 to add the FlowRider® surf simulator and an additional slide complex to further target the teen & young adult market.

RESULT

From play structures, slides and "dive-in" movies, to upscale cabanas, swaying palms, lush greenery and warm water spas, the outdoor area at the Palms has managed to create an oasis with multiple appeal, all in one property. Both Cypress Springs and South Beach Pool boast terrific results in event bookings and rentals with flexible configurations of deck space that increase revenue-generating opportunities.

"The Gaylord Palms is a functional powerhouse for families, couples and business travelers alike."

-Eve Lumsden, Director of Sale





SIX FLAGS NEW JERSEY Jackson, New Jersey

CHALLENGE

Design and build the largest waterpark in U.S. history, providing complete turnkey design, engineering and construction. ADG's objectives were to design/build a 10,000 person capacity waterpark across 30 acres and develop amenities that increase time on premises and per cap spending.

SOLUTION

Utilizing existing topography, ADG helped eliminate costly clearing and earthwork with minimum contour changes, retaining 75% of the mature oak trees on site. The park layout was developed around a core village island, creating a cross-axis circulation pattern allowing guests to easily travel between food and retail kiosks, restrooms, lockers, tube rentals and attractions which include: 14 high-speed thrill slides, a 45,000 sqft wave pool, 2-story play structure and 2,500ft lazy river. ADG preserved existing vegetation and site lines by setting features within lush landscaping and themed architecture.

RESULT

Hurricane Harbor remains one of the largest waterparks in the U.S. Exceeding the desired 10,000 person capacity, ADG was able to seamlessly integrate 30 acres of attractions with many amenities and support facilities to satisfy the wants and needs of up to 11,000 guests. Creative design and layouts maintained the synergy and feel of a small park setting within Hurricane Harbor's sprawling grounds.



"I had the greatest time at the water park. Hurricane Harbor was the best place to be; I was able to cool off completely in the Lazy River, Wave Pool and on the water slides."

—Customer, Six Flags NJ



MASSANUTTEN WATERPARK McGaheysville, VA

CHALLENGE

To become a true four-season destination, this popular golf and ski resort with timeshare community wanted to expand its offerings and add a state-of-the-art indoor/outdoor waterpark complex to their property. This project was designed to increase timeshare sales, generate revenue through sale of day passes, F&B, and incidentals, differentiate through a unique blending of indoor/outdoor waterpark design and aquatic attractions and designed for potential future expansions.

SOLUTION

Massanutten hired the experts at ADG to build a unique waterpark complex that would revolutionize waterpark design and position Massanutten as the premiere destination resort in the region. A state of the art, 3-story, 42,000 sqft indoor waterpark and 88,000 sqft outdoor complex was designed to include a perfect blend of leisure and play areas featuring the latest advances in aquatic attractions and wave generation technologies, including the Double FlowRider® and beach entry outdoor wave pool. With an abundance of deck and lounge areas surrounded by F&B, retail and entertainment outlets, ample room for relaxation is provided for guest enjoyment, increasing repeat visitation and length of stay.

RESULT

Massanutten experienced a noticeable increase in timeshare property sales as soon as the first cubic yard of concrete was poured for the foundation! The indoor waterpark was declared the “wave of the future” and has been featured in numerous articles, TV shows, and promotional spots. The addition of the indoor and outdoor waterpark dramatically increased timeshare sales and has proven to be a successful revenue generating amenity.

“ADG listened to our goals and understood that Massanutten wanted a truly unique year-round amenity using the latest features and technologies that could easily be expanded without having to build a new support space.”

-Clay Rice, Director of Operations





HILTON ANATOLE Dallas, TX

CHALLENGE

The Hilton Anatole, a popular conference center and hotel destination in downtown Dallas, wanted to upgrade their recreational aquatic amenities in order to increase guest occupancy during the traditionally slower summer season. They turned to ADG to design a Resort Waterfront setting to increase guest occupancy during the traditionally slower summer season while appealing to business and leisure travelers alike.

SOLUTION

This Resort Waterfront “JadeWaters”, designed and built by ADG, seamlessly carries through the sophisticated Asian-influenced design, architecture and landscaping while addressing the water recreation needs of both family and business travelers alike. Highlights of the new JadeWaters waterfront area include a 4,000 sqft leisure pool, 7,000 sqft upgraded beach-entry family pool with kids play area, and a 630ft lazy river complete with a sun shelf for lounge chairs. Additional amenities of JadeWaters includes two 180-ft winding water slides, seating and lounging for over 800 guests, private cabanas and daybeds and a 23 seat swim-up bar.

RESULT

Opening half way into the summer season, Jade Waters produced immediate results in terms of increase in occupancy and resort fees. F&B sales at JadeWaters exceeded expectations, with over 70% of revenue resulting from poolside beverage sales alone. Summer visitation saw a tremendous boost from guests within the local market with an average occupancy rate of 30-35% increase over last summer.

“We are very happy with our newset amenity JadeWaters and so are our guests! We are recieving very positive responses from patrons.”

-Brett Kraft, Hotel Manager





GAYLORD TEXAN Grapevine, TX

CHALLENGE

Facing increased competition in the market, the Gaylord Texan Resort wanted to develop a unique recreational water setting that would appeal to the family and leisure traveler, increase the amount of family visits and extend length of stay, generate increased revenue from food and beverage sales and gain market share over competition.

SOLUTION

The Gaylord Texan's Paradise Springs, a 10-acre resort waterpark complex that creates the destination experience guests are looking for, whether traveling with the family or planning for a business event. A 6,000 sqft lagoon with walk-in beach, lazy river and horseshoe shaped 'hot pools' invite guests to relax, while a zip line, water basketball, water slides, toddler pools and a newly added Multi-Level Play Structure encourage family fun. The Multi-Level Play Structure, part of a complete Phase II area expansion, includes additional deck areas for lounge chairs, tables and cabanas for added family appeal. To enhance the overall resort feel, large decking and lounge areas were incorporated at the center and throughout Paradise Springs. Poolside bars and eateries offer specialty options and cabana rentals and VIP/party areas solicit additional revenue opportunities from both family gatherings and business events.

RESULT

Upon opening Paradise Springs the Gaylord Texan experienced a significant and positive impact to leisure guest bookings. Their Paradise Springs Grapevine Waterpark was rated 2011's No. 1 Top Aquatic Resort by Waterparks & Resorts Today.

"Paradise Springs is a great example of what resort properties can do to meet the needs and desires of guests while minimizing impact on the environment."

-Aquatics International





SIX FLAGS GREAT AMERICA Gurnee, IL

CHALLENGE

Having built more than twelve successful projects in seven years for Six Flags, ADG was once again the builder of choice when Six Flags decided to embark upon their latest challenge, to complete a massive 13-acre waterpark in only 9 months. ADG took on the task of transforming 13 undeveloped acres and parking lots into a state-of-the-art waterpark, completing the project within 9 months, from concept to opening day and the goal of increasing park capacity and revenue generating opportunities.

SOLUTION

In order to meet the aggressive development schedule, ADG’s teams worked 7 days a week throughout a difficult Chicago winter to complete the project for a Memorial Day opening. Created to appeal to visitors of all ages, the park was designed as a completely full-service environment with everything from luxury cabanas and tiki-style eateries, to daredevil drops, looping slides and family play areas, all carefully arranged with palm trees, vegetation, and brightly colored buildings that served to house all of the F&B, retail and guest service areas in easily accessible and attractive settings.

RESULT

Opened in 2005 and expanded in 2011, the massive Hurricane Harbor Park is a Caribbean oasis on the outskirts of Chicago. Completed on-time and on-budget, the initial 13-acre waterpark and 8-acre expansion were immediate successes and increased overall park capacity by more than 10,000 patrons.

“Riptide Bay is the perfect addition to our park’s extensive collection of thrills. We expanded the waterpark due to popular demand, and are excited to be able to provide guests of all ages with a variety of unique and thrilling attractions”

-Hank Salemi, Six Flags Great America Park President





AQUATOPA INDOOR WATERPARK Tannersville, PA

CHALLENGE

To complete the evolution from ski mountain to true resort destination, and achieve the original vision the owners had for Camelback Resort, the final phase of development, Camelback Lodge & Indoor Waterpark was put into motion. The owners turned to ADG to design & build the most innovative indoor waterpark in North America, supplying one-of-a-kind rides and featured attractions and incorporating theming throughout park.

SOLUTION

An immersive exercise in branding, the Camelback experience culminates in Aquatopia, a fully integrated, themed waterpark that enhances the resort's story and brand. From the Bombora Double Flowrider® to the Great Kanagawa Wave Pool and only-one-of-its-kind Lost River Adventure, to the uphill Storm Chaser water coaster and first ever 6-person raft ride, Aquatopia was designed to be a limitless environment of adventure, play and relaxation. No other indoor facility provides as much variety in theming, unique pool designs, thrilling rides, expansive lounge areas and available food & beverage options.

RESULT

Completed in less than 17 months, the \$163 million Camelback Lodge and Aquatopia Indoor Waterpark is the largest and most innovative hotel and indoor waterpark ever constructed in the US in a single phase. Conceived as a true ski-in/ski-out lodge, it offers a mix of dry and aquatic based adventure and leisure activities year round that no other resort in the world currently provides on one property.

"The waterpark was a great draw this winter for guests who were worried about booking a hotel in the face of less than ideal snow conditions. It gave them the security to know they would always have something to do. Our hotel remained full, our rooms were booked and guests left excited to return again next year!"

-Charles Blier, Executive VP & General Manager





WET N WILD SPLASHTOWN Houston, Texas

CHALLENGE

Opened in 1984, Hanna-Barbera Land was later redesigned as Houston’s Wet n’ Wild SplashTown Waterpark. Premier Parks sought to rebrand the park by adding a multi-million dollar waterpark. ADG was engaged to design/build renovations in under 4 months while seamlessly incorporating all desired features into the site plan and generating a design that would increase revenue and enhance the customer experience.

SOLUTION

ADG designed/build the largest expansion in the park’s history, creating a waterpark which combined thrill, adventure, relaxation and top-of-the-line amenities.

New attractions included Big Kahuna, a 5-story mega-tube serpentine raft ride; the FlowRider® wave surf system, an expanded kid’s area and interactive toddler-only play zone. To generate incremental revenue and enhance the guest experience the park design expanded changing areas, increased shaded lounge areas, widened walking paths and added new premium cabanas. Dining areas, viewing decks, food and beverage, and two new retail locations were also added.

RESULT

Since its expansion, Wet n’ Wild SplashTown has attracted crowds of all ages including the American Coasters Enthusiasts and WorldPro Flowboarding Champion, Xana-Kai Nash. The park continues to attract visitors from across the U.S. increasing revenues and per cap spending.

“On Opening Day I had some season pass guests, who have been members for years, stop me and shake my hand telling me how much they loved the new park.”

– Jody Kneupper, GM



COMPLETED PROJECTS

AQUATIC DEVELOPMENT GROUP

2020	Soaky Mountain King's Dominion	Design/Build Design/Build Renovation	Tennessee Virginia
2019	SoundWaves at Gaylord Opryland Island H2O Live! at Margaritaville Resort Kartrite Hotel & Indoor Waterpark	Design/Build Indoor & Outdoor Waterpark Design/Build Design/Build Indoor Waterpark	Tennessee Florida New York
2018	Canobie Lake Park Columbus Zoo Zoombezi Bay - Phase 4 Six Flags America - Phase 3	Design/Build Design/Build Expansion Design/Build Renovation	New Hampshire Ohio Maryland
2017	H2OBX Waterpark Pampanga Aqua Planet Waterpark Six Flags Hurricane Harbor Oaxtepec Wet 'n' Wild Toronto	Design/Build Design/Supply/Consult Int'l Design/Supply/Consult Int'l Design/Const. Mgmt Renovation Int'l	North Carolina Philippines Mexico Ontario
2016	Camelbeach Waterpark - Phase 5 Gaylord Palms - Phase 3 Gaylord Texan - Phase 2 Hilton Anatole Jade Waters Hyland Hills Water World Las Cañadas Campground Six Flags America - Phase 2 Village Vacances Valcartier Bora Parc	Design/Build Renovation Design/Build Expansion Design/Build Expansion Design/Build Design/Build Design/Supply Int'l Design/Build Expansion Design/Supply Indoor Waterpark Int'l	Pennsylvania Florida Texas Texas Colorado Mexico Maryland Québec
2015	Aquatopia Indoor Waterpark	Design/Build Indoor Waterpark	Pennsylvania
2014	Columbus Zoo Zoombezi Bay - Phase 3 Cowabunga Bay Kentucky Kingdom Hurricane Bay Six Flags Over Georgia Hurricane Harbor Wet 'n' Wild Splashtown	Design/Build Renovation Design/Build Design/Build Renovation/Expansion Design/Build Design/Build Renovation	Ohio Nevada Kentucky Georgia Texas
2013	Calypso Waterpark - Phase 3 Lake Winnepesaukah Soak Ya Magic Springs Waterpark - Phase 3 Rapids Waterpark Sahara Sam's Outdoor Waterpark	Design/Supply Expansion Design/Build Design/Build Expansion Design/Build Design/Supply Expansion	Ontario Georgia Arkansas Florida New Jersey
2012	Clementon Park Frontier City Gaylord Palms - Phase 2 Ocean Breeze Waterpark - Phase 2 Soaring Eagle Indoor Waterpark	Design/Build Expansion Design/Build Expansion Design/Build Expansion Design/Build Expansion Design/Build Indoor Waterpark	New Jersey Oklahoma Florida Virginia Michigan
2011	Batavia Clarion Inn Indoor Waterpark Calypso Waterpark - Phase 2 Camelbeach Waterpark - Phase 4 Columbus Zoo Zoombezi Bay - Phase 2 Gaylord Palms Gaylord Texan Jay Peak Resort Indoor Waterpark Ocean Breeze Waterpark Six Flags Great America - Phase 2	Design/Build Indoor Waterpark Design/Supply Expansion Int'l Design/Build Expansion Design/Build Expansion Design/Build Design/Build Design/Build/Supply Indoor Waterpark Design/Build Expansion Design/Build Expansion	New York Ontario Pennsylvania Ohio Florida Texas Vermont Virginia Illinois

COMPLETED PROJECTS

AQUATIC DEVELOPMENT GROUP

2010	Calyпсо Waterpark	Design/Supply Int'l	Ontario
	Nashville Shores	Design/Build	Tennessee
	Magic Springs Waterpark - Phase 2	Design/Build Expansion	Arkansas
	Splashtown at Darien Lake - Phase 2	Design/Build Expansion	New York
2009	Amazoo Waterpark	Design/Supply Expansion Int'l	Québec
	Greek Peak Indoor Waterpark	Design/Build Indoor Waterpark	New York
	Wilderness Resort Condos Indoor Waterpark	Design/Build Indoor Waterpark	Tennessee
	Wilderness Resort Condos Outdoor Waterpark	Design/Build	Tennessee
2008	Camping H2O Waterpark	Design/Supply Int'l	Québec
	Coco Key Mt. Laurel Marriott Indoor Waterpark	Design/Build Indoor Waterpark	New Jersey
	Coco Key Waterbury Grand Hotel Indoor Waterpark	Design/Build Indoor Waterpark	Connecticut
	Magic Springs Waterpark	Design/Build	Arkansas
	Oasis at the Wharf	Design/Build	Alabama
	Red Jacket Resort Indoor Waterpark	Design/Build Indoor Waterpark	New Hampshire
	Sahara Sam's Indoor Waterpark	Design/Build Indoor Waterpark	New Jersey
	Silver Mountain Resort Indoor Waterpark	Design/Build Indoor Waterpark	Idaho
	Split Rock Resort Indoor Waterpark	Design/Build Indoor Waterpark	Pennsylvania
	Wilderness Resort Outdoor Waterpark	Design/Build	Tennessee
2007	Columbus Zoo Zoombezi Bay	Design/Build	Ohio
	Kalahari Resort Indoor Waterpark - Phase 2	Design/Build Expansion Indoor Waterpark	Ohio
2006	Six Flags Great Escape Indoor Waterpark	Design/Build Indoor Waterpark	New York
	Wilderness Resort Indoor Waterpark	Design/Supply Indoor Waterpark	Wisconsin
2005	Geauga Lake Wildwater Kingdom - Phase 2	Design/Build Expansion	Ohio
	Kalahari Resort Indoor Waterpark	Design/Build	Ohio
	Massanutten Resort Indoor Waterpark	Design/Build	Virginia
	Six Flags Great America	Design/Build	Illinois
2004	Ameri-Cana Indoor Waterpark	Design/Const. Mgmt Indoor Waterpark	New York
	Kalahari Resort Indoor Waterpark	Design/Supply Expansion Indoor Waterpark	Wisconsin
	Kalahari Resort Outdoor Waterpark	Design/Supply Expansion	Wisconsin
2003	Six Flags New England - Phase 3	Design/Build Expansion	Massachusetts
2002	Camelbeach Waterpark - Phase 4	Design/Build Expansion	Pennsylvania
	Crystal Springs Resort & Golf Club	Design/Build	New Jersey
	Red Oaks Outdoor Waterpark	Design/Build	Michigan
2001	Camelbeach Waterpark - Phase 3	Design/Build Expansion	Pennsylvania
	Dollywood Dolly's Splash Country	Design/Build	Tennessee
	Roseland Outdoor Waterpark	Design/Build	New York
	Six Flags Great Adventure	Design/Build	New Jersey
2000	Camelbeach Waterpark - Phase 2	Design/Build Expansion	Pennsylvania
	Emerald Pointe Waterpark	Design/Build	North Carolina
	Geauga Lake Wildwater Kingdom	Design/Build	Ohio
1999	AstroWorld Park	Design/Build Renovation	Texas
	Mountain Creek Waterpark	Design/Build Renovation	New Jersey
	Six Flags Fiesta Texas	Design/Build	Texas

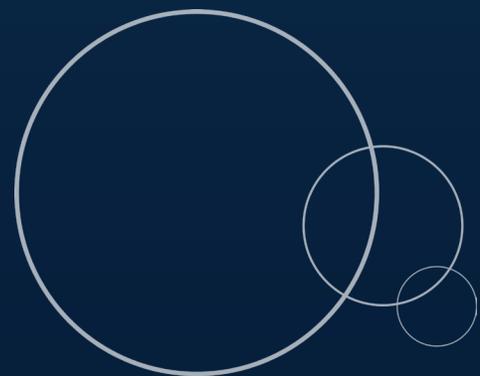
COMPLETED PROJECTS

AQUATIC DEVELOPMENT GROUP

	Six Flags Hurricane Harbor Arlington	Design/Build	Texas
	Six Flags New England - Phase 2	Design/Build Expansion	Massachusetts
	Six Flags St. Louis	Design/Build	Missouri
1998	Camelbeach Waterpark	Design/Build	Pennsylvania
	Six Flags New England	Design/Build	Massachusetts
	Supersplash Adventure	Design/Build	Texas
1997	Michigan Adventures	Design/Build	Michigan
	Six Flags Darien Lake	Design/Build	New York
	Six Flags Elitch Gardens	Design/Build	Colorado



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iv.

Swinerton Construction Corporation



SWINERTON BUILDERS COMPANY PROFILE



1888
YEAR
ESTABLISHED



\$3.5B
2018 REVENUE



0.50
2019 CA EMR



3,500+
EXPERTS
ON STAFF



\$770M+
2018 DIVERSITY
SPEND



#1
2019 CA ENR
GENERAL
CONTRACTOR



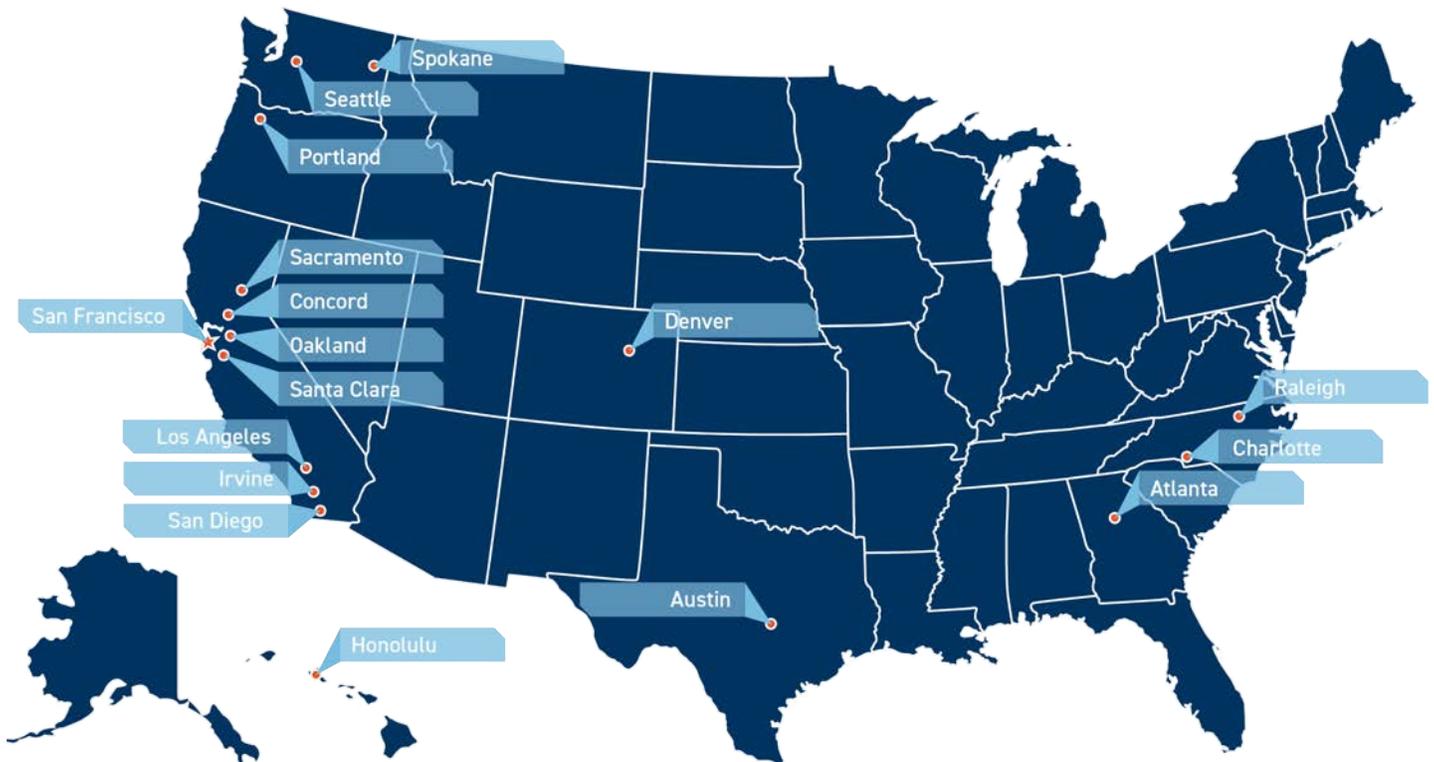
100%
EMPLOYEE
OWNED



\$5B
BONDING
CAPACITY



#2
HOSPITALITY
2019 CA ENR



SWINERTON BUILDERS

SELECT CALIFORNIA HOSPITALITY EXPERIENCE



Ritz-Carlton Highlands,
Truckee



Fairmont Heritage Place at
Ghirardelli Square, San Francisco



Sawyer Downtown Plaza Tower,
Sacramento



Hotel Del Coronado
Historic Renovation, San Diego



Omni Hotel,
San Diego



Hazens Sheraton,
Los Angeles



Courtyard by Marriott,
San Francisco



U.S. Grant Hotel Renovation,
San Diego



Hope Street,
Mountain View



Waldorf Astoria,
San Francisco



Hotel Z,
San Diego



Orchard Garden,
San Francisco



Lemery Development

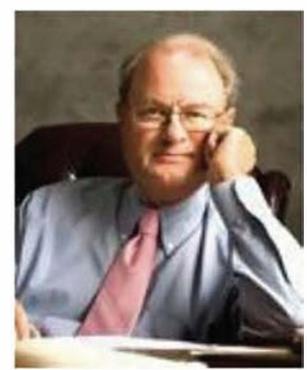




John C. Lemery Experience

Lemery Development

John C. Lemery



A founding member of the Lemery Greisler law firm, John C. Lemery practiced law in the Capital Region of New York for 47 years. He is an economic development specialist, focusing on siting, financing, structuring, and all other aspects related to economic development projects. He was the lead council for the developers of the 1,414-acre Luther Forest Technology Campus, which hosts Global Foundries Chip Manufacturing Plant. This plant employs 3,000 people, and many consider this the largest economic development project in Upstate New York.

Among other things, Mr. Lemery was primarily responsible for the development of the \$46 million Six Flags Great Escape Lodge & Indoor Waterpark, New York's first hotel with an indoor waterpark. He managed several aspects of the construction, land acquisition, the partnership that built the hotel/waterpark, and the financing.

Lemery is the principle founder and primary sponsor of the only Dinosaur Theme Park in New York State, which opened in May of 2019, with 40 animatronic dinosaurs. Lemery was involved in all aspects of the development including putting the team together which ultimately designed and built the theme park.

Mr. Lemery served as council to several Capital Region companies and local governmental economic development corporations. More generally, Mr. Lemery's practice focused on the areas of commercial and corporate law, including industrial development financings. In addition, Mr. Lemery has worked closely with clients to structure buyouts from several public companies through structured financings, commercial loans, mezzanine financing, and equity participation. He also helped companies obtain targeted funding from the State of New York and the Federal Government including Urban Development Action Grants, Farmers Home Administration, and the US Department of Agriculture – Business and Industry Division Loans.

Mr. Lemery is admitted to practice law in New York and Pennsylvania. He served on the Member Loan Committee of the Capital Region Economic Development Corporation and was a member of the Economic Development Council of the State University of New York in Albany and a former member of the Regional Advisory Board of the US Small Business Administration. Mr. Lemery has spoken on issues related to development and community economic well-being, and was an Adjunct Professor Emeritus of Entrepreneurship and Business Formation at the Graduate School of Business at the State University of New York in Albany.

Mr. Lemery served on Active Duty as a Captain in the United States Army from 1965-1967 and was a recipient of the United States Army Commendation Medal for Meritorious Service.

Luther Forest Technology Campus



"The Luther Forest Technology Campus is a 1,414-acre (573 hectares) site specifically designed for semiconductor and nanotechnology manufacturing and other innovative technologies. The site is environmentally friendly and pre-approved with convenient dedicated Interstate highway access only 1.5 miles away. This site offers abundant water, reliable electrical and gas systems, is pre-approved environmentally, and has a user-friendly site-plan review process in place. The Luther Forest Technology Campus is home to GLOBALFOUNDRIES (a joint venture between AMD Inc. and ATIC of Abu Dhabi)"

<https://lutherforest.org/about.php>

Mr. Lemery was lead council for the development team and managed the various aspects of the creation of this project. The Luther Forest Technology Campus is an invaluable asset to the area from job creation and technological advancement to environmental stewardship.

The Great Escape Hotel/Waterpark

Great Escape is
New York's
First Hotel with
an Indoor
Waterpark!



This facility brings
hundreds of
thousands of visitors
to the area annually
and contributes
greatly to the tourism
economy!

John Lemery's ability to create a development team was the essential ingredient in determining the success of this project. Not only was Lemery responsible for recruiting the team, but Lemery also managed certain aspects of the construction, land acquisition, and financing.

Lake George Expedition Park



Once again, John Lemery's ability to bring people of varying backgrounds and areas of expertise together to create something truly unique and amazing was exercised in the development of Dino Roar Valley in Lake George Expedition Park. Dino Roar is the only Dinosaur Theme Park in NY, bringing engagement, learning, and fun to Lake George area and creating a special destination for families and individuals alike. Through the collaboration of designers, engineers, and John Lemery, this project has become a great success, and has been delighting visitors since its opening in May of 2019.

Letters of Recommendation

John S. Collins

(330) 998-4482 johnscollins323@gmail.com

To whom it may concern,

I am writing this letter on the behalf of John Lemery who is working with others on the Solano 360 project in Vallejo CA. I was the general manager and park president of Six Flags the Great Escape in Queensbury NY (Lake George) for several years. John Lemery single handedly proposed that we consider building a hotel/indoor water park on property directly across Route 9 from the Great Escape. The property for the Hotel/ Waterpark lay between Route 9 and Interstate 87. The then chairman and CEO of Six Flags was very interested in the development and encouraged Lemery to find some partners who would be willing to partner with Six Flags. Lemery was able to engage three very strong financial partners, including two large construction companies and Aquatic Development Group who, with Six Flags, developed the facility. He was intimately involved with the aspects of the construction, all of the land acquisition necessary, the planning and zoning before local and state agencies, and arranged the financing.

John Lemery was also the principle attorney of the 2 million dollar Environmental Impact Statement, which the town required in order for us to expand the theme park. That impact statement took some two years to create and be approved, which paved the way for our ability to add attractions without going through a difficult zoning process.

Lemery was also a registered lobbyist for Six Flags and was instrumental in obtaining a substantial tax relief benefit on behalf of the company. He was also principally responsible for all the planning and zoning during my time as park president and served beyond that time for successive park presidents.

I am pleased to write this letter on behalf of John.

Regards,

John S. Collins

Letters of Recommendation Cont.



January 23, 2020

To whom it may concern,

John Lemery served as legal counsel to Six Flags in upstate N.Y., and his firm served to coordinate the development of our first Hotel Water Park in Queensbury, N.Y. His entrepreneurial experience and associated knowledge of political structure and law were invaluable to the success of that project.

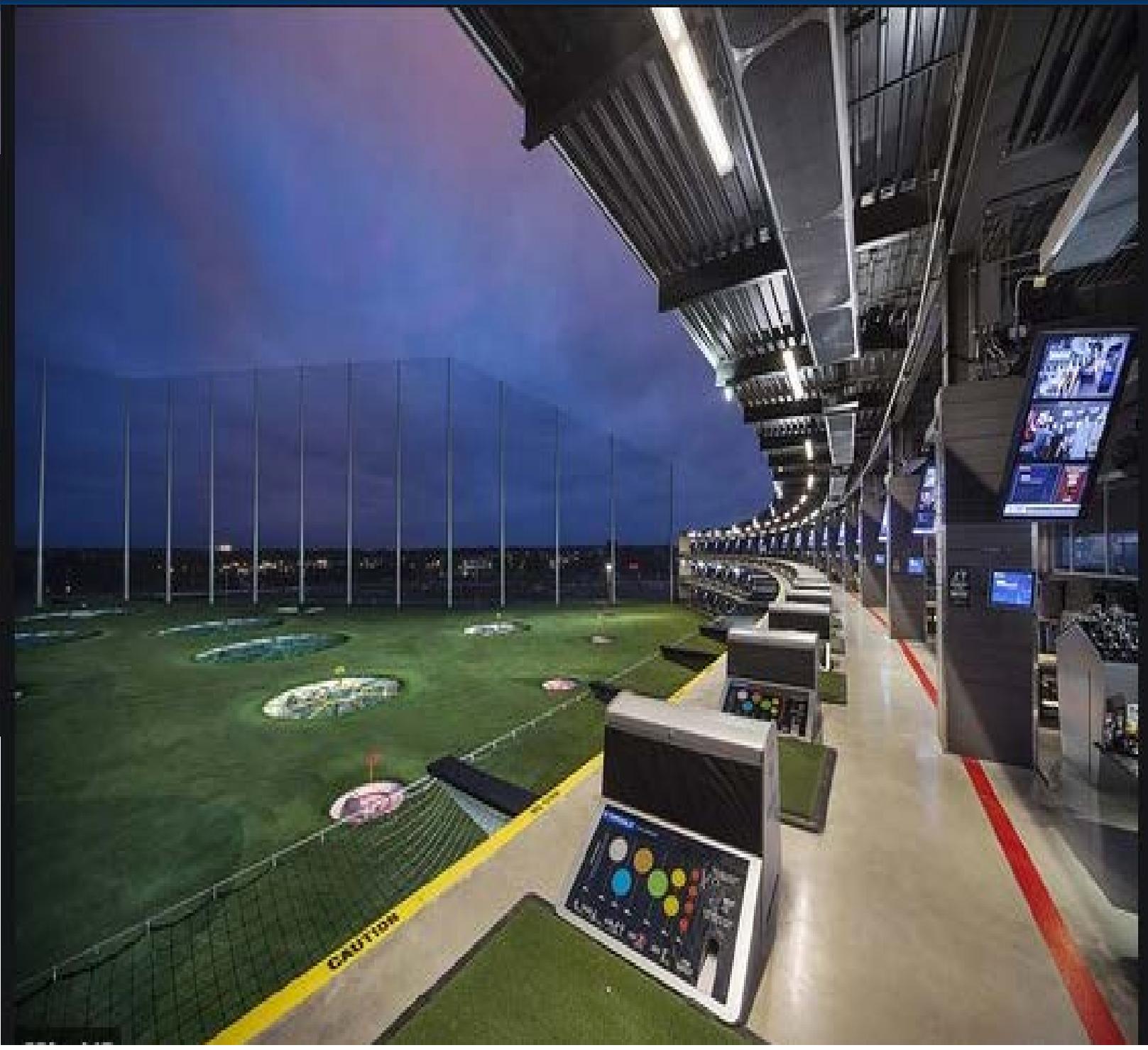
On a broader scale, John and his firm Lemery Griesler were instrumental in navigating us through many development opportunities over the years that ultimately benefitted all involved parties.

Sincerely,

A handwritten signature in black ink, appearing to read "Don McCoy".

Don McCoy
Park President
Six Flags Discovery Kingdom

D GOLF-RESIDENTIAL-RETAIL EXPERIENCE

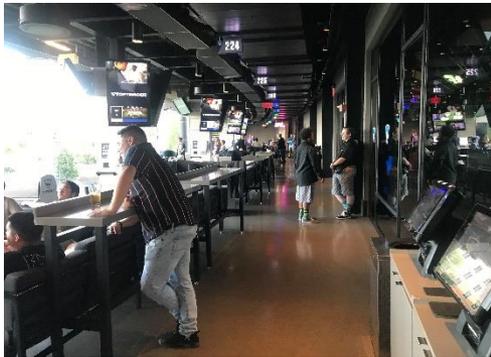


Recreational Golf Amenity



Recreational Golf Amenity

Part of a nationwide network of innovative golf entertainment venues, with a unique entertainment destination pairing the most advanced golf games and technology with outstanding food and drinks. It has something for everyone.



The indoor/outdoor all-weather golf-entertainment complex features hitting bays, a Free Play Game Lounge with classic games like shuffleboard and arcade style games, a full-service restaurant and bar, an outdoor lounge and fully equipped meeting and event rooms. This space will be ready to provide a turnkey, hassle-free experience customized to the patrons needs.

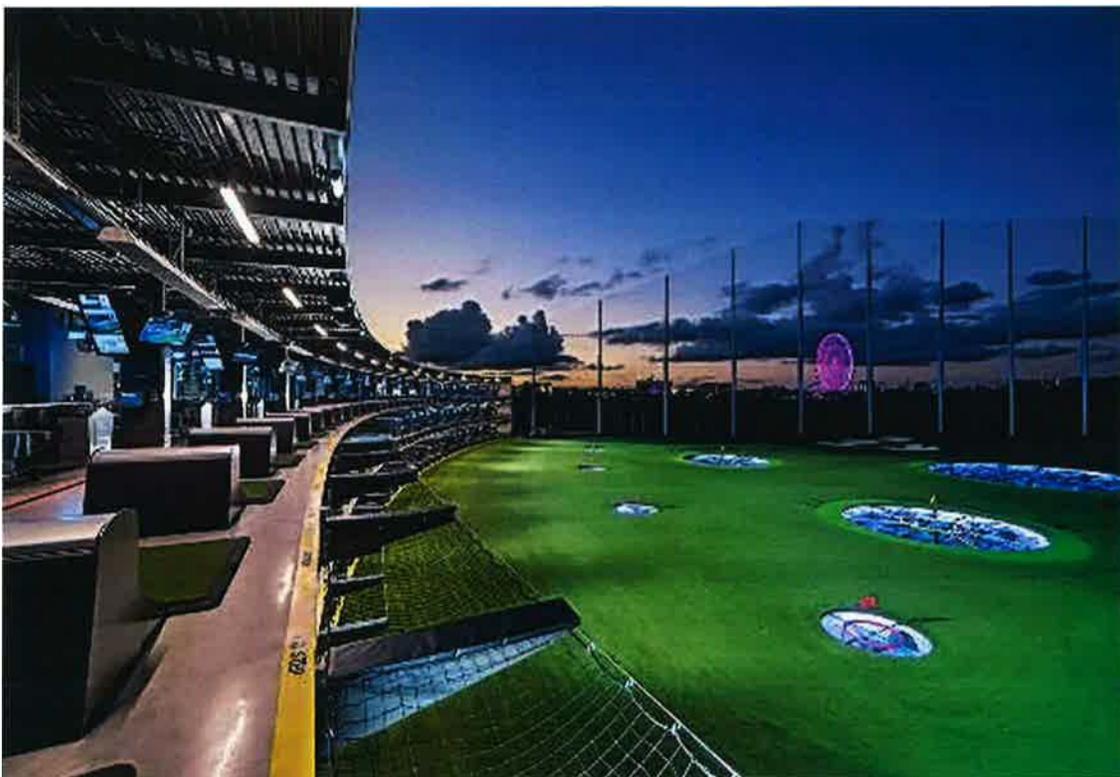


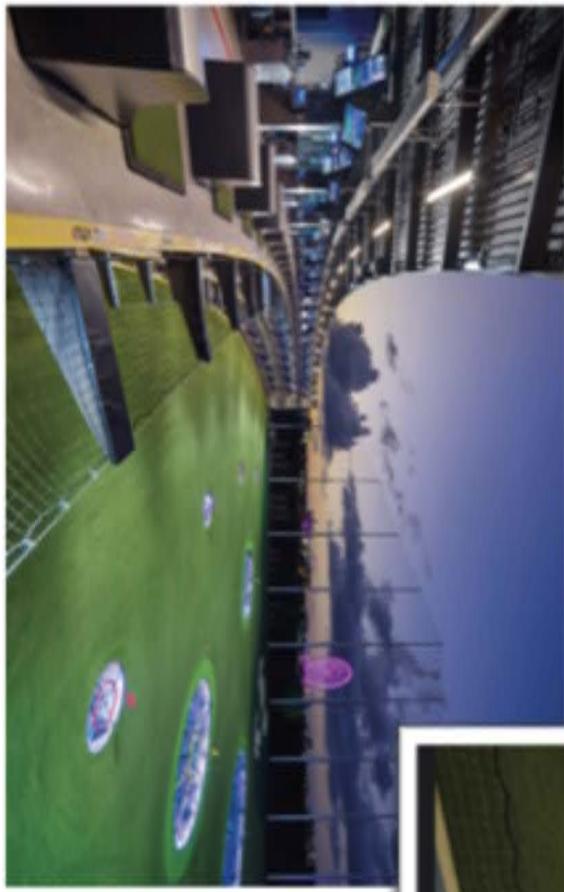
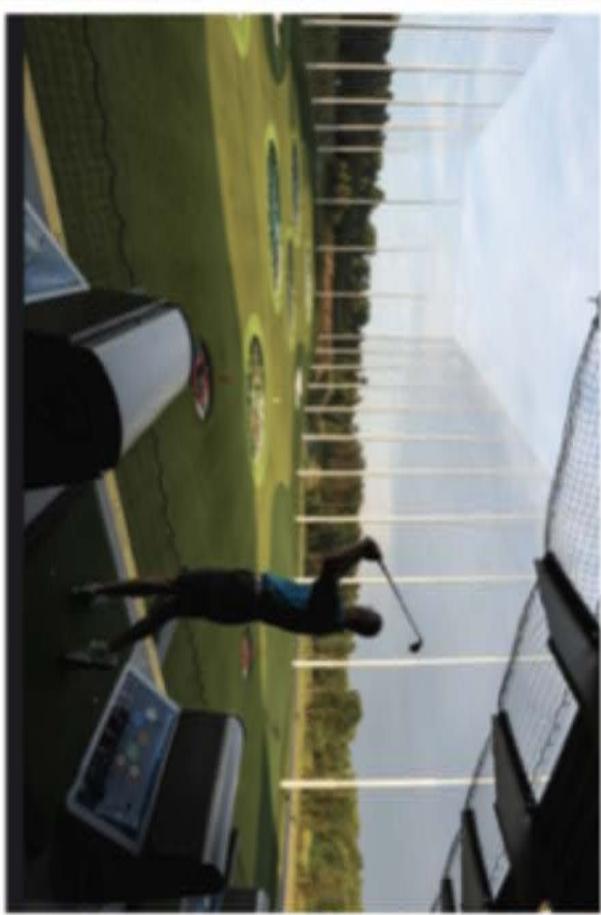
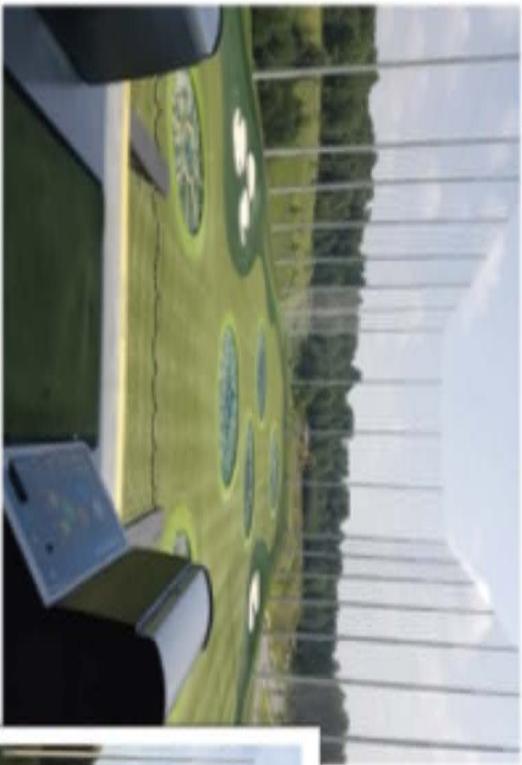
This indoor-outdoor facility is the perfect complement to feature and resort hospitality components. Providing an additional amenity that combines the driving range experience with an active high tech sports, food and beverage entertainment environment. Additionally the open space driving range will have the capacity to host a variety of outdoor events year round; providing direct connection to the rest of the outdoor program and tying into the surrounding outdoor experiences.

Golf Experience



The themed destination resort brings together all the amenities of a luxury resort and the high-energy excitement of state-of-the-art theme park that illuminate the accomplishments of middle eastern culture in a dazzlingly entertaining way. Creating family traditions, one family at a time, and continuously improving efficiency in operations are the cornerstones of the Themed Resort. The team is passionate about providing the customized, world-class amenities, entertainment experiences and service that will generate great guest satisfaction levels in the industry.





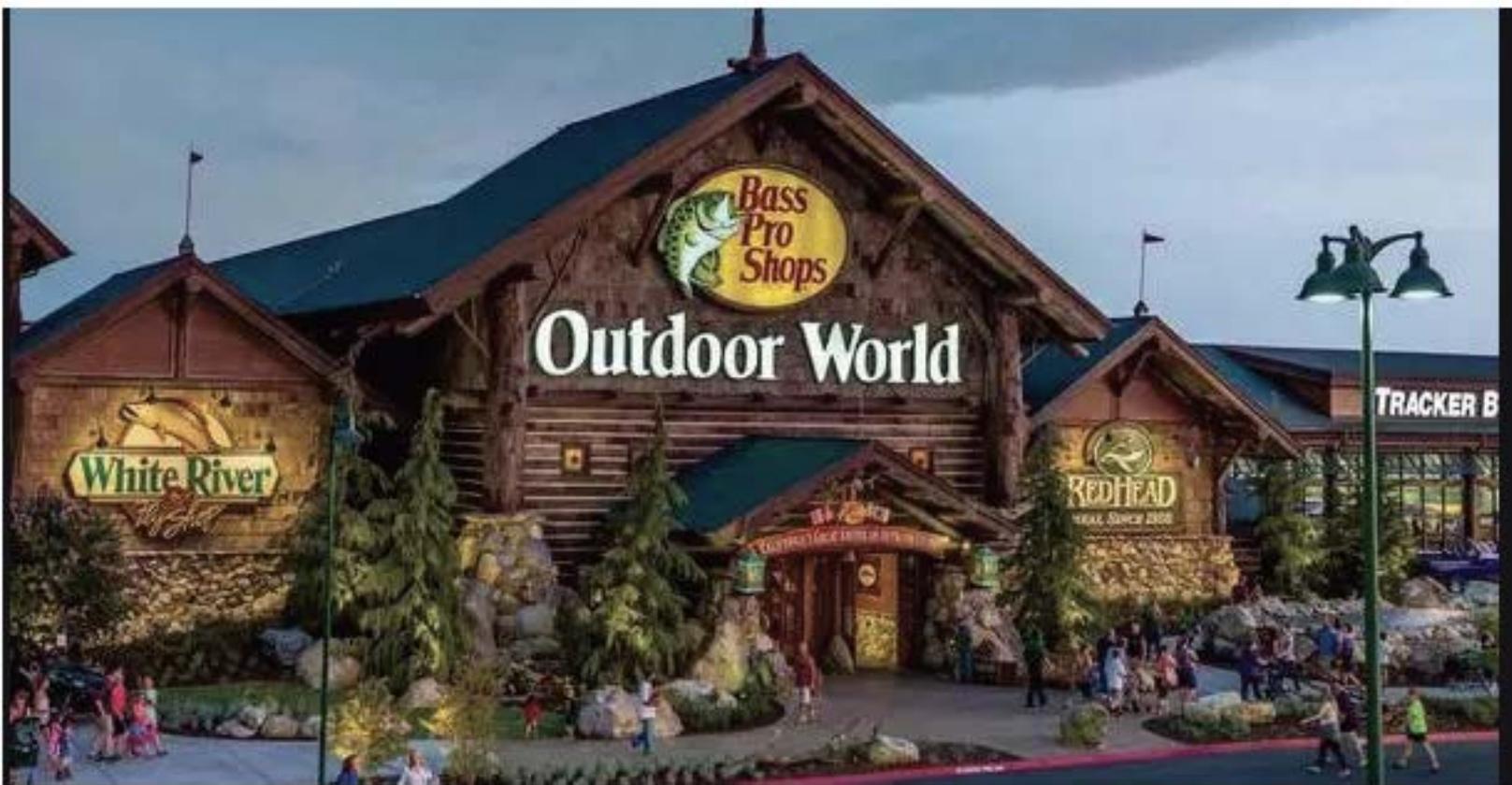
Other Prospective Tenants











E

Market Research and Feasibility Analysis



NARRATIVE SUMMARY

Vallejo, California

This comprehensive study is comprised of ten (10) separate and distinct analyses of a thirty (30) minute drive-time radius around the Solano County Fairgrounds property (“Trade Area”) located at 900 Fairgrounds Dr, Vallejo, CA 94589. By defining and then analyzing the demographic, psychographic, consumer habits, and retail supply & demand characteristics of this Trade Area, we are able to identify the make-up of the population therein and determine whether or not the various customer profiles targeted by national retailers, restaurants and other uses are in place for the Developer and then confidently predict whether or not this Trade Area possesses the desired characteristics to attract new store developments. For the purpose of this analysis and based upon the Developer’s desire to create a destination mixed-use project, DBC Advisors (“DBC”) has identified the aforementioned thirty (30) minute drive-time radius Trade Area to be within the Developer’s sphere of influence for a destination attraction(s). DBC has highlighted specific data throughout the individual reports herein that are deemed applicable to the Developer’s objectives and has written this Narrative Summary in order to make the Developer’s review an easier task.

Maps: In addition to the “Site Detail Map” at the beginning of this report, the analyst also considered the data within the “Dominant Tapestry Map” (Tapestry Profile section) and the “Traffic Count Map” (with an exceptional 136,000/vehicles/day on the adjacent Interstate 80) to arrive at determinations and recommendations for this Market Profile.

Major Shopping Center Locator: This summary of existing shopping center locations provides an important profile of competing properties, including the anchor tenants therein. For the purpose of this proposed development, we felt it was especially important to identify those shopping centers that had a multiplex theater as an anchor tenant and discovered 36 screens contained within three separate theaters in shopping centers within 12 miles of the proposed development. While it may be discouraging to the Developer that there is this much competition, it should be noted that the newest of these three centers, Hilltop Plaza was built in 1996 and is 11.2 miles away. The second newest, Gateway Plaza-Village was built in 1991 and is 0.75 miles away. The oldest of the three, Vallejo Plaza Shopping Center was built in 1962 and is 1.76 miles from the proposed development. Therefore, it is reasonable to assume that none of these theaters are designed and built in today’s stadium-style seating since the newest one was presumably built 23 years ago and that should mean that a new, modern theater facility would be welcomed by the theater-goers in the portion of the Trade Area that is in a 10-20 minute drive of the new theater.

Demographic Analysis: The data contained within the “Executive Summary” provides in-depth details on the demographic makeup of the Trade Area. The findings for 2018 demonstrate a population of 932,141 with an average household income of \$99,336 (median is \$74,441) per year. It should be noted that is substantially higher than the U.S. average household income at \$83,694 (U.S. median is \$58,100). The demographic group Caucasians (“White Only”) makes up nearly half of the population with 48.5% while those identified as Hispanic account for the second highest representation with 29.8% of the population in the Trade Area (this particular category is somewhat of a catch-all grouping and explains why the total is greater than 100%). The median age within the Trade Area is 38.2, which is on par with the national median age of 38.3 years old and bodes well for the

Developer's efforts in attracting the targeted demographic profiles suited for retail and entertainment purposes. The Trade Area has experienced an annual population growth of 0.75% between 2010 and 2018.

Tapestry Profile: This study provides an in-depth examination of the all-important psychographic characteristics (lifestyles) within the Trade Area. Tapestry Segmentation represents the fifth generation of market segmentation systems that began over 30 years ago. The 67 categories of the Tapestry Segmentation system classifies U.S. neighborhoods based on their socio-economic and demographic composition and provides insight into customers' lifestyle choices, what they buy, and how they spend their free time. It helps to identify the best customers, optimal sites, and underserved markets within a given trade area.

Detailed descriptions of the top five tapestry segments are included within the section labeled "Tapestry Profile" of this Market Profile, providing a comprehensive summary of each segment's particular socioeconomic traits along with their respective density maps (distribution) for of the entire country. This is extremely important information for the Developer to understand as it has a direct influence on the type of retailers, restaurants and other operators that have the best chance to be successful within the Trade Area.

The top five tapestry segments within the Trade Area of the site make up a substantial 38.6% of the population and tend to share comparable consumer characteristics. In comparison, these same top five segments make up a mere 8.3% of the U.S. population. The three most dominant tapestry segments are identified as "City Lights" with 10.62%, followed by "Pleasantville" at 8.4% and "Front Porches" with 6.9% for a cumulative 25.9% of the total populace. For the most part, the psychographic makeup of the Trade Area bodes well for the success of the type of mixed-use destination project envisioned by the Developer.

It should be noted that DBC found it curious that the City Lights segment was the highest concentration of tapestry segmentation in the Trade Area given the overall suburban nature of the communities located within therein. It is assumed that this is due to the dense population and diverse nature of the city of Richmond.

Market Profile: This study provides a deeper understanding of the makeup of the Trade Area by dissecting key factors such as the education, income and age breakdown of the populace. The daytime population of 868,836 with 393,951 workers demonstrates that the Trade Area is more than just a 'bedroom community' and bodes well for lunch business for the Development's restaurants (for those within a 10-15-minute drive window).

We also discover that 72,3% of the households earn more than \$50,000 annually, which is an impressive percentage. It is worth noting that 64.9% of the population is between 15 and 64, prime age period for maximum consumer spending. An impressive 65.7% of the residents have at least some college education with 32.6% having earned at least a four-year a college degree.

As for spending habits associated with the Developer's planned tenant mix, the residents spent an average of \$3,739.76/year on "entertainment/recreation with a strong SPI (Spending Potential Index) of 116 (100 SPI is the benchmark, national average SPI), while the "meals away from home" category showed an average of \$4,159.47/year with another strong SPI of 118.

Disposable Income Profile: Disposable Income measures the amount of after-tax income of households within the Trade Area. DBC likes to determine the income range(s) which encompasses approximately half of the population as that tends to be a good indicator of potential spending at retail and dining establishments. We found that the Trade Area effectively met this mark within the \$35,000 to \$100,000 range, with a percentage of 48.2% (159,293 of the 330,413 households) populating this income block. It should be noted that the median household

DISPOSABLE INCOME in the Trade Area is \$58,872, which is more than the actual MEDIAN INCOME of the country at \$58,100! Meanwhile, the average disposable income is a remarkable \$74,532 with an impressive 59.1% having a disposable income greater than \$50,000. Therefore, the Trade Area should be very attractive to retailers, restaurateurs and entertainment attractions.

Restaurant Market Potential: This study demonstrates a surprisingly strong affinity for dining out, with strong MPIs across many dining categories. That said, their preferred restaurant choices are not surprising given the socio-economic make-up of the Trade Area, with *California Pizza Kitchen* with a 149 MPI (Market Potential Index - which measures that against the National average “baseline” of 100), *Cheesecake Factory* (126 MPI), and *TGI Fridays* (124 MPI) being the runaway favorites. The strong support for these operators suggests that other restaurant chains featuring hearty helpings and/or comfort food could do well in this market. The study is also very positive for upscale dining that will draw from a wider area and support the “destination” development, the population that “went to fine dining last month” (113 MPI), “went to fine dining three-four times last month” (115 MPI), and they “spent \$101 -\$200 at fine dining restaurants in the last 30 days” (119 MPI).

Sports & Leisure Market Potential: This study measures the likelihood of adults or households participating, attending, watching or spending on sporting events, movies and/or for purchasing goods & services for hobbies and other leisure time activities. This study showed promise for certain outdoor activities and potential consumer support for the retailers that carry these products. For instance, saltwater fishing (107 MPI) suggest a potential market for outdoor retailers. As for supporting a multiplex cinema, the numbers are very strong with an MPI of 120 for those who attended a movie in the last 90 days. Furthermore, every category and/or genre had an MPI of 106 or better.

Retail MarketPlace Profile: This critical study measures the retail supply & demand factors (a/k/a: Surplus & Leakage) within the Trade Area. The Retail Gap numbers depict the difference between demand (retail potential) and supply (retail sales), with the surplus shown in red while the potential sales (leakage - residents leaving the Trade Area to purchase goods & services elsewhere) are shown in green. Please note that the surplus figures aren’t necessarily a negative factor, as they may also represent retail sales made within the Trade Area to citizens from outside the Trade Area. At first blush, these results present a bleak picture of current conditions in the combined “Retail Trade and Food & Drink” category, with a total of \$456,785,946 in resident dollars being spent outside the Trade Area on an annual basis. However, when looking at a long-term strategy, these leakage numbers should be considered ‘unmet opportunities’ for the Developer to tap into.

These leakage numbers bode especially well for the purpose of attracting the following potential big-ticket purveyors as these purchases by the citizens are currently occurring outside of the Trade Area:

- “Furniture & Home Furnishings Stores” at \$12,065,098;
- “Electronics & Appliance Stores” at \$42,938,533; and
- “Building Material & Supply Stores” at \$101,751,685.

The data also shows opportunity for localized retail goods & services within the Trade Area, most notably leakages in the following categories which should also be targeted as potential tenants by the Developer:

- “Specialty Food Stores” at \$81,218,451;
- “Clothing & Clothing Accessories Stores” at \$234,043,341;
- “Sporting Goods/Hobby/Musical Instrument Stores” at \$66,803,750.

This study also demonstrates an oversupply of \$85,326,969 for “Food Services & Drinking Places”, which aligns nicely with the residents’ affinity towards dining out as identified in the “Restaurant Market Potential” study in support of the Developer’s efforts to attract new restaurant options. That said, it is critical that the Developer

attract unique dining options that may be seen destination and/or combined with entertainment or other experiential offering. We shall address this opportunity in the Recommendations section of this Market Profile.

Medical Expenditures: This study is not typically included in DBC's Market Profile, but because the Developer is hoping to recruit the nearby Sutter Solano Medical Center (108 beds) to the project site, we felt this to be an important study for the Developer to consider. Given that their facility is not in compliance with current seismic standards in the state of California, there seems to be a legitimate opportunity to attract this health care provider to a new facility within the proposed development. The study demonstrates a strong market for health services with the medical care category currently pulling in \$722,279,603/year with an SPI of 112. Meanwhile, the hospital room & services category is driving revenues of \$63,851,551 with an SPI of 113.

It should be noted that Kaiser Permanente has opened a 248-bed hospital just a few years ago that is in close proximity to the proposed location and would compete with a relocated Sutter Solano Medical Center. DBC does not possess expertise in health care and recommends that the Developer engage a consultant in that industry before investing too much time and energy into its pursuit of Sutter.

Conclusion: The Trade Area appears to possess the characteristics of a thriving retail destination given its easily accessed location with excellent frontage and direct access to a major highway (I-80). Adding to this impression is the demographic make-up of the Trade Area, which has very strong household income levels well above the national levels in every possible measurement.

While the Retail MarketPlace Profile study demonstrates substantial sales leakage from the Trade Area suggesting a weak retail trade, DBC sees this as a clear lack of supply for the existing demand, therefore providing an excellent opportunity for the Developer to target operators in those retail categories that are experiencing leakages. With the exception of the Pleasantville tapestry segment, the "Tapestry Segmentation" study tells us that the population base is made up primarily of prudent consumers that tend to be pragmatic in their purchase decisions, the citizens nonetheless step up to spend money on quality retail goods & services. That is an important factor to share with retailers and other businesses targeted by the Developer - as is the impressive household income figures, making a location decision easier to make for these potential operators.

Recommendations: First & foremost, DBC strongly encourages the Developer to take advantage of the opportunities presented in the "Retail MarketPlace Profile" study, especially those retail categories identified and listed as bullets in that section of this Narrative. The retail categories demonstrating leakages should translate into targeted sectors for the Developer to concentrate their marketing efforts. Each one of these retail categories must be thoroughly researched to develop a list of the best candidates within each category and a structured marketing campaign should be designed to pursue those candidates identified as the ideal retail operators for the Trade Area. Focused marketing material (electronic flyers, etc.) should be created to clearly trumpet the benefits of the proposed development in order to effectively deliver these operators into the proposed development.

DBC believes that the proposed development should brand and market itself as a "destination" with events, experiences and retail attractions that would attract customers (and sales tax revenue) from the entire Trade Area and beyond. Destination retailing is different from traditional shopping because customers plan a trip to stores and other attractions to enjoy the experience, rather than simply purchasing goods and services. It is an experience as much as it is an opportunity to shop and customers will travel greater distances and spend more time than they would at traditional retail establishments. For example, Cabela's Legacy stores (125,000 sq. ft. or more) draw customers from over 80 miles away who then spend an average of three & a half to four hours enjoying the 'experience'. Outlet malls are another example of destination retail. A destination doesn't necessarily need to be retail-based as attractions such as water parks, sports venues (for both spectator and participation options - Big League Dreams is an example of a participation venue) or amusement parks would be good examples of

destination attractions. While bowling alleys and movie theaters are good draws, they are not considered destination attractions because they don't necessarily drive foot traffic for the other tenants (other than the F&B business driven by the theaters) in the shopping center and/or immediate retail vicinity. Nonetheless, DBC encourages the Developer to recruit a quality family entertainment center with these components (and other features) to the proposed development.

As referenced in the summary of the "Retail MarketPlace Profile", there is an oversupply of \$85,326,969 for "Food Services & Drinking Places", which would suggest that the Developer not pursue restaurants as potential tenants. However, by attracting a mix of uses that create a destination for the entire Trade Area, there will be ample demand for food & beverage ("F&B") because the visitors to the proposed development will be spending much more time (3-4 hours?) than at a traditional shopping center and that will drive customers to the restaurants and bars located therein. That said, the Developer should focus on the operators noted in the Restaurant Market Potential section of this summary in addition to entertainment options that include an F&B component.

It is worth noting that while the "Retail MarketPlace Profile" showed an annual leakage of \$81,218,451 in the "Specialty Food Stores" category (think Trader Joes or Whole Foods), there was a massive oversupply of \$411,061,690 in the traditional "Grocery Stores" category so it is important that the Developer focuses on that niche market rather than grocery stores.. Also, the relatively small leakage of \$12,065,098 in the "Furniture & Home Furnishings" category is not impacted by the IKEA store in Emeryville because it is outside of the 30-minute drive-time window which makes up the Trade Area.

Apparently, officials with the city of Vallejo were surprised to hear that the Scotts Valley Band of Pomo Indians have submitted a request to the Bureau of Indian Affairs to recognize a large parcel of land at the interchange of I-80 & state highway 37 as their "tribal home". Integrated Resort Development, LLC has already purchased the property and they have partnered with this Native American nation to build and operate a 40,000 sq. ft. casino within a resort hotel and spa. While this would negatively impact the potential for new hotel development on the subject property, it could be an opportunity to create a marketing agreement with the casino hotel to siphon off some of their anticipated guests to the proposed development for shopping excursions, much like the Cabazon Premium Outlets do with the Morango Resort Hotel & Casino in Riverside County, CA. It should be noted that all of the neighboring cities & counties are opposing the project along with US Senator Diane Feinstein and three different US Congressmen so that may impact the Tribe's likelihood of success. Regardless, the Developer should monitor their entitlement progress.

Finally, armed with this Market Profile, the Developer should meet with City and County officials and secure an Exclusive Negotiating Agreement ("ENA") to acquire the long-term lease of the Solano County Fairgrounds. The term of the ENA should be one year but by no means less than six months. The Developer has assembled a strong team of professionals and government officials should recognize that it has the best chance to succeed over any other competition because the proposed project is the right mix of entertainment, retail, housing and (the potential for) healthcare. It should be noted that under California law, the County Supervisors may have to publish a Request For Proposal ("RFP") so all interested parties have an equal opportunity to submit their proposals. This is not necessarily a bad thing since it would prevent groups in the future from claiming that there was a backroom deal and that it should be undone.

Appendix: This is an invaluable reference guide that provides insight into the methodology and science of the all-important Tapestry Segments, which describes the make-up, psychographic and lifestyle habits of 67 distinct and measurable groups. Detailed descriptions of each of the top five segments for the Trade Area are included in the "Tapestry Profile" section of this Market Profile as these tapestry segments are an important factor for a wide

variety of retailers, restaurant operators and investors alike and should be strongly considered in their decision-making process.

Disclaimer: Please note that *DBC Advisors* is an independent real estate consulting firm that has been hired by the Developer to assist in the evaluation of the Trade Area in order to provide a profile of the inhabitants therein and make recommendations based upon those findings. *DBC Advisors* has not studied nor evaluated the Developer's operations, their financial capacity or capital reserves and therefore makes no recommendations or warranties that an investment in this Trade Area by a new retail operator will provide a return of and/or on any capital investment made therein.

Sources: The studies contained within this Market Profile were generated from the CCIM Institute's *Site To Do Business* online research platform <http://www.stdb.com/> which in turn relies upon *ESRI*, the world leader in GIS (Geographic Information System) mapping platforms <http://www.esri.com/>

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Statement of Qualifications of Engineer



FINANCIAL REPORT

3.45	2.58	6.58	12.3
7.42	8.52	6.02	
5.42	0.58	6.02	
9.42	3.58	7.43	

Statement of Qualifications

ROBERT A. KARN & ASSOCIATES, INC.

CIVIL ENGINEERS

707 Beck Avenue • Fairfield, CA 94533
Phone (707) 435-9999 • Fax (707) 435-9988
Email: RAK@RAKEngineers.com

**ROBERT A. KARN & ASSOCIATES, INC.
CIVIL ENGINEERS**

ROBERT A. KARN & ASSOCIATES, INC., is a professional civil engineering firm organized to provide engineering services to public and private agencies throughout Central and Northern California. Its staff includes engineers and technicians with cumulative experience totaling several hundred years.

Robert Karn founded the firm and serves as President and CEO. Mr. Karn, a 1977 graduate of San Jose State University and a licensed professional engineer in the State of California, has over 40 years of engineering experience managing and directing the design and construction of public and private engineering projects in California. He has served as a principal of a 300-person firm and a manager of offices with up to 30 employees.

Mr. Karn and his staff have provided engineering services to an extensive list of clients including:

Public Clients

City of Antioch
City of Vallejo
City of Pinole
City of Benicia
City of Orinda
City of Fairfield
City of Lathrop
City of Richmond
City of Salinas
Vallejo Sanitation & Flood Control District
Vallejo Unified School District
Sequoia High School District
Jefferson High School District
Whittier School District
El Centro School District
Fair Oaks School District
Greater Vallejo Recreation District
San Joaquin Co. Office of Education
San Rafael City School
Kern Community College District

Private Clients

Busch Properties, Inc.
Boos Development
Copart
CDI, Inc.
Marriott Hotels
Wal-Mart Stores, Inc.
Southampton Co.
Marshall Lee Architects
Richmond American Homes
Citation Northern
McNellis Partners
Seeno Construction
Forecast Homes
In-N-Out Burger
Kaufman & Broad
Summergate
JBC Realty
George Meu & Associates
Lucky Stores
Mervyns
Longs Drug Stores
Rite Aid Corporation
Station Casinos
Six Flags Discovery Kingdom
Doug Mighell, AIA
Home Base

REPRESENTATIVE PROJECT

DESCRIPTIONS

PROJECT TEAM SUMMARY

Robert Karn, PE, QSD/QSP – Principal

Robert Karn is a licensed Civil Engineer in the State of California . Mr. Karn joined Edward Schwafel in 1981 and through successive ownership transitions now serves as President and CEO of the firm. Mr. Karn, a 1977 graduate of San Jose State University, has over 40 years of engineering experience managing and directing the design and construction of public and private engineering projects throughout California. Mr. Karn is also a registered Land Surveyor in the State of California and a Certified SWPPP Practitioner.

He has served as a principal of a 300-person firm prior to founding the company. He has extensive experience with the development of planning and preliminary engineering designs throughout Northern California.

Since coming to Solano County in 1981, he has managed projects from the 1,200 acre multi-use Northgate project in Vallejo, where the SCC Vallejo campus is located, to single family residential lot surveys. The projects ranged from 100's to 100's of million dollars in construction.

Mr. Karn has developed close working relationships with several of the local jurisdictions, gaining their respect with his ability to help Cities and Counties develop publicly funded projects.

Tony Perfetto

Tony Perfetto has been with Robert A. Karn & Associates since 2000 and currently is a Project Manager working on various types of projects, ranging from small ADA upgrades to large scale multi-million dollar ground ups. He began his career as a designer/drafter for a firm in Oregon while attending college for civil engineering. Once at Robert A. Karn & Associates he began designing and permitting projects varying in size, quickly gaining increasing responsibilities. Over the years his job responsibilities have included preparation of construction documents, cost estimates, coordination with project team, project permitting with local and state agencies, preparation of technical reports and project scheduling. In addition, Tony has years of experience working with contractors and clients in the field during construction. This includes completing on site inspections ensuring that the project is built per the approved plans and specifications, and ensuring SWPPP elements are implemented effectively. Tony's expertise on construction sites help foster a communicative environment between contractor, designers and client, resulting in a reduction in construction errors, contractor change-orders, and schedule delays.

REPRESENTATIVE PROJECT DESCRIPTIONS - COMMERCIAL PROJECTS

The following is a partial list of commercial projects performed under the direction of Robert A. Karn.

PINOLE VISTA SHOPPING CENTER - PHASE IV & PHASE V

Located off Fitzgerald Drive and adjacent to Interstate 80 in the City of Pinole, this project included design of all civil improvements for this 40 acre commercial center. Design included all grading, utilities, retaining walls and coordination with Caltrans and other agencies.

Client: City of Pinole Redevelopment Agency

WAL★MART STORES, INC. - SHOPPING CENTERS

Prepared Site Feasibility studies, Preliminary Cost Estimates and Agency fee analysis.

Provide Client representation at various public hearing forums throughout the project entitlement process.

Prepared all on-site Civil Engineering drawings including Grading, Utilities, Erosion Control, Signing and Striping; all Off-Site Street Improvements, Landscape and Irrigation Plans, and all ALTA Surveys and Parcel Mapping required for construction of these commercial centers. Performed agency processing for all Governmental Entitlement, CEQA process, and all site and building design approvals. Provided construction administration and review, throughout Certificate of Occupancy and release of bonds, resulting in project closeout.

Commercial centers were located at:

- 45 acre center at Rancho Parkway and Camino Mercado, Arroyo Grande, California.
- 9.5 acre center at Lincoln Avenue and Soscol Avenue, Napa, California.
- 23 acre center at Lone Tree Way and Hillcrest Avenue, Antioch, California.
- 13 acre center at I-5 and east Main Street, Woodland, California.
- 23.5 acre center at Osgood Road and Skyway Court, Fremont, California.
- 19 acre center at Chadbourne Road and Busch Drive, Fairfield, California.
- 15 acre center at Arroyo Circle and Highway 101, Gilroy, California.
- 11.5 acre center at Highway 162 and I-5, Willows, California.
- 60 acre center at Grant Line Road and I-205, Tracy, California.
- 13 acre center at Helen Power Drive and Burton Drive, Vacaville, California.
- 11.5 acre center at Washington Boulevard and Highway 101, Crescent City, California.
- 15.2 acre center at Hacienda Drive and Owens Drive, Pleasanton, California.
- 18.0 acre center at Sonoma Boulevard, Vallejo, California.
- 22 acre center at Dana Drive and Bradford Avenue, Redding, California.
- 20.4 acre center at Prosperity Avenue and Hillman Street, Tulare, California.
- 13.2 acre center at North Davis Street and Westridge Parkway, Salinas, California.
- 14.1 acre center at Hanzlick Drive and Highway 65, Rocklin, California.
- 17 acre center at Mountain City Highway, Elko, Nevada.

Client: Wal★Mart Stores, Inc.

CENTRAL COAST TOWN CENTER, ARROYO GRANDE, CA

Prepared On-site Civil Engineering drawings including Grading, Drainage, Utilities, and Erosion Control for this 34 Acre Commercial Center.

OFFICE MAX, SAN FRANCISCO, CA

Located at 14th and Harrison in San Francisco, California, this project included design of all Civil Engineering improvements.

Client: Lerer Brothers/G & G Investments

DIABLO PLAZA, NOVATO, CA

Located on Diablo Boulevard in Novato, California, this project included design of all Civil Engineering improvements for a 3 building commercial center including a Blockbuster Video Store.

Client: MCG Architects

BLOCKBUSTER VIDEO, VALLEJO, CA

Located at the Raley's Shopping Center on Sonoma Boulevard in Vallejo, California, this project involved design and processing of all Civil Engineering improvements.

Client: MCG Architects

BREUNERS REHABILITATION/PACIFIC ASIAN MALL, RICHMOND, CA

Located on Pierce Street at Central in Richmond, California, this 10 acre project included Site Feasibility, ALTA Survey, Cost Estimates, Preliminary and Final Civil Engineering documents.

Client: Terry Kwong

BREUNERS REHABILITATION, PLEASANT HILL, CA

Located on Buskirk Avenue in Pleasant Hill, California, this 6 acre project included Site Feasibility, ALTA Survey, Cost Estimates, Preliminary and Final Civil Engineering documents.

Client: JBC Realty

GATEWAY PLAZA, VALLEJO, CA

Located in the Northeast quadrant of Vallejo, this project included all City processing and design of all Civil improvements for this 65 acre commercial site.

Client: Vallejo Retail Center

CARLS JR., VACAVILLE, CA

Located on Nut Tree Parkway at Nut Tree Road in Vacaville, California, this project included preparation of all Civil Engineering drawings including Grading, Utilities, Erosion Control, Signage and Striping, and all ALTA Surveys and Parcel Maps required for construction of this restaurant. Performed agency processing for all Civil Engineering plans.

Client: Carl Karcher Enterprises

IN-N-OUT BURGER

Prepared all Civil Engineering drawings including Grading, Utilities, Erosion Control, Signage and Striping, and all ALTA Surveys and Parcel Maps required for construction of these restaurants. Performed agency processing for all Civil Engineering plans.

Restaurants are located at:

- **El Camino Real, Mountain View, California**
- **Nut Tree Parkway at Helen Power Drive, Vacaville, California.**
- **Leavesley Road at Highway 101, Gilroy, California.**
- **Holiday Lane at Travis Boulevard, Fairfield, California.**
- **Taylor at Eureka Street, Roseville, California.**

Client: In-N-Out Burger

APPLEBEES GRILL & BAR

Prepared all Civil Engineering drawings including Grading, Utilities, Erosion Control, Signage and Striping, and all ALTA Surveys and Parcel Maps required for construction of these restaurants. Performed agency processing for all Civil Engineering plans.

Restaurants are located at:

- **Nut Tree Parkway at Helen Power Drive, Vacaville, California.**

Client: The Kivelstadt Group

- **Arroyo Circle at Highway 101, Gilroy, California.**

Client: Apple Gilroy, Inc.

TACO BELL

Prepared all Civil Engineering drawings including Grading, Utilities, Erosion Control, Signage and Striping, and all ALTA Surveys and Parcel Maps required for construction of these restaurants. Performed agency processing for all Civil Engineering plans.

Restaurants are located at:

- **Jackson Street at Amador Street, Hayward, California.**
- **Capitol Expressway at Copperfield Drive, San Jose, California.**
- **Enterprise Road at Aliso Creek Road, Aliso Viejo, California.**
- **Story Road at Roberts, San Jose, California.**

Client: Taco Bell

POWER PLAZA, VACAVILLE, CA

Located on Helen Power Drive, Nut Tree Road and Burton Drive in Vacaville, California, this project included all Civil improvements for the Phase I, 13 acre Wal★Mart Store, and the Phase II, 10 acre multi-use commercial center.

Client: The Kivelstadt Group

MEADOWS PLAZA, VALLEJO, CA

Located on Sonoma Boulevard, Northerly of Highway 37 in Vallejo, this project included design of all Civil improvements for this 18 acre commercial site.

Client: The Kivelstadt Group

VALLEJO PLAZA, VALLEJO, CA

Located on Sonoma Boulevard at Valle Vista Avenue in Vallejo, this project was known as Larwin Plaza. Provided all Civil improvement design for the rehabilitation of this site, including Demolition Plans, Underground Utility Relocation and Pavement Overlays.

Client: LaCaze Development

TARGET CENTER, VALLEJO, CA

Located on Admiral Callaghan Lane, this project included all Mapping and Civil improvement design for this 45 acre site.

Client: Reininga Corporation

NORTHGATE PLAZA, VALLEJO, CA

Located at the Southeast corner of Highway 37 and Sonoma Boulevard in Vallejo, this project included all processing and Civil improvement design for this 5 acre commercial site.

Client: Randy Baukney

JACK IN THE BOX

Vallejo, CA

Prepared Civil Engineering drawings including Grading and Utility Plans for Jack In The Box, Inc. and for the redevelopment of the Cross Roads Commercial Center parking lot, provided assistance in agency processing for entitlements and permits.

Fairfield, CA

Prepared Civil Engineering drawings including Grading and Utility Plans for Jack In The Box, Inc. and provided assistance in agency processing for entitlements and permits.

BUSCH CAMPUS PARK, FAIRFIELD, CA

Prepared Civil Engineering drawings including Grading and Utility Plans, provided assistance in agency processing for entitlements and permits and performed construction staking for the development of Buildings 2A, 2B as part of the phased development of the 23 acre Busch Campus Park/University Center.

Client: CDI, Inc.

STAPLES

Woodland, CA

Prepared Civil Engineering drawings including Grading and Utility Plans for Staples store and provided assistance in agency processing for entitlements and permits.

Vacaville, CA

Prepared Civil Engineering drawings including Grading and Utility Plans for Staples store and provided assistance in agency processing for entitlements and permits.

RITE-AID PHARMACY

Prepared preliminary site plans and feasibility studies for over 50 sites throughout Northern CA. Provided client representation at various public hearing forums throughout the project entitlement process. Prepared Civil Engineering drawings including Grading and Utility Plans, ALTA Surveys and agency processing for the following projects:

- **Oroville, California**
- **Yuba City, California**
- **Fremont, California**
- **Redwood City, California**
- **San Jose, California**
- **Oakland, California**
- **Chico, California**

GREEN ISLAND INDUSTRIAL PARK No. 4, AMERICAN CANYON, CA

Prepared Civil Engineering drawings including Grading and Utility Plans and a comprehensive Hydrology Study, provided agency processing for permitting and performed construction staking for Lots 1A and 2 to complete the phased development of the 25 acre Green Island Industrial Park No. 4.

Client: CDI, Inc./Buntain Construction

GUITTARD CHOCOLATE, FAIRFIELD, CA

Prepare Civil Engineering drawings and support calculations for the construction of a 530,000 square foot chocolate manufacturing facility. Design includes site grading plan, water, sewer and storm drain plans as part of a phased development of a 25 acre site.

Client: Guittard Chocolate Company

REPRESENTATIVE PROJECT DESCRIPTIONS - RESIDENTIAL PROJECTS

The following is a partial list of residential projects performed under the direction of Robert A. Karn.

SOUTHAMPTON, BENICIA, CALIFORNIA

Prepared Civil Engineering drawings and performed construction staking for this project. Specific tasks included preparation of Grading, Improvement, Erosion Control, Topography, Parcel Maps and Final Subdivision Maps for this 2,500 ± acre project consisting of approximately 5,000 single family residential townhouses and apartment units, various commercial sites, school sites, park sites and open space areas.

NORTHGATE PROJECT, VALLEJO, CALIFORNIA

Prepared Civil Engineering drawings and performed construction staking for this project. Specific tasks included preparation of Grading, Improvement, Erosion Control, Topography, Parcel Maps and Final Subdivision maps for this 1,200 acre project.

Subdivisions include:

Northgate Neighborhood "A": 160 single family unit subdivision.

Northgate Neighborhood "B": 127 single family unit subdivision.

Northgate Neighborhood "C": 306 single family unit subdivision.

Northgate Neighborhood "D": 173 single family unit subdivision.

Northgate Neighborhood "E": 269 single family unit subdivision.

Northgate Neighborhood "F": 364 single family unit subdivision.

Northgate Neighborhood "H": 22 single family unit subdivision.

Commercial Project:

65 Acre multi-tenant commercial center.

TURNBERRY, VALLEJO, CALIFORNIA

Located in the Northeast Quadrant of Vallejo, this project included all City processing, design and construction staking of all Civil Engineering improvements for this 53 single family unit subdivision.

VALLEY GLEN, VALLEJO, CALIFORNIA

Located in the Northeast Quadrant of Vallejo, this project included all City processing, design and construction staking of all Civil Engineering improvements for this multi phase 27 single family unit subdivision.

CARRIAGE OAKS, VALLEJO, CALIFORNIA

Located in the Northeast Quadrant of Vallejo, this project included all City processing, design and construction staking of all Civil Engineering improvements for this 249 single family unit subdivision.

HAMMOND HILLS, BENICIA, CALIFORNIA

Located in Benicia, this project included all City processing, design and construction staking of all Civil Engineering improvements for this 71 single family unit subdivision.

THE OVERLOOK, BENICIA, CALIFORNIA

Located in Benicia, this project included all City processing, design and construction staking of all Civil Engineering improvements for this 150 single family unit.

HYDE PARK, VALLEJO, CALIFORNIA

Located in Vallejo, California, the project includes 133 lots zoned for single family residential. Specific tasks included preparation of a preliminary site plan, grading, improvements, final map, plot plan, Department of Real Estate exhibits, quantity and cost estimates, NPDES permitting, record drawings, and construction staking.

ROBERT A. KARN

REGISTRATION: Civil Engineer No. 33173, California, since 1981

EDUCATION: B.S., Civil Engineering, San Jose State University, 1977

EXPERIENCE: **ROBERT A. KARN & ASSOCIATES, INC., FAIRFIELD, CALIFORNIA**
PRESIDENT **October, 1995 to Present**

Serves as President and CEO of the firm. Under Mr. Karn's direction, the firm provides a full range of services including boundary and topographic surveys, the design of public works improvements, site engineering, land planning and subdivision, preliminary engineering and cost estimates, design and spread of assessment districts, construction staking and supervision and representations at public meetings and hearings.

GREINER, INC., VALLEJO AND FAIRFIELD, CALIFORNIA
VICE PRESIDENT & REGIONAL MGR. **1990 to September, 1995**

BISSELL & KARN, INC., VALLEJO AND FAIRFIELD, CALIFORNIA
PRINCIPAL AND VICE PRESIDENT **1982 to 1990**

EDWARD P. SCHWAFEL ENGINEER, INC., VALLEJO, CALIFORNIA
CIVIL ENGINEER **1981 to 1982**

In 1990, Greiner, Inc. acquired Bissell & Karn, Inc. and Mr. Karn became Vice President and Division Manager of the Development Division. In 1982, Bissell & Karn, Inc. acquired Edward P. Schwafel Engineer, Inc. and Mr. Karn became the Manager of the Vallejo Office. Mr. Karn started with Schwafel as a Civil Engineer and progressed through the positions listed above as the firm went through ownership transitions.

During this period, Mr. Karn was responsible for program management, master planning, design and construction of major projects, including street, flood control facilities, drainage, water and sanitary sewer systems, utilities and other infrastructure requirements. He managed site work for private and public development projects for commercial, office, industrial and housing developments, including assessment district engineering.

Mr. Karn has worked extensively with public agencies and private land owners in the development of capital improvement programs. He was Engineer of Work for the I-80/Atlas Road Interchange Assessment District for the City of Richmond which is financing the local share of \$8 to \$10 million dollars. Mr. Karn has also been serving as the Engineer-of-Work for the Northeast Quadrant Assessment Districts in the City of Vallejo. These assessment districts encompass 3,500 acres and total approximately \$12 million in construction costs. As part of these projects, Mr. Karn supervised the design of arterial streets, traffic signals, sanitary sewers, storm drains, landscape architecture, water tanks, bridges and utilities. As Civil

Engineer for Schwafel, Mr. Karn was responsible for the design of public works improvements including streets, sewers, storm drains, earthwork grading, water systems, culverts, retaining walls and other structures involving the application of hydraulics and hydrology, structural analysis, grading and survey computations. He coordinated the work with clients and with the cities, county and district staffs.

MACKAY & SOMPS, CIVIL ENGINEERS, UNION CITY, CA
CIVIL AND HYDRAULIC ENGINEER **1978 to 1981**

Responsible for design of public works improvements including streets, sewers, storm drains, earthwork, water systems, culverts, retaining walls and other structures involving the application of hydraulics and hydrology, structural analysis, grading and survey computations. He also coordinated the work with clients and with the cities, county and districts.

ALAMEDA COUNTY FLOOD CONTROL AND WATER CONSERVATION
DISTRICT, HAYWARD, CA
CIVIL AND HYDRAULIC ENGINEER **1976 to 1978**

Responsibilities included performing engineering investigations, hydrology and hydraulics, preliminary and final designs, plans, specifications, cost estimates and construction contract documents for flood control and storm drainage improvements in East Bay cities. Reviewed flood Insurance Rate Maps and Flood Hazard Boundary Maps for application to specific areas. Attended public hearings to explain engineering principles involved in the flood control and drainage projects and flood hazard maps.



SONNENBLICK
DEVELOPMENT

County of Solano
675 Texas Street Suite 6500
Fairfield, CA 94533

February 13, 2020

Dear Mr. James Bezek

I have enclosed two USBs as requested by you yesterday which include the entire market study prepared by DBC advisors on the Solano 360 Fairgrounds project in Vallejo, California.

The Six Flags Hotel and Water park site did not require (at this time) a feasibility study because our partners at Six Flags were able to share the results of their attendance which more than satisfied our needs for concluding the use of a Hotel and indoor water park. However the other uses, potential tenants and Demographics were needed to help support and convince potential tenants/clients of the area for their uses. For example, you will see the void in the market for certain entertainment retail, destination retail, etc that have now been addressed including a focus on sports like Bass Pro, Cabellas and Top Golf, Restaurants like TGIF, Cheesecake Factory, and other potential tenants like Dave and Busters, Andretti Raceway, Sky diving, laser bowling, Organic markets, and residential uses to help support the complimentary uses of Six Flags and its family regional draw, new employees and their need for housing, and certain uses void in your market.

I also wanted to explain the financial envelope I attached to our submission. The RFQ was asking financial information which would support our ability and capacity to complete the proposed project, specifically other projects completed funded and now owned by the proponent.

I have several things to address regarding that subject:

1. A letter from Six Flags reflecting their ownership interest and approval of our venture in Developing The Six Flags Hotel and indoor waterpark.
2. Resumes and previous projects completed by my organization as well as the other partners and team members both historically and today.
3. A memo from the financing documents on the \$185 million usd Wyndam hotel in Downtown Miami, Florida that our personal net worth was in excess of that needed to record and build such a great hotel of that size. This was just one month ago.
4. I have also included information on my partner Six Flags and their existing entertainment parks globally, they are not just an operator but we have agreed on a formal partnership on this venture, and we are working on many more nationally as we speak.
5. The office buildings I attached were to show our experience in working with government agencies to build, lease, finance millions of square feet of Government occupied office buildings in Southern California as the Owner, builder and investor, thereby showing our ability to work through very complicated government public private partnerships. Each of these cities and agencies are available as references of our financial and production capacity and their experience to date with our firm.

6. The marquis attached reflect funded and recorded real estate projects over two billion USD Including Hotel, resorts office, retail, residential and commercial construction throughout the USA including our great Loews Hotel project which we are partners which is on the beach in Santa Monica, California.

With our history of construction, leasing, and financing Billions of USD and owning of Hotels Government leased buildings and mixed use projects you should have no question of our financial capacity. This is clearly shown.

However, should you or your 360 committee require more, I am happy to provide you references of cities, banks, insurance companies and hotel operators or copies of recorded construction loans of last year to evidence our ability to fund build and operate these type of projects.

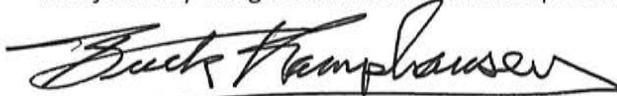
These references are readily available upon request

We have worked with many cities including more recently Norwalk, El Monte and Los Angeles in California and Miami Florida on large public private projects.

My contact information is

Bob Sonnenblick
Chairman of the board
www.Sonndev.com
310-230-1200
Bob@sonndev.com

Thank you and do not hesitate to contact me for any additional information needed, we are ready to get this project started and to make both Solano County and the City of Vallejo a fully integrated mixed use development with Six Flags.



Bob Sonnenblick by Buck Kamphausen
Chairman

MARKET PROFILE

Solano County Fairgrounds VALLEJO, CALIFORNIA



Prepared by: Dan Cromwell, CCIM
949-300-7377



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DBC Advisors' Market Profile

Vallejo, CA

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NARRATIVE SUMMARY

Vallejo, California

This comprehensive study is comprised of ten (10) separate and distinct analyses of a thirty (30) minute drive-time radius around the Solano County Fairgrounds property (“Trade Area”) located at 900 Fairgrounds Dr, Vallejo, CA 94589. By defining and then analyzing the demographic, psychographic, consumer habits, and retail supply & demand characteristics of this Trade Area, we are able to identify the make-up of the population therein and determine whether or not the various customer profiles targeted by national retailers, restaurants and other uses are in place for the Developer and then confidently predict whether or not this Trade Area possesses the desired characteristics to attract new store developments. For the purpose of this analysis and based upon the Developer’s desire to create a destination mixed-use project, DBC Advisors (“DBC”) has identified the aforementioned thirty (30) minute drive-time radius Trade Area to be within the Developer’s sphere of influence for a destination attraction(s). DBC has highlighted specific data throughout the individual reports herein that are deemed applicable to the Developer’s objectives and has written this Narrative Summary in order to make the Developer’s review an easier task.

Maps: In addition to the “Site Detail Map” at the beginning of this report, the analyst also considered the data within the “Dominant Tapestry Map” (Tapestry Profile section) and the “Traffic Count Map” (with an exceptional 136,000/vehicles/day on the adjacent Interstate 80) to arrive at determinations and recommendations for this Market Profile.

Major Shopping Center Locator: This summary of existing shopping center locations provides an important profile of competing properties, including the anchor tenants therein. For the purpose of this proposed development, we felt it was especially important to identify those shopping centers that had a multiplex theater as an anchor tenant and discovered 36 screens contained within three separate theaters in shopping centers within 12 miles of the proposed development. While it may be discouraging to the Developer that there is this much competition, it should be noted that the newest of these three centers, Hilltop Plaza was built in 1996 and is 11.2 miles away. The second newest, Gateway Plaza-Village was built in 1991 and is 0.75 miles away. The oldest of the three, Vallejo Plaza Shopping Center was built in 1962 and is 1.76 miles from the proposed development. Therefore, it is reasonable to assume that none of these theaters are designed and built in today’s stadium-style seating since the newest one was presumably built 23 years ago and that should mean that a new, modern theater facility would be welcomed by the theater-goers in the portion of the Trade Area that is in a 10-20 minute drive of the new theater.

Demographic Analysis: The data contained within the “Executive Summary” provides in-depth details on the demographic makeup of the Trade Area. The findings for 2018 demonstrate a population of 932,141 with an average household income of \$99,336 (median is \$74,441) per year. It should be noted that is substantially higher than the U.S. average household income at \$83,694 (U.S. median is \$58,100). The demographic group Caucasians (“White Only”) makes up nearly half of the population with 48.5% while those identified as Hispanic account for the second highest representation with 29.8% of the population in the Trade Area (this particular category is somewhat of a catch-all grouping and explains why the total is greater than 100%). The median age within the Trade Area is 38.2, which is on par with the national median age of 38.3 years old and bodes well for the

Developer's efforts in attracting the targeted demographic profiles suited for retail and entertainment purposes. The Trade Area has experienced an annual population growth of 0.75% between 2010 and 2018.

Tapestry Profile: This study provides an in-depth examination of the all-important psychographic characteristics (lifestyles) within the Trade Area. Tapestry Segmentation represents the fifth generation of market segmentation systems that began over 30 years ago. The 67 categories of the Tapestry Segmentation system classifies U.S. neighborhoods based on their socio-economic and demographic composition and provides insight into customers' lifestyle choices, what they buy, and how they spend their free time. It helps to identify the best customers, optimal sites, and underserved markets within a given trade area.

Detailed descriptions of the top five tapestry segments are included within the section labeled "Tapestry Profile" of this Market Profile, providing a comprehensive summary of each segment's particular socioeconomic traits along with their respective density maps (distribution) for of the entire country. This is extremely important information for the Developer to understand as it has a direct influence on the type of retailers, restaurants and other operators that have the best chance to be successful within the Trade Area.

The top five tapestry segments within the Trade Area of the site make up a substantial 38.6% of the population and tend to share comparable consumer characteristics. In comparison, these same top five segments make up a mere 8.3% of the U.S. population. The three most dominant tapestry segments are identified as "City Lights" with 10.62%, followed by "Pleasantville" at 8.4% and "Front Porches" with 6.9% for a cumulative 25.9% of the total populace. For the most part, the psychographic makeup of the Trade Area bodes well for the success of the type of mixed-use destination project envisioned by the Developer.

It should be noted that DBC found it curious that the City Lights segment was the highest concentration of tapestry segmentation in the Trade Area given the overall suburban nature of the communities located within therein. It is assumed that this is due to the dense population and diverse nature of the city of Richmond.

Market Profile: This study provides a deeper understanding of the makeup of the Trade Area by dissecting key factors such as the education, income and age breakdown of the populace. The daytime population of 868,836 with 393,951 workers demonstrates that the Trade Area is more than just a 'bedroom community' and bodes well for lunch business for the Development's restaurants (for those within a 10-15-minute drive window).

We also discover that 72.3% of the households earn more than \$50,000 annually, which is an impressive percentage. It is worth noting that 64.9% of the population is between 15 and 64, prime age period for maximum consumer spending. An impressive 65.7% of the residents have at least some college education with 32.6% having earned at least a four-year a college degree.

As for spending habits associated with the Developer's planned tenant mix, the residents spent an average of \$3,739.76/year on "entertainment/recreation with a strong SPI (Spending Potential Index) of 116 (100 SPI is the benchmark, national average SPI), while the "meals away from home" category showed an average of \$4,159.47/year with another strong SPI of 118.

Disposable Income Profile: Disposable Income measures the amount of after-tax income of households within the Trade Area. DBC likes to determine the income range(s) which encompasses approximately half of the population as that tends to be a good indicator of potential spending at retail and dining establishments. We found that the Trade Area effectively met this mark within the \$35,000 to \$100,000 range, with a percentage of 48.2% (159,293 of the 330,413 households) populating this income block. It should be noted that the median household

DISPOSABLE INCOME in the Trade Area is \$58,872, which is more than the actual MEDIAN INCOME of the country at \$58,100! Meanwhile, the average disposable income is a remarkable \$74.532 with an impressive 59.1% having a disposable income greater than \$50,000. Therefore, the Trade Area should be very attractive to retailers, restaurateurs and entertainment attractions.

Restaurant Market Potential: This study demonstrates a surprisingly strong affinity for dining out, with strong MPIs across many dining categories. That said, their preferred restaurant choices are not surprising given the socio-economic make-up of the Trade Area, with *California Pizza Kitchen* with a 149 MPI (Market Potential Index - which measures that against the National average “baseline” of 100), *Cheesecake Factory* (126 MPI), and *TGI Fridays* (124 MPI) being the runaway favorites. The strong support for these operators suggests that other restaurant chains featuring hearty helpings and/or comfort food could do well in this market. The study is also very positive for upscale dining that will draw from a wider area and support the “destination” development, the population that “went to fine dining last month” (113 MPI), “went to fine dining three-four times last month” (115 MPI), and they “spent \$101 -\$200 at fine dining restaurants in the last 30 days” (119 MPI).

Sports & Leisure Market Potential: This study measures the likelihood of adults or households participating, attending, watching or spending on sporting events, movies and/or for purchasing goods & services for hobbies and other leisure time activities. This study showed promise for certain outdoor activities and potential consumer support for the retailers that carry these products. For instance, saltwater fishing (107 MPI) suggest a potential market for outdoor retailers. As for supporting a multiplex cinema, the numbers are very strong with an MPI of 120 for those who attended a movie in the last 90 days. Furthermore, every category and/or genre had an MPI of 106 or better.

Retail MarketPlace Profile: This critical study measures the retail supply & demand factors (a/k/a: Surplus & Leakage) within the Trade Area. The Retail Gap numbers depict the difference between demand (retail potential) and supply (retail sales), with the surplus shown in red while the potential sales (leakage - residents leaving the Trade Area to purchase goods & services elsewhere) are shown in green. Please note that the surplus figures aren't necessarily a negative factor, as they may also represent retail sales made within the Trade Area to citizens from outside the Trade Area. At first blush, these results present a bleak picture of current conditions in the combined “Retail Trade and Food & Drink” category, with a total of \$456,785,946 in resident dollars being spent outside the Trade Area on an annual basis. However, when looking at a long-term strategy, these leakage numbers should be considered ‘unmet opportunities’ for the Developer to tap into.

These leakage numbers bode especially well for the purpose of attracting the following potential big-ticket purveyors as these purchases by the citizens are currently occurring outside of the Trade Area:

- “Furniture & Home Furnishings Stores” at \$12,065,098;
- “Electronics & Appliance Stores” at \$42,938,533; and
- “Building Material & Supply Stores” at \$101,751,685.

The data also shows opportunity for localized retail goods & services within the Trade Area, most notably leakages in the following categories which should also be targeted as potential tenants by the Developer:

- “Specialty Food Stores” at \$81,218,451;
- “Clothing & Clothing Accessories Stores” at \$234,043,341;
- “Sporting Goods/Hobby/Musical Instrument Stores” at \$66,803,750.

This study also demonstrates an oversupply of \$85,326,969 for “Food Services & Drinking Places”, which aligns nicely with the residents’ affinity towards dining out as identified in the “Restaurant Market Potential” study in support of the Developer’s efforts to attract new restaurant options. That said, it is critical that the Developer

attract unique dining options that may be seen destination and/or combined with entertainment or other experiential offering. We shall address this opportunity in the Recommendations section of this Market Profile.

Medical Expenditures: This study is not typically included in DBC's Market Profile, but because the Developer is hoping to recruit the nearby Sutter Solano Medical Center (108 beds) to the project site, we felt this to be an important study for the Developer to consider. Given that their facility is not in compliance with current seismic standards in the state of California, there seems to be a legitimate opportunity to attract this health care provider to a new facility within the proposed development. The study demonstrates a strong market for health services with the medical care category currently pulling in \$722,279,603/year with an SPI of 112. Meanwhile, the hospital room & services category is driving revenues of \$63,851,551 with an SPI of 113.

It should be noted that Kaiser Permanente has opened a 248-bed hospital just a few years ago that is in close proximity to the proposed location and would compete with a relocated Sutter Solano Medical Center. DBC does not possess expertise in health care and recommends that the Developer engage a consultant in that industry before investing too much time and energy into its pursuit of Sutter.

Conclusion: The Trade Area appears to possess the characteristics of a thriving retail destination given its easily accessed location with excellent frontage and direct access to a major highway (I-80). Adding to this impression is the demographic make-up of the Trade Area, which has very strong household income levels well above the national levels in every possible measurement.

While the Retail MarketPlace Profile study demonstrates substantial sales leakage from the Trade Area suggesting a weak retail trade, DBC sees this as a clear lack of supply for the existing demand, therefore providing an excellent opportunity for the Developer to target operators in those retail categories that are experiencing leakages. With the exception of the Pleasantville tapestry segment, the "Tapestry Segmentation" study tells us that the population base is made up primarily of prudent consumers that tend to be pragmatic in their purchase decisions, the citizens nonetheless step up to spend money on quality retail goods & services. That is an important factor to share with retailers and other businesses targeted by the Developer - as is the impressive household income figures, making a location decision easier to make for these potential operators.

Recommendations: First & foremost, DBC strongly encourages the Developer to take advantage of the opportunities presented in the "Retail MarketPlace Profile" study, especially those retail categories identified and listed as bullets in that section of this Narrative. The retail categories demonstrating leakages should translate into targeted sectors for the Developer to concentrate their marketing efforts. Each one of these retail categories must be thoroughly researched to develop a list of the best candidates within each category and a structured marketing campaign should be designed to pursue those candidates identified as the ideal retail operators for the Trade Area. Focused marketing material (electronic flyers, etc.) should be created to clearly trumpet the benefits of the proposed development in order to effectively deliver these operators into the proposed development.

DBC believes that the proposed development should brand and market itself as a "destination" with events, experiences and retail attractions that would attract customers (and sales tax revenue) from the entire Trade Area and beyond. Destination retailing is different from traditional shopping because customers plan a trip to stores and other attractions to enjoy the experience, rather than simply purchasing goods and services. It is an experience as much as it is an opportunity to shop and customers will travel greater distances and spend more time than they would at traditional retail establishments. For example, Cabela's Legacy stores (125,000 sq. ft. or more) draw customers from over 80 miles away who then spend an average of three & a half to four hours enjoying the 'experience'. Outlet malls are another example of destination retail. A destination doesn't necessarily need to be retail-based as attractions such as water parks, sports venues (for both spectator and participation options - Big League Dreams is an example of a participation venue) or amusement parks would be good examples of

destination attractions. While bowling alleys and movie theaters are good draws, they are not considered destination attractions because they don't necessarily drive foot traffic for the other tenants (other than the F&B business driven by the theaters) in the shopping center and/or immediate retail vicinity. Nonetheless, DBC encourages the Developer to recruit a quality family entertainment center with these components (and other features) to the proposed development.

As referenced in the summary of the "Retail MarketPlace Profile", there is an oversupply of \$85,326,969 for "Food Services & Drinking Places", which would suggest that the Developer not pursue restaurants as potential tenants. However, by attracting a mix of uses that create a destination for the entire Trade Area, there will be ample demand for food & beverage ("F&B") because the visitors to the proposed development will be spending much more time (3-4 hours?) than at a traditional shopping center and that will drive customers to the restaurants and bars located therein. That said, the Developer should focus on the operators noted in the Restaurant Market Potential section of this summary in addition to entertainment options that include an F&B component.

It is worth noting that while the "Retail MarketPlace Profile" showed an annual leakage of \$81,218,451 in the "Specialty Food Stores" category (think Trader Joes or Whole Foods), there was a massive oversupply of \$411,061,690 in the traditional "Grocery Stores" category so it is important that the Developer focuses on that niche market rather than grocery stores.. Also, the relatively small leakage of \$12,065,098 in the "Furniture & Home Furnishings" category is not impacted by the IKEA store in Emeryville because it is outside of the 30-minute drive-time window which makes up the Trade Area.

Apparently, officials with the city of Vallejo were surprised to hear that the Scotts Valley Band of Pomo Indians have submitted a request to the Bureau of Indian Affairs to recognize a large parcel of land at the interchange of I-80 & state highway 37 as their "tribal home". Integrated Resort Development, LLC has already purchased the property and they have partnered with this Native American nation to build and operate a 40,000 sq. ft. casino within a resort hotel and spa. While this would negatively impact the potential for new hotel development on the subject property, it could be an opportunity to create a marketing agreement with the casino hotel to siphon off some of their anticipated guests to the proposed development for shopping excursions, much like the Cabazon Premium Outlets do with the Morongo Resort Hotel & Casino in Riverside County, CA. It should be noted that all of the neighboring cities & counties are opposing the project along with US Senator Diane Feinstein and three different US Congressmen so that may impact the Tribe's likelihood of success. Regardless, the Developer should monitor their entitlement progress.

Finally, armed with this Market Profile, the Developer should meet with City and County officials and secure an Exclusive Negotiating Agreement ("ENA") to acquire the long-term lease of the Solano County Fairgrounds. The term of the ENA should be one year but by no means less than six months. The Developer has assembled a strong team of professionals and government officials should recognize that it has the best chance to succeed over any other competition because the proposed project is the right mix of entertainment, retail, housing and (the potential for) healthcare. It should be noted that under California law, the County Supervisors may have to publish a Request For Proposal ("RFP") so all interested parties have an equal opportunity to submit their proposals. This is not necessarily a bad thing since it would prevent groups in the future from claiming that there was a backroom deal and that it should be undone.

Appendix: This is an invaluable reference guide that provides insight into the methodology and science of the all-important Tapestry Segments, which describes the make-up, psychographic and lifestyle habits of 67 distinct and measurable groups. Detailed descriptions of each of the top five segments for the Trade Area are included in the "Tapestry Profile" section of this Market Profile as these tapestry segments are an important factor for a wide

variety of retailers, restaurant operators and investors alike and should be strongly considered in their decision-making process.

Disclaimer: Please note that *DBC Advisors* is an independent real estate consulting firm that has been hired by the Developer to assist in the evaluation of the Trade Area in order to provide a profile of the inhabitants therein and make recommendations based upon those findings. *DBC Advisors* has not studied nor evaluated the Developer's operations, their financial capacity or capital reserves and therefore makes no recommendations or warranties that an investment in this Trade Area by a new retail operator will provide a return of and/or on any capital investment made therein.

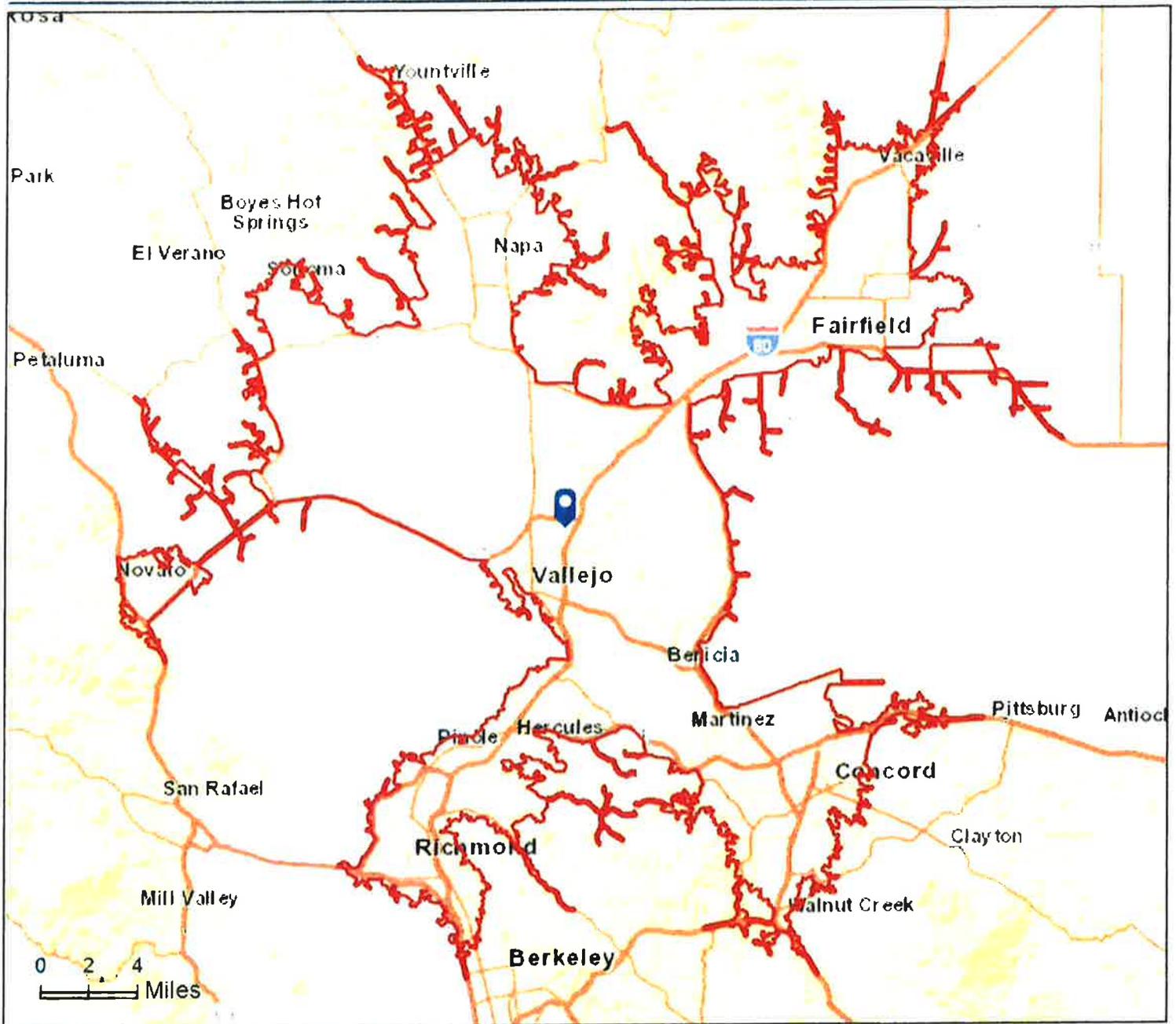
Sources: The studies contained within this Market Profile were generated from the CCIM Institute's *Site To Do Business* online research platform <http://www.stdb.com/> which in turn relies upon *ESRI*, the world leader in GIS (Geographic Information System) mapping platforms <http://www.esri.com/>



Site Details Map

Solano County Fairgrounds
Drive Time: 30 minute radii

Site Details Map
Latitude: 38.13497
Longitude: -122.22966



This site is located in:

City: Vallejo
County: Solano County
State: California
ZIP Code: 94589
Census Tract: 06095251901
Census Block Group: 060952519011
CBSA: Vallejo-Fairfield, CA Metropolitan Statistical Area



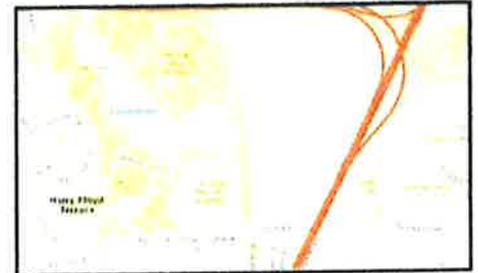
Traffic Count Map - Close Up

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors



- Average Daily Traffic Volume**
Up to 6,000 vehicles per day
- ▲ 6,001 - 15,000
 - ▲ 15,001 - 30,000
 - ▲ 30,001 - 50,000
 - ▲ 50,001 - 100,000
 - ▲ More than 100,000 per day



Source: ©2019 Kalibrate Technologies (Q4 2018).

May 10, 2019



Major Shopping Center Locator

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

Major Shopping Center Name and Address Type and Number of Stores	Distance from site in miles	Year Open	GLA in square feet	Total Major Shopping Centers
				28
				Total GLA
				11,033,378
				Total Stores
				1,446
Vallejo Corners Admiral Callaghan Way @ Turner Pkwy. Vallejo, CA 94591 Open, 34 Stores Anchors:	0.44 SE	1991	180,829	
Gateway Plaza-Vallejo Plaza Dr. & Turner Pkwy. Vallejo, CA 94591-3703 Open, 88 Stores Anchors: Target, Costco, Kohl's, Century Theatres	0.75 SE	1991	680,371	
Vallejo Plaza Shopping Center Sonoma Blvd. & Redwood St. Vallejo, CA 94590 Open, 45 Stores Anchors: Sav-Max Foods, AMC 6 Theatres, Michaels, Office Depot	1.76 SW	1962	239,695	
Watson Ranch Town Center Hwy. 29 & S. Napa Junction Rd. American Canyon, CA 94503 Open, 0 Stores Anchors:	3.25 NW	2017	200,000	
Napa Junction Napa Junction Rd. & Hwy. 29 American Canyon, CA 94503 Open, 22 Stores Anchors:	3.56 NW		344,000	
South Napa Market Place Imola & Soscol Aves. Napa, CA 94559 Open, 27 Stores Anchors: Target, The Home Depot, Raley's, Office Depot	10.52 NW	1995	349,530	
Pinole Vista Appian Way & Fitzgerald Dr. Pinole, CA 94564 Open, 37 Stores Anchors:	10.73 SW	1981	245,002	

Data Note: N/A means data was not reported. GLA = Gross Leasable Area. **Source:** Directory of Major Malls, Inc. (January 2019).



Major Shopping Center Locator

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

Latitude 38.134117
Longitude -122.22955

Major Shopping Center Name and Address Type and Number of Stores	Distance from site in miles	Year Open	GLA in square feet
Pinole Vista Crossing Fitzgerald Dr. @ I-80 & Richmond Pkwy. Pinole, CA 94564 Open, 33 Stores Anchors: Target, Burlington, Babies R Us/Toys R Us (C*), FoodMaxx	11.20 SW	1995	402,195
Hilltop Plaza I-80 & Richmond Pkwy. Richmond, CA 94806 Open, 24 Stores Anchors: Century Theatres, City Sports, Ross Dress For Less, dd's Discounts	11.52 SW	1996	251,009
Napa Premium Outlets Hwy 29 North & First St. Napa, CA 94558 Open, 50 Stores Anchors:	11.71 NW	1994	179,386
First Street Napa First St. btwn Franklin St. & Coombs St. Napa, CA 94559 Open, 45 Stores Anchors:	11.73 NW	1987	325,000
The Shops at Hilltop Hilltop Rd., I-80 & San Pablo Ave. Richmond, CA 94806 Enclosed, 149 Stores Anchors: JCPenney (Closed), Macy's, Sears, Walmart	11.93 SW	1976	1,094,479
Gateway Courtyard NEC 1-80 & Travis Blvd. Fairfield, CA 94533 Open, 22 Stores Anchors:	12.80 NE	2000	134,000
Solano Town Center Gateway Blvd. & Pennsylvania Ave. Fairfield, CA 94533 Enclosed, 129 Stores Anchors: JCPenney, Macy's, Sears (Closed), Best Buy	12.88 NE	1981	1,042,295

Data Note: N/A means data was not reported. GLA = Gross Leasable Area. **Source:** Directory of Major Malls, Inc. (January 2019).

May 10, 2019



Major Shopping Center Locator

Solano County Fairgrounds
 Drive Time: 30 minute radii

Prepared by DBC Advisors

Major Shopping Center Name and Address Type and Number of Stores	Distance from site in miles	Year Open	GLA in square feet
Gateway Plaza Pennsylvania Ave. & Gateway Blvd. Fairfield, CA 94533 Open, 24 Stores Anchors: Babies R Us (Closed), Ross Dress For Less, Vacant, Michaels	13.16 NE	1988	211,000
College Center El Portal Dr. & San Pablo Ave. San Pablo, CA 94806 Open, 30 Stores Anchors:	13.24 SW	1998	150,000
Bel Aire Plaza Trancas St. & California Blvd. Napa, CA 94558 Open, 30 Stores Anchors: Target, Whole Foods Market, Orchard Supply Hardware, Cost Plus World Market	13.68 NW	1964	258,216
Pleasant Hills Shopping Center Contra Costa Blvd. & Chilpanchingo Pkwy. Pleasant Hills, CA 94523 Open, 11 Stores Anchors: Target, Burlington, Ross Dress For Less, HomeGoods	14.05 SE	1962	231,680
Sunvalley Contra Costa Blvd & Sunvalley Blvd Concord, CA 94520 Enclosed, 143 Stores Anchors: Sears, JCPenney, Round1 Bowling & Amuseme*, Macy's	14.76 SE	1967	1,320,000
Willows Shopping Center Willow Pass Rd., I-680 & Diamond Blvd. Concord, CA 94520 Open, 28 Stores Anchors: REI, UFC Gym, Cost Plus World Market, Old Navy	14.83 SE	1977	254,537
Concord Park & Shop Center Willow Pass Rd. & Market St. Concord, CA 94520 Open, 80 Stores Anchors: Fry's Electronics, Burlington, Jo-Ann Fabric & Craft, 99 Ranch Market	15.09 SE	1957	475,000

Data Note: N/A means data was not reported. GLA = Gross Leasable Area. **Source:** Directory of Major Malls, Inc. (January 2019).



Major Shopping Center Locator

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors
Latitude: 38.13497
Longitude: -122.22968

Major Shopping Center Name and Address Type and Number of Stores	Distance from site in miles	Year Open	GLA In square feet
Downtown Pleasant Hill Crescent Plaza & Contra Costa Blvd. Pleasant Hill, CA 94523 Open, 45 Stores Anchors: Century Theatres, Orchard Supply Hardware, Bed Bath & Beyond, Ross Dress For Less	15.91 SE	1993	345,930
Crossroads at Pleasant Hill Monument Blvd. & I-680 Pleasant Hill, CA 94523 Open, 27 Stores Anchors: Kohl's, Marshalls, Friedman's Appliances, Dick's Sporting Goods	16.21 SE		217,000
El Cerrito Plaza San Pablo & Fairmont Aves. El Cerrito, CA 94530 Open, 50 Stores Anchors: Lucky Supermarkets, Jo-Ann Fabric & Craft, Ross Dress For Less, Bed Bath & Beyond	16.66 SW	1958	255,828
Vintage Oaks At Novato Rowland Blvd. & Hwy. 101 Novato, CA 94945-5009 Open, 56 Stores Anchors: Costco, Target, Macy's Furniture Gallery*, Nordstrom Rack	17.85 SW	1992	620,213

Data Note: N/A means data was not reported. GLA = Gross Leasable Area. **Source:** Directory of Major Malls, Inc. (January 2019).



Executive Summary

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

30 minutes

Population

2000 Population	839,725
2010 Population	876,310
2018 Population	932,141
2023 Population	971,400
2000-2010 Annual Rate	0.43%
2010-2018 Annual Rate	0.75%
2018-2023 Annual Rate	0.83%
2018 Male Population	49.4%
2018 Female Population	50.6%
2018 Median Age	38.2

In the identified area, the current year population is 932,141. In 2010, the Census count in the area was 876,310. The rate of change since 2010 was 0.75% annually. The five-year projection for the population in the area is 971,400 representing a change of 0.83% annually from 2018 to 2023. Currently, the population is 49.4% male and 50.6% female.

Median Age

The median age in this area is 38.2, compared to U.S. median age of 38.3.

Race and Ethnicity

2018 White Alone	48.5%
2018 Black Alone	12.2%
2018 American Indian/Alaska Native Alone	0.7%
2018 Asian Alone	17.0%
2018 Pacific Islander Alone	0.7%
2018 Other Race	14.0%
2018 Two or More Races	7.1%
2018 Hispanic Origin (Any Race)	29.8%

Persons of Hispanic origin represent 29.8% of the population in the identified area compared to 18.3% of the U.S. population. Persons of Hispanic Origin may be of any race. The Diversity Index, which measures the probability that two people from the same area will be from different race/ethnic groups, is 83.8 in the identified area, compared to 64.3 for the U.S. as a whole.

Households

2000 Households	298,533
2010 Households	312,251
2018 Total Households	330,423
2023 Total Households	343,580
2000-2010 Annual Rate	0.45%
2010-2018 Annual Rate	0.69%
2018-2023 Annual Rate	0.78%
2018 Average Household Size	2.76

The household count in this area has changed from 312,251 in 2010 to 330,423 in the current year, a change of 0.69% annually. The five-year projection of households is 343,580, a change of 0.78% annually from the current year total. Average household size is currently 2.76, compared to 2.74 in the year 2010. The number of families in the current year is 223,374 in the specified area.

Data Note: Income is expressed in current dollars
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023. Esri converted Census 2000 data into 2010 geography.



Executive Summary

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

30 minutes

Median Household Income

2018 Median Household Income	\$74,441
2023 Median Household Income	\$85,794
2018-2023 Annual Rate	2.88%

Average Household Income

2018 Average Household Income	\$99,336
2023 Average Household Income	\$118,002
2018-2023 Annual Rate	3.50%

Per Capita Income

2018 Per Capita Income	\$35,706
2023 Per Capita Income	\$42,214
2018-2023 Annual Rate	3.41%

Households by Income

Current median household income is \$74,441 in the area, compared to \$58,100 for all U.S. households. Median household income is projected to be \$85,794 in five years, compared to \$65,727 for all U.S. households

Current average household income is \$99,336 in this area, compared to \$83,694 for all U.S. households. Average household income is projected to be \$118,002 in five years, compared to \$96,109 for all U.S. households

Current per capita income is \$35,706 in the area, compared to the U.S. per capita income of \$31,950. The per capita income is projected to be \$42,214 in five years, compared to \$36,530 for all U.S. households

Housing

2000 Total Housing Units	307,756
2000 Owner Occupied Housing Units	183,267
2000 Renter Occupied Housing Units	115,266
2000 Vacant Housing Units	9,223
2010 Total Housing Units	335,842
2010 Owner Occupied Housing Units	185,745
2010 Renter Occupied Housing Units	126,506
2010 Vacant Housing Units	23,591
2018 Total Housing Units	350,003
2018 Owner Occupied Housing Units	191,362
2018 Renter Occupied Housing Units	139,061
2018 Vacant Housing Units	19,580
2023 Total Housing Units	362,626
2023 Owner Occupied Housing Units	208,598
2023 Renter Occupied Housing Units	134,982
2023 Vacant Housing Units	19,046

Currently, 54.7% of the 350,003 housing units in the area are owner occupied; 39.7%, renter occupied; and 5.6% are vacant. Currently, in the U.S., 56.0% of the housing units in the area are owner occupied; 32.8% are renter occupied; and 11.2% are vacant. In 2010, there were 335,842 housing units in the area - 55.3% owner occupied, 37.7% renter occupied, and 7.0% vacant. The annual rate of change in housing units since 2010 is 1.85%. Median home value in the area is \$472,921, compared to a median home value of \$218,492 for the U.S. In five years, median value is projected to change by 3.04% annually to \$549,222.

Data Note: Income is expressed in current dollars

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023. Esri converted Census 2000 data into 2010 geography.

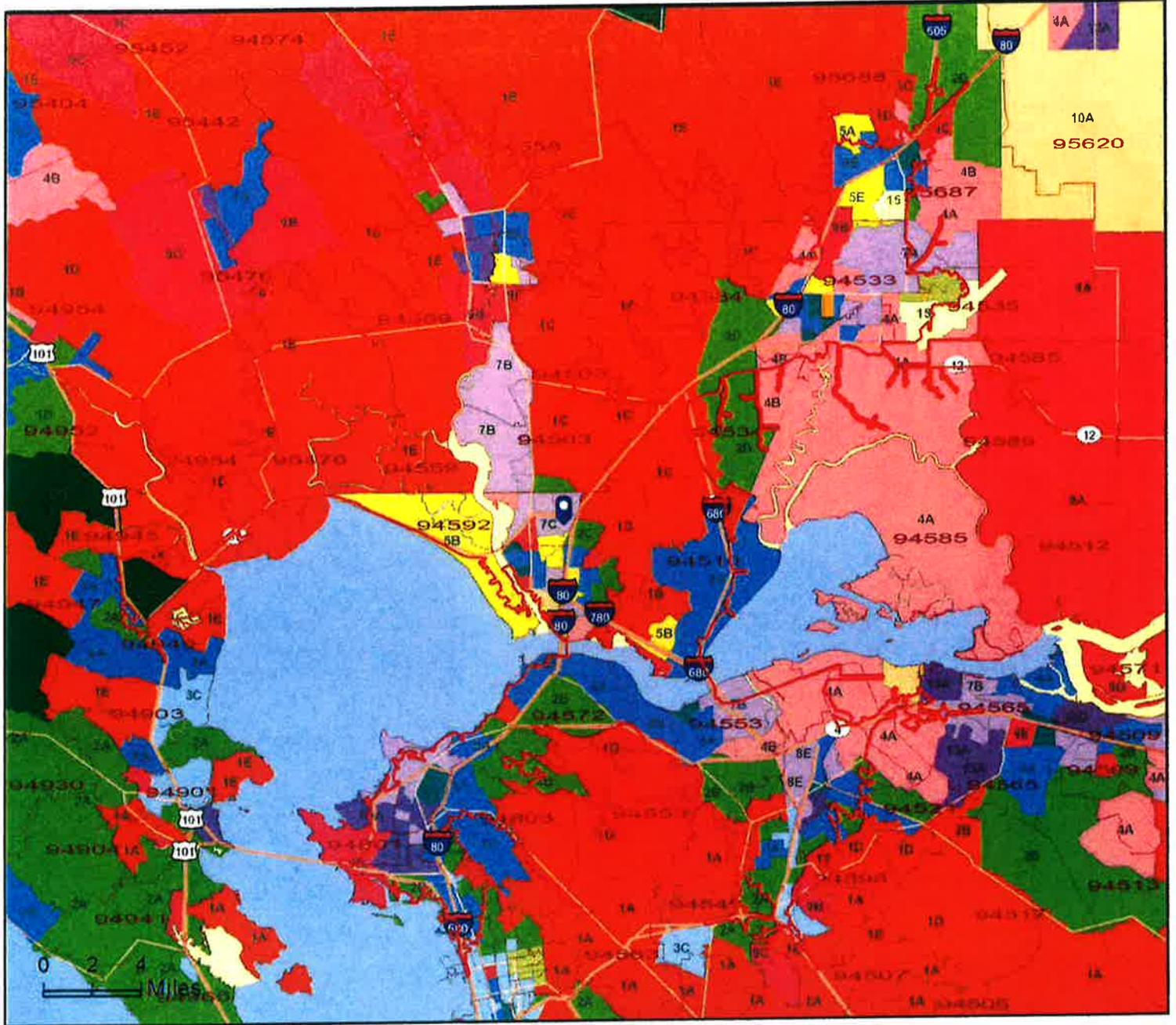
May 10, 2019



Dominant Tapestry Map

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors



Tapestry LifeMode

- | | |
|------------------------|----------------------------|
| L1: Affluent Estates | L8: Middle Ground |
| L2: Upscale Avenues | L9: Senior Styles |
| L3: Uptown Individuals | L10: Rustic Outposts |
| L4: Family Landscapes | L11: Midtown Singles |
| L5: Ginkurbar | L12: Hometown |
| L6: Cozy Country | L13: Next Wave |
| L7: Ethnic Enclaves | L14: Scholars and Patriots |



Source: Esri



Dominant Tapestry Map

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

Tapestry Segmentation

Tapestry Segmentation represents the latest generation of market segmentation systems that began over 30 years ago. The 68-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic composition. Each segment is identified by its two-digit Segment Code. Match the two-digit segment labels on the map to the list below. Click each segment below for a detailed description.

- Segment 1A (Top Tier)
- Segment 1B (Professional Pride)
- Segment 1C (Boomburbs)
- Segment 1D (Savvy Suburbanites)
- Segment 1E (Exurbanites)
- Segment 2A (Urban Chic)
- Segment 2B (Pleasantville)
- Segment 2C (Pacific Heights)
- Segment 2D (Enterprising Professionals)
- Segment 3A (Laptops and Lattes)
- Segment 3B (Metro Renters)
- Segment 3C (Trendsetters)
- Segment 4A (Soccer Moms)
- Segment 4B (Home Improvement)
- Segment 4C (Middleburg)
- Segment 5A (Comfortable Empty Nesters)
- Segment 5B (In Style)
- Segment 5C (Parks and Rec)
- Segment 5D (Rustbelt Traditions)
- Segment 5E (Midlife Constants)
- Segment 6A (Green Acres)
- Segment 6B (Salt of the Earth)
- Segment 6C (The Great Outdoors)
- Segment 6D (Prairie Living)
- Segment 6E (Rural Resort Dwellers)
- Segment 6F (Heartland Communities)
- Segment 7A (Up and Coming Families)
- Segment 7B (Urban Villages)
- Segment 7C (American Dreamers)
- Segment 7D (Barrios Urbanos)
- Segment 7E (Valley Growers)
- Segment 7F (Southwestern Families)
- Segment 8A (City Lights)
- Segment 8B (Emerald City)
- Segment 8C (Bright Young Professionals)
- Segment 8D (Downtown Melting Pot)
- Segment 8E (Front Porches)
- Segment 8F (Old and Newcomers)
- Segment 8G (Hardscrabble Road)
- Segment 9A (Silver & Gold)
- Segment 9B (Golden Years)
- Segment 9C (The Elders)
- Segment 9D (Senior Escapes)
- Segment 9E (Retirement Communities)
- Segment 9F (Social Security Set)
- Segment 10A (Southern Satellites)
- Segment 10B (Rooted Rural)
- Segment 10C (Diners & Miners)
- Segment 10D (Down the Road)
- Segment 10E (Rural Bypasses)
- Segment 11A (City Strivers)
- Segment 11B (Young and Restless)
- Segment 11C (Metro Fusion)
- Segment 11D (Set to Impress)
- Segment 11E (City Commons)
- Segment 12A (Family Foundations)
- Segment 12B (Traditional Living)
- Segment 12C (Small Town Simplicity)
- Segment 12D (Modest Income Homes)
- Segment 13A (International Marketplace)
- Segment 13B (Las Casas)
- Segment 13C (NeWest Residents)
- Segment 13D (Fresh Ambitions)
- Segment 13E (High Rise Renters)
- Segment 14A (Military Proximity)
- Segment 14B (College Towns)
- Segment 14C (Dorms to Diplomas)
- Segment 15 (Unclassified)



Tapestry Segmentation Area Profile

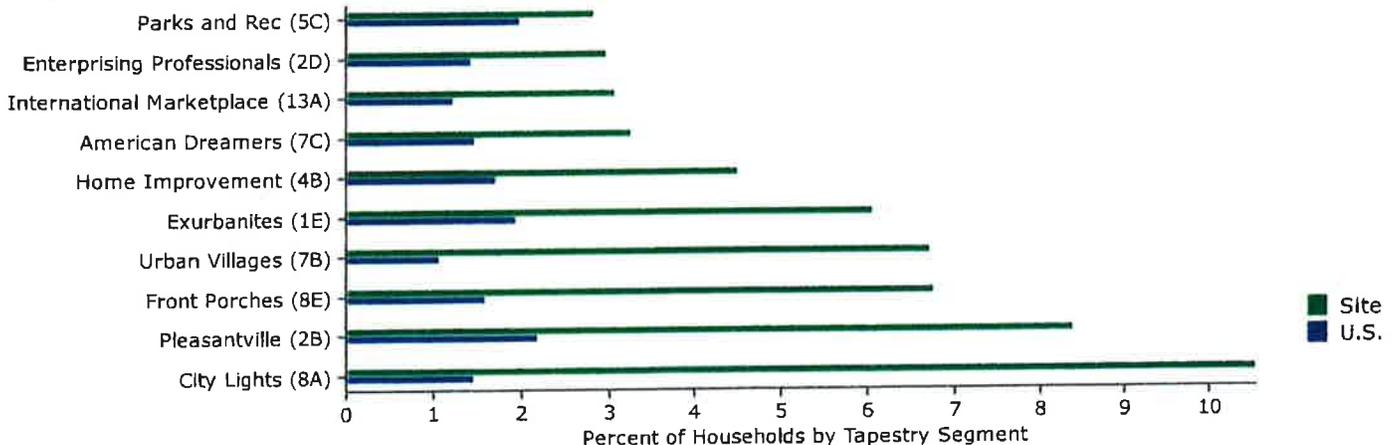
Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

Top Twenty Tapestry Segments

Rank	Tapestry Segment	2018 Households		2018 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	City Lights (8A)	10.6%	10.6%	1.5%	1.5%	724
2	Pleasantville (2B)	8.4%	19.0%	2.2%	3.7%	383
3	Front Porches (8E)	6.8%	25.8%	1.6%	5.3%	428
4	Urban Villages (7B)	6.7%	32.5%	1.1%	6.4%	632
5	Exurbanites (1E)	6.1%	38.6%	1.9%	8.3%	312
	Subtotal	38.6%		8.3%		
6	Home Improvement (4B)	4.5%	43.1%	1.7%	10.0%	263
7	American Dreamers (7C)	3.2%	46.3%	1.5%	11.5%	220
8	International Marketplace (13A)	3.1%	49.4%	1.2%	12.7%	249
9	Enterprising Professionals (2D)	3.0%	52.4%	1.4%	14.1%	208
10	Parks and Rec (5C)	2.8%	55.2%	2.0%	16.1%	143
	Subtotal	16.6%		7.8%		
11	Golden Years (9B)	2.8%	58.0%	1.3%	17.4%	209
12	Savvy Suburbanites (1D)	2.7%	60.7%	3.0%	20.4%	91
13	Urban Chic (2A)	2.4%	63.1%	1.3%	21.7%	179
14	Pacific Heights (2C)	2.3%	65.4%	0.7%	22.4%	327
15	Soccer Moms (4A)	2.3%	67.7%	2.9%	25.3%	79
	Subtotal	12.5%		9.2%		
16	Boomburbs (1C)	2.2%	69.9%	1.7%	27.0%	133
17	NeWest Residents (13C)	2.2%	72.1%	0.8%	27.8%	280
18	Metro Fusion (11C)	2.1%	74.2%	1.4%	29.2%	151
19	Trendsetters (3C)	2.1%	76.3%	1.1%	30.3%	193
20	Las Casas (13B)	2.0%	78.3%	0.7%	31.0%	272
	Subtotal	10.6%		5.7%		
	Total	78.2%		31.0%		252

Top Ten Tapestry Segments Site vs. U.S.



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Tapestry Segmentation Area Profile

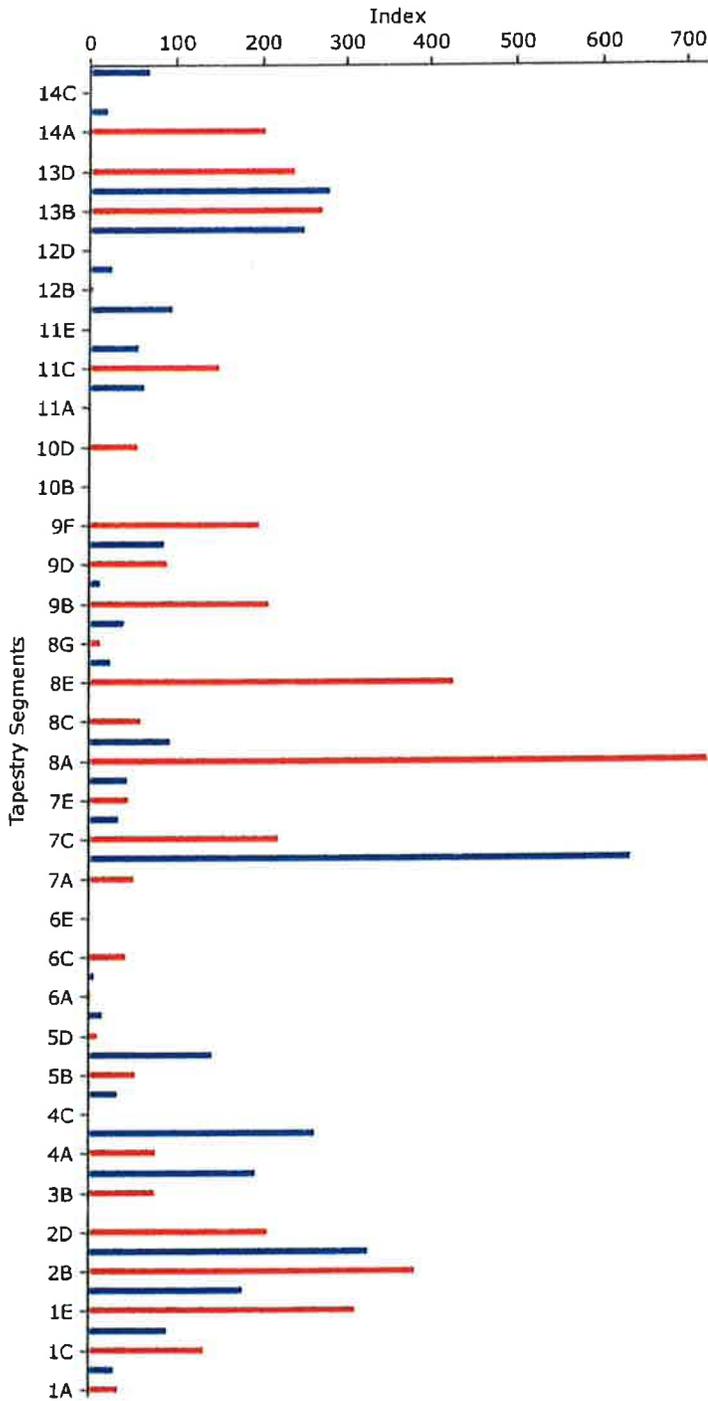
Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

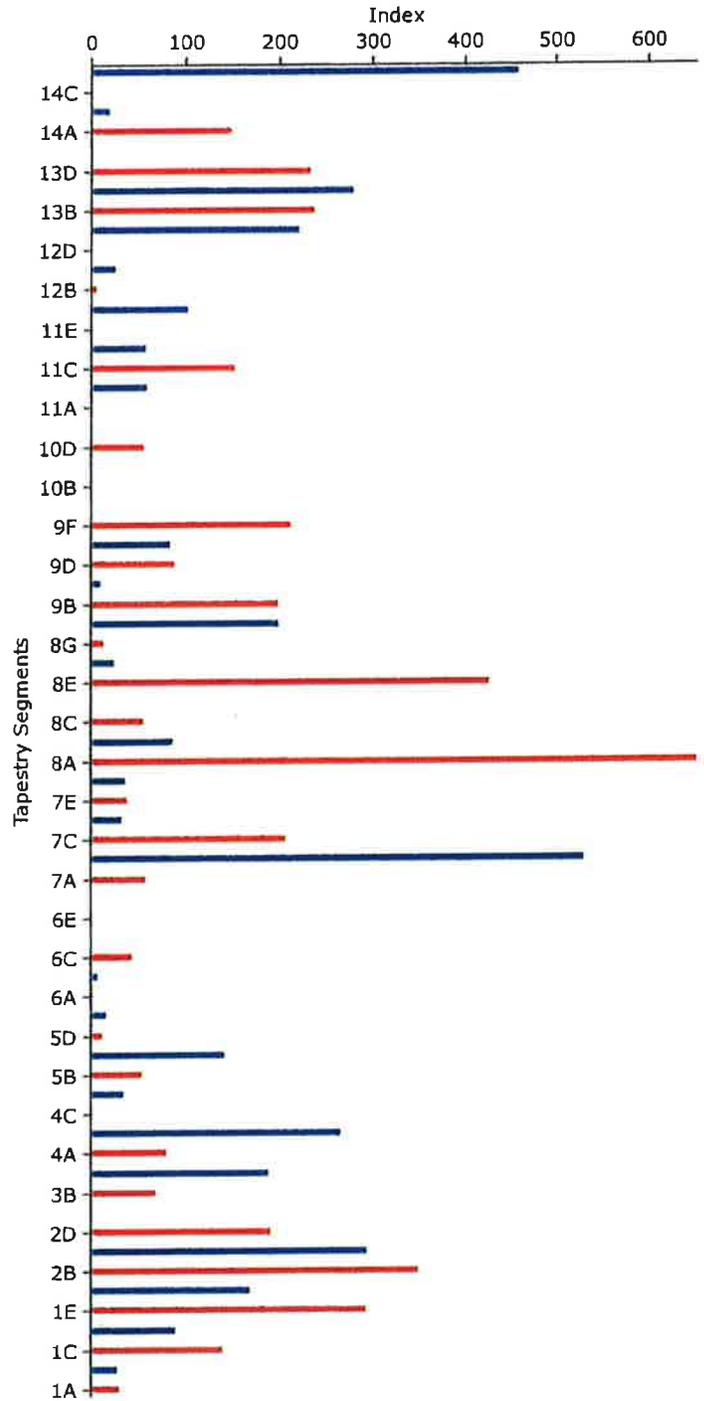
Latitude: 38.13497

Longitude: -122.22966

2018 Tapestry Indexes by Households



2018 Tapestry Indexes by Total Population 18+



Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Tapestry Segmentation Area Profile

Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

Tapestry LifeMode Groups	2018 Households			2018 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	330,420	100.0%		726,213	100.0%	
1. Affluent Estates	39,850	12.1%	122	89,094	12.3%	116
Top Tier (1A)	1,976	0.6%	35	4,135	0.6%	32
Professional Pride (1B)	1,551	0.5%	29	3,815	0.5%	29
Boomburbs (1C)	7,382	2.2%	133	18,146	2.5%	140
Savvy Suburbanites (1D)	8,924	2.7%	91	21,325	2.9%	91
Exurbanites (1E)	20,017	6.1%	312	41,673	5.7%	294
2. Upscale Avenues	53,033	16.1%	284	115,250	15.9%	269
Urban Chic (2A)	7,808	2.4%	179	15,243	2.1%	169
Pleasantville (2B)	27,710	8.4%	383	62,396	8.6%	352
Pacific Heights (2C)	7,706	2.3%	328	19,042	2.6%	295
Enterprising Professionals (2D)	9,809	3.0%	208	18,569	2.6%	192
3. Uptown Individuals	11,058	3.3%	88	19,549	2.7%	86
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	4,199	1.3%	77	6,403	0.9%	69
Trendsetters (3C)	6,859	2.1%	193	13,146	1.8%	189
4. Family Landscapes	22,443	6.8%	91	54,163	7.5%	96
Soccer Moms (4A)	7,554	2.3%	79	18,369	2.5%	82
Home Improvement (4B)	14,889	4.5%	263	35,794	4.9%	267
Middleburg (4C)	0	0.0%	0	0	0.0%	0
5. GenXurban	18,437	5.6%	49	39,709	5.5%	50
Comfortable Empty Nesters (5A)	2,765	0.8%	34	6,459	0.9%	36
In Style (5B)	4,100	1.2%	55	8,380	1.2%	55
Parks and Rec (5C)	9,334	2.8%	143	19,947	2.7%	142
Rustbelt Traditions (5D)	889	0.3%	12	1,997	0.3%	13
Midlife Constants (5E)	1,349	0.4%	16	2,926	0.4%	17
6. Cozy Country Living	3,413	1.0%	9	7,498	1.0%	9
Green Acres (6A)	441	0.1%	4	995	0.1%	4
Salt of the Earth (6B)	691	0.2%	7	1,568	0.2%	8
The Great Outdoors (6C)	2,281	0.7%	44	4,935	0.7%	45
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
7. Ethnic Enclaves	39,945	12.1%	171	98,882	13.6%	166
Up and Coming Families (7A)	4,216	1.3%	53	10,913	1.5%	59
Urban Villages (7B)	22,203	6.7%	632	56,325	7.8%	530
American Dreamers (7C)	10,737	3.2%	220	25,219	3.5%	208
Barrios Urbanos (7D)	1,199	0.4%	35	2,997	0.4%	33
Valley Growers (7E)	373	0.1%	47	885	0.1%	39
Southwestern Families (7F)	1,217	0.4%	45	2,543	0.4%	37

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Tapestry Segmentation Area Profile

Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

Tapestry LifeMode Groups	2018 Households			2018 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	330,420	100.0%		726,213	100.0%	
8. Middle Ground	68,671	20.8%	191	138,494	19.1%	188
City Lights (8A)	34,877	10.6%	724	70,451	9.7%	655
Emerald City (8B)	4,451	1.3%	94	7,742	1.1%	87
Bright Young Professionals (8C)	4,563	1.4%	61	8,331	1.1%	57
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	22,363	6.8%	428	47,150	6.5%	428
Old and Newcomers (8F)	1,816	0.5%	24	3,662	0.5%	25
Hardscrabble Road (8G)	601	0.2%	15	1,158	0.2%	14
9. Senior Styles	22,201	6.7%	116	41,472	5.7%	114
Silver & Gold (9A)	1,047	0.3%	41	1,905	0.3%	38
Golden Years (9B)	9,271	2.8%	209	17,220	2.4%	200
The Elders (9C)	311	0.1%	13	426	0.1%	10
Senior Escapes (9D)	2,750	0.8%	92	5,443	0.7%	89
Retirement Communities (9E)	3,465	1.0%	87	6,164	0.8%	84
Social Security Set (9F)	5,357	1.6%	198	10,314	1.4%	213
10. Rustic Outposts	2,174	0.7%	8	4,812	0.7%	8
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	2,174	0.7%	57	4,812	0.7%	57
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	13,338	4.0%	65	25,409	3.5%	64
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	3,702	1.1%	64	5,991	0.8%	59
Metro Fusion (11C)	7,030	2.1%	151	14,411	2.0%	152
Set to Impress (11D)	2,606	0.8%	57	5,007	0.7%	58
City Commons (11E)	0	0.0%	0	0	0.0%	0
12. Hometown	5,258	1.6%	26	11,852	1.6%	28
Family Foundations (12A)	3,315	1.0%	96	7,935	1.1%	102
Traditional Living (12B)	368	0.1%	6	773	0.1%	6
Small Town Simplicity (12C)	1,575	0.5%	26	3,144	0.4%	26
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
13. Next Wave	28,941	8.8%	226	68,542	9.4%	212
International Marketplace (13A)	10,124	3.1%	249	22,019	3.0%	220
Las Casas (13B)	6,585	2.0%	272	17,385	2.4%	237
NeWest Residents (13C)	7,225	2.2%	280	17,554	2.4%	279
Fresh Ambitions (13D)	5,007	1.5%	238	11,584	1.6%	233
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	1,655	0.5%	31	4,381	0.6%	26
Military Proximity (14A)	1,001	0.3%	203	2,899	0.4%	148
College Towns (14B)	654	0.2%	21	1,482	0.2%	20
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0
Unclassified (15)	3	0.0%	70	7,106	1.0%	460

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Source: Esri



Tapestry Segmentation Area Profile

Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

Tapestry Urbanization Groups	2018 Households			2018 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	330,420	100.0%		726,213	100.0%	
1. Principal Urban Center	23,290	7.0%	99	48,687	6.7%	100
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	4,199	1.3%	77	6,403	0.9%	69
Trendsetters (3C)	6,859	2.1%	193	13,146	1.8%	189
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	7,225	2.2%	280	17,554	2.4%	279
Fresh Ambitions (13D)	5,007	1.5%	238	11,584	1.6%	233
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	110,445	33.4%	200	248,655	34.2%	192
Pacific Heights (2C)	7,706	2.3%	328	19,042	2.6%	295
Rustbelt Traditions (5D)	889	0.3%	12	1,997	0.3%	13
Urban Villages (7B)	22,203	6.7%	632	56,325	7.8%	530
American Dreamers (7C)	10,737	3.2%	220	25,219	3.5%	208
Barrios Urbanos (7D)	1,199	0.4%	35	2,997	0.4%	33
Southwestern Families (7F)	1,217	0.4%	45	2,543	0.4%	37
City Lights (8A)	34,877	10.6%	724	70,451	9.7%	655
Bright Young Professionals (8C)	4,563	1.4%	61	8,331	1.1%	57
Metro Fusion (11C)	7,030	2.1%	151	14,411	2.0%	152
Family Foundations (12A)	3,315	1.0%	96	7,935	1.1%	102
Modest Income Homes (12D)	0	0.0%	0	0	0.0%	0
International Marketplace (13A)	10,124	3.1%	249	22,019	3.0%	220
Las Casas (13B)	6,585	2.0%	272	17,385	2.4%	237
3. Metro Cities	49,483	15.0%	82	97,823	13.5%	80
In Style (5B)	4,100	1.2%	55	8,380	1.2%	55
Emerald City (8B)	4,451	1.3%	94	7,742	1.1%	87
Front Porches (8E)	22,363	6.8%	428	47,150	6.5%	428
Old and Newcomers (8F)	1,816	0.5%	24	3,662	0.5%	25
Hardscrabble Road (8G)	601	0.2%	15	1,158	0.2%	14
Retirement Communities (9E)	3,465	1.0%	87	6,164	0.8%	84
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Young and Restless (11B)	3,702	1.1%	64	5,991	0.8%	59
Set to Impress (11D)	2,606	0.8%	57	5,007	0.7%	58
City Commons (11E)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	368	0.1%	6	773	0.1%	6
College Towns (14B)	654	0.2%	21	1,482	0.2%	20
Dorms to Diplomas (14C)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

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Tapestry Segmentation Area Profile

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

Tapestry Urbanization Groups	2018 Households			2018 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	330,420	100.0%		726,213	100.0%	
4. Suburban Periphery	136,914	41.4%	130	302,160	41.6%	128
Top Tier (1A)	1,976	0.6%	35	4,135	0.6%	32
Professional Pride (1B)	1,551	0.5%	29	3,815	0.5%	29
Boomburbs (1C)	7,382	2.2%	133	18,146	2.5%	140
Savvy Suburbanites (1D)	8,924	2.7%	91	21,325	2.9%	91
Exurbanites (1E)	20,017	6.1%	312	41,673	5.7%	294
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Pleasantville (2B)	27,710	8.4%	383	62,396	8.6%	352
Enterprising Professionals (2D)	9,809	3.0%	208	18,569	2.6%	192
Soccer Moms (4A)	7,554	2.3%	79	18,369	2.5%	82
Home Improvement (4B)	14,889	4.5%	263	35,794	4.9%	267
Comfortable Empty Nesters (5A)	2,765	0.8%	34	6,459	0.9%	36
Parks and Rec (5C)	9,334	2.8%	143	19,947	2.7%	142
Midlife Constants (5E)	1,349	0.4%	16	2,926	0.4%	17
Up and Coming Families (7A)	4,216	1.3%	53	10,913	1.5%	59
Silver & Gold (9A)	1,047	0.3%	41	1,905	0.3%	38
Golden Years (9B)	9,271	2.8%	209	17,220	2.4%	200
The Elders (9C)	311	0.1%	13	426	0.1%	10
Military Proximity (14A)	1,001	0.3%	203	2,899	0.4%	148
5. Semirural	6,872	2.1%	22	14,284	2.0%	22
Middleburg (4C)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	373	0.1%	47	885	0.1%	39
Senior Escapes (9D)	2,750	0.8%	92	5,443	0.7%	89
Down the Road (10D)	2,174	0.7%	57	4,812	0.7%	57
Small Town Simplicity (12C)	1,575	0.5%	26	3,144	0.4%	26
6. Rural	3,413	1.0%	6	7,498	1.0%	6
Green Acres (6A)	441	0.1%	4	995	0.1%	4
Salt of the Earth (6B)	691	0.2%	7	1,568	0.2%	8
The Great Outdoors (6C)	2,281	0.7%	44	4,935	0.7%	45
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	0	0.0%	0	0	0.0%	0
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	3	0.0%	70	7,106	1.0%	460

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.

Source: Esri



Middle Ground

Front Porches

8E

Households: 1,960,300

Average Household Size: 2.57

Median Age: 34.9

Median Household Income: \$43,700

WHO ARE WE?

Front Porches blends household types, with more young families with children or single households than average. This group is also more diverse than the US. More than half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to Front Porches residents and help to influence household buying decisions. Households tend to own just one vehicle but used only when needed. Income and net worth of these residents are well below the US average.

OUR NEIGHBORHOOD

- Nearly one in five homes is a duplex, triplex, or quad; half are older single-family dwellings.
- Just over half the homes are occupied by renters.
- Older, established neighborhoods; three quarters of all homes were built before 1980.
- Single-parent families or singles living alone make up almost half of the households.

SOCIOECONOMIC TRAITS

- Composed of a blue-collar work force with a strong labor force participation rate, but unemployment is slightly high at 7.1%.
- Price is more important than brand names or style to these consumers.
- With limited incomes, these are not adventurous shoppers.
- They would rather cook a meal at home than dine out.
- They seek adventure and strive to have fun.



Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



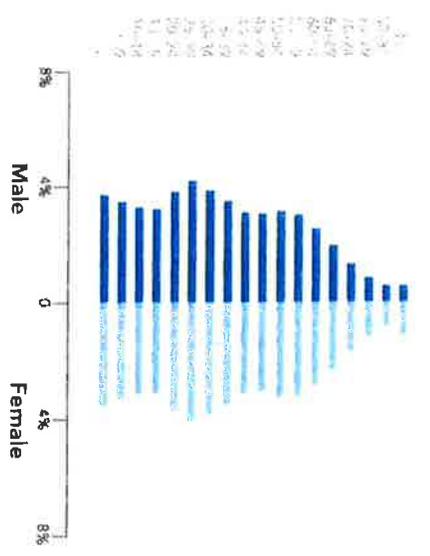
Front Porches

Middle Ground



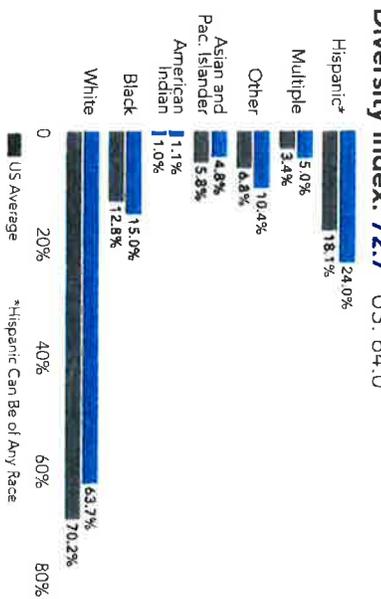
AGE BY SEX (Esri data)

Median Age: 34.9 US: 38.2
Indicates US



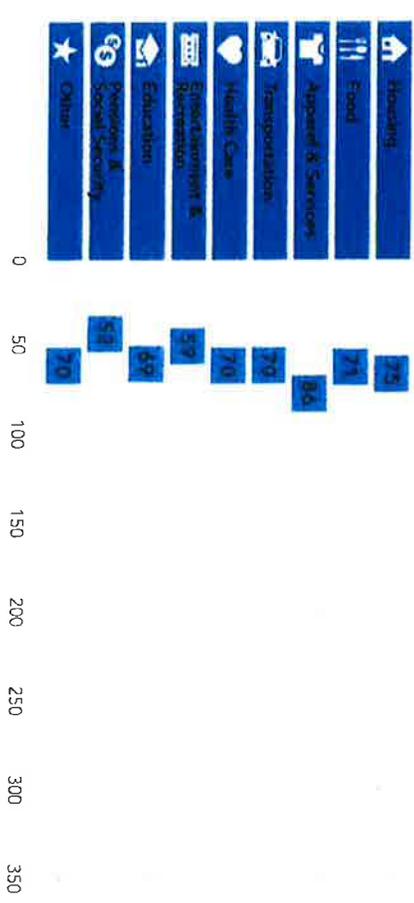
RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).



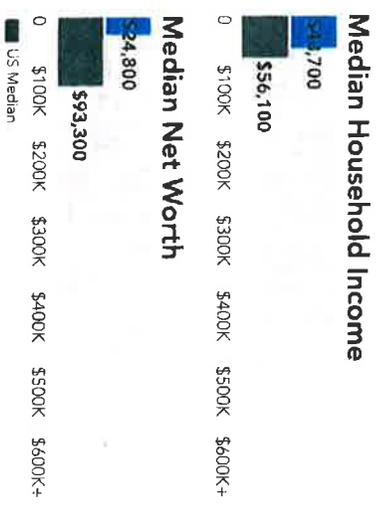
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



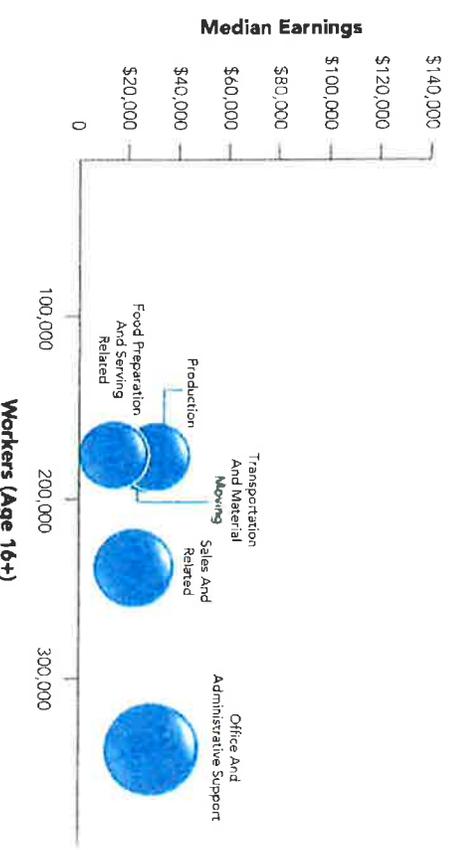
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.



MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Go online for gaming, watching movies, employment searches, and posting pics on social media.
- Prefer cellphones over landlines, and use their mobile devices for entertainment such as streaming movies and music.
- Drink energy and sports drinks.
- Participate in leisure activities including sports, playing board games and video games.
- Watch Comedy Central, Nickelodeon, and PBS Kids Sprout.

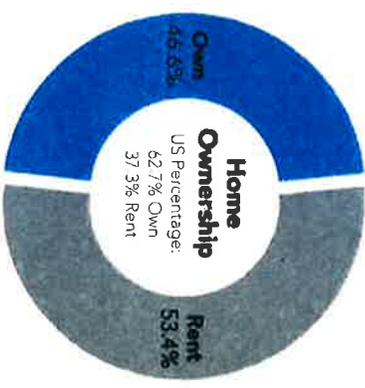
HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



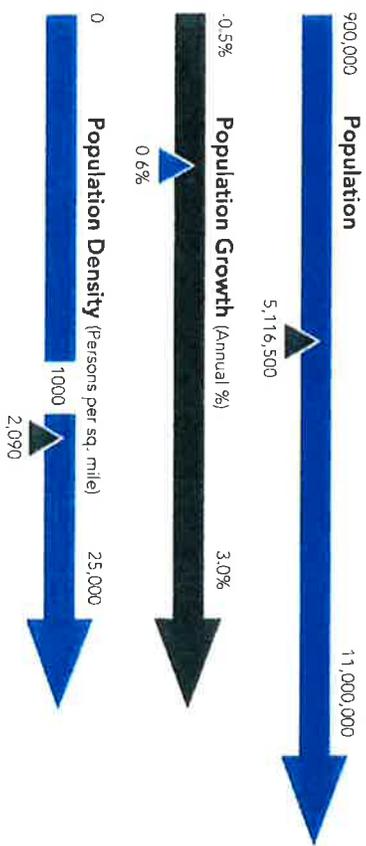
Typical Housing:
Single Family;
Multi-Units

Average Rent:
\$913
US Average: \$1,038



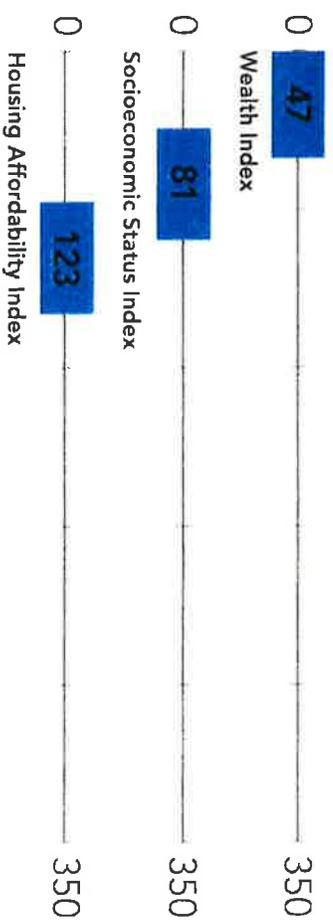
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



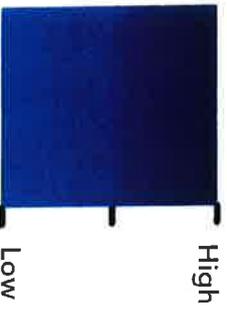


Middle Ground Front Porches



SEGMENT DENSITY

This map illustrates the density and distribution of the *Front Porches* Tapestry Segment by households.



Map data © 2008 Esri, Garmin, GPS, and IGC, the Esri, DeLorme, NAVTEQ, Swire, Samba, AeroGRID, IGN, and the GIS User Community
Segmentation based on the 2000 Census, and Esri's Tapestry Segmentation. © 2008 Esri. All rights reserved.
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info@esri.com
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THE
SCIENCE
OF
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LifeMode Group: Ethnic Enclaves
Urban Villages

7B

Households: 1,293,000

Average Household Size: 3.75

Median Age: 33.3

Median Household Income: \$58,000

WHO ARE WE?

Urban Villages residents are multicultural, multigenerational, and multilingual. Trendy and fashion conscious, they are risk takers. However, these consumers focus on their children and maintain gardens. They are well connected with their smartphones, but more likely to shop in person or via the Home Shopping Network. Their favorite stores are as diverse as they are, Costco or Whole Foods, Target or Nordstrom.

OUR NEIGHBORHOOD

- Older homes (most built before 1970) are found in the urban periphery of large metropolitan markets.
- Married couples with children, and grandparents: many households are multigenerational (Index 322). Average household size is 3.75.
- Homes are older, primarily single family, with a higher median value of \$228,000 (Index 128) and a lower vacancy rate of 5.2%.

SOCIOECONOMIC TRAITS

- Multicultural market including recent immigrants (Index 271) and some language barriers (Index 303).
- Education: more than half the population aged 25 or older have a high school diploma or some college.
- Labor force participation rate higher than the US, but so is the unemployment rate at 10.5%.
- Brand conscious but not necessarily brand loyal; open to trying new things.
- Status-conscious consumers; choices reflect their youth—attention to style and pursuit of trends.
- Comfortable with technology and interested in the latest innovations.

TAPESTRY
SEGMENTATION

© 2014 GEAC

Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from Jan. by GK MRI.

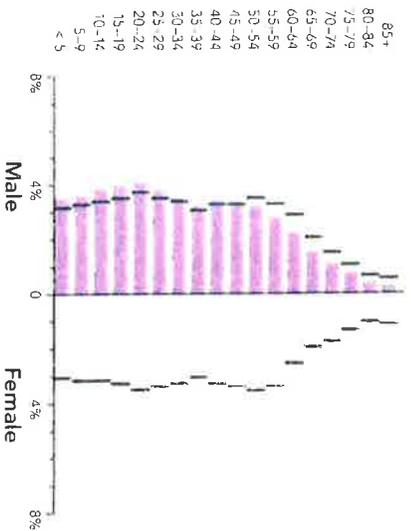


LifeMode Group: Ethnic Enclaves Urban Villages



AGE BY SEX (Esri data)

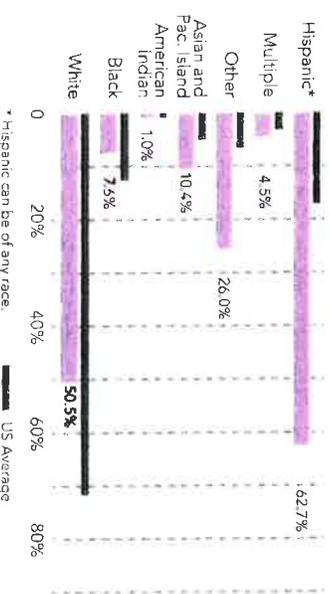
Median Age: **37.6** US: 37.6
I Indicates US



RACE AND ETHNICITY (Esri data)

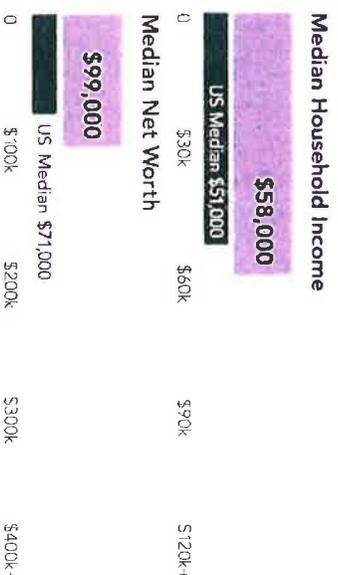
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **62.1** US: 62.1



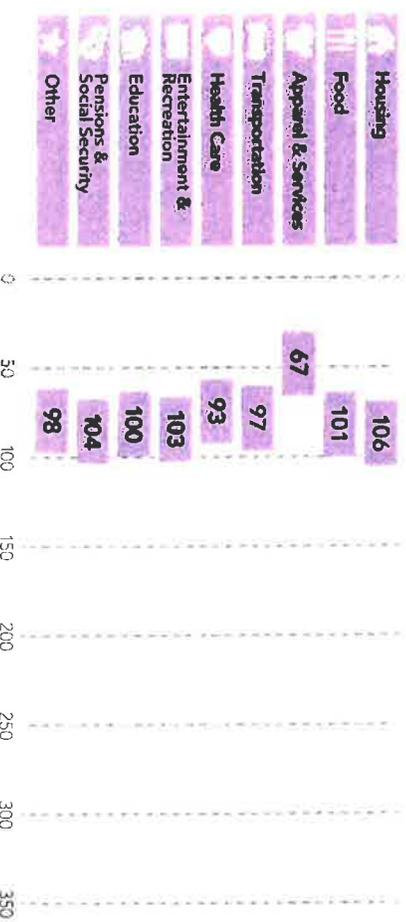
INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.



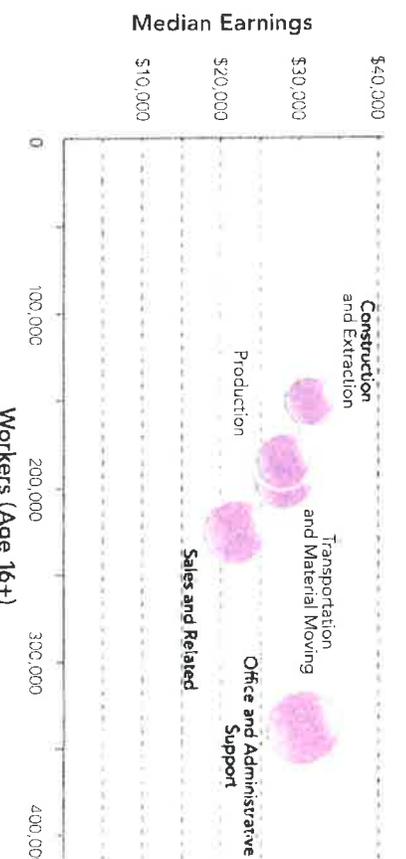
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





LifeMode Group: Ethnic Enclaves Urban Villages



MARKET PROFILE

(Consumer preferences are estimated from data by GfK WR)

- Fashion matters to Urban Villages residents, who spend liberally on new clothes for the whole family.
- Saving is more limited than spending in this young market.
- They carry credit cards, but banking is basic. They are likely to pay bills in person or online.
- Media preferences vary, but feature culturally specific channels or children's shows.
- Leisure includes family activities like going to water parks, gardening, and clubbing, plus sports like soccer and softball.

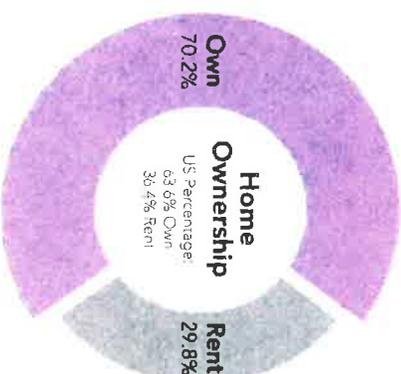
HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



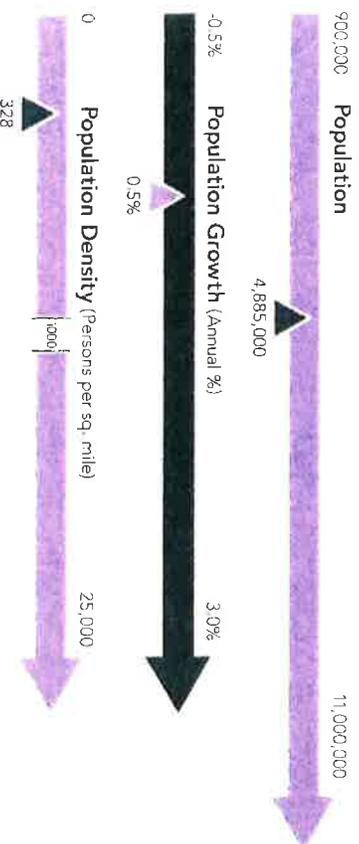
Typical Housing:
Single Family

Median Value:
\$228,000
US Median: \$177,000



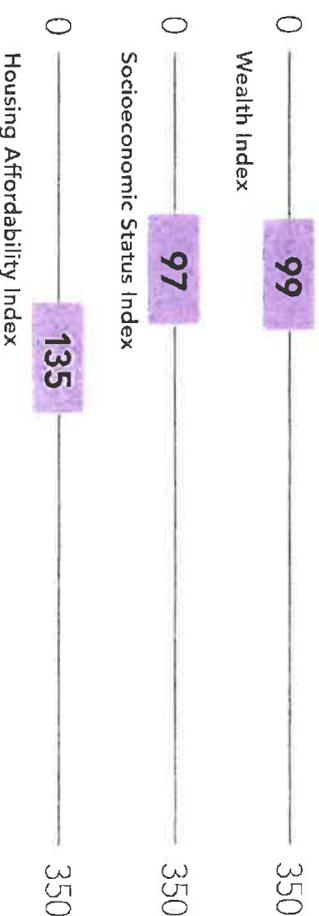
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMosaic Group Affluent Estates

Exurbanites



Households: 2,398,200

Average Household Size: 2.50

Median Age: 51.0

Median Household Income: \$103,400

WHO ARE WE?

Ten years later, Exurbanites residents are now approaching retirement but showing few signs of slowing down. They are active in their communities, generous in their donations, and seasoned travelers. They take advantage of their proximity to large metropolitan centers to support the arts, but prefer a more expansive home style in less crowded neighborhoods. They have cultivated a lifestyle that is both affluent and urbane.

OUR NEIGHBORHOOD

- Established neighborhoods (most built between 1970 and 1990) found in the suburban periphery of large metropolitan markets.
- A larger market of empty nesters, married couples with no children; average household size is 2.50.
- Primarily single-family homes with a high median value of \$423,400 (Index 204), most still carrying mortgages.
- Higher vacancy rate at 9%.

SOCIOECONOMIC TRAITS

- Residents are college educated; more than half have a bachelor's degree or higher; nearly 81% have some college education.
- This labor force is beginning to retire. 1 in 3 households currently receive Social Security or retirement income. Labor force participation has declined to less than 60% (Index 95).
- Unemployment remains low at 3.3% (Index 61); more of the residents prefer self-employment (Index 178) or working from home (Index 177).
- Consumers are more interested in quality than cost. They take pride in their homes and foster a sense of personal style.
- Exurbanites residents are well connected, using the Internet for everything from shopping to managing their finances.
- Sociable and hardworking, they still find time to stay physically fit.



TAPESTRY
SEGMENTATION
esri.com/tapestry

Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



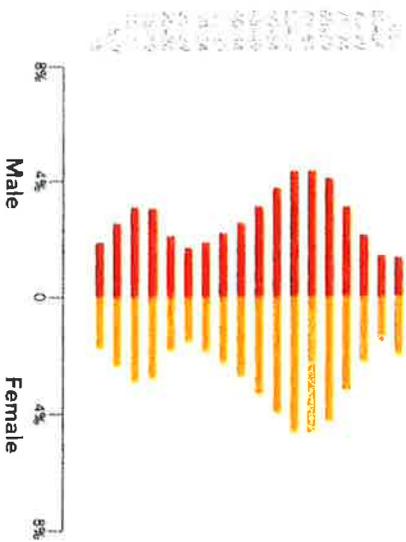
Exurbanites



AGE BY SEX

Median Age: 51.0 US: 38.2

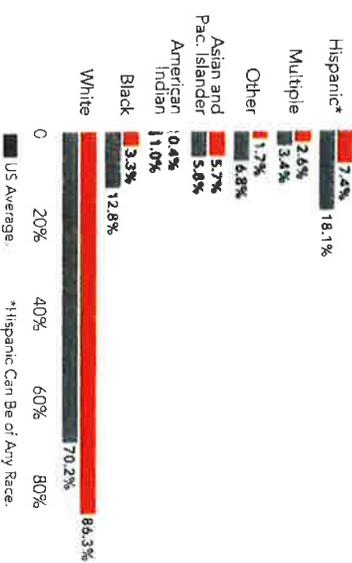
Indicates US



RACE AND ETHNICITY

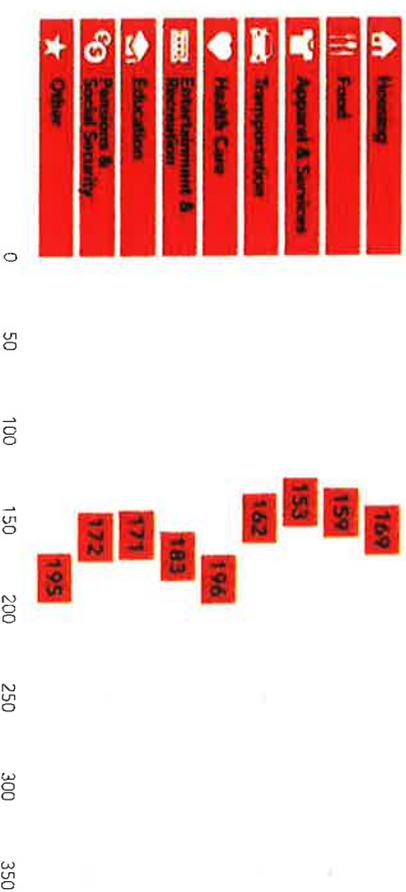
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 35.2 US: 64.0



AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g. mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

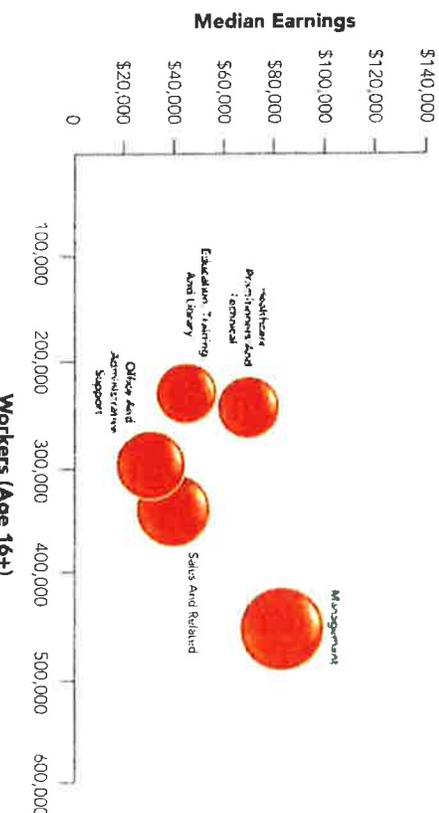
\$103,400
\$56,100

Median Net Worth

\$505,400
\$93,300

OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





Exurbanites



MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Exurbanites residents' preferred vehicles are late model luxury cars or SUVs.
- They are active supporters of the arts and public television/radio.
- Attentive to ingredients, they prefer natural or organic products.
- Gardening and home improvement are priorities, but they also use a number of services, from home care and maintenance to personal care.
- Financially active with wide-ranging investments, these investors rely on financial planners, extensive reading, and the Internet to handle their money.

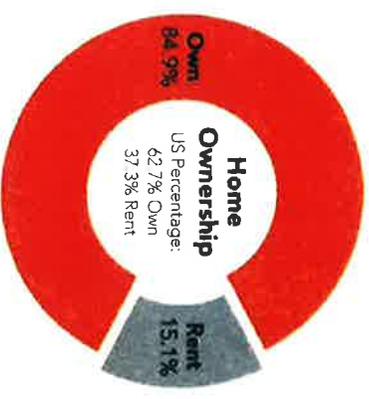
HOUSING

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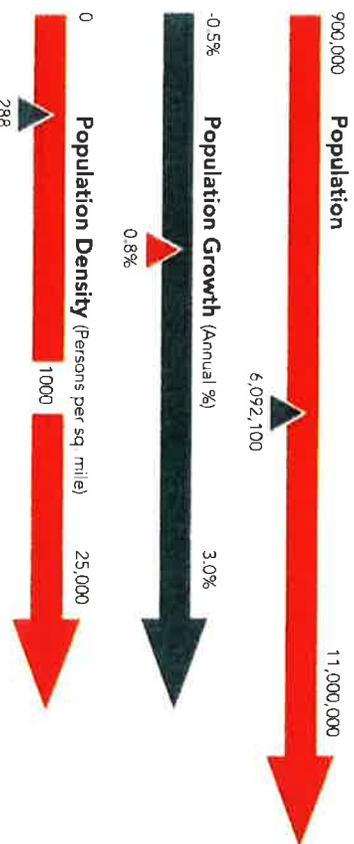
Typical Housing:
Single Family

Median Value:
\$423,400
US Median: \$207,300



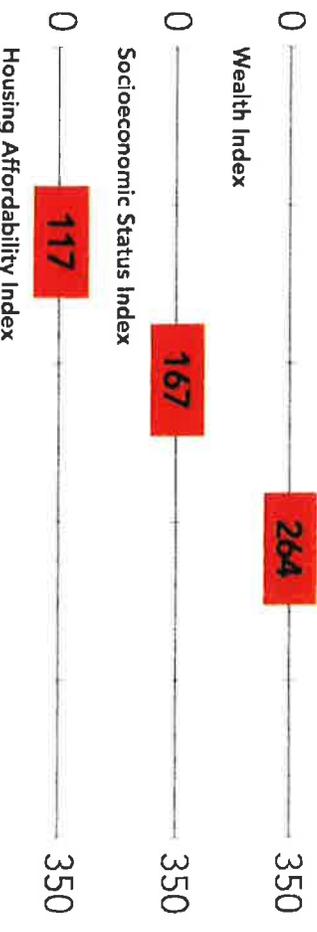
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





Market Profile

Solano County Fairgrounds
 Drive Time: 30 minute radii

Prepared by DBC Advisors

Latitude: 38.13497
 Longitude: -122.24971

30 minutes

Population Summary

2000 Total Population	839,725
2010 Total Population	876,310
2018 Total Population	932,141
2018 Group Quarters	19,367
2023 Total Population	971,400
2018-2023 Annual Rate	0.83%
2018 Total Daytime Population	868,836
Workers	393,951
Residents	474,885

Household Summary

2000 Households	298,533
2000 Average Household Size	2.73
2010 Households	312,251
2010 Average Household Size	2.74
2018 Households	330,423
2018 Average Household Size	2.76
2023 Households	343,580
2023 Average Household Size	2.77
2018-2023 Annual Rate	0.78%
2010 Families	211,387
2010 Average Family Size	3.29
2018 Families	223,374
2018 Average Family Size	3.34
2023 Families	232,150
2023 Average Family Size	3.35
2018-2023 Annual Rate	0.77%

Housing Unit Summary

2000 Housing Units	307,756
Owner Occupied Housing Units	59.5%
Renter Occupied Housing Units	37.5%
Vacant Housing Units	3.0%
2010 Housing Units	335,842
Owner Occupied Housing Units	55.3%
Renter Occupied Housing Units	37.7%
Vacant Housing Units	7.0%
2018 Housing Units	350,003
Owner Occupied Housing Units	54.7%
Renter Occupied Housing Units	39.7%
Vacant Housing Units	5.6%
2023 Housing Units	362,626
Owner Occupied Housing Units	57.5%
Renter Occupied Housing Units	37.2%
Vacant Housing Units	5.3%

Median Household Income

2018	\$74,441
2023	\$85,794

Median Home Value

2018	\$472,921
2023	\$549,222

Per Capita Income

2018	\$35,706
2023	\$42,214

Median Age

2010	37.1
2018	38.2
2023	38.9

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.



Market Profile

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

30 minutes

2018 Households by Income

Household Income Base	330,413
<\$15,000	8.4%
\$15,000 - \$24,999	6.9%
\$25,000 - \$34,999	7.1%
\$35,000 - \$49,999	11.0%
\$50,000 - \$74,999	16.8%
\$75,000 - \$99,999	13.3%
\$100,000 - \$149,999	18.0%
\$150,000 - \$199,999	9.0%
\$200,000+	9.5%
Average Household Income	\$99,336

2023 Households by Income

Household Income Base	343,570
<\$15,000	6.8%
\$15,000 - \$24,999	5.5%
\$25,000 - \$34,999	5.9%
\$35,000 - \$49,999	9.6%
\$50,000 - \$74,999	15.6%
\$75,000 - \$99,999	13.3%
\$100,000 - \$149,999	19.6%
\$150,000 - \$199,999	10.7%
\$200,000+	13.1%
Average Household Income	\$118,002

2018 Owner Occupied Housing Units by Value

Total	191,328
<\$50,000	2.4%
\$50,000 - \$99,999	1.9%
\$100,000 - \$149,999	2.5%
\$150,000 - \$199,999	3.3%
\$200,000 - \$249,999	5.7%
\$250,000 - \$299,999	6.8%
\$300,000 - \$399,999	15.7%
\$400,000 - \$499,999	16.0%
\$500,000 - \$749,999	27.4%
\$750,000 - \$999,999	10.4%
\$1,000,000 - \$1,499,999	5.7%
\$1,500,000 - \$1,999,999	0.9%
\$2,000,000 +	1.3%
Average Home Value	\$548,054

2023 Owner Occupied Housing Units by Value

Total	208,556
<\$50,000	1.7%
\$50,000 - \$99,999	0.9%
\$100,000 - \$149,999	0.9%
\$150,000 - \$199,999	1.8%
\$200,000 - \$249,999	3.5%
\$250,000 - \$299,999	5.2%
\$300,000 - \$399,999	13.5%
\$400,000 - \$499,999	16.2%
\$500,000 - \$749,999	32.0%
\$750,000 - \$999,999	14.5%
\$1,000,000 - \$1,499,999	7.1%
\$1,500,000 - \$1,999,999	1.1%
\$2,000,000 +	1.6%
Average Home Value	\$618,048

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.



Market Profile

Solano County Fairgrounds
 Drive Time: 30 minute radii

Prepared by DBC Advisors

30 minutes

2010 Population by Age

Total	876,309
0 - 4	6.6%
5 - 9	6.4%
10 - 14	6.4%
15 - 24	13.5%
25 - 34	14.2%
35 - 44	13.8%
45 - 54	15.1%
55 - 64	12.3%
65 - 74	6.3%
75 - 84	3.7%
85 +	1.7%
18 +	76.5%

2018 Population by Age

Total	932,141
0 - 4	6.1%
5 - 9	6.1%
10 - 14	6.3%
15 - 24	12.5%
25 - 34	14.6%
35 - 44	13.2%
45 - 54	13.0%
55 - 64	13.2%
65 - 74	9.1%
75 - 84	4.1%
85 +	1.9%
18 +	77.9%

2023 Population by Age

Total	971,400
0 - 4	6.1%
5 - 9	5.9%
10 - 14	6.1%
15 - 24	11.7%
25 - 34	14.6%
35 - 44	14.0%
45 - 54	12.2%
55 - 64	12.4%
65 - 74	10.1%
75 - 84	5.1%
85 +	1.9%
18 +	78.4%

2010 Population by Sex

Males	433,495
Females	442,815

2018 Population by Sex

Males	460,834
Females	471,307

2023 Population by Sex

Males	481,583
Females	489,817

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.



Market Profile

Solano County Fairgrounds
 Drive Time: 30 minute radii

Prepared by DBC Advisors

30 minutes

2010 Population by Race/Ethnicity

Total	876,311
White Alone	51.3%
Black Alone	12.7%
American Indian Alone	0.7%
Asian Alone	15.2%
Pacific Islander Alone	0.6%
Some Other Race Alone	13.0%
Two or More Races	6.5%
Hispanic Origin	27.8%
Diversity Index	81.9

2018 Population by Race/Ethnicity

Total	932,140
White Alone	48.5%
Black Alone	12.2%
American Indian Alone	0.7%
Asian Alone	17.0%
Pacific Islander Alone	0.7%
Some Other Race Alone	14.0%
Two or More Races	7.1%
Hispanic Origin	29.8%
Diversity Index	83.8

2023 Population by Race/Ethnicity

Total	971,400
White Alone	46.2%
Black Alone	11.8%
American Indian Alone	0.7%
Asian Alone	18.4%
Pacific Islander Alone	0.7%
Some Other Race Alone	14.8%
Two or More Races	7.5%
Hispanic Origin	31.6%
Diversity Index	85.2

2010 Population by Relationship and Household Type

Total	876,310
In Households	97.7%
In Family Households	82.6%
Householder	24.1%
Spouse	16.8%
Child	31.7%
Other relative	6.7%
Nonrelative	3.3%
In Nonfamily Households	15.1%
In Group Quarters	2.3%
Institutionalized Population	1.7%
Noninstitutionalized Population	0.6%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

May 10, 2019



Market Profile

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

30 minutes

2018 Population 25+ by Educational Attainment

Total	643,667
Less than 9th Grade	7.4%
9th - 12th Grade, No Diploma	6.4%
High School Graduate	17.8%
GED/Alternative Credential	2.7%
Some College, No Degree	24.3%
Associate Degree	8.8%
Bachelor's Degree	21.8%
Graduate/Professional Degree	10.8%

2018 Population 15+ by Marital Status

Total	759,918
Never Married	35.4%
Married	48.5%
Widowed	5.0%
Divorced	11.0%

2018 Civilian Population 16+ in Labor Force

Civilian Employed	95.7%
Civilian Unemployed (Unemployment Rate)	4.3%

2018 Employed Population 16+ by Industry

Total	455,115
Agriculture/Mining	1.5%
Construction	6.9%
Manufacturing	7.4%
Wholesale Trade	2.2%
Retail Trade	10.4%
Transportation/Utilities	5.8%
Information	2.0%
Finance/Insurance/Real Estate	7.0%
Services	51.8%
Public Administration	5.0%

2018 Employed Population 16+ by Occupation

Total	455,115
White Collar	60.0%
Management/Business/Financial	15.1%
Professional	21.2%
Sales	9.8%
Administrative Support	13.9%
Services	20.4%
Blue Collar	19.7%
Farming/Forestry/Fishing	1.1%
Construction/Extraction	5.0%
Installation/Maintenance/Repair	3.1%
Production	4.4%
Transportation/Material Moving	6.0%

2010 Population By Urban/ Rural Status

Total Population	876,310
Population Inside Urbanized Area	98.3%
Population Inside Urbanized Cluster	0.5%
Rural Population	1.2%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.



Market Profile

Solano County Fairgrounds
Drive Time: 30 minute radii

Prepared by DBC Advisors

30 minutes

2010 Households by Type

Total	312,252
Households with 1 Person	24.8%
Households with 2+ People	75.2%
Family Households	67.7%
Husband-wife Families	47.2%
With Related Children	22.9%
Other Family (No Spouse Present)	20.5%
Other Family with Male Householder	6.0%
With Related Children	3.4%
Other Family with Female Householder	14.5%
With Related Children	8.8%
Nonfamily Households	7.5%

All Households with Children

	35.6%
Multigenerational Households	6.0%
Unmarried Partner Households	7.4%
Male-female	6.4%
Same-sex	1.0%

2010 Households by Size

Total	312,251
1 Person Household	24.8%
2 Person Household	30.4%
3 Person Household	16.9%
4 Person Household	14.1%
5 Person Household	7.4%
6 Person Household	3.4%
7 + Person Household	3.0%

2010 Households by Tenure and Mortgage Status

Total	312,251
Owner Occupied	59.5%
Owned with a Mortgage/Loan	47.4%
Owned Free and Clear	12.1%
Renter Occupied	40.5%

2010 Housing Units By Urban/ Rural Status

Total Housing Units	335,842
Housing Units Inside Urbanized Area	97.9%
Housing Units Inside Urbanized Cluster	0.7%
Rural Housing Units	1.4%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.



Market Profile

Solano County Fairgrounds
 Drive Time: 30 minute radii

Prepared by DBC Advisors

DATE: 05/10/2019
 TIME: 10:00 AM

30 minutes

Top 3 Tapestry Segments

1. City Lights (8A)
2. Pleasantville (2B)
3. Front Porches (8E)

2018 Consumer Spending

Apparel & Services: Total \$	\$860,478,994
Average Spent	\$2,604.17
Spending Potential Index	120
Education: Total \$	\$587,403,343
Average Spent	\$1,777.73
Spending Potential Index	123
Entertainment/Recreation: Total \$	\$1,235,701,475
Average Spent	\$3,739.76
Spending Potential Index	116
Food at Home: Total \$	\$1,934,160,877
Average Spent	\$5,853.59
Spending Potential Index	117
Food Away from Home: Total \$	\$1,374,384,254
Average Spent	\$4,159.47
Spending Potential Index	118
Health Care: Total \$	\$2,133,767,517
Average Spent	\$6,457.68
Spending Potential Index	113
HH Furnishings & Equipment: Total \$	\$809,634,071
Average Spent	\$2,450.30
Spending Potential Index	117
Personal Care Products & Services: Total \$	\$324,436,835
Average Spent	\$981.88
Spending Potential Index	119
Shelter: Total \$	\$6,810,264,920
Average Spent	\$20,610.75
Spending Potential Index	123
Support Payments/Cash Contributions/Gifts in Kind: Total \$	\$963,901,544
Average Spent	\$2,917.17
Spending Potential Index	117
Travel: Total \$	\$868,317,009
Average Spent	\$2,627.90
Spending Potential Index	122
Vehicle Maintenance & Repairs: Total \$	\$413,750,336
Average Spent	\$1,252.18
Spending Potential Index	116

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2015 and 2016 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

May 10, 2019



Disposable Income Profile

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors
 Latitude: 38.13497
 Longitude: -122.22766

	Census 2010	2018	2023	2018-2023 Change	2018-2023 Annual Rate
Population	876,310	932,141	971,400	39,259	0.83%
Median Age	37.1	38.2	38.9	0.7	0.36%
Households	312,251	330,423	343,580	13,157	0.78%
Average Household Size	2.74	2.76	2.77	0.01	0.07%

2018 Households by Disposable Income

	Number	Percent
Total	330,413	100.0%
<\$15,000	30,808	9.3%
\$15,000-\$24,999	26,142	7.9%
\$25,000-\$34,999	30,639	9.3%
\$35,000-\$49,999	47,564	14.4%
\$50,000-\$74,999	66,308	20.1%
\$75,000-\$99,999	45,421	13.7%
\$100,000-\$149,999	57,434	17.4%
\$150,000-\$199,999	14,969	4.5%
\$200,000+	11,128	3.4%
Median Disposable Income	\$58,872	
Average Disposable Income	\$74,532	

2018 Disposable Income by Age of Householder	Number of Households						75+
	<25	25-34	35-44	45-54	55-64	65-74	
Total	9,906	49,423	58,166	62,741	67,741	48,677	33,757
<\$15,000	1,536	3,778	3,770	3,989	6,410	5,108	6,216
\$15,000-\$24,999	951	4,320	3,072	2,575	4,517	4,800	5,908
\$25,000-\$34,999	1,716	5,211	3,703	4,454	5,136	4,934	5,483
\$35,000-\$49,999	1,929	8,600	9,052	6,834	8,393	7,953	4,803
\$50,000-\$74,999	2,071	11,618	13,566	11,629	12,647	9,338	5,438
\$75,000-\$99,999	908	6,825	10,652	9,929	9,737	5,086	2,284
\$100,000-\$149,999	639	7,011	9,680	15,545	14,200	7,750	2,607
\$150,000-\$199,999	121	1,301	3,330	4,347	3,364	2,083	424
\$200,000+	35	759	1,341	3,438	3,337	1,624	594
Median Disposable Income	\$39,534	\$54,132	\$65,111	\$78,644	\$66,673	\$52,864	\$33,267
Average Disposable Income	\$48,810	\$65,605	\$77,702	\$91,401	\$82,239	\$70,573	\$48,584

Data Note: Disposable Income is after-tax household income. Disposable income forecasts are based on the Current Population Survey, U.S. Census Bureau. Detail may not sum to totals due to rounding.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023.



Restaurant Market Potential

Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

Demographic Summary	2018	2023
	Population	932,141
Population 18+	726,212	761,471
Households	330,423	343,580
Median Household Income	\$74,441	\$85,794

Product/Consumer Behavior	Expected Number of		
	Adults	Percent	MPI
Went to family restaurant/steak house in last 6 mo	544,434	75.0%	99
Went to family restaurant/steak house 4+ times/mo	195,778	27.0%	100
Spent at family restaurant/30 days: <\$31	54,491	7.5%	86
Spent at family restaurant/30 days: \$31-50	67,327	9.3%	93
Spent at family restaurant/30 days: \$51-100	113,350	15.6%	101
Spent at family restaurant/30 days: \$101-200	68,817	9.5%	102
Spent at family restaurant/30 days: \$201-300	19,822	2.7%	110
Family restaurant/steak house last 6 months: breakfast	102,060	14.1%	105
Family restaurant/steak house last 6 months: lunch	137,227	18.9%	97
Family restaurant/steak house last 6 months: dinner	334,363	46.0%	98
Family restaurant/steak house last 6 months: snack	16,258	2.2%	114
Family restaurant/steak house last 6 months: weekday	213,185	29.4%	95
Family restaurant/steak house last 6 months: weekend	309,530	42.6%	100
Fam rest/steak hse/6 months: Applebee's	151,651	20.9%	93
Fam rest/steak hse/6 months: Bob Evans Farms	16,499	2.3%	62
Fam rest/steak hse/6 months: Buffalo Wild Wings	75,060	10.3%	99
Fam rest/steak hse/6 months: California Pizza Kitchen	30,370	4.2%	149
Fam rest/steak hse/6 months: Carrabba's Italian Grill	21,421	2.9%	98
Fam rest/steak hse/6 months: The Cheesecake Factory	66,363	9.1%	126
Fam rest/steak hse/6 months: Chili's Grill & Bar	74,371	10.2%	99
Fam rest/steak hse/6 months: CiCi's Pizza	21,943	3.0%	85
Fam rest/steak hse/6 months: Cracker Barrel	55,120	7.6%	69
Fam rest/steak hse/6 months: Denny's	69,335	9.5%	111
Fam rest/steak hse/6 months: Golden Corral	37,538	5.2%	69
Fam rest/steak hse/6 months: IHOP	80,512	11.1%	108
Fam rest/steak hse/6 months: Logan's Roadhouse	14,549	2.0%	63
Fam rest/steak hse/6 months: LongHorn Steakhouse	30,718	4.2%	81
Fam rest/steak hse/6 months: Olive Garden	118,313	16.3%	97
Fam rest/steak hse/6 months: Outback Steakhouse	62,300	8.6%	96
Fam rest/steak hse/6 months: Red Lobster	67,004	9.2%	88
Fam rest/steak hse/6 months: Red Robin	53,848	7.4%	106
Fam rest/steak hse/6 months: Ruby Tuesday	33,639	4.6%	86
Fam rest/steak hse/6 months: Texas Roadhouse	56,104	7.7%	78
Fam rest/steak hse/6 months: T.G.I. Friday's	50,690	7.0%	124
Fam rest/steak hse/6 months: Waffle House	29,737	4.1%	71
Went to fast food/drive-in restaurant in last 6 mo	644,581	88.8%	98
Went to fast food/drive-in restaurant 9+ times/mo	283,632	39.1%	99
Spent at fast food restaurant/30 days: <\$11	37,005	5.1%	99
Spent at fast food restaurant/30 days: \$11-\$20	73,344	10.1%	95
Spent at fast food restaurant/30 days: \$21-\$40	111,193	15.3%	94
Spent at fast food restaurant/30 days: \$41-\$50	62,604	8.6%	96
Spent at fast food restaurant/30 days: \$51-\$100	120,953	16.7%	100
Spent at fast food restaurant/30 days: \$101-\$200	59,341	8.2%	103
Spent at fast food restaurant/30 days: \$201+	20,574	2.8%	101

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.



Restaurant Market Potential

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

Product/Consumer Behavior	Expected Number of Adults	Percent	MPI
Fast food/drive-in last 6 months: eat in	258,743	35.6%	97
Fast food/drive-in last 6 months: home delivery	66,730	9.2%	110
Fast food/drive-in last 6 months: take-out/drive-thru	318,293	43.8%	93
Fast food/drive-in last 6 months: take-out/walk-in	157,194	21.6%	103
Fast food/drive-in last 6 months: breakfast	241,291	33.2%	96
Fast food/drive-in last 6 months: lunch	353,677	48.7%	96
Fast food/drive-in last 6 months: dinner	317,426	43.7%	95
Fast food/drive-in last 6 months: snack	93,519	12.9%	103
Fast food/drive-in last 6 months: weekday	413,381	56.9%	95
Fast food/drive-in last 6 months: weekend	344,667	47.5%	99
Fast food/drive-in last 6 months: A & W	13,595	1.9%	72
Fast food/drive-in last 6 months: Arby's	87,055	12.0%	72
Fast food/drive-in last 6 months: Baskin-Robbins	32,581	4.5%	128
Fast food/drive-in last 6 months: Boston Market	31,659	4.4%	132
Fast food/drive-in last 6 months: Burger King	194,526	26.8%	90
Fast food/drive-in last 6 months: Captain D's	17,453	2.4%	57
Fast food/drive-in last 6 months: Carl's Jr.	61,781	8.5%	149
Fast food/drive-in last 6 months: Checkers	22,926	3.2%	94
Fast food/drive-in last 6 months: Chick-fil-A	147,726	20.3%	93
Fast food/drive-in last 6 months: Chipotle Mex. Grill	117,233	16.1%	122
Fast food/drive-in last 6 months: Chuck E. Cheese's	26,751	3.7%	119
Fast food/drive-in last 6 months: Church's Fr. Chicken	19,983	2.8%	77
Fast food/drive-in last 6 months: Cold Stone Creamery	25,574	3.5%	109
Fast food/drive-in last 6 months: Dairy Queen	80,275	11.1%	72
Fast food/drive-in last 6 months: Del Taco	39,856	5.5%	155
Fast food/drive-in last 6 months: Domino's Pizza	92,306	12.7%	104
Fast food/drive-in last 6 months: Dunkin' Donuts	124,733	17.2%	125
Went to Five Guys in last 6 months	75,155	10.3%	106
Fast food/drive-in last 6 months: Hardee's	25,451	3.5%	56
Fast food/drive-in last 6 months: Jack in the Box	77,621	10.7%	134
Went to Jimmy John's in last 6 months	35,603	4.9%	84
Fast food/drive-in last 6 months: KFC	136,490	18.8%	93
Fast food/drive-in last 6 months: Krispy Kreme	40,072	5.5%	96
Fast food/drive-in last 6 months: Little Caesars	88,060	12.1%	90
Fast food/drive-in last 6 months: Long John Silver's	17,407	2.4%	66
Fast food/drive-in last 6 months: McDonald's	359,225	49.5%	94
Went to Panda Express in last 6 months	84,380	11.6%	123
Fast food/drive-in last 6 months: Panera Bread	104,382	14.4%	112
Fast food/drive-in last 6 months: Papa John's	58,644	8.1%	91
Fast food/drive-in last 6 months: Papa Murphy's	30,760	4.2%	84
Fast food/drive-in last 6 months: Pizza Hut	105,108	14.5%	85
Fast food/drive-in last 6 months: Popeyes Chicken	69,710	9.6%	103
Fast food/drive-in last 6 months: Sonic Drive-In	59,306	8.2%	70
Fast food/drive-in last 6 months: Starbucks	163,025	22.4%	124
Fast food/drive-in last 6 months: Steak 'n Shake	26,531	3.7%	66
Fast food/drive-in last 6 months: Subway	187,825	25.9%	95
Fast food/drive-in last 6 months: Taco Bell	189,730	26.1%	91
Fast food/drive-in last 6 months: Wendy's	167,291	23.0%	92
Fast food/drive-in last 6 months: Whataburger	30,824	4.2%	89
Fast food/drive-in last 6 months: White Castle	21,535	3.0%	94

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.



Restaurant Market Potential

Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

Went to fine dining restaurant last month	88,487	12.2%	113
Went to fine dining restaurant 3+ times last month	27,035	3.7%	115
Spent at fine dining restaurant/30 days: <\$51	11,264	1.6%	95
Spent at fine dining restaurant/30 days: \$51-\$100	26,282	3.6%	109
Spent at fine dining restaurant/30 days: \$101-\$200	22,711	3.1%	119

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.

May 10, 2019



Sports and Leisure Market Potential

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

		2018	2023
Demographic Summary			
Population		932,141	971,400
Population 18+		726,212	761,471
Households		330,423	343,580
Median Household Income		\$74,441	\$85,794
Product/Consumer Behavior			
	Expected Number of Adults/HHs	Percent	MPI
Participated in aerobics in last 12 months	60,467	8.3%	106
Participated in archery in last 12 months	17,406	2.4%	89
Participated in backpacking in last 12 months	26,876	3.7%	103
Participated in baseball in last 12 months	29,809	4.1%	99
Participated in basketball in last 12 months	59,159	8.1%	99
Participated in bicycling (mountain) in last 12 months	30,876	4.3%	104
Participated in bicycling (road) in last 12 months	75,282	10.4%	102
Participated in boating (power) in last 12 months	30,354	4.2%	82
Participated in bowling in last 12 months	72,998	10.1%	104
Participated in canoeing/kayaking in last 12 months	43,982	6.1%	92
Participated in fishing (fresh water) in last 12 months	59,547	8.2%	71
Participated in fishing (salt water) in last 12 months	29,403	4.0%	107
Participated in football in last 12 months	29,804	4.1%	94
Participated in Frisbee in last 12 months	27,633	3.8%	92
Participated in golf in last 12 months	60,400	8.3%	96
Participated in hiking in last 12 months	92,989	12.8%	106
Participated in horseback riding in last 12 months	15,422	2.1%	94
Participated in hunting with rifle in last 12 months	18,337	2.5%	59
Participated in hunting with shotgun in last 12 months	16,406	2.3%	67
Participated in ice skating in last 12 months	22,892	3.2%	105
Participated in jogging/running in last 12 months	100,758	13.9%	107
Participated in motorcycling in last 12 months	22,297	3.1%	96
Participated in Pilates in last 12 months	21,201	2.9%	104
Participated in ping pong in last 12 mos	27,074	3.7%	98
Participated in rock climbing in last 12 mos	13,110	1.8%	106
Participated in skiing (downhill) in last 12 months	22,906	3.2%	105
Participated in soccer in last 12 months	36,092	5.0%	120
Participated in softball in last 12 months	20,132	2.8%	101
Participated in swimming in last 12 months	118,552	16.3%	101
Participated in target shooting in last 12 months	24,426	3.4%	77
Participated in tennis in last 12 months	26,267	3.6%	104
Participated in volleyball in last 12 months	22,420	3.1%	94
Participated in walking for exercise in last 12 months	178,243	24.5%	101
Participated in weight lifting in last 12 months	80,073	11.0%	105
Participated in yoga in last 12 months	65,272	9.0%	110
Participated in Zumba in last 12 mos	30,487	4.2%	113
Spent on sports/rec equip in last 12 months: \$1-99	47,419	6.5%	97
Spent on sports/rec equip in last 12 months: \$100-\$249	42,485	5.9%	93
Spent on sports/rec equip in last 12 months: \$250+	51,123	7.0%	89
Attend sports events	124,712	17.2%	102
Attend sports events: baseball game - MLB reg seas	47,945	6.6%	116
Attend sports events: basketball game-NBA reg seas	14,837	2.0%	124
Attend sports events: football game (college)	20,244	2.8%	80
Attend sports events: football game - NFL weekend	15,494	2.1%	102
Attend sports events: high school sports	18,456	2.5%	79

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.



Sports and Leisure Market Potential

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Listen to sports on radio	84,093	11.6%	100
Watch sports on TV	419,900	57.8%	99
Watch on TV: alpine skiing/ski jumping	21,938	3.0%	102
Watch on TV: auto racing (NASCAR)	57,258	7.9%	75
Watch on TV: auto racing (not NASCAR)	27,566	3.8%	89
Watch on TV: baseball (MLB regular season)	151,517	20.9%	107
Watch on TV: baseball (MLB playoffs/World Series)	131,299	18.1%	106
Watch on TV: basketball (college)	83,251	11.5%	89
Watch on TV: basketball (NCAA tournament)	86,210	11.9%	92
Watch on TV: basketball (NBA regular season)	122,531	16.9%	110
Watch on TV: basketball (NBA playoffs/finals)	133,718	18.4%	110
Watch on TV: basketball (WNBA)	21,670	3.0%	102
Watch on TV: bicycle racing	18,107	2.5%	111
Watch on TV: bowling	15,156	2.1%	99
Watch on TV: boxing	56,362	7.8%	116
Watch on TV: bull riding (pro)	15,393	2.1%	72
Watch on TV: Equestrian events	16,017	2.2%	98
Watch on TV: extreme sports (summer)	26,807	3.7%	103
Watch on TV: extreme sports (winter)	29,075	4.0%	100
Watch on TV: figure skating	39,601	5.5%	99
Watch on TV: fishing	26,278	3.6%	78
Watch on TV: football (college)	147,899	20.4%	86
Watch on TV: football (NFL Mon/Thurs night games)	225,065	31.0%	96
Watch on TV: football (NFL weekend games)	229,064	31.5%	96
Watch on TV: football (NFL playoffs/Super Bowl)	236,838	32.6%	97
Watch on TV: golf (PGA)	78,363	10.8%	92
Watch on TV: golf (LPGA)	26,807	3.7%	96
Watch on TV: gymnastics	41,232	5.7%	100
Watch on TV: high school sports	30,763	4.2%	87
Watch on TV: horse racing (at track or OTB)	21,253	2.9%	99
Watch on TV: ice hockey (NHL regular season)	69,465	9.6%	108
Watch on TV: ice hockey (NHL playoffs/St Stanley Cup)	67,449	9.3%	108
Watch on TV: mixed martial arts (MMA)	29,670	4.1%	103
Watch on TV: motorcycle racing	20,389	2.8%	95
Watch on TV: Olympics (summer)	116,297	16.0%	101
Watch on TV: Olympics (winter)	81,235	11.2%	100
Watch on TV: rodeo	15,378	2.1%	68
Watch on TV: soccer (MLS)	44,060	6.1%	121
Watch on TV: soccer (World Cup)	72,285	10.0%	122
Watch on TV: tennis (men`s)	48,432	6.7%	111
Watch on TV: tennis (women`s)	48,917	6.7%	110
Watch on TV: track & field	29,438	4.1%	102
Watch on TV: volleyball (pro beach)	20,705	2.9%	105
Watch on TV: wrestling (WWE)	34,894	4.8%	95
Interest in sports: college basketball Super Fan	27,578	3.8%	102
Interest in sports: college football Super Fan	55,371	7.6%	96
Interest in sports: golf Super Fan	14,800	2.0%	102
Interest in sports: high school sports Super Fan	22,769	3.1%	105
Interest in sports: MLB Super Fan	44,628	6.1%	120
Interest in sports: NASCAR Super Fan	21,798	3.0%	100
Interest in sports: NBA Super Fan	47,151	6.5%	117
Interest in sports: NFL Super Fan	94,347	13.0%	103
Interest in sports: NHL Super Fan	33,155	4.6%	133
Interest in sports: soccer Super Fan	30,199	4.2%	142

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.



Sports and Leisure Market Potential

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

Latitude: 38.1343°
 Longitude: -121.2274°

Product/Consumer Behavior	Expected		MPI
	Number of Adults/HHs	Percent	
Member of AARP	82,482	11.4%	95
Member of charitable organization	29,830	4.1%	93
Member of church board	17,300	2.4%	82
Member of fraternal order	15,774	2.2%	90
Member of religious club	23,167	3.2%	88
Member of union	27,829	3.8%	100
Member of veterans club	14,222	2.0%	79
Attended adult education course in last 12 months	64,571	8.9%	114
Went to art gallery in last 12 months	64,986	8.9%	113
Attended auto show in last 12 months	45,354	6.2%	106
Did baking in last 12 months	162,614	22.4%	96
Went to bar/night club in last 12 months	129,802	17.9%	102
Went to beach in last 12 months	233,529	32.2%	114
Played billiards/pool in last 12 months	52,358	7.2%	109
Played bingo in last 12 months	27,861	3.8%	95
Did birdwatching in last 12 months	28,725	4.0%	89
Played board game in last 12 months	106,582	14.7%	100
Read book in last 12 months	246,354	33.9%	100
Participated in book club in last 12 months	22,451	3.1%	105
Went on overnight camping trip in last 12 months	85,626	11.8%	97
Played cards in last 12 months	109,721	15.1%	94
Played chess in last 12 months	26,498	3.6%	104
Played computer game (offline w/software)/12 months	47,535	6.5%	99
Played computer game (online w/o software)/12 months	86,717	11.9%	98
Cooked for fun in last 12 months	160,253	22.1%	101
Did crossword puzzle in last 12 months	69,256	9.5%	97
Danced/went dancing in last 12 months	64,792	8.9%	117
Attended dance performance in last 12 months	34,403	4.7%	112
Dined out in last 12 months	376,148	51.8%	102
Participated in fantasy sports league last 12 months	37,210	5.1%	106
Participated in tailgating in last 12 months	31,842	4.4%	94
Did furniture refinishing in last 12 months	27,744	3.8%	103
Gambled at casino in last 12 months	103,602	14.3%	110
Gambled in Las Vegas in last 12 months	32,858	4.5%	134
Participate in indoor gardening/plant care	62,228	8.6%	93
Attended horse races in last 12 months	18,032	2.5%	107
Participated in karaoke in last 12 months	32,270	4.4%	112
Bought lottery ticket in last 12 months	269,761	37.1%	104
Played lottery 6+ times in last 30 days	78,998	10.9%	103
Bought lottery ticket in last 12 months: Daily Drawing	25,260	3.5%	104
Bought lottery ticket in last 12 months: Instant Game	127,341	17.5%	99
Bought lottery ticket in last 12 months: Mega Millions	129,508	17.8%	114
Bought lottery ticket in last 12 months: Powerball	162,788	22.4%	102
Attended a movie in last 6 months	454,938	62.6%	105
Attended movie in last 90 days: once/week or more	20,463	2.8%	120
Attended movie in last 90 days: 2-3 times a month	50,720	7.0%	112
Attended movie in last 90 days: once a month	80,961	11.1%	112
Attended movie in last 90 days: < once a month	266,672	36.7%	102
Movie genre seen at theater/6 months: action	220,316	30.3%	110

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.



Sports and Leisure Market Potential

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

DATE: 05/10/2019
 COMPANY: DBC Advisors

Product/Consumer Behavior	Expected Number of Adults/HHs	Percent	MPI
Movie genre seen at theater/6 months: adventure	241,826	33.3%	107
Movie genre seen at theater/6 months: comedy	188,879	26.0%	107
Movie genre seen at theater/6 months: crime	94,611	13.0%	119
Movie genre seen at theater/6 months: drama	187,065	25.8%	110
Movie genre seen at theater/6 months: family	79,118	10.9%	106
Movie genre seen at theater/6 months: fantasy	110,719	15.2%	110
Movie genre seen at theater/6 months: horror	41,160	5.7%	106
Movie genre seen at theater/6 months: romance	62,608	8.6%	110
Movie genre seen at theater/6 months: science fiction	159,677	22.0%	112
Movie genre seen at theater/6 months: thriller	139,346	19.2%	111
Went to museum in last 12 months	106,883	14.7%	114
Attended classical music/opera performance/12 months	29,237	4.0%	107
Attended country music performance in last 12 months	41,378	5.7%	87
Attended rock music performance in last 12 months	73,491	10.1%	107
Played musical instrument in last 12 months	53,239	7.3%	98
Did painting/drawing in last 12 months	56,964	7.8%	103
Did photo album/scrapbooking in last 12 months	33,414	4.6%	103
Did photography in last 12 months	80,451	11.1%	106
Did Sudoku puzzle in last 12 months	54,886	7.6%	96
Went to live theater in last 12 months	91,252	12.6%	108
Visited a theme park in last 12 months	165,188	22.7%	120
Visited a theme park 5+ times in last 12 months	34,924	4.8%	121
Participated in trivia games in last 12 months	48,407	6.7%	100
Played video/electronic game (console) last 12 months	63,381	8.7%	96
Played video/electronic game (portable) last 12 months	38,564	5.3%	102
Visited an indoor water park in last 12 months	26,599	3.7%	112
Did woodworking in last 12 months	27,460	3.8%	83
Participated in word games in last 12 months	75,087	10.3%	100
Went to zoo in last 12 months	92,367	12.7%	100
Purchased DVDs in last 30 days: 1	18,250	2.5%	97
Purchased DVDs in last 30 days: 2	14,469	2.0%	98
Purchased DVDs in last 30 days: 3+	25,795	3.6%	93
Purchased DVD/Blu-ray disc online in last 12 months	50,889	7.0%	105
Rented DVDs in last 30 days: 1	26,371	3.6%	102
Rented DVDs in last 30 days: 2	27,110	3.7%	100
Rented DVDs in last 30 days: 3+	61,627	8.5%	94
Rented movie/oth video/30 days: action/adventure	159,049	21.9%	102
Rented movie/oth video/30 days: classics	48,997	6.7%	106
Rented movie/oth video/30 days: comedy	154,456	21.3%	102
Rented movie/oth video/30 days: drama	109,999	15.1%	103
Rented movie/oth video/30 days: family/children	72,838	10.0%	99
Rented movie/oth video/30 days: foreign	23,219	3.2%	127
Rented movie/oth video/30 days: horror	53,581	7.4%	103
Rented movie/oth video/30 days: musical	21,228	2.9%	106
Rented movie/oth video/30 days: news/documentary	32,962	4.5%	109
Rented movie/oth video/30 days: romance	57,093	7.9%	101
Rented movie/oth video/30 days: science fiction	55,046	7.6%	103
Rented movie/oth video/30 days: TV show	61,172	8.4%	107
Rented movie/oth video/30 days: western	16,948	2.3%	86

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Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.



Sports and Leisure Market Potential

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

Product/Consumer Behavior	Expected		MPI
	Number of Adults/HHs	Percent	
Rented/purch DVD/Blu-ray/30 days: from amazon.com	58,716	8.1%	108
Rented DVD/Blu-ray/30 days: from netflix.com	104,341	14.4%	107
Rented/purch DVD/Blu-ray/30 days: from Redbox	123,147	17.0%	100
HH owns ATV/UTV	11,420	3.5%	59
Bought any children`s toy/game in last 12 months	240,143	33.1%	101
Spent on toys/games for child last 12 months: <\$50	41,404	5.7%	95
Spent on toys/games for child last 12 months: \$50-99	16,305	2.2%	88
Spent on toys/games for child last 12 months: \$100-199	43,843	6.0%	97
Spent on toys/games for child last 12 months: \$200-499	66,239	9.1%	103
Spent on toys/games for child last 12 months: \$500+	33,876	4.7%	100
Bought any toys/games online in last 12 months	74,660	10.3%	110
Bought infant toy in last 12 months	45,830	6.3%	95
Bought pre-school toy in last 12 months	48,951	6.7%	98
Bought for child last 12 months: boy action figure	58,886	8.1%	102
Bought for child last 12 months: girl action figure	27,497	3.8%	111
Bought for child last 12 months: action game	17,735	2.4%	97
Bought for child last 12 months: bicycle	40,419	5.6%	93
Bought for child last 12 months: board game	78,285	10.8%	97
Bought for child last 12 months: builder set	38,307	5.3%	102
Bought for child last 12 months: car	57,842	8.0%	99
Bought for child last 12 months: construction toy	39,332	5.4%	95
Bought for child last 12 months: fashion doll	29,696	4.1%	95
Bought for child last 12 months: large/baby doll	50,064	6.9%	99
Bought for child last 12 months: doll accessories	25,987	3.6%	93
Bought for child last 12 months: doll clothing	27,075	3.7%	91
Bought for child last 12 months: educational toy	87,010	12.0%	102
Bought for child last 12 months: electronic doll/animal	19,492	2.7%	97
Bought for child last 12 months: electronic game	40,143	5.5%	100
Bought for child last 12 months: mechanical toy	29,538	4.1%	103
Bought for child last 12 months: model kit/set	20,774	2.9%	98
Bought for child last 12 months: plush doll/animal	59,840	8.2%	101
Bought for child last 12 months: sound game	13,735	1.9%	99
Bought for child last 12 months: water toy	62,224	8.6%	93
Bought for child last 12 months: word game	17,817	2.5%	98

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

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Sports and Leisure Market Potential

Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

Product/Consumer Behavior	Expected		MPI
	Number of Adults/HHs	Percent	
Bought digital book in last 12 months	102,145	14.1%	106
Bought hardcover book in last 12 months	150,750	20.8%	104
Bought paperback book in last 12 months	217,263	29.9%	103
Bought 1-3 books in last 12 months	153,533	21.1%	107
Bought 4-6 books in last 12 months	68,401	9.4%	101
Bought 7+ books in last 12 months	119,221	16.4%	102
Bought book (fiction) in last 12 months	182,440	25.1%	102
Bought book (non-fiction) in last 12 months	171,079	23.6%	105
Bought biography in last 12 months	51,883	7.1%	105
Bought children`s book in last 12 months	70,174	9.7%	106
Bought cookbook in last 12 months	52,634	7.2%	100
Bought history book in last 12 months	64,170	8.8%	105
Bought mystery book in last 12 months	71,869	9.9%	97
Bought novel in last 12 months	103,690	14.3%	105
Bought religious book (not bible) in last 12 mo	42,549	5.9%	90
Bought romance book in last 12 months	40,553	5.6%	95
Bought science fiction book in last 12 months	43,184	5.9%	105
Bought personal/business self-help book last 12 months	50,644	7.0%	110
Bought travel book in last 12 months	17,465	2.4%	116
Bought book online in last 12 months	159,424	22.0%	108
Bought book last 12 months: amazon.com	153,806	21.2%	108
Bought book last 12 months: barnes&noble.com	18,218	2.5%	114
Bought book last 12 months: Barnes & Noble book store	107,096	14.7%	113
Bought book last 12 months: other book store (not B&N)	68,090	9.4%	93
Bought book last 12 months: mail order	13,881	1.9%	98
Listened to/purchased audiobook in last 6 months	41,084	5.7%	105

Data Note: An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Source: These data are based upon national propensities to use various products and services, applied to local demographic composition. Usage data were collected by GfK MRI in a nationally representative survey of U.S. households. Esri forecasts for 2018 and 2023.



Retail MarketPlace Profile

Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

Summary Demographics

2018 Population	932,141
2018 Households	330,423
2018 Median Disposable Income	\$58,872
2018 Per Capita Income	\$35,706

2017 Industry Summary

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Total Retail Trade and Food & Drink	44-45,722	\$14,137,727,002	\$14,594,512,948	-\$456,785,946	-1.6	6,485
Total Retail Trade	44-45	\$12,735,104,693	\$13,106,563,671	-\$371,458,978	-1.4	4,384
Total Food & Drink	722	\$1,402,622,309	\$1,487,949,278	-\$85,326,969	-3.0	2,100

2017 Industry Group

	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Motor Vehicle & Parts Dealers	441	\$2,614,118,214	\$2,781,997,206	-\$167,878,992	-3.1	490
Automobile Dealers	4411	\$2,067,349,949	\$2,519,056,461	-\$451,706,512	-9.8	226
Other Motor Vehicle Dealers	4412	\$316,503,703	\$93,093,050	\$223,410,653	54.5	69
Auto Parts, Accessories & Tire Stores	4413	\$230,264,562	\$169,847,695	\$60,416,867	15.1	196
Furniture & Home Furnishings Stores	442	\$475,577,662	\$463,511,694	\$12,065,968	1.3	282
Furniture Stores	4421	\$247,637,480	\$201,965,158	\$45,672,322	10.2	128
Home Furnishings Stores	4422	\$227,940,183	\$261,546,537	-\$33,606,354	-6.9	154
Electronics & Appliance Stores	443	\$473,831,908	\$430,893,375	\$42,938,533	4.7	202
Bldg Materials, Garden Equip. & Supply Stores	444	\$770,892,242	\$669,140,557	\$101,751,685	7.1	387
Bldg Material & Supplies Dealers	4441	\$718,018,297	\$636,511,062	\$81,507,235	6.0	334
Lawn & Garden Equip & Supply Stores	4442	\$52,873,945	\$32,629,496	\$20,244,449	23.7	53
Food & Beverage Stores	445	\$2,070,029,592	\$2,654,693,849	-\$584,664,257	-12.4	671
Grocery Stores	4451	\$1,767,483,008	\$2,178,544,698	-\$411,061,690	-10.4	347
Specialty Food Stores	4452	\$146,439,066	\$65,220,615	\$81,218,451	38.4	133
Beer, Wine & Liquor Stores	4453	\$156,107,518	\$410,928,536	-\$254,821,018	-44.9	191
Health & Personal Care Stores	446,4461	\$880,472,311	\$638,854,580	\$241,617,731	15.9	284
Gasoline Stations	447,4471	\$1,116,141,118	\$1,053,233,203	\$62,907,915	2.9	208
Clothing & Clothing Accessories Stores	448	\$934,363,980	\$700,320,639	\$234,043,341	14.3	596
Clothing Stores	4481	\$663,859,447	\$486,413,132	\$177,446,315	15.4	388
Shoe Stores	4482	\$114,199,264	\$105,973,493	\$8,225,771	3.7	100
Jewelry, Luggage & Leather Goods Stores	4483	\$156,305,269	\$107,934,015	\$48,371,254	18.3	109
Sporting Goods, Hobby, Book & Music Stores	451	\$408,079,727	\$317,586,940	\$90,492,787	12.5	298
Sporting Goods/Hobby/Musical Instr Stores	4511	\$352,186,392	\$285,382,662	\$66,803,730	10.5	250
Book, Periodical & Music Stores	4512	\$55,893,335	\$32,204,278	\$23,689,057	26.9	49
General Merchandise Stores	452	\$2,136,314,034	\$2,851,409,368	-\$715,095,334	-14.3	177
Department Stores Excluding Leased Depts.	4521	\$1,281,881,112	\$1,764,554,206	-\$482,673,094	-15.8	93
Other General Merchandise Stores	4529	\$854,432,922	\$1,086,855,162	-\$232,422,240	-12.0	84
Miscellaneous Store Retailers	453	\$473,112,839	\$466,209,127	\$6,903,712	0.7	715
Florists	4531	\$23,673,089	\$17,558,057	\$6,115,032	14.8	64
Office Supplies, Stationery & Gift Stores	4532	\$109,584,784	\$100,822,812	\$8,761,972	4.2	128
Used Merchandise Stores	4533	\$50,699,158	\$64,527,744	-\$13,828,586	-12.0	146
Other Miscellaneous Store Retailers	4539	\$289,155,808	\$283,300,514	\$5,855,294	1.0	377
Nonstore Retailers	454	\$382,171,066	\$78,713,132	\$303,457,934	65.8	74
Electronic Shopping & Mail-Order Houses	4541	\$326,898,657	\$53,166,193	\$273,732,464	72.0	37
Vending Machine Operators	4542	\$5,741,497	\$2,117,333	\$3,624,164	46.1	8
Direct Selling Establishments	4543	\$49,530,912	\$23,429,605	\$26,101,307	35.8	29
Food Services & Drinking Places	722	\$1,402,622,309	\$1,487,949,278	-\$85,326,969	-3.0	2,100
Special Food Services	7223	\$28,486,495	\$22,291,109	\$6,195,386	12.2	57
Drinking Places - Alcoholic Beverages	7224	\$30,553,131	\$23,538,864	\$7,014,267	13.0	78
Restaurants/Other Eating Places	7225	\$1,343,582,683	\$1,442,119,305	-\$98,536,622	-3.5	1,965

Data Note: Supply (retail sales) estimates sales to consumers by establishments. Sales to businesses are excluded. Demand (retail potential) estimates the expected amount spent by consumers at retail establishments. Supply and demand estimates are in current dollars. The Leakage/Surplus Factor presents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand that ranges from +100 (total leakage) to -100 (total surplus). A positive value represents 'leakage' of retail opportunity outside the trade area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the trade area. The Retail Gap represents the difference between Retail Potential and Retail Sales. Esri uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments subsector. For more information on the Retail MarketPlace data, please click the link below to view the Methodology Statement.
<http://www.esri.com/library/whitepapers/pdfs/esri-data-retail-marketplace.pdf>

Source: Esri and Infogroup. Esri 2018 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2018 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.



Retail MarketPlace Profile

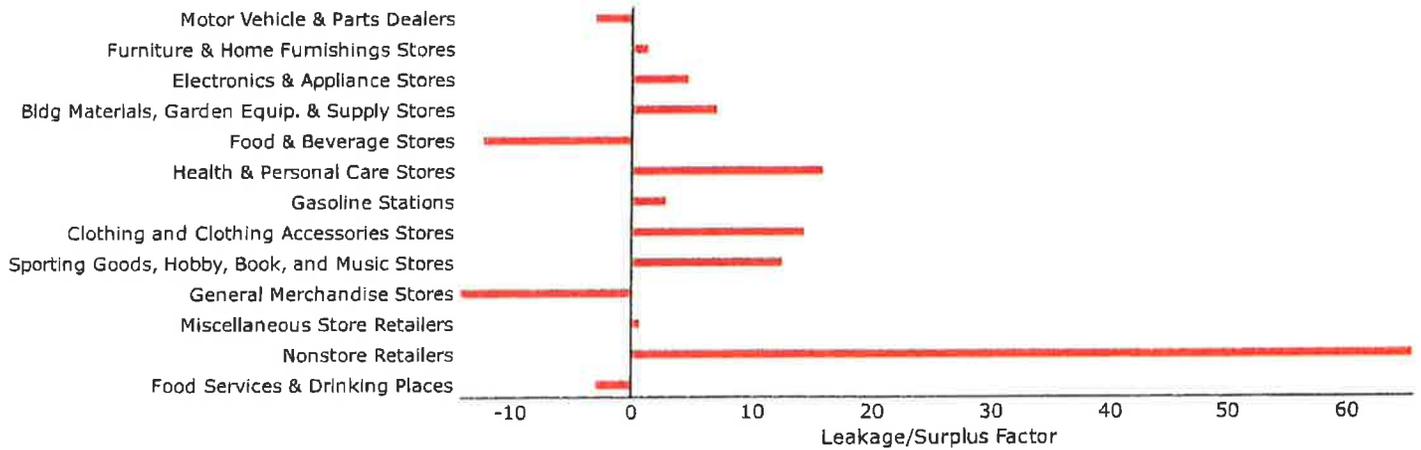
Solano County Fairgrounds
 Drive Time: 30 minute radius

Prepared by DBC Advisors

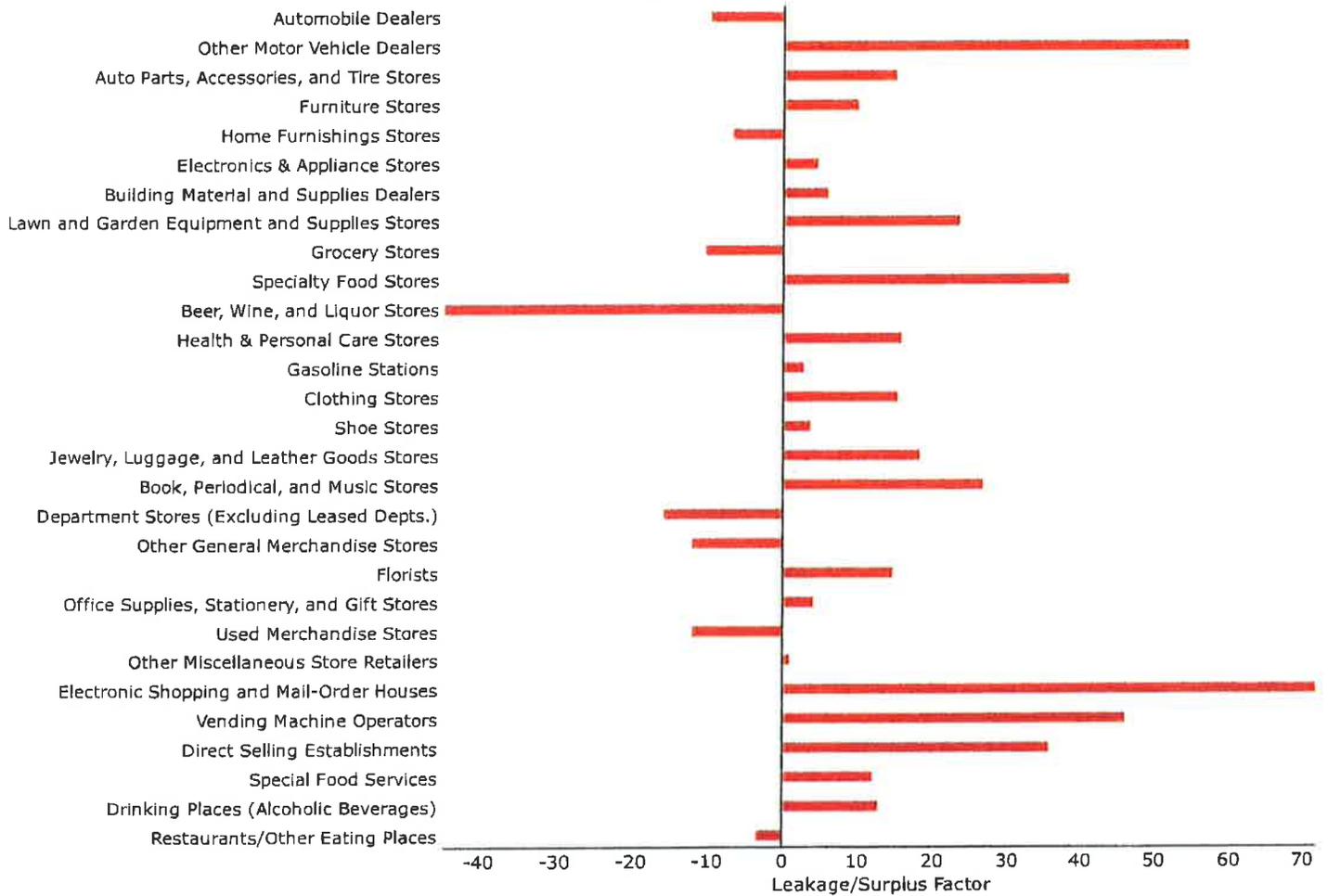
Latitude: 38.10497

Longitude: 122.22966

2017 Leakage/Surplus Factor by Industry Subsector



2017 Leakage/Surplus Factor by Industry Group



Source: Esri and Infogroup. Esri 2018 Updated Demographics. Esri 2017 Retail MarketPlace. Copyright 2018 Esri. Copyright 2017 Infogroup, Inc. All rights reserved.



Medical Expenditures

Solano County Fairgrounds
Drive Time: 30 minute radius

Prepared by DBC Advisors

		2018	2023
Demographic Summary			
Population		932,141	971,400
Households		330,423	343,580
Families		223,374	232,150
Median Household Income		\$74,441	\$85,794
Males per 100 Females		97.8	98.3
Population By Age			
Population <5 Years		6.1%	6.1%
Population 65+ Years		15.0%	17.0%
Median Age		38.2	38.9
	Spending Potential Index	Average Amount Spent	Total
Health Care	113	\$6,457.68	\$2,133,767,517
Medical Care	112	\$2,185.92	\$722,279,603
Physician Services	114	\$288.05	\$95,177,408
Dental Services	120	\$447.05	\$147,715,068
Eyecare Services	111	\$68.08	\$22,496,021
Lab Tests, X-Rays	110	\$65.75	\$21,723,721
Hospital Room and Hospital Services	113	\$193.24	\$63,851,551
Convalescent or Nursing Home Care	85	\$27.05	\$8,939,312
Other Medical services (1)	116	\$134.68	\$44,499,961
Nonprescription Drugs	111	\$147.75	\$48,820,597
Prescription Drugs	107	\$385.64	\$127,424,544
Nonprescription Vitamins	112	\$79.66	\$26,322,321
Medicare Prescription Drug Premium	105	\$135.04	\$44,621,871
Eyeglasses and Contact Lenses	114	\$106.22	\$35,096,372
Hearing Aids	106	\$30.16	\$9,966,120
Medical Equipment for General Use	135	\$8.02	\$2,648,501
Other Medical Supplies/Equipment (2)	114	\$69.54	\$22,976,231
Health Insurance	113	\$4,271.76	\$1,411,487,913
Blue Cross/Blue Shield	110	\$1,393.71	\$460,512,560
Fee for Service Health Plan	115	\$853.73	\$282,092,789
HMO	124	\$999.38	\$330,219,082
Medicare Payments	107	\$653.85	\$216,045,505
Long Term Care Insurance	106	\$111.48	\$36,834,388
Other Health Insurance (3)	107	\$259.62	\$85,783,589

Data Note: The Spending Potential Index (SPI) is household-based, and represents the amount spent for a product or service relative to a national average of 100. Detail may not sum to totals due to rounding.

(1) Other Medical Supplies includes Services by Medical Professionals other than Physicians, Outpatient Hospital Care, Blood Donation, and Ambulance, Dialysis, Emergency Room, Oxygen or Rescue Services.

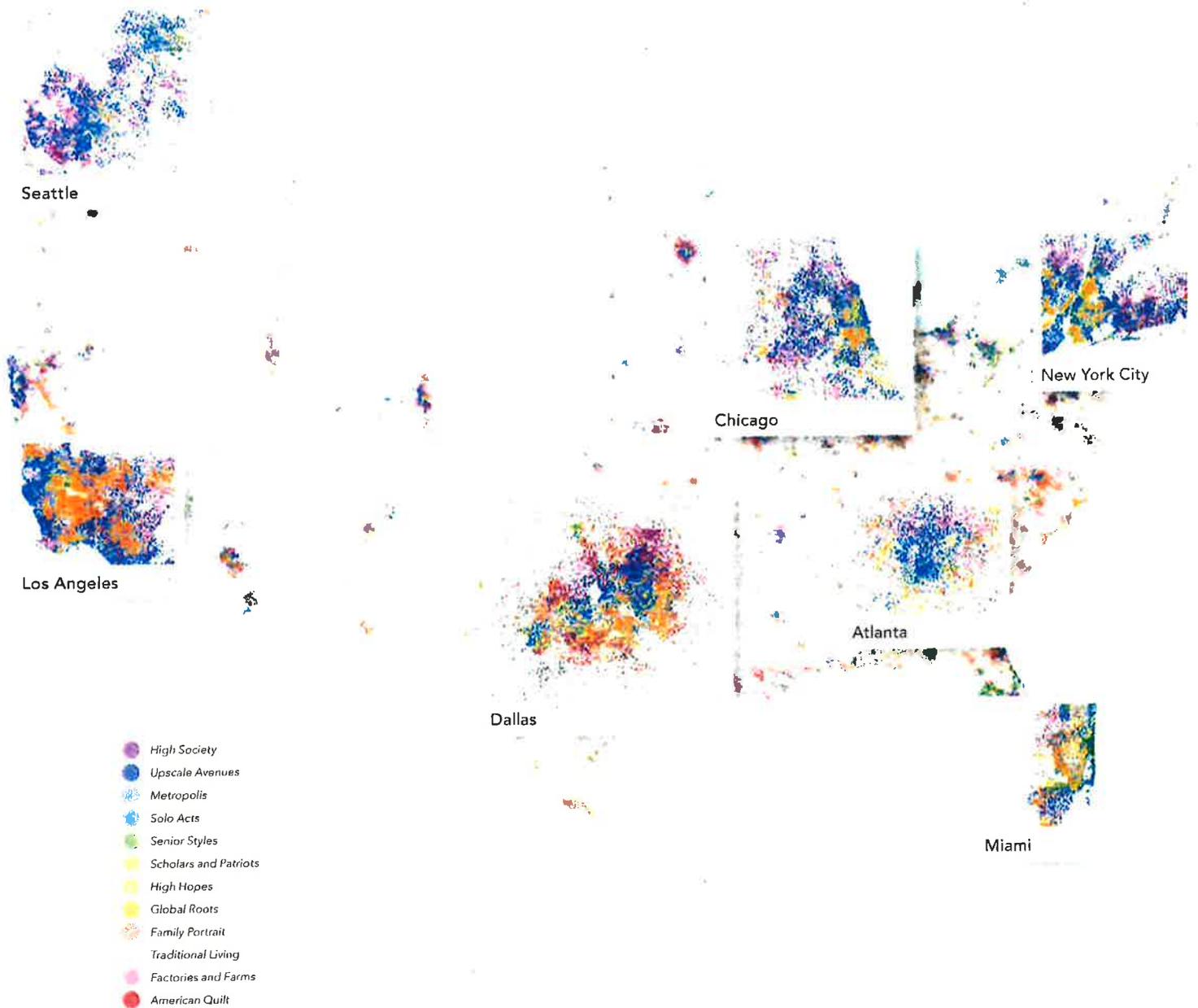
(2) Other Medical/Equipment includes Topicals, Dressings, Supportive and Convalescent Medical Equipment, Rental of Medical Equipment for General Use, and Rental of Supportive and Convalescent Medical Equipment.

(3) Other Health Insurance includes Medicare Supplements and Other Health Insurance excluding Blue Cross/Blue Shield.

Source: Esri forecasts for 2018 and 2023; Consumer Spending data are derived from the 2015 and 2016 Consumer Expenditure Surveys, Bureau of Labor Statistics.

Tapestry™ Segmentation

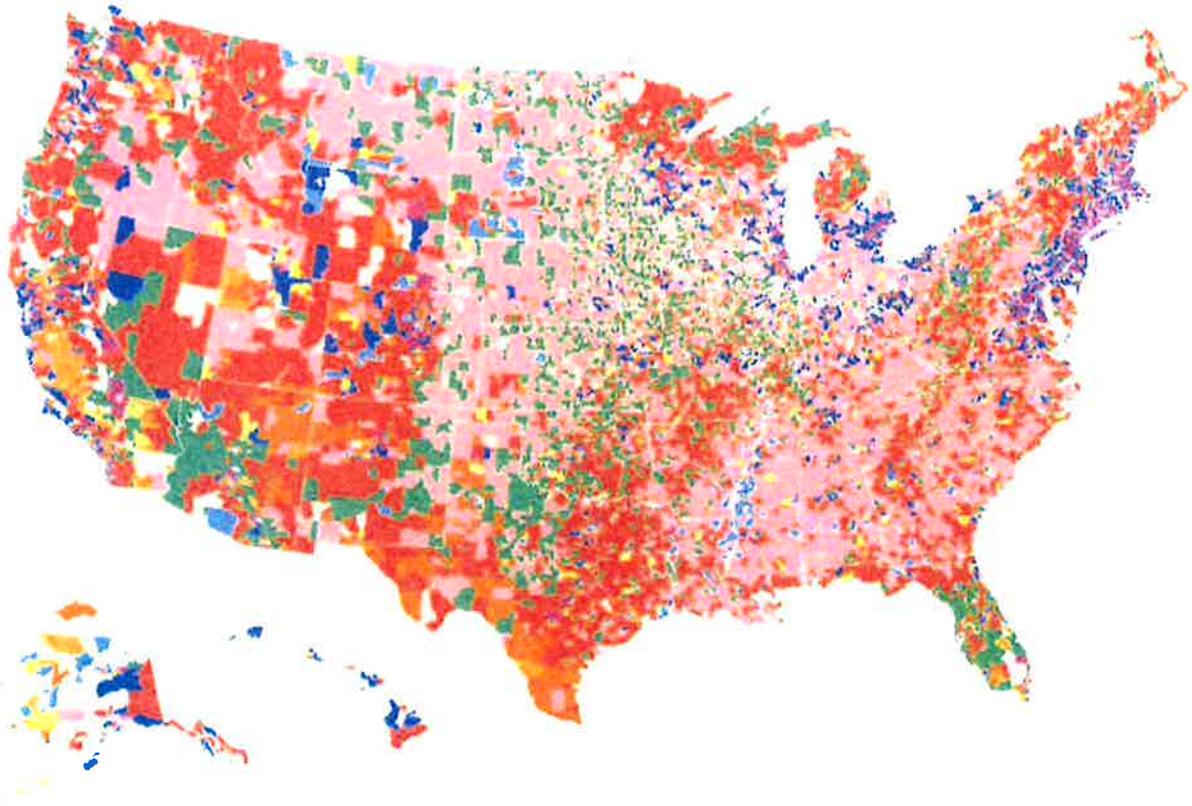
Reference Guide



Esri's Tapestry Segmentation divides US residential areas into 65 distinctive segments based on socioeconomic and demographic characteristics to provide an accurate, detailed description of US neighborhoods.



Tapestry LifeMode Summary Groups



Tapestry LifeMode Summary Groups in the US by County

- High Society
- Upscale Avenues
- Metropolis
- Solo Acts
- Senior Styles
- Scholars and Patriots
- High Hopes
- Global Roots
- Family Portrait
- Traditional Living
- Factories and Farms
- American Quilt

Segments in the 12 Tapestry™ Segmentation LifeMode Summary Groups are characterized by lifestyle and lifestage and share an experience such as being born in the same time period or a trait such as affluence.

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26	03 Connoisseurs	67	44 Urban Melting Pot
27	04 Boomburbs	68	45 City Strivers
28	05 Wealthy Seaboard Suburbs	69	46 Rooted Rural
29	06 Sophisticated Squires	70	47 Las Casas
30	07 Exurbanites	71	48 Great Expectations
31	08 Laptops and Lattes	72	49 Senior Sun Seekers
32	09 Urban Chic	73	50 Heartland Communities
33	10 Pleasant-Ville	74	51 Metro City Edge
34	11 Pacific Heights	75	52 Inner City Tenants
35	12 Up and Coming Families	76	53 Home Town
36	13 In Style	77	54 Urban Rows
37	14 Prosperous Empty Nesters	78	55 College Towns
38	15 Silver and Gold	79	56 Rural Bypasses
39	16 Enterprising Professionals	80	57 Simple Living
40	17 Green Acres	81	58 NeWest Residents
41	18 Cozy and Comfortable	82	59 Southwestern Families
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Segmentation 101

For more than 30 years, companies, agencies, and organizations have used segmentation to divide and group their consumer markets to more precisely target their best customers and prospects. This targeting method is superior to using "scattershot" methods that might attract these preferred groups. Segmentation explains customer diversity, simplifies marketing campaigns, describes lifestyle and lifestage, and incorporates a wide range of data.

Segmentation systems operate on the theory that people with similar tastes, lifestyles, and behaviors seek others with the same tastes—"like seeks like." These behaviors can be measured, predicted, and targeted. Esri's Tapestry Segmentation system combines the "who" of lifestyle demography with the "where" of local neighborhood geography to create a model of various lifestyle classifications or segments of actual neighborhoods with addresses—distinct behavioral market segments.

Where can you find the largest demographic data source? The decennial census! Census 2000 data included a broad range of demographic variables and provided a rich profile of the US population on April 1, 2000. Users can sift through data on the population: how they live—households and families, labor force and occupation, travel to work, income and housing costs; where they live—cities or farms, single-family homes, apartments, or boats; and where they are from—living in the same house as five years ago, born in the same state, immigrated from abroad, ancestry, language. Different areas of the country can also be compared: Is this city larger/older/wealthier than that city? Comparisons are limited to conditions on April 1, 2000, and standard geographic areas: blocks, block groups, census tracts, places, county subdivisions, counties, states, and special interest areas such as congressional districts or school districts.

If the analysis requires user-defined areas such as circles or polygons or questions changes in the data, the user will need more than the public Census 2000 data files. The 1990 Census data is also available online, but geographic areas change with every census. Direct comparisons, even for large areas such as counties, require a correspondence file, or "crosswalk," between 1990, 2000, and 2010 geographies. Comparable census databases or user-defined polygons require access to private data sources.

Suppose the user wants demographic data that is more current than the last census. The largest share of Census 2000 data was still being released in the fall of 2002, when it was already two and one-half years out of date! Most data users want to know what is happening today, not more than 10 years ago. Collection of information for the decennial census changed in 2010. All households received a 10-question short form. The traditional long form was eliminated and replaced by the rolling American Community Survey that will be mailed to 2.5 million people each month. This new method of collecting data will change the amount of information that is available to both the public and private sectors. Given the pace of changes in the economy and society, current data is mandatory and a forecast of current change, prudent.

Again, there are both public and private sources of current demographic data. Data for larger geographic areas—counties, states, and the United States—is also available from the US Census Bureau. There are population estimates that can include characteristics such as age, sex, and race in addition to estimates of households and housing units. Of course, estimates, by definition, are based on data for the time period in question. A 2008 estimate might be based on data such as births and deaths, income tax returns, or building permits for 2008. Because annual public data is commonly released six months to a year after the fact, a 2008 estimate would be published in 2009, at the earliest.

For more demographic detail, such as income, employment, or housing characteristics, the user can employ a variety of annual surveys such as the Census Bureau's Current Population Survey and the American Community Survey. A wealth of demographic data is available from these sources. However, geographic detail is severely limited by the size of the survey base to states or the largest counties. No small (subcounty) area data is reported from these surveys. In addition, the survey data is likely to be inconsistent with decennial census data. Surveys are useful but are better used to track change over time than as point estimates.

Most of the data items in the decennial census were of special interest to federal government planners, but an ancillary benefit of the census also yielded all the key factors necessary to classify the lifestyles of America's neighborhoods. This data is grouped in eight broad areas of information:

- Population by Age and Sex
- Household Composition and Marital and Living Arrangements
- Patterns of Migration, Mobility, and Commutation
- General Characteristics of Housing
- Economic Characteristics of Housing
- Educational Enrollment and Attainment
- Employment, Occupations, and Industrial Classifications
- Household, Family, and Personal Incomes

Following each decennial census, marketing information companies with segmentation systems rebuild the models that produce these systems. Esri's data development team created Tapestry Segmentation, its fourth-generation segmentation system, building on its foundation of proven segmentation methodology. Hallmarks of a valuable segmentation system are accuracy and stability.

The Next Generation

Census 2000 and Esri's proprietary annual demographic data updates provide the premier source of information to capture changes at the neighborhood level. Neighborhood is the focus of a valid segmentation system, its predictive power coming from a community's character, formation, and behaviors.

Neighborhoods are natural formations of people drawn together by their common need for a "place"—for security and acceptance. Neighborhood tangibles are housing, land value, available labor, infrastructure, transportation, school system, and other factors that remain stable over decades. Intangibles are elements such as economic opportunities, lifestyles, and overall ambience that separate and characterize neighborhoods. The most compelling feature about neighborhoods is the ability to attract residents and shape their living standards and tastes. People need to feel that they belong and will seek places where their lifestyles and behaviors fit.

Conclusion

The benefits of segmentation can be clearly defined by anyone who needs accurate information about their consumers, constituents, or members. Information in this Reference Guide will help you understand Esri's segmentation system, Tapestry Segmentation.

Tapestry Segmentation

The Fabric of America's Neighborhoods

What Is Tapestry Segmentation?

Tapestry Segmentation represents the fourth generation of market segmentation systems that began more than 30 years ago. The 65-segment Tapestry Segmentation system classifies US neighborhoods based on their socioeconomic and demographic compositions. The power of Tapestry Segmentation allows you to profile consumers and constituents in a number of ways including

- Standard geographic areas including census tract, block group, ZIP Code®, and ZIP+4
- User-defined areas such as rings or polygons based on distance, drive time, or other specifications
- Customer addresses or site locations

The versatility of Tapestry Segmentation provides several methods of dividing the 65 segments into summary groups for a broader view of US neighborhoods.

- LifeMode: 12 summary groups based on lifestyle and lifestage
- Urbanization: 11 summary groups based on geographic and physical features along with income

Trends Revealed by Tapestry Segmentation

Since Census 2010, several interesting demographic changes have occurred:

- The US population has increased by two million people.
- More than 740,000 households have been created.
- Half a million people have become homeowners.

"Although the demographic landscape of the United States changed significantly in some areas since Census 2000, this review and update of the segmentation system further confirms the stability of the Tapestry Segmentation system as some neighborhoods evolved and moved into other segments," said Lynn Wombold, chief demographer and manager of data development, Esri. "Tapestry Segmentation stands as a solid affirmation of the proven segmentation methodology that has been developed and enhanced by Esri's data development team for more than 30 years."

Who Should Use Tapestry Segmentation?

All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The versatility and predictive power of Tapestry Segmentation allow users to integrate their own data or national consumer surveys into Tapestry Segmentation to identify their best market segments and reach them through the most effective channels.

Tapestry Segmentation Methodology

Tapestry Segmentation for Black Groups and ZIP+4s

Introduction

Tapestry Segmentation represents the fourth generation of geodemographic market segmentation systems that began with the first mass release of machine-readable, small-area data from the 1970 Census. The availability of hundreds of variables for thousands of US neighborhoods was both irresistible and daunting for marketers. What they needed was a structure—a way to create useful information from an overwhelming database. Market segments provide that structure: a system for classifying consumers and constituents using all the variables that can distinguish consumer behavior, from household characteristics such as income and family type to personal traits like age, education, or employment and even housing choices.

Tapestry Segmentation classifies US neighborhoods into 65 distinct market segments. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Tapestry Segmentation combines the “who” of lifestyle demography with the “where” of local neighborhood geography to create a model of various lifestyle classifications, or segments, of actual neighborhoods with addresses—distinct behavioral market segments.

Statistical Methods

Cluster analysis is the generic approach used to create a market segmentation system. There are a number of different techniques or clustering methods that can be applied to identify and classify market types. Each technique has its strengths and weaknesses. Previous generations of Tapestry Segmentation have been built using a combination of techniques, such as the iterative partition K-means algorithm, to create the initial clusters or market segments, followed by the application of Ward’s hierarchical minimum-variance method to group the clusters. This combination has provided a complementary match of the strengths of each technique.

Tapestry Segmentation combines the traditional and latest data mining techniques to provide a robust and compelling segmentation of US neighborhoods. Esri developed and incorporated the data mining techniques to complement and strengthen traditional methods to work with large geodemographic databases. Robust methods are less susceptible to extreme values, or outliers, and are therefore crucial to small-area analysis. The traditional methodology of cluster analysis has a long track record in developing market segmentation systems. Complementary use of data mining techniques and implementation of robust methods enhance the effectiveness of traditional statistical methodology in developing Tapestry Segmentation.

Creation of Tapestry Segmentation Summary Groups

For a broader view of consumer markets, cluster analysis was again used to develop the Tapestry Segmentation summary groups. Summary groups are ideal when users want to work with fewer than 65 segments. The 65 segments are combined into 12 LifeMode Summary Groups based on lifestyle and lifestage. The 11 Urbanization Summary Groups present an alternative way of combining the 65 segments based on their geographic and physical features, such as population density, city size, and location relative to a metropolitan area, and whether they are part of the economic and social center of a metropolitan area.

Tapestry Segmentation Methodology

Tapestry Segmentation For Block Groups and ZIP+4s

Data Used to Build Tapestry Segmentation

Cluster analysis techniques are essentially trial-and-error methods that rely on exploratory procedures to arrive at stable and optimal solutions. The key to developing a powerful market segmentation system lies in the selection of the variables used to classify consumers. US consumer markets are multidimensional and diverse. Using a large, well-selected array of attributes captures this diversity with the most powerful data available. Data sources include Census 2000 data; Esri's Updated Demographics; Acxiom Corporation's InfoBase-X® consumer database; and consumer surveys, such as the Survey of the American Consumer* from GfK MRI, to capture the subtlety and vibrancy of the US marketplace.

Selection of the variables used to identify consumer markets begins with data from Census 2000, the most accurate source of data on the American consumer. Census data is collected directly from the population (self-reported), then edited by the Census Bureau for consistency. Data includes household characteristics such as single-person or family, income, relationships (single- or multigenerational), and owner/renter status. Personal traits such as age, sex, education, employment, and marital status and housing characteristics like home value or rent, type of housing (single family, apartment, or townhouse), seasonal status, and owner costs relative to income are also included. In essence, any characteristic that is likely to differentiate consumer spending and preferences is assessed for use in identifying consumer markets.

The selection process draws on Esri's experience in working with the 1980 and 1990 censuses and Census 2000, and includes a range of multivariate statistical methods, in addition to factor analysis, principal components analysis, correlation matrices, and graphic methods. Selecting the most relevant variables is critical to defining homogeneous market segments; however, determining the most effective measure of each variable is equally important. Is income best represented by a median, an average, or an interval? Would household or disposable income best measure actual buying power? In the end, selection was narrowed to more than 60 attributes to identify and cluster US neighborhoods by market type.

From the neighborhood or block group level, Tapestry Segmentation profiles enable users to compare consumer markets across the country by state, metropolitan area, county, place, census tract, ZIP Code, and even congressional districts. However, direct mail campaigns frequently require a smaller target than a ZIP Code. To improve targeting capabilities and capture the diversity of the population within a block group, Tapestry Segmentation data is also provided at the ZIP+4 level.

Tapestry Segmentation at the ZIP+4 Level

Because ZIP+4 is a postal designation represented by addresses instead of boundaries, Esri built the ZIP+4 model using list-based household data. List data is different from census data. It represents an address list of households overlaid with information compiled from a variety of different lists and sources, both public and private. Most lists include 120 to 130 million household records—more than the actual number of households in the country due to duplicate records. Addresses range from complete street address information to post office boxes, which confound the best geocoders.

The Census Bureau provides detailed analyses of its data collections, coverage, validation procedures, rates of imputation for incomplete items, and estimate errors. List providers are more circumspect regarding both their sources and validation procedures. However, census data cannot be provided for individuals or households due to Title 13, which protects the confidentiality of data collected. To provide market segments for addresses, list-based data is the only option.

To create segmentation at this level, Esri used the InfoBase-X data from Axiom Corporation. Axiom compiles its lists and data from an unprecedented number of data sources including public real estate information, purchased data from catalogs, auto dealerships, consumer surveys, publications, product registrations, and telephone directories.

Esri aggregates household attributes from the InfoBase-X data to assign a Tapestry Segmentation code to each ZIP+4. By building the Tapestry Segmentation markets with census data, updating them with Esri® data, and assigning the markets to ZIP+4 codes using an aggregate of household attributes, Esri has developed an effective way to use the vast amount of information from list compilers while maintaining the integrity of the data. Tapestry Segmentation ZIP+4 classifies each US ZIP+4 by one of its 65 distinctive market segments. Excluding post office boxes and business ZIP+4s, approximately 24 million residential ZIP+4s are currently available in Tapestry Segmentation ZIP+4.

Verification Procedures

Verification procedures follow the creation of the segments to ensure their stability and validity. Replicating the segments with independent samples can check stability. Validity is checked with characteristics that are not used to generate the segments. Linking Tapestry Segmentation to the latest consumer survey data is the critical test. As expected, a market segmentation system must be able to distinguish consumer behavior such as spending patterns and lifestyle choices. Esri verifies the efficacy of its Tapestry Segmentation markets against consumer surveys from GfK MRI, which include nearly 6,000 product and service brands in 550 categories, along with readership of hundreds of magazines and newspapers, Internet usage, TV viewership by channel and program, radio listening, and use of Yellow Pages. When creating Tapestry Segmentation at the ZIP+4 group-level markets, Esri employs the same rigorous verification tests that are used to check the block group-level markets. This validity check provides the answer to the most important question: Does it work? Yes, indeed, it does.

Using Tapestry Segmentation to Grow Your Business

Data fuels any organization. Customer databases can provide a tremendously rich source of information. Data-based marketing in itself is a broad subject and can be defined as a process of collecting data, then mining it for intelligence. Database-driven decision making, also called database marketing, is a process that involves a partnership between a data vendor, the company, and Esri.

By partnering with Esri, companies, agencies, and organizations will have access to Tapestry Segmentation, additional marketing data, and information about geographic areas. Customer data merged with Esri's business, consumer spending, demographics, and segmentation data will strengthen a company's database marketing abilities.

Esri data can help increase understanding of geographic areas such as block groups, census tracts, ZIP Codes, and other market levels. Geographic information system (GIS) technology can help users take data from database formats, conduct analyses, display it in usable reports and maps, and share it. Users can perform this application from the desktop, the field, the web, and the cloud. This process begins with a customer database that can be easily enhanced with a data overlay.

Understanding consumer types, their shopping patterns, product and media preferences, and successfully retaining profitable consumers are some activities supported by mining customer data files. Consumer marketing activities include

- Customer profiling
- Media targeting
- Direct mail
- Site analysis

Customer/Constituent Profiling

A thorough knowledge of customers or constituents is critical to an organization's success; this knowledge is key to developing effective marketing programs with information mined from customer databases. Cleansing, geocoding, and appending Tapestry Segmentation codes to address records will further refine and enrich an understanding of customer/constituent preferences. With these tools, you can track customer buying data by segment; target different populations; and analyze the results of each direct marketing campaign, loyalty program, and advertising.

A customer profile can reveal the demographics, lifestyles, and product preferences of a company's customers. If a company knows who its customers are, it can respond to their needs with better messaging, products, and services. Address information in a customer database is necessary to begin the profiling process. Data such as latitudes/longitudes, demographics, and segmentation codes can be geocoded and appended to each customer record, creating an enhanced customer database. Adding this data to each customer record provides a detailed portrait of customers. These data-enhanced customer records can be sorted and analyzed to provide more solid business decisions.

Customer profiles created with segmentation can help

- Find the best locations for new stores.
- Evaluate the success of existing locations.
- Study differences in population segments.
- Select merchandise suited to customer preferences.
- Direct advertising with the right message to the right audience.
- Target direct mail and other promotions to the most responsive recipients.

A customer profile illuminates and helps define customer behaviors. The profile will identify your core customer groups as well as groups with opportunity. Customer profiling is used to develop

- Insight into the lifestyle characteristics of your best customers
- A "picture" or map of where these customers live
- Plans to target neighborhoods previously unserved
- New opportunities
- Strategies that attract customers to stores to purchase your products and services

Organizations can add Tapestry Segmentation to their customer/constituent data to learn more about them. A completed customer/constituent profile analysis provides a detailed picture of an organization's customers/constituents, producing actionable information for better, more cost-effective decisions.

Media Targeting

Organizations can combine their customer/constituent data with Tapestry Segmentation codes to develop effective, targeted media programs. Knowing the types of media preferred by your customers/constituents enables you to

- Rank media preferences.
- Analyze responses to campaign promotions.
- Identify shopping patterns.
- Study and rank markets based on Tapestry Segmentation profiles or demographics targeted by age, income, lifestyle preferences, or lifestage.

Direct Mail

Direct mail applications are more precise than print or other advertising media. Advertising goes to everyone, whereas effective direct mail campaigns must be crafted from segmented lists with a targeted message. Responses to direct mail can be tracked to analyze the effectiveness of the campaign. Response analysis is a useful tool. Many companies rely on direct mail as a vehicle to promote stores, products, and events. In this age of “do not call,” many marketers will simply increase the volume of direct mail. This may not be the ideal solution if certain customer segments are resistant to receiving direct mail. Therefore, companies must determine customer segments that will respond and target messages only to those segments. To better understand customer preferences for marketing communications, companies must understand customers individually and learn how each customer wants to be contacted. Once that happens, marketing programs will be more effective. By aligning communication channels with what the customer wants, companies can improve their direct mail and other marketing methods.

Site Location Analysis

“Location, location, location” is the mantra of commercial real estate. Selecting the right location may be the most important decision that a business can make. Retailers face competition everywhere—specialty mall stores, department stores, boutiques, discounters, big-box stores, mail-order catalogs, and online shopping sites all compete for customers. Savvy retailers know that to successfully compete in today’s marketplace, they must keep abreast of their customers’ changing tastes, product preferences, and spending patterns.

It is not enough to know just where potential customers live; companies must examine other data such as the types of people who live, work, and shop near a store as well as information about the impact of competitors in the area. For a more complete analysis, optional traffic data can be added. Successful site selection analyses using Esri data and software solutions will help the user make more informed and profitable decisions.

Understanding geography is crucial for supporting marketing functions. To answer this need, Esri added Tapestry Segmentation data to the already comprehensive demographic, business, and shopping center datasets that are included with Business Analyst™ Desktop software. Integrating customer data with these types of data allows an even more refined level of site location analyses.

Companies can use customer, demographic, business, and shopping center data for store location evaluation, trade area definition, and competitive analysis. Other marketing applications for customer data include

- Conducting store performance evaluations
- Calculating market potential
- Locating untapped market areas
- Visualizing market cannibalization

Conclusion

Customer data should be used and treated as a company's most valuable asset. It is worth its weight in gold, or revenue. Esri believes that the more information companies can learn about their customers, the better they can serve them, keep them, and find more like them.

To read about how Tapestry Segmentation was used effectively for identifying population segments and fund-raising, please see the success stories on the following pages.

Success Scenario— Retail Store Chain

A discount shoe chain wanted to expand its operations to new locations in a nearby state. For many years, the chain had collected customer information from its loyalty programs. Although it had used demographics to analyze this data and the effectiveness of these promotions, it had never used segmentation for site analysis.

Tapestry Segmentation codes were appended to the customer file, and the existing store locations were analyzed. Using this data, Esri developed a definition of a standard trade area to be used in the prospective site analyses. Esri found that several factors appeared to make the existing stores successful such as proximity to a major shopping mall; five to seven competitors within the existing trade area; and the presence of the *Laptops and Lattes*, *Trendsetters*, and *Aspiring Young Families* segments.

Consumers in these segments have different lifestyles, but all frequently shop for shoes. *Laptops and Lattes* and *Trendsetters* residents are more affluent with disposable income and will shop more frequently, while the more price-conscious *Aspiring Young Families* residents search for bargains. The chain's current demographic criteria of income and home values would not select the *Aspiring Young Families* segment as a target market. Diversity is in the marketplace. Although some similarities exist, the household lifestyle characteristics are very different but important indicators of market potential for the shoe chain. Targeting key segments enabled the chain to capitalize on other possible markets that might have been missed when straight demographic criteria were used.

When evaluating new sites, these factors were considered. Using the criteria, the chain previewed dozens of sites and selected a new site that matched the characteristics of the chain's best-performing stores.

Success Story: Central Virginia Fire District

Tapestry Identifies Special Needs Populations for Disaster Evacuation Planning

The Challenge

Staff in the Central Virginia Fire District was concerned about how to identify and communicate with special needs populations in the event of a disaster evacuation. The central Virginia region is located due south of Washington, D.C., and includes the city of Richmond, the Norfolk-Virginia Beach metropolitan area, and the city of Charlottesville.

The Solution

By applying traditional customer profiling techniques to identify population segments, Esri's Tapestry Segmentation system helped answer basic questions about special needs populations, such as

- **Who** are the resident types in my area?
- **Where** do they live?
- **How** do I communicate with them?
- **What** messaging will be most effective?

The Implementation

The City of Virginia Beach Fire Department provided Esri with a file of residential structure addresses and a file defining the flood hazard (surge) zones. Esri appended each address record with latitude-longitude coordinates and demographic and Tapestry Segmentation codes, enabling the file to be used for demographic analysis. Esri then created reports and maps specifically for the Virginia Beach, Virginia, area, then analyzed the data and provided practical conclusions and recommendations that met the fire chiefs' stated goals.

Esri analysts identified neighborhoods with high concentrations of these special needs residents and learned more about their requirements and how to best communicate with them before, during, and after a disaster. Based on criteria provided by the fire chiefs, seniors in Tapestry's dominant *Silver and Gold* segment in the surge zone were considered the most at risk.

The Results

The Tapestry Segmentation study proved to be an effective method for obtaining valuable information about the special needs of residents in these communities. The study confirmed that traditional marketing methodologies could be applied effectively to produce important findings to enhance the safety of all residents. During a follow-up focus group meeting conducted at the International Association of Fire Chiefs, the findings of this study were shared and the potential was explored for developing tools to enable more widespread use of these methodologies and make them more readily available to fire department planners. Consensus opinion affirmed the importance of this work, resulting in the formation of a technology advisory council to advance such programs.

For more information about this analysis, read the white paper *Identifying Special Needs Populations in Hazard Zones: How to Use Tapestry Segmentation for Disaster Evacuation Planning*.



Success Story: Arlington Food Assistance Center

Tapestry Segmentation Boosts Response Rates and Fund-Raising Dollars

Arlington Food Assistance Center (AFAC), a nonprofit organization in Arlington, Virginia, provides groceries to Arlington County families who cannot afford to buy basic food items. AFAC distributes groceries to approximately 1,200 families each week. The organization depends on Arlington community members to volunteer their time, food, and money to help combat hunger in the area.

The Challenge

AFAC's funding relies heavily on individual donations from the direct mail program, for which AFAC maintained an in-house mailing list of past contributors. Increased demand and a simultaneous dip in contributions made it apparent to the executive director that the center must find new donors. AFAC also had to control mailing costs by sending a minimum number of letters that would still produce maximum results. Although the in-house list contained valuable contributors, there was no clear structure to it; names had been added over 20 years, sometimes without AFAC knowing why they were selected.



The Solution

After an Esri staff member described how Tapestry Segmentation could identify new areas to target based on the best donor types, AFAC turned to Esri for assistance.

Esri analysts recognized immediately that, for AFAC to increase its direct mail response rate and dollar contributions, it must adopt a new direct mail strategy. The goal would be to send specially crafted appeal letters to targeted groups that were identified as the most likely to contribute.

Tapestry Segmentation provided an ideal way to identify the groups. Esri's Address Coder™ software geocoded the existing contributor list and appended a Tapestry Segmentation code to each record. This process identified neighborhoods where donors lived. The resulting Customer Tapestry Profile enabled AFAC to analyze its proven donors and find others like them. The analysis also helped AFAC better understand donor lifestyle behaviors and other demographic traits in order to craft messaging that would appeal to each segment. To reach new contributors, Esri recommended that AFAC purchase a mailing list appended with Tapestry Segmentation codes from Acxiom Corporation.

The Results

AFAC mailed letters to 20,000 existing and new donor households, which generated a total of \$67,000 and added 275 new donors at a total cost of \$6,500.

"Before turning to Esri for our direct mail efforts, we did not understand how to reach current and potential donors," said AFAC's director Christine Lucas. "Today, we are able to craft and deliver mail pieces that better appeal to our existing and potential donors, plus increase our gift donations, while keeping our mailing list costs low."

Tapestry Segmentation Summary Groups

Esri's Tapestry Segmentation provides a robust, powerful portrait of the 65 US consumer markets. To provide a broader view of these 65 segments, Esri combined them into 12 LifeMode Summary Groups based on lifestyle and lifestage composition. For instance, Group L1, *High Society*, consists of the seven most affluent segments, whereas Group L5, *Senior Styles*, includes the nine segments with a high presence of seniors.

- | | |
|---------------------------------|--------------------------------|
| L1 <i>High Society</i> | L7 <i>High Hopes</i> |
| L2 <i>Upscale Avenues</i> | L8 <i>Global Roots</i> |
| L3 <i>Metropolis</i> | L9 <i>Family Portrait</i> |
| L4 <i>Solo Acts</i> | L10 <i>Traditional Living</i> |
| L5 <i>Senior Styles</i> | L11 <i>Factories and Farms</i> |
| L6 <i>Scholars and Patriots</i> | L12 <i>American Quilt</i> |

The 65 segments in Tapestry Segmentation are also organized into 11 Urbanization Summary Groups to highlight another dimension of these markets. These 11 groups are based on geographic and physical features such as population density, size of city, location in or outside a metropolitan area, and whether it is part of the economic and social center of a metropolitan area. For example, U1, *Principal Urban Centers I*, includes eight segments that are mainly in densely settled cities within a major metropolitan area. The "I" or "II" appearing after each group name designates the relative affluence within the group, with I being more affluent than II.

- | | |
|--------------------------------------|---------------------------------|
| U1 <i>Principal Urban Centers I</i> | U7 <i>Suburban Periphery I</i> |
| U2 <i>Principal Urban Centers II</i> | U8 <i>Suburban Periphery II</i> |
| U3 <i>Metro Cities I</i> | U9 <i>Small Towns</i> |
| U4 <i>Metro Cities II</i> | U10 <i>Rural I</i> |
| U5 <i>Urban Outskirts I</i> | U11 <i>Rural II</i> |
| U6 <i>Urban Outskirts II</i> | |

Segments provide more differentiating power than summary groups. However, if the user wants to summarize or analyze a smaller number of markets, summary groups are appropriate. Choosing between the two ways of grouping segments depends on the application. For certain products or services, Urbanization groups may more effectively distinguish the consumption pattern than LifeMode groups; for example, going to the movies. But for certain lifestyle- or lifestage-related behavior, such as domestic travel, grouping by LifeMode would be more effective.

Users can also define their own groups to capture the dynamics of Tapestry Segmentation for specific applications. This can be accomplished, for example, by grouping the 65 segments based on their rank order on the consumption rate from customer profiles and consumer surveys.

See the tables for a list of the 65 segments in Tapestry Segmentation and how they are organized into LifeMode and Urbanization Summary Groups. Each segment is given a short descriptive name in addition to a numeric code ranging from 01 through 65. For example, Segment 01 (*Top Rung*) falls into the LifeMode Summary Group of *High Society* and the Urbanization Summary Group of *Metro Cities I*.

Table 1

LifeMode Summary Groups by Segment Codes

LifeMode Summary Group	Segment Codes
L1 <i>High Society</i>	01, 02, 03, 04, 05, 06, 07
L2 <i>Upscale Avenues</i>	09, 10, 11, 13, 16, 17, 18
L3 <i>Metropolis</i>	20, 22, 45, 51, 54, 62
L4 <i>Solo Acts</i>	08, 23, 27, 36, 39
L5 <i>Senior Styles</i>	14, 15, 29, 30, 43, 49, 50, 57, 65
L6 <i>Scholars and Patriots</i>	40, 55, 63
L7 <i>High Hopes</i>	28, 48
L8 <i>Global Roots</i>	35, 38, 44, 47, 52, 58, 60, 61
L9 <i>Family Portrait</i>	12, 19, 21, 59, 64
L10 <i>Traditional Living</i>	24, 32, 33, 34
L11 <i>Factories and Farms</i>	25, 37, 42, 53, 56
L12 <i>American Quilt</i>	26, 31, 41, 46

Tapestry Segmentation LifeMode Group Descriptions

The 65 distinct market segments in Tapestry Segmentation profile the diversity of the American population and provide two ways to summarize and simplify these differences—LifeMode summary groups and Urbanization summary groups. Segments within a LifeMode summary group share an experience such as being born in the same time period or a trait such as affluence. Urbanization summary groups share a locale, from the urban canyons of the largest cities to the rural lanes of villages or farms.

LifeMode Group: L1 High Society

Segment Codes: 01, 02, 03, 04, 05, 06, 07

Residents of the seven *High Society* neighborhoods are affluent and well educated. They represent slightly more than 12 percent of all US households but generate nearly one-quarter of the total US income. Employment in high paying positions, such as professional or managerial occupations, is a primary reason why the median household income for this group is \$100,216. Most households are married couple families who live in affluent neighborhoods. Although this is one of the least ethnically diverse groups in the United States, it is one of the fastest growing, increasing by more than 2 percent annually since 2000. Residents of *High Society* are affluent and active—financially, civically, and physically. They participate in a wide variety of public activities and sports and travel extensively. Try the Internet or radio instead of television to reach these markets.

LifeMode Group: L2 Upscale Avenues

Segment Codes: 09, 10, 11, 13, 16, 17, 18

Prosperity is the overriding attribute shared by the seven segments in *Upscale Avenues*. Residents have earned their success from years of hard work. Similar to the *High Society* segments, many in this group are also well educated with above-average earnings. However, their housing choices reveal their distinct preferences. Urban markets such as *Urban Chic* and *Pacific Heights* favor townhouses and high-rises, *Pleasant-Ville* residents prefer single-family homes in suburban neighborhoods, and *Green Acres* residents opt for open spaces. Some have not settled on a home yet, such as the renters among *Enterprising Professionals*; others, such as *Cozy and Comfortable* residents, have been settled for years. The median household income for the group is \$65,912. Prosperous domesticity also characterizes the lifestyle in *Upscale Avenues*. They invest in their homes; the owners work on landscaping and home remodeling projects, and the renters buy new furnishings and appliances. They

play golf, lift weights, go bicycling, and take domestic vacations. Although they are partial to new cars, they also save and invest their earnings.

LifeMode Group: L3 Metropolis

Segment Codes: 20, 22, 45, 51, 54, 62

Residents in the six segments of the *Metropolis* group live and work in America's cities. They live in older, single-family homes or row houses built in the 1940s or earlier. Those living in larger cities tend to own fewer vehicles and rely more on public transportation; however, workers in most of the *Metropolis* segments commute to service-related jobs. The *Metropolis* group reflects the segments' diversity in housing, age, and income. For example, ages among the segments range from Generation Xers to retirees; households include married couples with children and single parents with children. Employment status also varies from well-educated professionals to unemployed. The median household income of the group is \$39,031. Their lifestyle is also uniquely urban and media oriented. They like music, especially urban and contemporary formats, which they listen to during their commutes. They watch a variety of TV programs, from news to syndicated sitcoms, and would rather see movies than read books.

LifeMode Group: L4 Solo Acts

Segment Codes: 08, 23, 27, 36, 39

Residents of the *Solo Acts* summary group segments are singles who prefer city life. Many are young, just starting out in more densely populated US neighborhoods; others are well-established singles who have no home ownership or child-rearing responsibilities. Second only to *High Society*, residents of this group tend to be well-educated, working professionals who are either attending college or already hold a degree. Their incomes reflect their employment experience, ranging from a low median of \$39,234 (*Old and Newcomers*) among the newest households to approximately \$84,612 (*Laptops & Lattes*) among established singles. Home ownership is at 28 percent. Contrary to modern migration patterns that flow away from the largest cities, *Solo Acts*' residents are moving into major cities such as New York City; Chicago; Washington, D.C.; Boston; Los Angeles; and San Francisco. With considerable discretionary income and few commitments, their lifestyle is urban, including the best of city life—dining out, attending plays and concerts, and visiting museums—and, for a break from constant connectivity, extensive travel domestically and abroad.

Tapestry Segmentation LifeMode Group Descriptions

LifeMode Group: L5 Senior Styles

Segment Codes: 11, 15, 22, 30, 43, 49, 50, 57, 65

More than 14.4 million households in the nine *Senior Styles* segments comprise one of the largest LifeMode summary groups. As the US population ages, two of the fastest-growing American markets are found among *The Elders* and the *Silver and Gold* segments. *Senior Styles* segments illustrate the diversity among today's senior markets. Although incomes within this group cover a wide range, the median is \$41,334, attributable mostly to retirement income or Social Security payments. Younger, more affluent seniors, freed of their child-rearing responsibilities, are traveling and relocating to warmer climates. Settled seniors are looking forward to retirement and remaining in their homes. Residents in some of the older, less privileged segments live alone and collect Social Security and other benefits. Their choice of housing depends on their income. This group may reside in single-family homes, retirement homes, or high-rises. Their lifestyles can be as diverse as their circumstances, but senior markets do have common traits among their preferences. Golf is their favorite sport; they play and watch golf on TV. They read the newspaper daily and prefer to watch news shows on television. Although their use of the Internet is nearly average, they are more likely to shop through QVC than online.

LifeMode Group: L6 Scholars and Patriots

Segment Codes: 40, 55, 63

This summary group is unique in the Tapestry Segmentation system. Their shared traits include youth, with the attendant lower incomes, and atypical environments such as college life or military service. Because of their transient lifestyle and lifestage, their home ownership rate is low. Most live in townhouses or apartments, although one-quarter reside in single-family homes. One segment, *Military Proximity*, is dominated by military life; the other two, *College Towns* and *Dorms and Diplomas*, are predominantly students who are pursuing college degrees. Although most of the residents in the military segment are either on active duty or employed in civilian jobs on military bases, the students tend to work part-time at low-paying jobs to support themselves while attending school. However, low personal income does not inhibit their lifestyles. *Scholars and Patriots* residents' eclectic tastes in sports range from yoga to football. Electronically savvy, they have wireless Internet connections, notebook computers, iPods, and digital cameras.

LifeMode Group: L7 High Hopes

Segment Codes: 28, 48

The *High Hopes* summary group includes *Aspiring Young Families* and *Great Expectations*. These residents are a mix of married couples, single parents, and singles who seek the "American Dream" of home ownership and a rewarding job. Most live in single-family houses or multiunit buildings; approximately half own their homes. Many would move to a new location for better opportunities. Many are young, mobile, and college educated; one-third are younger than 35 years. The median household income is \$40,928.

LifeMode Group: L8 Global Roots

Segment Codes: 35, 38, 44, 47, 52, 58, 60, 61

Ethnic diversity is the common thread among the eight segments in *Global Roots*; the diversity index stands at 88. *Las Casas* and *NeWest Residents* represent a strong Hispanic influence in addition to a broad mix of cultural and racial diversity found in *Urban Melting Pot* and *International Marketplace*. Typical of new households, *Global Roots*' residents are young, earn modest incomes, and tend to rent in multiunit buildings. Their youth reflects recent immigration trends; half of all households have immigrated to the United States within the past 10 years. Married couples, usually with children; single parents; and people who live alone are typical of the household types in the *Global Roots* segments. Because households with children dominate, it is not surprising that spending is high for baby products, children's clothing, and toys. Residents of *Global Roots* are less likely than other groups to have home PCs but just as likely to use cell phones. They maintain ties with friends and relatives in their countries of origin with foreign travel.

LifeMode Group: L9 Family Portrait

Segment Codes: 12, 19, 21, 59, 64

Family Portrait has the fastest-growing population of the LifeMode summary groups, driven primarily by the rapid increase in the *Up and Coming Families* segment. Youth, family life, and the presence of children are the common characteristics across the five markets in *Family Portrait*. The group is also ethnically diverse: more than 30 percent of the residents are of Hispanic descent. The neighborhoods are predominantly composed of homeowners who live in single-family homes. Most households include married couples with children who contribute to the group's large household size, averaging more than 3.09 persons per household. Their lifestyle reflects their youth and family orientation—buying infant and children's clothing and toys and visiting theme parks and zoos.

LifeMode Group: L10 Traditional Living

Segment Codes: 24, 32, 33, 34

The four segments in *Traditional Living* convey the perception of real middle America—hardworking, settled families. The group's higher median age of 37.8 years also conveys their lifestage—a number of older residents who are completing their child-rearing responsibilities and anticipating retirement. Even though they're older, many still work hard to earn a modest living. They typically own single-family homes in established, slow-growing neighborhoods. They buy standard, four-door American cars, belong to veterans' clubs and fraternal organizations, take care of their homes and gardens, and rely on traditional media such as newspapers for their news.

LifeMode Group: L11 Factories and Farms

Segment Codes: 25, 37, 42, 53, 56

The segments in the *Factories and Farms* summary group represent rural life—from small towns and villages to farms. Employment in manufacturing and agricultural industries is typical in these small, settled communities across America's breadbasket. Population change is nominal, and the profile is classic. Most households are families, either married couples or married couples with children. By age, the residents of *Factories and Farms* mirror the US distribution, with slightly more retirees. Median household income is a bit lower, almost \$37,716. Most own their homes. Their lifestyle reflects their locale, emphasizing home and garden care, fishing and hunting, pets, and membership in local clubs.

LifeMode Group: L12 American Quilt

Segment Codes: 26, 31, 41, 46

Location in America's small towns and rural areas links the four segments in *American Quilt*. Unlike *Factories and Farms*, this group represents a more diverse microcosm of small-town life, including the largest segment of Tapestry Segmentation, *Midland Crowd*. Manufacturing and agriculture remain part of the local economy, but *American Quilt* also includes workers in local government, service, construction, communication, and utilities. In addition to farmers, *American Quilt* includes the *Rural Resort Dwellers* segment, an older population that is retiring to seasonal vacation spots, and *Crossroads*, young families who live in mobile homes. Households in *American Quilt* are also more affluent, with a median household income of \$41,953, and more are homeowners. However, the rural lifestyle is also evident, with a preference for fishing, hunting, power boats, pickups, and country music.

Income Range of the LifeMode Summary Groups

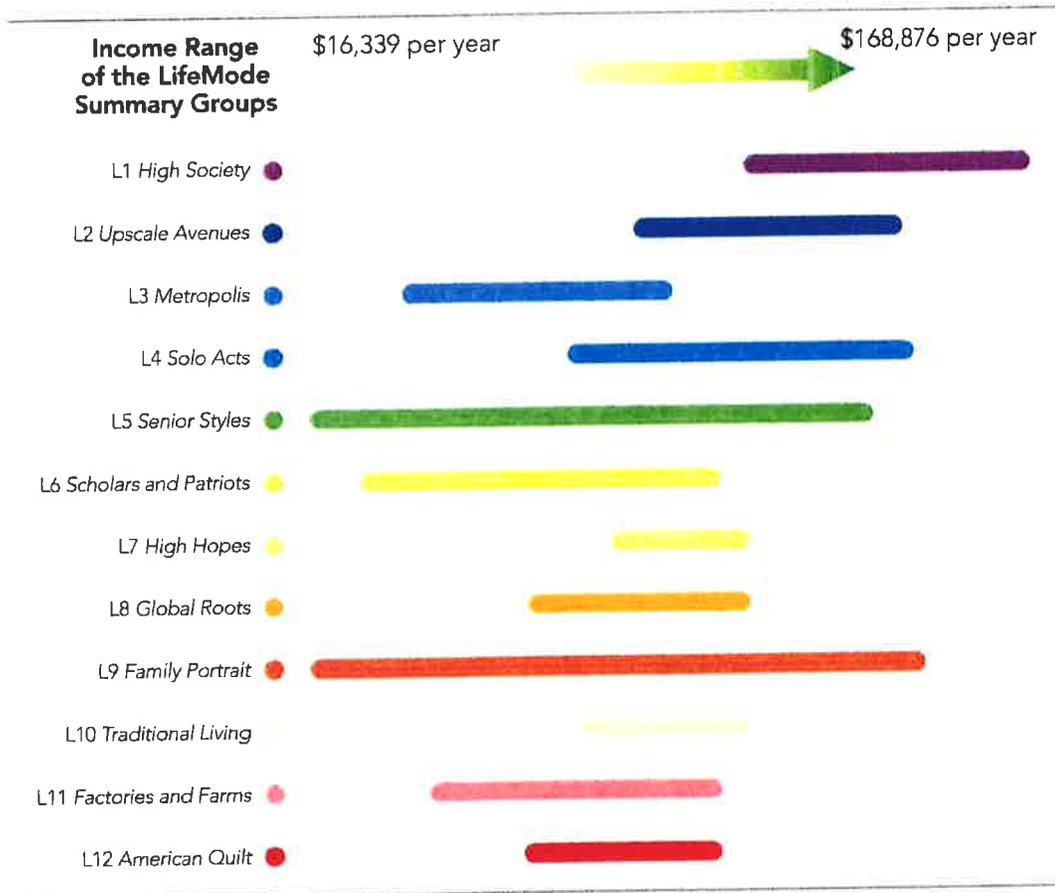


Table 2

Urbanization Summary Groups by Segment Codes

Urbanization Summary Group	Segment Codes
U1 <i>Principal Urban Centers I</i>	08, 11, 20, 21, 23, 27, 35, 44
U2 <i>Principal Urban Centers II</i>	45, 47, 54, 58, 61, 64, 65
U3 <i>Metro Cities I</i>	01, 03, 05, 09, 10, 16, 19, 22
U4 <i>Metro Cities II</i>	28, 30, 34, 36, 39, 52, 60, 63
U5 <i>Urban Outskirts I</i>	04, 24, 32, 38, 48
U6 <i>Urban Outskirts II</i>	51, 55, 57, 59, 62
U7 <i>Suburban Periphery I</i>	02, 06, 07, 12, 13, 14, 15
U8 <i>Suburban Periphery II</i>	18, 29, 33, 40, 43, 53
U9 <i>Small Towns</i>	41, 49, 50
U10 <i>Rural I</i>	17, 25, 26, 31
U11 <i>Rural II</i>	37, 42, 46, 56

Tapestry Segmentation Urbanization Group Descriptions

Tapestry Segmentation includes 65 distinctive market segments to profile the diversity of the American population and two ways to summarize and simplify the differences—LifeMode groups and Urbanization groups. Segments within a LifeMode group share an experience such as being born in the same period or a trait such as affluence. Urbanization groups share a locale, from the urban canyons of the largest cities to the rural lanes of villages or farms.

Urbanization Group: U1 *Principal Urban Centers I*

Segments: 08, 11, 20, 21, 23, 27, 35, 44

Principal Urban Centers I represents the most affluent populations of the country's largest metropolitan areas, those with populations of 2.5 million or more. Big-city residents live in apartments instead of single-family homes and take public transportation instead of driving. High population density exemplifies big-city life and its elements such as opportunities for high-paying jobs and paying higher rents and mortgages. Residents are young and just as likely to be single as married. Professional employment is typical, as is diversity. They take frequent vacations to visit family and friends. Foreign travel is important to the foreign-born population in this group. These urbanites embrace the amenities of city life from drinking coffee at the corner Starbucks to visiting museums, going dancing, and dining out. To stay fit, they walk or jog and work out at home or at a fitness club but rarely play team sports. They own the latest in electronics and go online for everything. Because they'd rather go out than stay in, home improvements and furnishings aren't important to them.

Urbanization Group: U2 *Principal Urban Centers II*

Segments: 45, 47, 54, 58, 61, 64, 65

Principal Urban Centers II represents the aspiring populations of the country's largest cities. This is the youngest (median age of 30.1 years) and most diverse population among the Urbanization groups including many recent arrivals in large "gateway" cities such as New York City, Los Angeles, and Chicago. Although the population density is second only to *Principal Urban Centers I*, it is still significantly lower. The search for affordable housing has moved these residents away from high-rises and into row houses, duplexes, and relatively lower-density buildings. Their lifestyle is characterized not only by their locale but also by their youth and nascent socioeconomic status. Their median household income is \$26,004. They are more likely to use public transportation and less likely to own their homes. Families are also more common in *Principal Urban Centers II*. Residents are more likely to buy baby goods and groceries than electronic gadgets.

Urbanization Group: U3 *Metro Cities I*

Segments: 01, 03, 05, 09, 10, 16, 19, 22

Upscale homeowners who live in densely populated cities characterize the eight segments in *Metro Cities I*. Their distinction lies in their choice of single-family homes in metropolitan cities. They embrace city living with the benefits of suburban single-family homes. *Metro Cities I* and *Suburban Periphery I* residents have the highest income among the Urbanization groups. Most are older than 35 years. Approximately 60 percent of the households are married couples with and without children. These well-educated residents are avid readers, particularly of novels. They are very active financial investors, are health conscious, and enjoy gardening as well as traveling domestically and abroad. They are also world-class shoppers, buying everything from electric tools and small household appliances to women's shoes and clothing.

Urbanization Group: U4 Metro Cities II

Segments: 28, 30, 34, 36, 39, 52, 60, 63

Ranked third for population density behind *Principal Urban Centers I* and *II*, *Metro Cities II* segments are found in larger cities and densely populated neighborhoods. The eight segments in *Metro Cities II* are neighborhoods in transition that include young starter households and retirees, single-person households, and families. Most householders rent apartments in multiunit buildings. The young population remains mobile. Many are enrolled in college; most are still trying different jobs. The median household income of this group is \$38,402; however, the disparity of wealth that varies from *Dorms and Diplomas* to *Retirement Communities* illustrates the wide range of ages and lifestyles in *Metro Cities II*. Consumers in this group look for economy and convenience. They prefer to drive four-door sedans, eat fast food, and shop at convenience stores. Because so many residents rent, few are interested in gardening and home improvement projects.

Urbanization Group: U5 Urban Outskirts I

Segments: 04, 24, 32, 38, 48

The segments in *Urban Outskirts I* live in higher-density suburban neighborhoods spread across metropolitan areas. Many of these neighborhoods are part of the main hub of social, cultural, and economic activity within the metro area. The proximity of higher-density suburban areas to employment and entertainment venues combines the convenience of access with the advantage of affordable suburban living. The median household income of *Urban Outskirts I* residents is \$51,313, on par with the national median, although the population is slightly younger with a median age of 34.1 (compared to the national median of 37 years). As in established suburban communities, housing is dominated by single-family dwellings but includes rental apartments to accommodate younger households with growing incomes. Owners will tackle do-it-yourself home improvement projects such as simple lighting and bathroom upgrades as well as painting and staining. They also enjoy caring for their lawns and gardens. They walk and swim for exercise; occasionally, they go bowling and fishing and play golf. Televisions are ubiquitous; however, residents are just as likely to read a newspaper or listen to the radio for news and entertainment.

Urbanization Group: U6 Urban Outskirts II

Segments: 51, 58, 59, 62

The settlement density and housing preferences of *Urban Outskirts II* are similar to *Urban Outskirts I*—high-density suburban neighborhoods in metropolitan areas. However, here the homes are older and the population is younger, with a median age of 30.9 years. Homes can be single-family or multiunit dwellings; nearly half of the housing units were built before 1960. Half of the households own their own home, although the younger population is less affluent, with household income approximately half that of the national median. This group includes a variety of household types ranging from the ethnically diverse family households of *Southwestern Families* to the shared and single-person student households found in *College Towns*. They prefer Folger's coffee to Starbucks, current consumption to saving, and shopping at discount retailers instead of patronizing high-end stores.

Urbanization Group: U7 Suburban Periphery I

Segments: 02, 06, 07, 12, 13, 14, 15

Moving away from the epicenters of city living, peripheral suburban expansion represents lower-density housing development located in metropolitan and micropolitan statistical areas throughout the United States. *Suburban Periphery I* is the largest Urbanization summary group in Tapestry Segmentation, with the most population and households, in addition to the highest annual growth. Married-couple families dominate, approximately half with children, primarily living in their own single-family homes with two cars. They are more likely to employ a lawn and gardening service, hire a professional cleaning service, and invest in home remodeling and improvement projects. This well-educated group not only shares the top rank for current household income with *Metro Cities I* but has also accumulated the most wealth. To keep up with the latest trends, they are constantly working on home improvement projects and furnishings. They own a variety of securities investments; many track their investments online frequently, and consult with a financial planner. They upgrade to the latest technology including big-screen TVs, personal computers, and the necessary software and peripherals. Domestic travel is part of their lifestyle. They watch CNN at home.

Tapestry Segmentation Urbanization

Group Descriptions

Urbanization Group: U8 Suburban Periphery II

Segments: 18, 29, 33, 40, 43, 53

Suburban Periphery II incorporates a population density similar to *Suburban Periphery I* but is more likely to be found in urban clusters of smaller cities in metropolitan areas. Housing is still predominantly owner-occupied, single-family homes but is older and closer to employment. Households are a mix, similar to that of the United States as a whole. More than half are married-couple families; one-quarter are singles who live alone. Although the median household income and home value are below the US median, their median net worth is higher. This is the oldest Urbanization summary group in Tapestry Segmentation, with a median age of 41.1 years, and the highest concentration of householders who are older than 65 years. They like to watch a variety of sports, news, or documentary shows on television; occasionally, they will also watch a movie or primetime drama. They prefer to read newspapers instead of magazines but have an equal preference for fiction or nonfiction books. They prefer domestic sedans.

Urbanization Group: U9 Small Towns

Segments: 41, 49, 50

Small towns represent the ideal in American communities—affordable, close-knit, and apart from the hustle and bustle of city life. The *Small Towns* Urbanization summary group is typical. Active members of their communities, residents participate in public activities, fund-raising, and public meetings. They make a modest living, with a median household income of \$35,561, but their earnings are sufficient to afford a single-family or mobile home. Most of the labor force is employed in manufacturing, construction, or retail sectors; many are already retired. *Heartland Communities* is well settled, but *Small Towns* welcomes the ongoing migration of younger *Crossroads* and older *Senior Sun Seekers*. They are less likely to own a credit card; those who do rarely use it. Technology is not an integral part of life for this group. Many still use a dial-up Internet connection; few will shop online or by phone. Because of their location, satellite TV is preferred, but many households don't subscribe to cable or satellite TV. Favorite pastimes include gardening and lawn care.

Urbanization Group: U10 Rural I

Segments: 14, 25, 26, 34

Small, nonfarm settlements, some of which are developing in suburban fringe areas, characterize the neighborhoods of *Rural I*. Married-couple families, many with grown children who have left home, work hard in blue-collar occupations. Some are self-employed with small businesses or farms. Their median age of 41.9 years is slightly older than that of the United States median. Their median household income of \$51,381 enables them to enjoy the comforts of large single-family homes with ample land. Do-it-yourselfers, they are proud of their homes and gardens, investing in major home improvement projects and the tools to do the job. Residents of *Rural I* may not be farmers, but they embrace the country lifestyle, from their gardens and pets to their favorite pastimes of hunting and fishing. They drive domestic pickup trucks.

Urbanization Group: U11 Rural II

Segments: 37, 42, 46, 56

Rural II countryside is the extreme opposite of urbanization. Low population density characterizes life in the country with its inconveniences such as the need for multiple vehicles and advantages such as affordable single-family homes with land. Most of the population lives in rural farm areas; the rest live in the country or in small villages and work in mining or manufacturing. Residents are slightly older than the US median, with a median age of 41.3 years; some are already retired. Most are homeowners. Residents of *Rural II* areas are settled; few of them will move. Family and home are central in their lives. Their lifestyles reflect a preference for comfort and practicality—western or work boots to dress shoes, kerosene heaters to espresso/cappuccino makers, recliners to patio furniture, garden tillers to trash compactors.

Levels of the Urbanization Summary Groups

U1 *Principal Urban Centers I*

U2 *Principal Urban Centers II*

U3 *Metro Cities I*

U4 *Metro Cities II*

U5 *Urban Outskirts I*

U6 *Urban Outskirts II*

U7 *Suburban Periphery I*

U8 *Suburban Periphery II*

U9 *Small Towns*

U10 *Rural I*

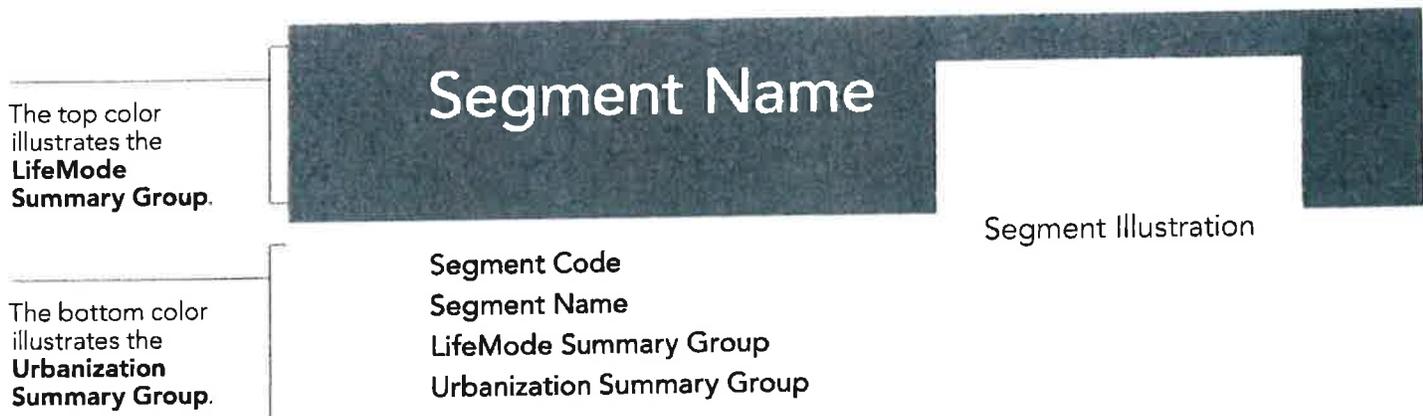
U11 *Rural II*

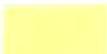
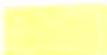
Urban

Rural

The "I" or "II" after each Urbanization summary group name denotes the relative affluence within the group, with I being more affluent than II.

Segment Legend



LifeMode Summary Group (top color)		Urbanization Summary Group (bottom color)
	L1 <i>High Society</i>	U1 <i>Principal Urban Centers I</i>
	L2 <i>Upscale Avenues</i>	U2 <i>Principal Urban Centers II</i>
	L3 <i>Metropolis</i>	U3 <i>Metro Cities I</i>
	L4 <i>Solo Acts</i>	U4 <i>Metro Cities II</i>
	L5 <i>Senior Styles</i>	U5 <i>Urban Outskirts I</i>
	L6 <i>Scholars and Patriots</i>	U6 <i>Urban Outskirts II</i>
	L7 <i>High Hopes</i>	U7 <i>Suburban Periphery I</i>
	L8 <i>Global Roots</i>	U8 <i>Suburban Periphery II</i>
	L9 <i>Family Portrait</i>	U9 <i>Small Towns</i>
	L10 <i>Traditional Living</i>	U10 <i>Rural I</i>
	L11 <i>Factories and Farms</i>	U11 <i>Rural II</i>
	L12 <i>American Quilt</i>	

01 Top Rung



Segment Code01
Segment Name*Top Rung*
LifeMode Summary GroupL1 *High Society*
Urbanization Summary GroupU3 *Metro Cities I*

Demographic

Residents of *Top Rung* neighborhoods are mature, married, highly educated, and wealthy. The median age is 44.6 years; one-third of the residents are in their peak earning years of 45–64. More than 77 percent of these households are composed of married couples; half of them have children, and half do not. Except for the presence of children, this is a low-diversity, monochromatic market.

Socioeconomic

Top Rung, the wealthiest consumer market, represents less than 1 percent of all US households. The median household income of \$168,876 is more than three-and-one-half times that of the US median. Their wealth comes from investments; income from interest, dividends, and rental properties; and remuneration from positions in management, professions, and sales, particularly in the finance, education, legal, and health care industry sectors. The proportion of households receiving self-employment income is twice that of the national level. The population is highly educated: more than 70 percent of residents aged 25 years and older hold a bachelor's or graduate degree.

Residential

The enclaves of the wealthy are dotted throughout major US cities, with higher concentrations located on the east and west coasts. *Top Rung* residents own at least one single-family home. Travel is part of their lives including the highest rate of interstate commuting.

Preferences

Top Rung residents can afford to indulge any choice. In addition to obvious investments such as stocks, money market accounts and funds, mutual funds, and annuities, residents hold life insurance policies valued at more than \$500,000. They travel frequently, always in style, to domestic and foreign destinations. Residents hire professional cleaning and lawn services to maintain their homes and property and contract for home improvement and remodeling projects. This is the top market for owning or leasing a luxury car. Residents favor new imported vehicles, especially convertibles. A vehicle navigation system is a key feature.

Top Rung residents are shoppers. They buy the “best of the best” at high-end department stores, in warehouse/club stores, and from catalogs. They also shop online for books and concert and sports event tickets. Residents spend approximately \$1,500 to \$2,000 for their home PCs, upgrading frequently to the latest and best technology. They need laptop computers and cell phones to network and keep up with their busy lives. They own three or more cell phones and generally have two phone lines in their homes.

Top Rung residents are avid readers of newspapers (usually two or more daily), magazines (especially airline, epicurean, business, finance, and fashion), and books (particularly history and biographies). They listen to classical music, jazz, all-news, public, sports, all-talk, and news/talk radio. They watch news shows on CNBC, CNN, and MSNBC and subscribe to HBO or Showtime.

They go to the theater and dance performances, visit museums, and play board games. Active in their communities, they join charitable organizations and environmental groups, work for political parties or candidates, write to elected officials, and contribute to PBS. Health conscious, they practice yoga, do aerobics, play golf and tennis, ski, ice skate, take vitamins, and buy low-fat food. They also watch tennis, golf, and skiing on TV.

02 Suburban Splendor



Segment Code02
Segment NameSuburban Splendor
LifeMode Summary GroupL1 High Society
Urbanization Summary GroupU7 Suburban Periphery I

Demographic

Suburban Splendor residents are families who live in growing suburban neighborhoods. Married couple families with and without children comprise 8 in 10 of these households. Household growth in these suburbs is 2 percent annually. The median age is 43.1 years, and half of the population is aged 35–64 years. These low-diversity neighborhoods are predominantly white.

Socioeconomic

These successful suburbanites are the epitome of upward mobility, just a couple of rungs below *Top Rung* in affluence. *Suburban Splendor* residents have a median household income of \$115,396. Labor force participation rates are high for both men and women; many households are two income. Most employed residents work in management, professional positions, and sales. They supplement their salaries with income from interest, dividends, and rental property at a rate much higher than the national level. Well educated, more than half the population aged 25 years and older hold a bachelor's or graduate degree.

Residential

Located in metropolitan areas throughout the United States, *Suburban Splendor* neighborhoods have a home ownership rate of 92 percent. Located in growing neighborhoods, 60 percent of the houses are relatively new, built after 1979. Because two-income households commonly require multiple vehicles, it is not surprising that 85 percent of these households own two or more vehicles.

Preferences

Hot tubs, espresso machines, granite countertops, and the latest interior design amenities are featured in *Suburban Splendor* homes. A main focus is home improvement and remodeling projects done mostly by contractors, although residents will tackle interior painting jobs. They own a wide array of electric tools that they may or may not use regularly. Residents hire a lawn maintenance service to cut the grass but like to plant their own shrubs and trees; treat their lawn with fertilizer, weed control, or insecticide; and sow grass seed. They have all the latest electronic gadgets including digital camcorders, video game systems, projection screen TVs, and numerous cell phones. This market prefers to own or lease a minivan or full-size SUV and is one of the top markets for owning or leasing a luxury car.

They devote free time to family; travel; and self-improvement pursuits such as physical fitness, reading, visiting museums, and attending the theater. They keep fit by working out weekly at a club or exercising on a treadmill or stationary bike at home in addition to skiing, ice skating, playing tennis and golf, and bicycling. They read the newspaper, books, and magazines (particularly epicurean, airline, travel, business, finance, and boating). Because they travel extensively in the United States and overseas for business and pleasure, they rack up the miles in frequent flyer programs. A favorite hobby is furniture refinishing. When listening to the radio, they prefer classical music as well as all-news, all-talk, news/talk, and sports programs.

Suburban Splendor residents are members of business clubs and are active investors, using the Internet to track and trade their stocks, bonds, and funds. They hold home equity credit lines, consult with financial planners, use stock rating services, and own life insurance policies valued at approximately \$500,000. They shop at upscale retailers, home stores, and wholesalers. They order items over the phone and shop online for airline tickets, flowers, and computer equipment.

03 Connoisseurs



Segment Code03
Segment Name*Connoisseurs*
LifeMode Summary GroupL1 *High Society*
Urbanization Summary GroupU3 *Metro Cities I*

Demographic

Residents of *Connoisseurs* neighborhoods are somewhat older, with a median age of 47.2 years. Approximately 70 percent of the population is married. Although residents appear closer to retirement than child-rearing age, 30 percent of the households are married couples with children living at home. Ethnic diversity is negligible.

Socioeconomic

Connoisseurs are second in affluence only to the *Top Rung* segment. This market is well educated; 64 percent of the population aged 25 years and older hold a bachelor's or graduate degree. Employed residents earn wages from high-paying management, professional, and sales jobs. Many are self-employed; the rate is twice that of the national average. They have a median household income of \$115,893 and supplement their salaries with income from interest, dividends, and rental properties.

Residential

Connoisseurs neighborhoods are usually slow-growing, established, affluent areas in densely populated city centers. Most of their homes are single-family structures built before 1970; 87 percent own their homes. Commuting is a way of life; compared to the US average, more *Connoisseurs* residents live in a different state from where they work.

Preferences

Connoisseurs residents may be second to *Top Rung* in wealth, but they are tops for conspicuous consumption. Their homes include the latest upgrades. Not do-it-yourselfers, residents hire contractors for home improvement and remodeling projects, lawn care, landscaping services for property upkeep, and professional housecleaning services. Households have burglar alarms for home security, and residents belong to the AAA auto club for vehicle security. They grind their own coffee beans, particularly Starbucks. This is one of the top markets for owning or leasing a luxury car or convertible equipped with a navigational system.

Exercise is a priority: they work out weekly at a club or other facility, ski, play golf and tennis, practice yoga, and jog. They also buy the latest sports attire to look good while exercising. They travel abroad and in the United States, go to museums, and attend theater and dance performances. They go online to make travel plans, track and trade their investments, and shop. They order from high-end catalogs and shop in person at service-oriented department stores.

Connoisseurs residents are well read. They read history books; mysteries; biographies; two or more daily newspapers; and epicurean, travel, finance, and business magazines. Residents listen to classical music as well as public, all-news, news/talk, and all-talk radio. Active in their communities, they work for political candidates or parties, write or visit elected officials, and participate in local civic issues. *Connoisseurs* eat out several times a week, but, for fun, will cook at home occasionally.

04 Boomburbs



Segment Code04
Segment Name*Boomburbs*
LifeMode Summary GroupL1 *High Society*
Urbanization Summary GroupU5 *Urban Outskirts I*

Demographic

The newest additions to the suburbs, these communities are home to busy, affluent young families. Both the neighborhoods and the families are growing. *Boomburbs* is the fastest-growing market in the United States; the population has been growing at a rate of 4.51 percent annually since 2000. It is also home to one of the highest concentrations of young families with children. The median age is 36.1 years; one-fifth of *Boomburbs* residents are between 35 and 44 years of age. There is little ethnic diversity in the population; most of the residents are white.

Socioeconomic

The *Boomburbs* market includes one of the highest concentrations of two-income households. Residents are well educated: more than 50 percent of the population aged 25 years and older hold a bachelor's or graduate degree. They work primarily in management, professional, and sales occupations. The median household income is \$104,395, more than double that of the US median. More than half of these households receive additional income from interest, dividends, and rental property.

Residential

The newest developments in growing areas, *Boomburbs* neighborhoods are concentrated in the South, West, and Midwest; the highest state concentrations are found in Texas and California. Approximately three-quarters of the housing units in *Boomburbs* neighborhoods were built after 1989; most are single-family houses. These are the newest developments in growing areas. The home ownership rate is 87 percent, compared to 64 percent for the United States. Commuting links these dual-career households with their suburban lifestyle. Many work outside their resident county; 35 percent cross county lines to work (compared to 23 percent for the United States).

Preferences

Residents' product preferences reflect their suburban lifestyle. *Boomburbs* is the top segment for buying household furnishings, toys and games, men's business and casual clothes, big-screen TVs, cars, and trees. This is also the top market to own big-screen TVs, DVD players, digital camcorders, video game systems, and scanners as well as owning or leasing full-size SUVs. Residents own laptop computers, all kinds of software, and two or more cell phones. They are well-insured, holding life insurance policies worth \$500,000 or more. They go online frequently to buy flowers and tickets to sports events, trade and track their investments, do their banking, and make travel plans. Personal computer use by children younger than 18 years is the highest of all the Tapestry segments.

Boomburbs residents prefer homes with fireplaces and hot tubs. They tend to employ professional household cleaning services. They will do home improvement projects themselves or hire a contractor for more complicated work. For property maintenance, they hire lawn care and landscaping services, but will also do some lawn care themselves.

Family vacations are a top priority; trips to Disney World, Sea World, and other theme parks are popular destinations. For exercise, they play tennis and golf, ski, lift weights, and jog. They watch family videos on DVD, attend baseball and basketball games, and go to golf tournaments. They will readily spend more than \$250 a year on high-end sports equipment and buy family DVDs for their collections. Favorite types of radio programs include alternative, soft contemporary, sports, and all-talk. They read parenting, finance, and business magazines and watch newer sitcoms and dramas on TV.

05 Wealthy Seaboard Suburbs



Segment Code05
Segment Name*Wealthy Seaboard Suburbs*
LifeMode Summary GroupL1 *High Society*
Urbanization Summary GroupU3 *Metro Cities I*

Demographic

Wealthy Seaboard Suburbs are older, established, affluent neighborhoods characteristic of US coastal metropolitan areas. Two-thirds of the population aged 15+ years is married; more than half of the married couples have no children. The median age is 42.9 years. Ethnic diversity is low; most residents are white.

Socioeconomic

Wealthy Seaboard Suburbs neighborhoods are affluent; the median household income is \$98,031. Income is derived from a variety of sources; approximately 60 percent of the households receive supplemental income from interest, dividends, and rental properties; 23 percent collect retirement income. More than half of those who work hold professional or management positions.

Residential

Wealthy Seaboard Suburbs neighborhoods are located primarily along the California, New York, New Jersey, and New England coasts. Three-fourths of the housing units were built before 1970. Single-family structures comprise 87.9 percent of the households. Slow to change, *Wealthy Seaboard Suburbs* homeowners are the least likely to have moved in the last five years. This segment ranks in the top five for residents who commute out of state to work.

Preferences

Not do-it-yourselfers, these residents hire lawn and maintenance services to care for their property and contractors to remodel their homes. The top market for remodeling expenditures, this segment spends more than \$5,000 a year on home improvements. A typical resident holds a home equity line of credit, holds life insurance policies worth \$500,000 or more, uses a brokerage firm, owns stocks, and donates to charities or nonprofits. They love to shop, especially at Macy's, Nordstrom, and warehouse stores. They also shop online and by phone from high-end catalogs. They drink coffee at home and on the road. They shop for milk and coffee at convenience stores, grind their own coffee beans, and visit coffee houses as well as Dunkin' Donuts and Starbucks.

Wealthy Seaboard Suburbs residents take nice vacations such as all-inclusive international packages, cruises, and beach trips in the United States or abroad. They also go to Las Vegas and Atlantic City. They go saltwater fishing, skiing, and ice skating and attend the theater. They read two or more daily newspapers; biographies; and epicurean, travel, business, and finance magazines. They listen to classical music, jazz, all-news, and sports radio programs. Cable movie channels are favorites, but residents will watch one or two drama series shows each week. This is a top segment for watching home shopping channels.

06 Sophisticated Squires



Segment Code06
Segment Name*Sophisticated Squires*
LifeMode Summary GroupL1 *High Society*
Urbanization Summary GroupU7 *Suburban Periphery I*

Demographic

Residents of *Sophisticated Squires* neighborhoods enjoy cultured country life on the urban fringe. These city escapees accept longer commutes to live near fewer neighbors. Mostly married couple families; more than 40 percent of the households are married couples with children that range from toddlers to young adults. The median age is 39.7 years. Most are Baby Boomers and are aged between 35 and 54 years. This segment is not ethnically diverse; most residents are white.

Socioeconomic

These residents are educated; more than one-third of the population aged 25 years or older holds a bachelor's or graduate degree; another third has attended college. Occupations range from management to unskilled labor positions. Most work in white-collar jobs. The median household income is \$83,079. Nearly 90 percent of the households earn wage or salary income; nearly half supplement their wages and salaries with interest, dividends, or rental income.

Residential

Sophisticated Squires live in less densely populated areas concentrated along the Atlantic coast and around the Great Lakes. Approximately 90 percent of the housing is single-family homes. Seventy-four percent of the housing was built before 1990; 55 percent was built between 1970 and 1989. More than 80 percent of the households own at least two vehicles. They prefer compact SUVs; however, many drive minivans or full-size SUVs.

Preferences

Do-it-yourselfers, *Sophisticated Squires* residents take care of their lawns and landscaping; home improvements; and remodeling projects such as bathroom remodeling, installing new light fixtures, painting home interiors, staining decks, and cleaning carpets with their steam cleaners. They like to barbecue on their gas grills and make bread with their bread-making machines. Many households own a motorcycle. A typical household will own three or more cell phones. Looking toward the future, many residents own stocks, bonds, and large life insurance policies. When dieting, they go on Weight Watchers; many own a treadmill or stationary bike to stay fit.

They go power boating, play board and word games, do woodworking projects, and attend football and baseball games. Adults also take photos, play golf, and ride their motorcycles. Children play games on the home personal computer and typically own a video game system. Residents listen to soft adult contemporary music; classic hits; news; all-talk; and sports radio, including broadcasts of professional games. Although many households have four or more TVs, residents watch as much television as typical US households. Favorite programs include news, comedies, dramas, and programs on HGTV.

07 Exurbanites



Segment Code07
Segment Name*Exurbanites*
LifeMode Summary GroupL1 *High Society*
Urbanization Summary GroupU7 *Suburban Periphery I*

Demographic

Exurbanites residents prefer an affluent lifestyle in open spaces beyond the urban fringe. Although 40 percent are empty nesters, another 32 percent are married couples with children still living at home. Half of the householders are aged between 45 and 64 years. They may be part of the “sandwich generation,” because their median age of 46.2 years places them directly between paying for children’s college expenses and caring for elderly parents. To understand this segment, the lifestage is as important as the lifestyle. There is little ethnic diversity; most residents are white.

Socioeconomic

Approximately half work in substantive professional or management positions. These residents are educated; more than 40 percent of the population aged 25 years and older hold a bachelor’s or graduate degree; approximately three in four have attended college. The median household income is \$82,074. More than 20 percent earn retirement income; another 57 percent receive additional income from investments.

Residential

Although *Exurbanites* neighborhoods are growing by 1.61 percent annually, they are not the newest areas. Recent construction comprises only 22 percent of the housing. Seventy percent of the housing units were built after 1969. Most are single-family homes. Because *Exurbanites* cannot take advantage of public transportation, nearly 80 percent of the households own at least two vehicles. Their average commute time to work is comparable to the US average.

Preferences

Because of their lifestage, *Exurbanites* residents focus on financial security. They consult with financial planners; have IRA accounts; own shares in money market funds, mutual funds, and tax-exempt funds; own common stock; and track their investments online. Between long-term care insurance and substantial life insurance policies, they are well insured. Many have home equity lines of credit.

To improve their properties, *Exurbanites* residents work on their homes, lawns, and gardens. They buy lawn and garden care products, shrubs, and plants. Although they will also work on home improvements such as interior and exterior painting, they hire contractors for more complicated projects. To help them complete their projects, they own all kinds of home improvement tools such as saws, sanders, and wallpaper strippers.

They are very physically active; they lift weights, practice yoga, and jog to stay fit. They also go boating, hiking, and kayaking; play Frisbee; take photos; and go bird watching. When vacationing in the United States, they hike, downhill ski, play golf, attend live theater, and see the sights. This is the top market for watching college basketball and professional football games. They listen to public and news/talk radio and contribute to PBS. They participate in civic activities, serve on committees of local organizations, address public meetings, and help with fundraising. Many are members of charitable organizations.

08 Laptops and Lattes



Segment Code08
Segment Name*Laptops and Lattes*
LifeMode Summary GroupL4 *Solo Acts*
Urbanization Summary GroupU1 *Principal Urban Centers I*

Demographic

With no home ownership or child-rearing responsibilities, residents of *Laptops and Lattes* neighborhoods enjoy single life in the big city. Most households are singles who live alone or with a roommate. The average household size remains constant at 1.8. Although this segment is slowly increasing, it is maturing and diversifying more quickly. The median age is 37.6 years. Although most of the population is white, Asians represent 10.4 percent of the total population.

Socioeconomic

This segment is affluent; the median household income of \$84,612 supports these residents. *Laptops and Lattes* residents are highly educated. More than 70 percent of residents aged 25 years and older hold a bachelor's or graduate degree; approximately 90 percent have attended college. The percentage enrolled in college or graduate school is more than three times the national level. Two-thirds of the employed residents work in professional or management positions, especially in the scientific, technical, finance, insurance, educational services, health care, and information industry sectors. More than half receive investment income; 19 percent earn self-employment income.

Residential

Laptops and Lattes residents prefer to live in major metropolitan areas such as New York City, Los Angeles, San Francisco, Boston, and Chicago. They are more likely to rent than own their homes; home ownership is at 39 percent. The majority of housing is apartments in multiunit buildings, especially those with 20 or more units. These neighborhoods are older and virtually untouched by urban renewal. Although 38 percent of the housing units were built before 1940, they are not inexpensive. The average gross rent is 85 percent higher than the US level, third highest of the Tapestry segments. Thirty percent do not own a vehicle.

Preferences

Cosmopolitan, connected, and politically liberal, *Laptops and Lattes* residents rely on their web-enabled cell phones instead of laptops to communicate. After the college segments, this is the top market to own an iPod and laptop or notebook computer. They go online to check e-mail, trade and track investments, review the latest news, arrange travel, and shop on sites such as amazon.com, ebay.com, and barnesandnoble.com. They also order items by phone. These residents travel, especially abroad, and enjoy a variety of vacations, such as backpacking, hiking, and beach trips. They stay at upscale hotels and rent cars when on vacation. A typical resident owns renter's insurance policies and uses dry cleaning services frequently.

Laptops and Lattes residents go to the movies, the theater, dance performances, rock concerts, museums, bars, nightclubs, baseball and football games, and professional basketball games. They watch foreign films or movie classics on DVD and news and music channels on cable TV. *Saturday Night Live* is a favorite program. They eat out frequently and take adult education classes. They shop at Target for essentials and luxuries at high-end department and home stores.

Residents exercise regularly at a health club and practice yoga, go downhill skiing, play tennis, jog, and bike. When they listen to the radio, they have a strong preference for classical music and all-news programs. They also listen to public radio and contribute to PBS. They read two or more daily newspapers; a variety of books such as history, biographies, and self-help; and travel, epicurean, airline, fashion, finance, and business magazines. They tend to buy organic and low fat/high fiber food. They eat nutrition/energy bars and take vitamins regularly. They get involved in community activities, write to elected officials, write articles that are published, and participate in environmental groups.

09 Urban Chic



Segment Code09
Segment Name*Urban Chic*
LifeMode Summary GroupL2 *Upscale Avenues*
Urbanization Summary GroupU3 *Metro Cities I*

Demographic

Urban Chic residents are professionals who live a sophisticated, exclusive lifestyle. More than half of these households are married-couple families, similar to the US proportion. Fewer than half of them have children. Unlike the United States, there is a smaller proportion of single parents and a higher proportion of singles and shared households. The median age of 42.7 years is older than the US median of 37 years, while the diversity index of 48 is lower than the US figure of 61.

Socioeconomic

Their median household income is \$82,524. They are well-educated; more than half of residents aged 25 years and older hold a bachelor's or graduate degree; 80 percent have attended college. They work in a variety of occupations, especially professional, management, and sales positions in the scientific and technical services, educational services, and health care industry sectors. Twenty percent of these households earn income from self-employment ventures; 55 percent receive additional income from investments.

Residential

Major concentrations of *Urban Chic* neighborhoods are found in urban areas on the northern and southern California coasts and along the east coast. These neighborhoods parallel the United States for housing type and home ownership. Homes range in age from pre-World War II to post-2000, and types from high-rises to single-family houses. Sixty-three percent of the housing is single-family; 27 percent is apartments in multiunit buildings. The rate of home ownership is 65 percent.

Preferences

Urban Chic residents focus more on their lifestyle than ambience. They travel extensively, visit museums, attend dance performances, shop at upscale stores, and do volunteer work. To stay fit, they downhill ski; go backpacking, hiking, and biking; practice yoga; do aerobics; play tennis; and lift weights. They buy natural or organic food and take a multitude of vitamins and dietary supplements. They drink imported wine and truly appreciate a good cup of coffee.

These busy, tech-savvy residents use PCs extensively. This is a top segment to own an Apple computer. They go online to arrange travel; get the latest news; check their investment portfolios; trade stocks; and buy books, clothes, flowers, and tickets to concerts and sports events. They use credit cards, often charging more than \$700 a month. They also own shares in stocks, tax-exempt funds, mutual funds, and money market funds. They will occasionally use a financial planner or brokerage firm.

Urban Chic is one of Tapestry Segmentation's top segments for radio listening; these residents tune in to classical music, all-talk, and public radio. They are also avid readers of newspapers; books; and general editorial, news and entertainment, business, and home service magazines. They seldom watch TV; however, their favorite channels broadcast news programs and documentaries.

10 Pleasant-Ville



Segment Code 10
Segment Name *Pleasant-Ville*
LifeMode Summary Group L2 *Upscale Avenues*
Urbanization Summary Group U3 *Metro Cities I*

Demographic

Prosperous domesticity distinguishes the settled lives of *Pleasant-Ville* residents. Families, especially middle-aged married couples, characterize *Pleasant-Ville* neighborhoods. The average family size is 3.3; nearly 40 percent of the households include children. Thirteen percent of the households have adult children. The median age of 40.5 years is slightly older than the US median of 37.2 years. The diversity index of 60 for the *Pleasant-Ville* population is slightly below the US figure of 61.

Socioeconomic

Prosperous domesticity distinguishes the settled lives of *Pleasant-Ville* neighborhoods. Among Tapestry Segmentation's upscale segments, these residents have a median household income of \$76,642. Employed residents work in a variety of occupations in diverse industry sectors, similar to the US distributions. Approximately one in five households receives retirement income, a ratio that is expected to increase. Forty-four percent of households earn additional income from interest, dividends, or rental properties.

Residential

Residents of *Pleasant-Ville* neighborhoods live in single family homes; nearly half were built between 1950 and 1970. Because these neighborhoods are concentrated in the Northeast and California, home values increased dramatically in this decade, but have begun to decline. These settled residents enjoy where they live; two-thirds have lived in the same house since 1995, when they bought their homes for much lower prices. Despite the fluctuation in value, home ownership remains high at 82 percent. To maintain their comfortable lifestyle, 12 percent commute an hour or more to work. Transportation is important; two-thirds maintain two or more vehicles.

Preferences

Because older homes require maintenance and renovation, home improvement projects are a priority in *Pleasant-Ville* neighborhoods. Not do-it-yourselfers, residents hire contractors for remodeling projects; however, they would probably do their own yard work instead of hiring a lawn service. They shop at warehouse stores for value and use coupons for discounts. For more upscale items, they shop at department stores. Those who are union members contract for health insurance through the union.

Pleasant-Ville residents spend time with their families, dine out, play cards and board games, attend baseball games, and visit theme parks. They take sightseeing vacations and beach trips in the United States or cruise to foreign ports. They own and use older PCs to shop online for small items, check e-mail, and read the news.

These residents listen to contemporary hit, all-news, all-talk, and sports radio, particularly during their commute times. The sports fanatics listen to ball games on the radio and watch a variety of major sports on TV. For exercise, they usually work out on the treadmill at home, walk, and swim. To keep abreast of current events, they would probably read two or more daily newspapers.

11 Pacific Heights



Segment Code11
Segment NamePacific Heights
LifeMode Summary GroupL2 Upscale Avenues
Urbanization Summary GroupU1 Principal Urban Centers I

Demographic

Upscale neighborhoods in Pacific coastal cities best describe *Pacific Heights*. More than three-fourths of the households include families, primarily married couples with or without children. The average family size for this market is 3.61. Less than 1 percent of US households, this segment has the highest percentages of Asian and Pacific Islander populations. The median age is 39.8 years.

Socioeconomic

At 60.6 percent, labor force participation is slightly below the national average, as is unemployment, at 10.5 percent. Most *Pacific Heights* households include more than one worker. The median household income is \$78,595. Education remains a priority for these first- and second-generation Americans. More than 60 percent of the residents aged 25 years and older have attended college; more than one in three hold a bachelor's or graduate degree. College and graduate school enrollment is slightly higher than the national average. Most households earn income from wages or salaries; 44 percent receive income from investments.

Residential

Pacific Heights households are found in the high-rent districts of California and Hawaii. The home ownership rate is 68 percent. Residents prefer single-family homes or townhomes. Most live in densely populated urban centers near their jobs in homes built before 1980.

Preferences

Pacific Heights residents keep in touch with family living overseas; they call frequently and travel abroad to visit. Residents will usually go to Las Vegas or visit Disneyland during the year. They read mystery books and listen to music on their MP3 players. They also rent foreign films, movies, comedies, and dramas on DVD to watch on their giant-screen TVs. Their favorite TV shows are detective dramas. They read general editorial and entertainment magazines. They listen to contemporary hit, adult contemporary, all-news, or urban radio, usually during their commutes. Baseball is their favorite sport to watch, listen to, and play.

To keep their homes looking first-rate, *Pacific Heights* residents spend for home improvement and remodeling projects. Most households own an imported vehicle, usually a Toyota or Honda that they will drive for several years. They belong to an auto club and rent cars when they travel. They shop regularly at Wal-Mart, Target, JCPenney, and wholesalers for essentials but will also often shop at upscale retailers. These residents are health conscious; they take vitamins and exercise regularly at a health club. When grocery shopping, they buy organic, low-sodium, and low cholesterol products. They eat nutrition bars as a healthy snack.

12 Up and Coming Families



Segment Code12
Segment Name*Up and Coming Families*
LifeMode Summary GroupL9 *Family Portrait*
Urbanization Summary GroupU7 *Suburban Periphery I*

Demographic

With an annual household growth rate of 4.56 percent, *Up and Coming Families* represents Tapestry Segmentation's second highest household growth market. A mix of Generation Xers and Baby Boomers with a median age of 32.6 years, this segment is the youngest of Tapestry Segmentation's affluent family markets. Residents of these neighborhoods are young, affluent families with younger children. Eighty percent of the households are families. Most of the residents are white; however, diversity is increasing as the segment grows.

Socioeconomic

Beginning their careers, residents of *Up and Coming Families* are earning above-average incomes. The median household income is \$69,522, higher than the national median. Nearly two-thirds of the residents aged 25 years and older have attended college; more than one in five holds a bachelor's degree. Ninety-one percent of households earn income from wages and salaries. Although half of the households have children, they also have working parents.

Residential

In the suburban outskirts of midsized metropolitan areas with populations higher than 250,000, approximately half of *Up and Coming Families* neighborhoods are concentrated in the South, the other half in the West and Midwest. Most residents live in new single-family housing; more than half the housing units were built in the last 10 years. Home ownership is at 80 percent.

Preferences

Family and home dictate the products these residents buy. Many are beginning or expanding their families, so baby equipment, children's clothing, and toys are essential purchases. Because many are first-time homeowners, basic household furniture and lawn fertilizer, weed control, and insecticide products are important. Car loans and mortgage payments are major household budget items. They are most likely to own or lease an SUV or a minivan. They eat out at family restaurants, especially on the weekends, and buy fast food at the drive-through or for takeout.

They play softball, take the kids to the zoo, and visit theme parks (generally Sea World or Disney World) where they make good use of their digital camera or camcorder. They rent comedy, family, and action/adventure DVDs. Cable station favorites include Country Music Channel, ESPN news, The Learning Channel, and the Disney Channel. They listen to country, soft rock, and contemporary hit radio.

13 In Style



Segment Code13
Segment Name*In Style*
LifeMode Summary GroupL2 *Upscale Avenues*
Urbanization Summary GroupU7 *Suburban Periphery I*

Demographic

In Style residents live in the suburbs but prefer the city lifestyle. Professional couples predominate. Household distributions by type are similar to those of the United States. Married-couple families represent 54 percent of households. Households without children (married couples without children, single-person, shared, and other family types), comprise more than two-thirds of all households. This count is increasing. The population is slightly older, with a median age of 40.5 years. There is little diversity in these neighborhoods.

Socioeconomic

In Style residents are prosperous, with a median household income of \$65,387. Wages and salaries provide income for 84 percent of the households; 47 percent also receive some form of investment income. *In Style* residents are more educated compared to the US level: 42 percent of the population aged 25 years and older hold a bachelor's or graduate degree. Forty-six percent of employed residents have professional or management positions, with above average concentrations in the finance, insurance, health care, technical services, and education industry sectors.

Residential

In Style residents live in affluent neighborhoods of metropolitan areas across the country. More suburban than urban, they embrace an urbane lifestyle; 14 percent prefer townhouses to traditional single-family homes chosen by 56 percent of the households. The 69 percent rate of home ownership is just slightly above average. More than three-quarters of the housing was built in the last 30 years.

Preferences

Computer savvy *In Style* residents go online daily to research real estate information; do their banking; track investments; trade stocks; book travel; and buy computer hardware or software, concert tickets, or tickets to sporting events. They use a financial planner and invest in stocks, bonds, money market funds, money market bank accounts, and securities. Looking toward the future, residents hold life insurance policies and contribute to IRA and 401(k) retirement accounts. To maintain their homes, they hire professional household cleaning services and contractors to remodel their kitchens.

Residents stay fit by exercising, eating a healthy diet to control their weight, buying low-fat foods, and taking vitamins. They attend live musical performances and gamble at casinos. They take domestic vacations to hike, golf, and go backpacking. They read magazines, listen to news-talk radio, and watch professional sports events and golf on TV.

14 Prosperous Empty Nesters



Segment Code14
Segment Name*Prosperous Empty Nesters*
LifeMode Summary GroupL5 *Senior Styles*
Urbanization Summary GroupU7 *Suburban Periphery I*

Demographic

Approximately 6 in 10 householders in *Prosperous Empty Nesters* neighborhoods are aged 55 years or older. Forty percent of the households are composed of married couples with no children living at home. Residents are enjoying the move from child-rearing to retirement. The median age is 47.6 years. Population in this segment is increasing slowly, at 0.53 percent annually; however, the pace will probably accelerate as the Baby Boomers mature. *Prosperous Empty Nesters* residents are not ethnically diverse; approximately 90 percent are white.

Socioeconomic

Prosperous Empty Nesters invest prudently for the future. The median household income is \$63,682. Although 71 percent of the households earn income from wages and salaries, 59 percent receive investment income, 30 percent collect Social Security benefits, and 28 percent receive retirement income. Thirty-nine percent of residents aged 25 years and older hold bachelor's or graduate degrees; nearly 70 percent have attended college. Many residents who are still working have solid professional and management careers, especially in the education and health care industry sectors.

Residential

These residents live in established neighborhoods located throughout the United States; approximately one-third of these households are found on the East Coast. These neighborhoods experience little turnover from year to year. Seventy-seven percent of the housing was built before 1980. Most of the housing is single-family.

Preferences

Prosperous Empty Nesters residents value their health and financial well-being. Their investments include annuities, certificates of deposit held longer than six months, mutual funds, money market funds, tax-exempt funds, and common stock. They hold universal life insurance policies. Residents exercise regularly and take a multitude of vitamins. They refinish furniture and play golf. They also attend golf tournaments and sports events, particularly baseball games and college football games. They order by phone from catalogs and use coupons. Households are likely to own or lease a luxury car.

Prosperous Empty Nesters residents take pride in their homes and communities, so home remodeling, improvements, and lawn care are priorities. Residents will join a civic club or charitable organization, help with fund-raising, write to a radio station or newspaper editor, and volunteer. They travel extensively in the United States and abroad. They read biographies, mysteries, and history books; two or more daily newspapers; and business or fitness magazines. They watch golf, news, and talk programs on TV.

15 Silver and Gold



Segment Code15
Segment Name*Silver and Gold*
LifeMode Summary GroupL5 *Senior Styles*
Urbanization Summary GroupU7 *Suburban Periphery I*

Demographic

With a median age of 60.5 years, *Silver and Gold* residents are the second oldest of the Tapestry segments. More than 70 percent are aged 55 years or older. Most residents have retired from professional occupations. Half of the households are composed of married couples without children. This segment is small, less than 1 percent of all US households; however, annual household growth is 2.35 percent since 2000. Residents of these neighborhoods are not ethnically diverse; 93 percent of them are white.

Socioeconomic

These are wealthy, educated seniors. Their median household income is \$62,761. Fifty-six percent of the households still earn wages or salaries, half collect Social Security benefits, 63 percent receive investment income, and 35 percent collect retirement income. The percentage of those who work from home is higher than the US worker percentage; nearly one-fourth of employed residents are self-employed, also higher than the US level.

Residential

Their affluence enables them to relocate to sunnier climates. More than 60 percent of these households are in the South, mainly in Florida. One-fourth are located in the West, mainly in California and Arizona. Neighborhoods are exclusive, with a home ownership rate of 82 percent. *Silver and Gold* ranks second of the Tapestry segments for the percentage of seasonal housing. Because these seniors have moved to newer single-family homes, they are not living in the homes where they raised their children.

Preferences

Silver and Gold residents have the free time and resources to pursue their interests. They travel domestically and abroad including cruise vacations. They are also interested in home improvement and remodeling projects. Although they own the tools and are interested in home improvement and remodeling projects, they are more likely to contract for remodeling and housecleaning services. Active in their communities, they join civic clubs, participate in local civic issues, and write to newspaper or magazine editors. They prefer to shop by phone from catalogs such as L.L. Bean and Lands' End.

Golf is more a way of life than just a leisure pursuit. They play golf, attend tournaments, and watch The Golf Channel. They also go to horse races, bird watching, saltwater fishing, and power boating. They eat out, attend classical music performances, and relax with a glass of wine. Favorite restaurants include Outback Steakhouse, Cracker Barrel, and Applebee's.

Silver and Gold residents are avid readers of biography and mystery books and watch numerous news programs and news channels such as Fox News and CNN. Favorite non-news programs include detective dramas.

16 Enterprising Professionals



Segment Code16
Segment Name*Enterprising Professionals*
LifeMode Summary GroupL2 *Upscale Avenues*
Urbanization Summary GroupU3 *Metro Cities I*

Demographic

Young, educated, single, married, working professionals, residents of *Enterprising Professionals* neighborhoods have a median age of 32.8 years. Forty-three percent of the households are singles who live alone or share housing with roommates, and 43 percent are married couple families. With an annual household growth of 1.95 percent per year since 2000, the households in this segment comprise approximately 2 percent of total US households. The diversity of the population is similar to that of the United States. Most of the residents are white; however, 12.4 percent are Asian.

Socioeconomic

Median household income is \$63,837. Ninety percent of the households earn income from wages and salaries; 39 percent receive income from investments. This is an educated group: approximately half of the population aged 25 years and older hold a bachelor's or graduate degree; more than three in four have attended college. These working professionals are employed in various jobs, especially in management, finance, computer, sales, and office/administrative support.

Residential

Enterprising Professionals residents move frequently to find growth opportunities and better jobs, especially in cities such as Chicago, Atlanta, and Seattle. Forty-six percent of the households are located in the South, 29 percent are in the West, and 20 percent are in the Midwest. They prefer to own instead of rent in newer neighborhoods of townhouses or apartments. For those who rent, the average gross rent is 36 percent higher than the US average.

Preferences

They are young and mobile with growing consumer clout. Those who rent hold renter's insurance policies. They rely on cell phones and e-mail to stay in touch. They go online to download videos and music, track their investments, and shop for items, including personal computers and software. They own laptops, video game systems, and digital camcorders.

They love to travel abroad and in the United States often. They play video games, visit theme parks, jog, and swim. They read computer, science, and technology magazines and listen to alternative, public-all-talk, and sports radio. They eat out at Cheesecake Factory and Chili's Grill and Bar. They shop for groceries at stores such as Publix and Albertson's.

17 Green Acres



Segment Code17
Segment NameGreen Acres
LifeMode Summary GroupL2 Upscale Avenues
Urbanization Summary GroupU10 Rural I

Demographic

Seventy-one percent of the households in *Green Acres* neighborhoods are married couples with and without children. Many families are blue-collar Baby Boomers, many with children aged 6–17 years. With more than 10 million people, *Green Acres* represents Tapestry Segmentation's third largest segment, currently more than 3 percent of the US population and growing by 1.92 percent annually. The median age is 42 years. This segment is not ethnically diverse; 92 percent of the residents are white.

Socioeconomic

Educated and hard-working, more than one-fourth of *Green Acres* residents hold a bachelor's or graduate degree; more than half have attended college. Occupation distributions are similar to those of the United States. Seventeen percent of the households earn income from self-employment ventures. The median household income is \$60,461.

Residential

Although *Green Acres* neighborhoods are located throughout the country, they are found primarily in the Midwest and South, with the highest concentrations in Michigan, Ohio, and Pennsylvania. A "little bit country," these residents live in pastoral settings of developing suburban. Home ownership is at 86 percent. Typical of rural residents, *Green Acres* households own multiple vehicles; 78 percent own two or more vehicles.

Preferences

Country living describes the lifestyle of *Green Acres* residents. Pet dogs or cats are considered part of the family. These do-it-yourselfers maintain and remodel their homes; projects include roofing and installing carpet or insulation. They own all the necessary power tools, including routers, welders, sanders, and various saws, to finish their projects. Residents also have the right tools to maintain their lawns, flower gardens, and vegetable gardens. They own riding lawn mowers, garden tillers, tractors, and even separate home freezers for the harvest. Continuing the do-it-yourself mode, it is not surprising that *Green Acres* is the top market for owning a sewing machine. A favorite pastime is using their ice cream maker to produce homemade ice cream. They prefer motorcycles and full-size pickup trucks.

For exercise, *Green Acres* residents ride their mountain bikes and go fishing, canoeing, and kayaking. They also ride horseback and go power boating, bird watching, target shooting, hunting, motorcycling, and bowling. They listen to auto racing and country music on the radio and read fishing and hunting magazines. Many own satellite dishes so they can watch news programs, the Speed Channel, and auto racing on TV. A favorite channel is Country Music Television.

18 Cozy and Comfortable



Segment Code18
Segment Name*Cozy and Comfortable*
LifeMode Summary GroupL2 *Upscale Avenues*
Urbanization Summary GroupU8 *Suburban Periphery II*

Demographic

Cozy and Comfortable residents are middle-aged married couples who are comfortably settled in their single-family homes in older neighborhoods. The median age of 41.7 years is four years older than the US median of 37.2 years. Most residents are married without children or married couples with school-aged or adult children. With 8.7 million people, this is a relatively large segment that is growing moderately by 0.48 percent annually since 2000. Most of these residents are white.

Socioeconomic

Although the labor force is older, they are in no hurry to retire. Employed residents work in professional, managerial, and service occupations in a variety of industry sectors. Occupation distributions are similar to US values. The median household income is \$59,287. Income for 80 percent of the households is earned from wages and salaries. Forty-six percent of households receive investment income.

Residential

Cozy and Comfortable neighborhoods are located in suburban areas, primarily in the Midwest, Northeast, and South. Many residents are still living in the homes in which they raised their children. Single-family structures make up 88 percent of the household inventory. Sixty-two percent of the housing units were built before 1970. Home ownership is at 84 percent.

Preferences

Cozy and Comfortable residents prefer to own certificates of deposit and consult a financial planner. They typically hold a second mortgage, a new car loan, a home equity line of credit, and a universal life insurance policy. Home improvement and remodeling projects are important to them. Although they will contract for some work, they attempt many projects, especially painting and lawn care. Depending on the season, they play golf or ice skate for exercise. They attend ice hockey games, watch science fiction movies on DVD, and take domestic vacations. They eat at family restaurants such as Friendly's, Bob Evans Farms, and Big Boy.

Going online isn't a priority, so they own older home computers. Television is very important; many households own four or more sets so they won't miss any of their favorite shows. They watch sports, particularly football, and news programs. Reading the Sunday newspaper is part of the routine for many.

19 Milk and Cookies



Segment Code19
Segment Name*Milk and Cookies*
LifeMode Summary GroupL9 *Family Portrait*
Urbanization Summary GroupU3 *Metro Cities I*

Demographic

Upscale living on a family allowance, *Milk and Cookies* represents young, affluent married couples who are starting their families or already have young children. The median age of 34.1 years represents the presence of kids; nearly half of the households include children. One in four householders is between the ages of 45 and 54. The population diversity is comparable to that of the United States, and the proportions of the population by race approximate the US distributions with slightly above-average ratios of black and Hispanic residents.

Socioeconomic

Ninety percent of *Milk and Cookies* households earn income from wages. The median household income is \$57,170. Fifty-eight percent have attended college; more than 20 percent hold bachelor's or graduate degrees.

Residential

Milk and Cookies residents prefer single-family homes in suburban neighborhoods of cities, largely in the South, particularly in Texas. Smaller concentrations of households are located in the West and Midwest. Housing units are generally 20–30 years old. Given the concentration of dual-income families, 71 percent of households have at least two vehicles. A family with two or more workers, more than one child, and two or more vehicles is the norm for these neighborhoods.

Preferences

As *Milk and Cookies* residents settle into their family-oriented lifestyle, they focus on family and the future. They are properly insured, carrying life and accidental death and dismemberment policies. They use a credit union, have overdraft protection, and usually have a new car loan. Although they may still own a motorcycle or small car, they prefer larger vehicles. When they move, they rent a U-Haul and move their own belongings. Many households own a dog. The presence of children in *Milk and Cookies* households drives their large purchases of baby and children's products including baby food, baby equipment, clothes, shoes, medicine, vitamins, board games, bicycles, toys, video games, and children's DVDs. Most households own one of the latest video game systems and a large-screen TV.

To save time in their busy lives, they frequently buy prepared dinners from the grocery store and fast food. They play video games, go bowling, and visit theme parks such as Six Flags and Sea World. They watch professional football and basketball games. Favorite cable channels include Cartoon Network, Discovery Channel, National Geographic Channel, and BET. They also work on their lawns, tackle interior painting projects, or do minor maintenance on their vehicles.

20 City Lights



Segment Code20
Segment NameCity Lights
LifeMode Summary GroupL3 Metropolis
Urbanization Summary GroupU1 Principal Urban Centers I

Demographic

The *City Lights* segment is composed of diverse neighborhoods situated primarily in the Northeast. This dense urban market is a mixture of housing, household types, and cultures that all share the same city space. Households include families and singles, similar to the US distribution by household type. The median age is 38.3 years. Compared to the US population, there are fewer children and slightly more people aged 75 or older. The ethnic or racial diversity is slightly higher than the US level, with higher ratios of Asian, Hispanic, and multiracial populations.

Socioeconomic

City Lights residents earn a good living working in white-collar and service occupations. The median household income is \$60,149, derived primarily from wages and some investments.

Residential

Housing types include single-family homes, townhouses, and apartments in buildings with 2 to 50 or more units. Thirty-five percent of housing are apartments in buildings with two to four units, approximately four times the national level. Unlike US housing, the proportion of single-family homes in the *City Lights* market is only 36 percent of the household inventory. Housing is also much older than the US average, because nearly two-thirds of the structures were built before 1960. The home ownership rate of 53 percent is lower than the national average.

Preferences

City Lights residents lead an urban lifestyle and take advantage of big-city opportunities. They buy household furnishings, groceries (including fast food and takeout), personal goods, and entertainment. They are more likely to buy household furnishings than home maintenance. They shop for clothes, shoes, jewelry, and toys at stores such as Target, Macy's, and Costco. They buy groceries at stores such as Kroger and Stop & Shop.

City Lights residents take vitamins, practice yoga, and do aerobics to stay fit. They travel domestically and abroad, take cruises, go to the movies, and watch family and classic movies on DVD. They visit Atlantic City to gamble and play the lottery. They read two or more Sunday newspapers and listen to news, soft adult contemporary, and classical music radio. Many households in large cities subscribe to digital cable service; HBO is a favorite cable channel.

21 Urban Villages



Segment Code21
Segment NameUrban Villages
LifeMode Summary GroupL9 Family Portrait
Urbanization Summary GroupU1 Principal Urban Centers I

Demographic

Urban Villages neighborhoods are multicultural enclaves of young families, unique to densely populated cities in "gateway" states, primarily California. The average family size of 4.1 people is the second largest in the Tapestry system. Household types are married couples with (approximately 40 percent) and without children, single parents, and other family types. The median age is 32.9 years. Population diversity is especially high; virtually every race and culture is represented in these communities. Asians comprise 11.2 percent of the total population. Sixty-one percent of the population is Hispanic, primarily of Mexican origin. Slightly more than one-third of the population is foreign born.

Socioeconomic

Fifteen percent of *Urban Villages* residents aged 25 years or older have not completed high school; more than one-fourth are high school graduates, and two-fifths have attended college. Many households have two wage earners, most of whom work in the manufacturing, health care, retail trade, construction, and educational services industry sectors. The median household income is \$58,348.

Residential

Eighty-four percent of *Urban Villages* households are located in California. Most homes are older, single-family structures. Approximately two-thirds of the housing units were built before 1970. The home ownership rate is 68 percent. Approximately 12 percent live in apartments, and at 3.6 percent, vacancy rates barely support turnover. A typical household owns multiple vehicles; 27 percent own three or more.

Preferences

Family and home items are household budget priorities for *Urban Villages* residents. Because most of their housing is older, residents repaint and remodel bathrooms and replace carpeting and roofing. Many buy groceries and baby products. They shop for groceries at Ralphs and Vons. They vacation in Hawaii and Mexico.

Leisure time is a family affair; residents visit Sea World regularly. They also like to go to the movies, eat fast-food at Carl's Jr. and Del Taco, and visit family restaurants such as Denny's.

Urban Villages residents rent foreign films on DVD and listen to Hispanic, contemporary hit, and variety radio. Although most watch TV, sports programming is not as popular here as in other markets. They have recently bought iPods and giant-screen TVs.

22 Metropolitans



Segment Code22
Segment NameMetropolitans
LifeMode Summary GroupL3 *Metropolis*
Urbanization Summary GroupU3 *Metro Cities I*

Demographic

Residents of *Metropolitans* communities prefer to live in older city neighborhoods. Approximately half of these households are singles who live alone or with others; 40 percent are married-couple families. One in four of the residents is aged 20–34 years; the median age is 37 years. Diversity is low; most of the population is white.

Socioeconomic

Half of the residents who are employed work in professional or managerial positions. More than 75 percent of the population aged 25 years and older have attended college or completed a degree program. Thirty percent have earned a bachelor's degree, and 23 percent hold a graduate degree. The median household income is \$53,486. Nearly half of the households earn extra income from interest, dividends, and rental properties.

Residential

Distributed throughout the country, residents of *Metropolitans* neighborhoods live in an eclectic mix of single-family homes and multiunit buildings. Sixty percent of the housing units were built before 1960. These neighborhoods change slowly; since 2000, the annual household growth is 0.28 percent. The home ownership rate is 59 percent.

Preferences

Metropolitans residents are no different from other owners of older homes who incur costs for maintenance and remodeling. They will contract for lawn maintenance and professional housecleaning services. Many will own or lease a station wagon. Planning for the future, residents own shares in investment funds, contribute to IRA savings accounts, and hold large life insurance policies.

These residents pursue an active, urbane lifestyle. They travel frequently for business and pleasure. They listen to jazz, classical, public, and alternative music radio. They go to rock concerts, watch foreign films on DVD, read women's fashion magazines, and play a musical instrument. They also practice yoga and go kayaking, hiking/backpacking, and water and snow skiing.

Active members of their communities, *Metropolitans* residents join civic clubs, volunteer for environmental causes, address public meetings, and work for a political party or candidate. They also belong to business clubs and contribute to PBS. They prefer to own and use a laptop computer, preferably an Apple. They go online daily to download music and buy books, airline tickets, CDs, and clothes. They also order merchandise by mail or over the phone.

23 Trendsetters



Segment Code23
Segment NameTrendsetters
LifeMode Summary GroupL4 Solo Acts
Urbanization Summary GroupU1 Principal Urban Centers I

Demographic

On the cutting edge of urban style, *Trendsetters* residents are young, diverse, and mobile. More than half the households are singles who live alone or share the rent with a roommate. Families comprise the remainder. With a median age of 34.8 years, this segment is slightly younger than the US median. Ethnically diverse, 13.7 percent of the residents are Asian and 23 percent are Hispanic; both percentages are well above those of the United States.

Socioeconomic

These residents are educated professionals who work in substantive jobs. Eighteen percent of the residents who are aged 25 years and older hold a graduate degree, 30 percent have earned a bachelor's degree, and 72 percent have attended college. The median household income is \$53,423. Wages account for most of the earned income; however, other sources include interest, dividends, rental properties, and self-employment business ventures.

Residential

Seventy-five percent of these neighborhoods are located on the West Coast; the other 25 percent are in the Northeast. Not ready for homeowner responsibilities, sixty-eight percent rent apartments in upscale, multiunit settlements in older urban districts. The average gross rent is one-third higher than the US average. Single-family homes and townhouses comprise the remainder of the housing types. Most of the housing was built before 1960. Because public transportation is so readily available, 18 percent of the households don't own a vehicle.

Preferences

Trendsetters residents are spenders; they shop in stores, online, and by phone. Fashion-conscious residents buy essentials at discount warehouse stores and branded clothing from stores such as Banana Republic, Gap, Nordstrom, and Macy's. To stay current on trends, they read fashion and epicurean magazines. They listen to classical, alternative music, public, and all-news radio. They are politically liberal.

To keep in touch, *Trendsetters* residents are never far from their electronic gadgets and computers. They own the latest and greatest laptop computers, PDAs, and iPods. They go online frequently to shop, make travel reservations, research real estate or investment information, and watch videos. Many young residents are beginning to invest, especially in bonds or CDs.

Health-conscious residents buy natural/organic foods, take vitamins, and exercise regularly. They go downhill skiing and practice yoga. They also travel, go to the movies, attend rock concerts, and read—especially nonfiction and biographies. When they watch TV, they prefer movie channels or MTV.

24 Main Street, USA



Segment Code24
Segment Name*Main Street, USA*
LifeMode Summary GroupL10 *Traditional Living*
Urbanization Summary GroupU5 *Urban Outskirts I*

Demographic

Main Street, USA neighborhoods are a mix of household types, similar to the US distribution. Approximately half of the households are composed of married-couple families, nearly one-third are single-person or shared households, and the rest are single-parent or other family households. The median age of 36.8 years nearly matches the US median. These residents are less diverse than the US population.

Socioeconomic

The median household income is \$50,987, derived from wages, interest, dividends, or rental property. More than one in five residents aged 25 years and older hold a bachelor's or graduate degree; half of the residents have attended college. Occupation and industry distributions are similar to those of the United States.

Residential

A mix of single-family homes and multiunit buildings, these neighborhoods are located in the suburbs of smaller cities in the Northeast, West, and Midwest. Nearly two-thirds of the housing was built before 1970. The home ownership rate is 62.

Preferences

Family-oriented and frugal, these residents may occasionally go to the movies or eat out at a family restaurant, such as Friendly's or Red Robin, but are most likely to stay home and watch a rental movie or play games with their children. They own pet cats. They play baseball and basketball and go swimming. They listen to classic hits and rock radio and watch cartoons and courtroom shows on TV. They go to the beach and theme parks or take domestic vacations to visit with family or see national parks.

They go online periodically to look for jobs, research real estate, and play games and are beginning to shop online. Those who do not have Internet access at home will go online at school or the public library. They use the Yellow Pages to find veterinarians or stores. They will invest in small home improvement and remodeling projects, usually doing the work themselves instead of hiring a contractor. They buy the tools and supplies for these projects from Home Depot or Ace Hardware. They keep up their lawns and gardens by planting bulbs, fertilizing, and applying lawn care products regularly.

25 Salt of the Earth



Segment Code25
Segment Name*Salt of the Earth*
LifeMode Summary GroupL11 *Factories and Farms*
Urbanization Summary GroupU10 *Rural I*

Demographic

Sixty-five percent of *Salt of the Earth* households are married couples with and without children. Twenty percent of the households are singles who live alone. The average household size of 2.6 people matches the US figure; the average family size of three is below the US value. The median age is 42.7 years. These neighborhoods are the least diverse of the Tapestry segments.

Socioeconomic

These residents work in professional and managerial positions and unskilled labor jobs. Higher than average proportions work in skilled labor occupations. Approximately 20 percent of the workers are employed in the manufacturing sector. The median household income of \$48,409, slightly lower than the US figure. At higher than national rates, residents supplement their wages with income from interest, dividends, rental properties, self-employment businesses, retirement plans, and Social Security benefits. Forty-one percent of the residents aged 25 years and older have attended college; 15 percent have earned a bachelor's or graduate degree.

Residential

Although these neighborhoods are found in rural areas across the United States, nearly half are in the Midwest, with concentrations in Pennsylvania, Ohio, Indiana, and Michigan. The other half are in the South and Northeast. Eighty-four percent of the residents own their homes. Most of the housing is single family; 12 percent are mobile homes. Twenty-two percent of the homes were built before 1940.

Preferences

Salt of the Earth residents are settled, traditional, and hardworking. Independent and self-reliant, they tackle small home improvement and remodeling projects. They spend money and time on their flower and vegetable gardens and own the necessary tools to handle these chores successfully. Twenty-eight percent of the households own three or more vehicles including a truck; many own a motorcycle. One of Tapestry Segmentation's top segments for owning or leasing multiple vehicles, these residents prefer domestic vehicles and do their own maintenance. Most of them carry insurance policies to protect themselves and their families. They invest in annuities, certificates of deposit, and US savings bonds. Many families own two or more pets, either dogs or cats.

They eat out at family restaurants such as Bob Evans Farms or Cracker Barrel. Satisfying their sweet tooth, they often bake goodies at home. They go fishing, hunting, target shooting, and boating and work out on indoor exercise equipment such as stationary bikes and treadmills. They read fishing and hunting magazines. They listen to country music radio and follow NASCAR racing. Many households own a satellite dish so they can watch CMT and the Speed Channel. Favorite TV programs include auto racing, horse racing, truck and tractor pulls/mud racing, and weekly sitcoms.

26 Midland Crowd



Segment Code26
Segment NameMidland Crowd
LifeMode Summary GroupL12 American Quilt
Urbanization Summary GroupU10 Rural I

Demographic

The growing population of 12 million, approximately 4 percent of the US population, identifies *Midland Crowd* as Tapestry Segmentation's largest segment. Since 2000, the population has grown by 2.18 percent annually. The median age of 37.9 years parallels that of the US median. Sixty-two percent of the households are married couple families; half of them have children. Twenty percent of the households are singles who live alone. *Midland Crowd* neighborhoods are not diverse.

Socioeconomic

Median household income is \$47,544, slightly lower than the US median. Most income is earned from wages and salaries; however, self-employment ventures are slightly higher for this segment than the national average. Half of the residents who work hold white collar jobs. More than 45 percent of the residents aged 25 years and older have attended college; 16 percent have earned a bachelor's or graduate degree.

Residential

Midland Crowd residents live in housing developments in rural villages and towns throughout the United States, mainly in the South. Three-fourths of the housing was built after 1969. The home ownership rate is 80 percent, higher than the national rate of 64 percent. Two-thirds of the housing is single-family houses; 24 percent are mobile homes.

Preferences

These politically active, conservative residents vote, work for their candidates, and serve on local committees. Their rural location and traditional lifestyle dictate their product preferences. A fourth of the households own three or more vehicles; they typically own or lease a truck, and many own a motorcycle. Proficient do-it-yourselfers, they work on their vehicles, homes, and gardens and keep everything in tip-top shape. They hunt, fish, and do woodworking. Dogs are their favorite pets. They patronize local stores or shop by mail order. They have recently bought radial tires. They often go to the drive-through at a fast-food restaurant.

Many households own a satellite dish so they can watch CMT, the Speed Channel, Home & Garden Television, NASCAR racing, rodeo/bull riding, truck and tractor pulls, fishing programs, and a variety of news programs. They listen to country music on the radio and read fishing and hunting magazines.

27 Metro Renters



Segment Code27
Segment NameMetro Renters
LifeMode Summary GroupL4 Solo Acts
Urbanization Summary GroupU1 Principal Urban Centers I

Demographic

Young, educated singles, residents of *Metro Renters* neighborhoods are just beginning their professional careers in some of the largest US cities such as New York, Chicago, and Los Angeles. Residents will sometimes share housing with a roommate to help defray the cost of their high rent. Households are either single person or shared. The median age of 32.1 years is younger than the US median of 37 years. Approximately 30 percent are in their 20s; 14 percent are in their early 30s. This younger population is also more diverse than the US population; 11.5 percent of the residents are Asian.

Socioeconomic

The median household income is \$48,211. Approximately 60 percent of employed residents work in professional and management occupations, most in the service industry sector. One of Tapestry Segmentation's most educated markets, more than one in four *Metro Renters* residents aged 25 years or older holds a graduate degree; one in three has earned a bachelor's degree. More than 80 percent of these residents have attended college; 17 percent are still enrolled in undergraduate or graduate school.

Residential

Metro Renters neighborhoods are found in the largest metropolitan centers across the United States, with the highest concentrations in California, New York, and Illinois. Approximately 90 percent of the housing is apartments; 37 percent in high-rise buildings.

Preferences

Because they rent, "home and hearth" products are low priority, although they will buy new furniture from stores such as Crate & Barrel or Pier One Imports. Most of them have renter's insurance. They buy clothes and other merchandise from traditional stores or online from favorites such as Banana Republic, Gap, Nordstrom, amazon.com, and barnesandnoble.com. They take their clothes to dry cleaners.

Active *Metro Renters* residents work out regularly at clubs, play tennis and volleyball, practice yoga, ski, and jog. They take advantage of their urban milieu; they go dancing, visit museums, attend classical or rock concerts, go to karaoke nights and the movies, and eat out. Painting and drawing are favorite hobbies. Residents enjoy traveling domestically and overseas and drinking domestic and imported beer and wine. They read two or more daily newspapers; history books; and airline, fashion, epicurean, travel, and business/finance magazines. They listen to alternative, jazz, classical music, all-news, and public radio. They seldom watch TV; most households own only one set so they can watch movies and news programs. They rent foreign and classic films on DVD.

They go online frequently to look for jobs, make travel arrangements, download music, research real estate, watch videos, and shop. Many buy their PCs online; they prefer laptops, although many also own PDAs. Politically, these neighborhoods are liberal.

28 Aspiring Young Families



Segment Code28
Segment Name*Aspiring Young Families*
LifeMode Summary GroupL7 *High Hopes*
Urbanization Summary GroupU4 *Metro Cities II*

Demographic

Most of the residents in these neighborhoods are young, startup families, married couples with or without children, and single parents. The average family size of 3.1 people matches the US average. Approximately two-thirds of the households are families, 27 percent are single person, and 9 percent are shared. Annual population growth is 1.13 percent, higher than the US figure. The median age is 31.1 years; nearly 20 percent of the residents are in their 20s. Typical of younger populations, *Aspiring Young Families* residents are more ethnically diverse than the total US population.

Socioeconomic

The median household income is \$46,275; wages provide the primary source of income. Approximately 60 percent of employed residents work in professional, management, sales, or office/administrative support positions. Overall, 87 percent of residents aged 25 years and older have graduated from high school, 58 percent have attended college, and 24 percent hold a bachelor's or graduate degree.

Residential

In large, growing southern and western metropolitan areas, the highest concentrations of these neighborhoods are found in California, Florida, and Texas. Twenty percent are located in the Midwest. Tenure is nearly even; 51 percent of the households rent; 47 percent own their homes. Residents live in moderately priced apartments, single-family houses, and startup townhouses. Most of the housing was built after 1969. The average gross rent is comparable to the US average.

Preferences

Focused on family and home, residents of *Aspiring Young Families* communities spend most of their discretionary income for baby and children's products, toys, home furnishings, cameras, and video game systems. They go online to look for jobs, play games, and buy personal preference items such as music and computer equipment.

These residents would probably go to a theme park while on vacation. They play video games, watch TV, eat out, and go to the movies. They also play basketball and go bowling and biking. They listen to urban stations and professional basketball games on the radio and watch sports, news, entertainment, and courtroom shows on TV. They eat out at family restaurants such as Chili's or IHOP and go to Jack in the Box or Sonic for fast food.

29 Rustbelt Retirees



Segment Code29
Segment NameRustbelt Retirees
LifeMode Summary GroupL5 Senior Styles
Urbanization Summary GroupU8 Suburban Periphery II

Demographic

Most of the households in these neighborhoods are married couples with no children or singles who live alone. Twenty percent are married couples with children. The median age is 44.2 years; more than one-third of the householders are aged 65 years or older. Seventeen percent are veterans. These neighborhoods are not ethnically diverse.

Socioeconomic

Many residents still work. Most households derive income from wages. However, 45 percent of households earn income from interest, dividends, and rental properties; 40 percent draw Social Security benefits; and 28 percent receive retirement income. The median household income is \$46,909, just below that of the US median. Overall, 88 percent of residents aged 25 years and older have graduated from high school, approximately 50 percent have attended college, and 20 percent hold a bachelor's or graduate degree.

Residential

Most *Rustbelt Retirees* neighborhoods can be found in older, industrial northeastern cities, especially in Pennsylvania, and other states surrounding the Great Lakes; 67 percent of the households are located in the Northeast and Midwest. Twenty-eight percent are in the South. Eighty-four percent of the housing is single-family homes; three-fourths were built before 1970. Unlike many retirees, these residents are content to stay put and live in the same house for years.

Preferences

These hardworking folks are settled; many have lived in the same house for years. Loyal to country and community, they tend to be politically conservative. They participate in public activities and fund-raising, visit elected officials, and work for political parties or candidates. They belong to fraternal organizations, unions, and veterans' clubs. Practical people who take pride in their homes and gardens, *Rustbelt Retirees* buy home furnishings and work on remodeling projects to update their houses. They watch their pennies, use coupons, and look for bargains at discount stores and warehouse clubs. They own savings bonds and certificates of deposit and hold life insurance policies.

They eat out at family restaurants such as Perkins and Friendly's and watch rented movies on DVD instead of going to the theater. They also go bowling, play cards and bingo, gamble in Atlantic City, and go to horse races. They watch home improvement shows, sports events, news programs, game shows, and old reruns on TV. Favorite channels include HGTV, the Hallmark Channel, and the Weather Channel. They listen to country, oldies, and sports radio and peruse the daily newspaper.

30 Retirement Communities



Segment Code30
Segment NameRetirement Communities
LifeMode Summary GroupL5 Senior Styles
Urbanization Summary GroupU4 Metro Cities II

Demographic

Most of the households in *Retirement Communities neighborhoods* are **single** seniors who live alone; a **fourth** is **married** couples with no children living at home. This **older market** has a median age of 50.3 years. One-third of the residents and 44 percent of householders are aged 65 years or older. Twenty-three percent of the population and 31 percent of householders are aged 75 years or older. Most of the residents are white.

Socioeconomic

The median household income for *Retirement Communities* is \$46,251, slightly below the US median. Nearly half of the households earn income from interest, dividends, and rental properties; 45 percent receive Social Security benefits; and 26 percent receive retirement income. Most of those still working are employed in white-collar occupations. *Retirement Communities* residents are an educated group: 14 percent of the residents aged 25 years and older hold a graduate degree, 35 percent have a bachelor's degree, and more than 60 percent have attended college.

Residential

Retirement Communities neighborhoods are found mostly in cities scattered across the United States. Most housing was built after 1959. Congregate housing with meals and other services included in the rent is a feature of these neighborhoods. Fifty-seven percent of the households live in multiunit buildings; however, 34 percent of the housing is single-family structures, and 8 percent is townhouses. The home ownership rate is 53 percent.

Preferences

With more time to spend on leisure activities and hobbies, residents play musical instruments, paint or draw, work crosswords, play bingo, or attend adult education classes. They also visit museums, attend the theater, go dancing, practice yoga, go canoeing, and play golf. They will travel to gamble in Atlantic City or to visit Disney World. They attend sports events such as golf tournaments, tennis matches, and baseball games. They spend time with their grandchildren and spoil them with toys. Politically active, these residents are "joiners" and belong to civic clubs and charitable organizations. They own stocks and bank online. They prefer to own or lease a domestic vehicle.

These residents describe themselves as moderate or frequent viewers of daytime and primetime TV. They watch news programs and baseball games, tennis matches, and golf tournaments. Cable channel favorites are Bravo, truTV, ESPN news, and Travel Channel. They listen to classical and public radio. Avid readers, they regularly read daily newspapers.

31 Rural Resort Dwellers



Segment Code31
Segment Name*Rural Resort Dwellers*
LifeMode Summary GroupL12 *American Quilt*
Urbanization Summary GroupU10 *Rural I*

Demographic

These neighborhoods are found in pastoral settings in rural nonfarm areas throughout the United States. Household types include empty-nester married couples, singles, and married couples with children. The median age is 49.4 years; more than half are aged 55 and older. Most residents are white in these low-diversity neighborhoods.

Socioeconomic

Although retirement beckons, most of these residents still work. The median household income is \$45,733, slightly below the US level. Six percent of those who are employed work at home, twice the US rate. Because so many residents are aged 65 and older, receipt of retirement income and Social Security benefits is common. More than two-fifths collect investment income; approximately 20 percent receive self-employment income. Nearly one in four residents aged 25 years and older holds a bachelor's or graduate degree; more than half of the residents have attended college.

Residential

The number of households in these small, low-density neighborhoods is growing at 1.5 percent annually. Seventy-eight percent of the housing is single-family structures; 15 percent is mobile homes. Home ownership is at 80 percent. Of the Tapestry segments, *Rural Resort Dwellers* has the highest percentage of seasonal housing, 16 times higher than the national level.

Preferences

These residents live modestly and have simple tastes. They often work on home improvement and remodeling projects and own garden equipment to maintain their yards. They cook and bake at home. Many households own multiple pets, particularly dogs and cats. Riding lawn mowers and satellite dishes are familiar sights in these areas, along with multiple vehicles, including a truck.

Active participants in local civic issues, residents also belong to environmental groups, church and charitable organizations, fraternal orders, unions, and veterans' clubs. They go hiking, boating, canoeing, hunting, fishing, horseback riding, and golfing. They listen to country radio and watch Animal Planet, CMT, BBC America, the National Geographic Channel, and primetime dramas on TV. The older residents focus on their general health care, prescription medications, and financial- and retirement-related matters. Many residents actively manage or plan their investments and retirement savings. The self-employed residents are more likely to have IRAs than 401(k) plans.

32 Rustbelt Traditions



Segment Code32
Segment Name*Rustbelt Traditions*
LifeMode Summary GroupL10 *Traditional Living*
Urbanization Summary GroupU5 *Urban Outskirts I*

Demographic

These neighborhoods are primarily a mix of married-couple families, single parents, and singles who live alone. With a population of 8.4 million, this segment is one of Tapestry Segmentation's largest. The median age is 35.9 years, just below the US median. There is little diversity in these communities.

Socioeconomic

The median household income is \$42,337. Half of the employed residents work in white-collar jobs. For years, these residents sustained the manufacturing industry that drove local economies. Now, the service industry predominates, followed by manufacturing and retail trade. Their education attainment is improving; more than 84 percent of residents aged 25 years and older have graduated from high school, 15 percent hold a bachelor's or graduate degree, and 44 percent have attended college.

Residential

The backbone of older industrial cities in the Great Lakes border states, residents of these neighborhoods live in modest, single-family homes. Home ownership is 70 percent. The relatively low median home value is because nearly two-thirds of the housing was built before 1960.

Preferences

These residents stick close to home; for years, they've lived, worked, shopped, and played in the same area. Not tempted by fads, they stick to familiar products and services. They drive domestic cars. They will spend money on their families, yard maintenance, and home improvements. They will hire contractors for special projects such as the installation of roofing, carpet, and flooring.

These financially conservative residents prefer to bank at a credit union and have personal savings. They might carry a personal loan and hold low-value life and homeowner's insurance policies. They're frugal and shop for bargains at Sam's Club, JCPenney, and Kmart. They go online weekly to play games and shop.

They go bowling, fishing, and hunting and attend car races, country music shows, and ice hockey games. They're big TV fans; they watch sitcoms and sports events. They also subscribe to cable and watch it regularly. Favorite channels are truTV, the Game Show Network, and the Disney Channel.

33 Midlife Junction



Segment Code33
Segment Name*Midlife Junction*
LifeMode Summary GroupL10 *Traditional Living*
Urbanization Summary GroupU8 *Suburban Periphery II*

Demographic

The median age for residents in these neighborhoods is 37 years; nearly 20 percent are aged 65 years or older. Households are a mix of family types and singles who live alone or share housing. Nearly half are married-couple families; 31 percent are singles. Most of these residents are white.

Socioeconomic

Most are still working; although at 61 percent, the labor force participation rate is slightly below average. A third of the households receive Social Security. The median household income is \$42,694. Educational attainment levels are comparable to the US levels.

Residential

Although scattered in suburbs across the country, these neighborhoods are found more frequently in the South and Midwest. Sixty-two percent of residents own their homes, close to the US rate. Nearly two-thirds of the housing is single family; the remainder are primarily apartments in multiunit buildings.

Preferences

Midlife Junction residents live quiet, settled lives as they move from child-rearing into retirement. To finance their retirement, they own certificates of deposit, savings bonds, and IRAs. They're careful spenders, always looking for bargains, and not swayed by fads.

On weekends, they eat fast food or go to family restaurants such as Friendly's or Perkins. They drive standard-sized domestic cars and shop by mail or phone from the L.L. Bean and JCPenney catalogs. They communicate with friends and family by e-mail. They go fishing, take walks, work crossword puzzles, play board games, do woodworking, and read science fiction or romance novels. They watch TV network shows and news programs.

34 Family Foundations



Segment Code34
Segment Name*Family Foundations*
LifeMode Summary GroupL10 *Traditional Living*
Urbanization Summary GroupU4 *Metro Cities II*

Demographic

Family is the cornerstone of life in these neighborhoods that are a mix of married couples, single parents, grandparents, and young and adult children. The average family size is 3.3. The median age is 39.1 years, slightly older than the US median; 7 in 10 are aged 45 or older. Diversity is low; 84 percent of the population is black.

Socioeconomic

The median household income is \$38,460. Some workers are retiring. More than 20 percent of the employed residents work for the government. Approximately one-third of the households are on Social Security or public assistance. Although education attainment levels are below the US level, a slightly higher proportion of residents aged 25 or older have graduated from high school.

Residential

These small urban communities are located in large metropolitan areas, primarily in the South and Midwest. Because these residents tend to stay put, very little household growth has occurred since 2000. Sixty-eight percent own their homes. Most of their houses are single-family, built before 1970.

Preferences

Active in their communities, *Family Foundations* residents attend church, serve on church boards, help with fundraising projects, and participate in civic activities. They spend money on their families and home maintenance projects. Careful consumers, they watch their budgets. They eat at home, shop at discount stores such as Marshalls and T.J. Maxx, and take advantage of savings at Sam's Club.

They're big TV fans; they watch courtroom shows, sports, and news programs. Viewership rates are very high; cable subscriptions are near the US level. Many households own multiple sets so they won't miss anything. They listen to gospel, urban, and jazz radio and read newspapers, *Entertainment Weekly*, and general editorial and newsmagazines. Basketball is a favorite sport; they play, attend professional games, watch games on TV, and listen to games on the radio.

35 International Marketplace



Segment Code35
Segment Name*International Marketplace*
LifeMode Summary GroupL8 *Global Roots*
Urbanization Summary GroupU1 *Principal Urban Centers I*

Demographic

Located primarily in cities in "gateway" states on both US coasts, *International Marketplace* neighborhoods are developing urban markets with a rich blend of cultures and household types. The population is young, with a median age of 32 years. Approximately 70 percent of the households are families; 44 percent are married couples with children and single parents. The average family size is 3.7. *International Marketplace* is the second most diverse of the Tapestry segments. More than half of the total population is Hispanic; 11.6 percent is Asian, and 7 percent is of two or more races. A high proportion of immigrants, including recent arrivals, live in these neighborhoods.

Socioeconomic

A fifth of *International Marketplace* households has one or more persons who has difficulty speaking English. Residents who work have jobs in the manufacturing, retail trade, health care, and other services industry sectors. Eighty-two percent of the households earn income from wages; some receive Supplemental Security Income or public assistance. The median household income is \$42,725. College and graduate school enrollment is similar to the US average; educational attainment levels are below the US level.

Residential

These densely settled, older urban neighborhoods are found in California and the northeast, around the largest US cities such as New York City and Los Angeles. A typical family rents an apartment in an older, multiunit building; because renters are dominant, home ownership is only 30 percent. Most housing was built before 1970.

Preferences

Because family is a top priority, "home and hearth" products aren't important to these folks. They buy groceries, diapers, and children's clothes. They keep in touch with overseas relatives by long-distance calls or traveling to visit. They shop at Marshalls and Costco. Their favorite drug store is Rite Aid. They pop in to 7-Eleven or am/pm for quick purchases such as a gallon of milk.

They watch TV and listen to Hispanic, urban, and contemporary radio instead of reading newspapers and magazines. They drink domestic or imported beer. They show no brand preference between foreign or domestic cars.

36 Old and Newcomers



Segment Code36
Segment Name*Old and Newcomers*
LifeMode Summary GroupL4 *Solo Acts*
Urbanization Summary GroupU4 *Metro Cities II*

Demographic

Residents of these transitional neighborhoods are either beginning their careers or retiring. They range in age from their 20s to 75 and older. Their median age of 36.3 years splits this disparity. There are more singles and shared households than families in these neighborhoods. Most of the residents are white; however, the diversity closely resembles that of the United States.

Socioeconomic

The median household income of \$39,234 is below the US median. Educational attainment, college, and graduate school enrollment are above average. The distribution of employees by occupation is similar to that of the United States.

Residential

Spread throughout metropolitan areas of the United States, *Old and Newcomers* neighborhoods sustain a lot of transition. More than half the population aged five years and older has moved in the last five years. More than 60 percent rent; approximately half in mid- or high-rise buildings, with nearly 14 percent in two- to four-unit buildings. Six in ten housing units were built between 1969 and 1989. The average gross rent in these neighborhoods is similar to the US average.

Preferences

Their purchases reflect the unencumbered lifestyles of singles and renters. They spend less at the grocery store than larger households. A domestic subcompact or compact car serves them well. They arrange their vacations to keep in touch with out-of-town relatives and friends.

They read fiction and nonfiction, newspapers, and magazines. They watch TV, listen to contemporary hits radio, go to the movies, and rent DVDs to view at home.

Their leisure activities are as varied as their ages. They exercise by walking, swimming, and going bowling. They also cook at home.

47 Prairie Living



Segment Code37
Segment Name*Prairie Living*
LifeMode Summary GroupL11 *Factories and Farms*
Urbanization Summary GroupU11 *Rural II*

Demographic

Small, family-owned farms in the Midwest dominate this stable market. Two-thirds of these households are composed of married couples with or without children. These residents are slightly older, with a median age of 42.9 years. There is little diversity here; 9 in 10 of these residents are white.

Socioeconomic

One in four residents who work are self-employed. Even though agricultural jobs are important to the local economy, 40 percent of the residents work in white-collar jobs. Thirty-one percent of the households receive Social Security benefits; 43 percent collect income from their investments. The median household income is \$43,161. Fifty-three percent of the residents aged 25 years and older have graduated from high school; the number of those who hold a bachelor's or graduate degree is below the US level.

Residential

Most of these Midwestern neighborhoods are centered in Iowa, Nebraska, Minnesota, and Kansas. Smaller groups are concentrated in the West and South. Eighty-one percent own their homes. Most housing is single-family; however, 11 percent are mobile homes, slightly higher than the US average. Thirty-six percent of the housing was built before 1940. Multiple vehicles are necessary to cover these rural areas. Approximately three-quarters of the households own two or more vehicles; one-third have three or more.

Preferences

Their purchases reflect their rural lifestyle; *Prairie Living* residents buy work boots and hunting clothes. They can with pressure cookers and fill their separate freezers with produce from their vegetable gardens. They own riding mowers, gardening equipment, and tools to service their vehicles and make home repairs. They will tackle home improvement projects such as kitchen remodeling. They're pet owners.

Many own satellite dishes because cable TV is not available in many rural neighborhoods. *Prairie Living* residents are loyal country music fans and tune in to radio and television for their favorite music. They enjoy hunting, fishing, horseback riding, target shooting, and riding around on their all-terrain vehicles. They tend to be political conservatives. They prefer domestic vehicles, especially trucks. Civic-minded *Prairie Living* residents serve on church boards, speak at public meetings, volunteer for charitable organizations, and help with fund-raising. *Prairie Living* households shop for bargains. Wal-Mart is, by far, their favorite retailer, followed by Kmart and JCPenney. They often rely on a Wal-Mart Supercenter for extra grocery shopping.

38 Industrious Urban Fringe



Segment Code38
Segment Name*Industrious Urban Fringe*
LifeMode Summary GroupL8 *Global Roots*
Urbanization Summary GroupU5 *Urban Outskirts I*

Demographic

Family is central to residents of *Industrious Urban Fringe* neighborhoods; slightly more than half of the households have children. Fifty-four percent are married-couple families; 17 percent are single parents. Multigenerational households are relatively common. The high proportion of children contributes to the relatively low median age of 29 years. Hispanics comprise 61.7 percent of the residents in these neighborhoods. More than one-fourth are foreign born, bringing rich, diverse cultures to these urban outskirts neighborhoods.

Socioeconomic

The median household income is \$40,400. The large average household size of 3.45 lowers the discretionary income available compared to segments with similar income. Residents take advantage of job opportunities offered in nearby cities; most work in the manufacturing, construction, retail trade, and service industries.

Residential

These neighborhoods are located in the West and South; the highest concentrations are in California, Texas, and Florida. Home ownership is at 62 percent. Single-family housing is dominant in these areas. To find more affordable housing, many live farther out from the city.

Preferences

Industrious Urban Fringe households balance their budgets carefully. Mortgage payments take priority. They shop at Wal-Mart, Kmart, Target, and other major discount stores for baby and children's products. They dine out less often than average households. Many have no financial investments or retirement savings other than their homes and are less likely than average to carry health insurance.

Keeping in touch is important to these residents; they often have a second phone line at home. They watch movies at home and will also see multiple movies at the theater each month. Television and radio are better than newspapers and magazines to reach these residents. They watch TV as much as the average US household, but subscribe to cable less often. They listen frequently to Hispanic, contemporary hit, and urban radio.

39 Young and Restless



Segment Code39
Segment Name*Young and Restless*
LifeMode Summary GroupL4 *Solo Acts*
Urbanization Summary GroupU4 *Metro Cities II*

Demographic

Change is the constant for *Young and Restless* households. This young, on-the-go population has a median age of 28.9 years. Approximately two-thirds of them are younger than 35. Fifty-eight percent of these households are either single person or shared. Neighborhoods are diverse. Fifty-six percent of the residents are white; however, an above-average representation of blacks, Hispanics, and Asians also live in these neighborhoods.

Socioeconomic

The median household income is \$39,765. Although the median household income is below the US median; only 23 percent of these residents have children, giving them more disposable income than segments with similar income levels. They are educated; 36 percent aged 25 years or older hold a bachelor's or graduate degree; 69 percent have attended college. These ethnically diverse folks are very career-oriented. Most employed residents have professional, sales, service, or office/administration support jobs.

Residential

These neighborhoods are in metropolitan areas in the South, West, and Midwest; the highest concentration is in Texas. Ranked fifth of the Tapestry segments for renters, 85 percent rent apartments in multiunit buildings. Most of the housing was built in the 1970s and 1980s. They don't mind moving for better jobs; 85 percent have moved in the last five years.

Preferences

These young, single professionals are pursuing their careers and living a busy lifestyle. They are technologically savvy and take advantage of the convenience provided by many products and services. They go online to communicate with friends and family, shop, bank, and look for jobs.

They read magazines to stay current on the latest lifestyle and entertainment trends and are just as likely to read a music magazine as a business publication. They go online for the latest news and sports. Television viewing is average. Radio is a good way to reach them; they listen to urban and contemporary hit music.

Seeing movies at theaters and on DVD is a major source of entertainment. They also enjoy going to bars or nightclubs. Their busy schedule also includes working out at the gym and playing various sports. Domestic vehicles have a slight edge in this market.

40 Military Proximity



Segment Code40
Segment Name*Military Proximity*
LifeMode Summary GroupL6 *Scholars and Patriots*
Urbanization Summary GroupU8 *Suburban Periphery II*

Demographic

The second youngest of the Tapestry segments, with a median age of 22.4 years, *Military Proximity* residents are young, married, and beginning parenthood. Ninety-two percent of the householders are younger than 45 years. Two-thirds of the households are composed of married couples with children, the dominant household type for this segment. With an average of 3.37, *Military Proximity* is one of Tapestry Segmentation's top segments for household size.

Socioeconomic

The Armed Forces is the commonality for these residents. More than three-fourths of the labor force are on active duty or have civilian jobs on military bases. The median household income is \$41,240. Most families are too young to have accumulated much wealth. The educational attainment in this market is unique. Although the percentage of residents aged 25 years and older who hold a bachelor's or graduate degree is slightly below the US level, 72 percent have attended college.

Residential

Moving is routine for *Military Proximity* residents. More than 90 percent of householders have moved within the last five years. These communities are located throughout the United States but mainly in the South and West; the highest state concentrations are in California, Texas, Hawaii, North Carolina, and Virginia. Households live in a mix of townhomes and apartments in small multiunit buildings with fewer than 20 units. Only one-fifth of the housing is single-family dwellings. *Military Proximity* has the second highest percentage of renter-occupied housing units among the Tapestry segments; more than 9 in 10 rent. Most of these housing units were built between 1950 and 1979.

Preferences

Home life for *Military Proximity* residents revolves primarily around the family. They routinely shop for baby and children's products and clothing at major discount department stores. Whenever possible, they shop at the military commissary. They entertain their children with DVDs. Subscribing to cable television is for the adults as much as for the children; both Nickelodeon and MTV are popular. Besides listening to music on the radio, they also tune in to news and talk programs. The family portrait of a *Military Proximity* household is not complete without pets, particularly dogs.

To transport their families, many households own SUVs. Having two cars is common to juggle their daily needs. *Military Proximity* households are comfortable with personal computers and the Internet. In fact, their Internet usage exceeds that of the general population. Home personal computers are used by both adults and children. Renter's insurance is popular in this market, although the coverage is usually low. Despite their youth, the proportion of households investing for retirement is similar to the US average. To ensure the stability of their families' financial future, *Military Proximity* households are more likely to have disability income insurance.

41 Crossroads



Segment Code41
Segment NameCrossroads
LifeMode Summary GroupL12 American Quilt
Urbanization Summary GroupU9 Small Towns

Demographic

Crossroads neighborhoods are growing communities in small towns in the South, Midwest, and West. Married couples with and without children and single parents are the primary household types in these areas. Younger than the US average, they have a median age of 33.6 years; nearly half are younger than 45. This population is growing at 1.4 percent annually, faster than the growth of the US population. One in five is Hispanic, a higher proportion than the United States.

Socioeconomic

The median household income is \$37,185. Educational attainment is lower than the US average; 39 percent of residents aged 25 years or older have attended college, compared to 54 percent for the United States. Most employed residents work in the manufacturing, retail, construction, and service industries.

Residential

Affordable housing in these small-town communities provides opportunities for young families to own their homes. Home ownership is 69 percent. More than half of the housing is mobile homes; 36 percent are single-family dwellings. Most were built after 1969.

Preferences

Mindful of their expenses, *Crossroads* households budget for what they buy and choose selectively where to spend their money. They shop at discount department stores such as Wal-Mart and Kmart. Many shop for groceries at Wal-Mart Supercenters. Their priorities are their families and their cars. Children are the focus of their lives, and they buy children's products in addition to groceries. They drive domestic cars and trucks and handle the maintenance themselves. Investing and saving for retirement are a low priority; many households do not own mutual funds, stocks, or retirement savings accounts. Home improvement projects also rank low.

They watch NASCAR racing and other sports on TV. Typically, they own a satellite dish or subscribe to cable. They also like to listen to the radio, preferring country and contemporary hit music to other formats. They read the newspaper less frequently than average US households; however, they read magazines, especially automotive, boating, motorcycle, and fishing publications. They go fishing and watch movies on DVD.

42 Southern Satellites



Segment Code42
Segment Name*Southern Satellites*
LifeMode Summary GroupL11 *Factories and Farms*
Urbanization Summary GroupU11 *Rural II*

Demographic

Found primarily in the rural South, *Southern Satellites* households consist of married couples with and without children; 22 percent are singles. The median age of 39.6 years is near the US median of 37.2. This segment has low diversity; 87 percent of the residents are white.

Socioeconomic

The median household income is \$37,185. Most households earn income from wages and salaries; 28 percent receive Social Security benefits. The manufacturing and service industry sectors provide most of their jobs. Educational attainment is lower than the national level; 24 percent of residents aged 25 years and older have not graduated from high school.

Residential

Eighty percent of these households are in the South. Primary housing types in these neighborhoods are newer single-family dwellings for two-thirds of the households; 30 percent live in mobile homes. The home ownership rate is 79 percent. Nearly two-thirds of the housing was built after 1969. Vacancy rates are slightly above average.

Preferences

These rural residents enjoy country life. Fishing and hunting are two favorite leisure activities, and *Southern Satellites* residents spend money for magazines, clothes, and gear related to these interests. Because cable is not always available, many residents own satellite dishes.

Many own pets. They work in their vegetable gardens and might own equipment such as riding mowers and tillers to help with outdoor chores. Most households have two or more vehicles to meet their transportation needs; they prefer domestic cars, and many drive trucks.

They consider themselves to be politically conservative. They read newspapers and magazines infrequently; however, they listen to country radio and watch fishing programs, NASCAR races, and country music programs on TV. Owning personal computers and going online from home isn't important to these residents.

43 The Elders



Segment Code43
Segment Name*The Elders*
LifeMode Summary GroupL5 *Senior Styles*
Urbanization Summary Group ...U8 *Suburban Periphery II*

Demographic

With a median age of 71.2 years, *The Elders* is Tapestry Segmentation's oldest segment. Eighty percent of the householders are aged 65 years or older. This population is growing by 1.22 percent annually. Nine in ten households are either married couples with no children living at home or singles. The small household size of 1.7 reflects those two household types. More than 4 in 10 live alone, one of the top 10 ratios among the Tapestry segments. There is no ethnic diversity; 95 percent of the population is white.

Socioeconomic

Most of these residents have retired; 80 percent receive Social Security benefits, more than three times the national level. Forty-eight percent collect retirement income, more than two-and-one-half times the national level; 65 percent receive income from their investments. Only 20 percent are still working. The median household income is \$38,843, lower than the US median of \$50,227.

Residential

Representing the highest concentration of retirees, *The Elders* residents favor communities designed for senior living, primarily in warm climates. Half of these households are located in Florida, and 30 percent are found in Arizona and California. Nine in ten households live in owner-occupied housing. Housing types are mixed; half are single-family homes, one-third are multiunit buildings, and 17 percent are mobile homes.

Preferences

Informed, independent, and involved, these seniors are members of veterans' clubs and fraternal orders. They watch their diets; visit their doctors regularly; take vitamins and dietary supplements; buy low-cholesterol, fat-free, low-sodium, low-calorie, and sugar-free food; and take prescription drugs to manage various health conditions. To reduce their caffeine intake, they drink decaffeinated coffee and caffeine-free diet colas. Their diverse investment portfolios include shares in tax-exempt funds, annuities, and insured money market accounts. Many hold long-term care and travel insurance policies.

Golf is important to them; they play golf, buy golf clothes, and watch golf tournaments on TV. They also walk, work crosswords, fish, gamble at casinos, go to the theater, and eat out. Freed from work, many travel domestically and abroad. A cruise is a favorite vacation.

TV is part of their daily routine; most subscribe to cable. They watch a variety of news programs, movies, game shows, and sports. They read mysteries and daily newspapers. They have a slight preference for domestic vehicles; many belong to an auto club. They prefer to shop at Wal-Mart, Target, and JCPenney instead of other department stores.

44 Urban Melting Pot



Segment Code44
Segment Name*Urban Melting Pot*
LifeMode Summary GroupL8 *Global Roots*
Urbanization Summary GroupU1 *Principal Urban Centers I*

Demographic

Recently settled immigrants live in ethnically rich *Urban Melting Pot* neighborhoods. More than half of the population is foreign born; half of these have come to the United States in the last 10 years. The median age is 36.3 years, slightly younger than the US median of 37.2. Distinctly diverse, more than one in four are Hispanic. Whites represent 47 percent of the population; Asians, 30 percent; and 6 percent are multiracial. Household types are equally diverse: 45 percent are married couple families; 30 percent are singles who live alone; single parents, other family types, and shared households also live in these neighborhoods.

Socioeconomic

The median household income is \$39,570. Wages and salaries provide income for most households. Some receive income from Supplemental Security Income and public assistance. As expected in a large urban center, the educational attainment levels vary. Although the proportion of the population aged 25 years and older who have no high school diploma is high compared to that of the United States, the proportion with a bachelor's or graduate degree is comparable to the US level. Twenty percent are enrolled in college or graduate school. Although the cost of urban living is high, generally, urban areas provide better employment opportunities. Nearly half of the employed residents work in the service industry sectors.

Residential

Three-fourths of *Urban Melting Pot* households rent. Half of these housing units were built before 1950. Most of these neighborhoods are located in the high-density, urban canyons of large cities; 70 percent are in New York, and 16 percent are in California. *Urban Melting Pot* neighborhoods are the second most densely populated of the Tapestry segments. Because transportation is widely accessible, 47 percent of the households don't own a vehicle.

Preferences

Fashion conscious yet cost conscious, *Urban Melting Pot* residents love to shop. Macy's is one of their favorite shopping haunts, but they shop at other upscale retailers, as well as warehouse/club stores, especially for clothes and jewelry.

Distance does not deter these residents from contacting family living outside the United States. They keep in touch with phone calls and foreign travel. Because so many rent, some households need to wash clothes at laundromats.

In their spare time, they go to the beach, visit theme parks, gamble at casinos such as those in Atlantic City, and buy lottery tickets. They watch news programs and movies on TV. They would rather see professional sports on TV than college games; they really like to watch baseball games. They listen to contemporary hit, all-news, Hispanic, and soft rock radio.

45 City Strivers



Segment Code45
Segment NameCity Strivers
LifeMode Summary GroupL3 *Metropolis*
Urbanization Summary GroupU2 *Principal Urban Centers II*

Demographic

Residents of this young, relatively diverse urban market have a median age of 33.7 years and a 68 percent mix of family types, such as married couples, single parents, and other families. Nearly eight in ten residents are black.

Socioeconomic

The median household income is \$37,034. Some households receive Supplemental Security Income or public assistance income. Education attainment levels are below those of the United States; approximately 43 percent of residents aged 25 years and older have attended college. Approximately half of employed residents work in the service and health care industry sectors in the city. Twenty-two percent of the residents who are employed are government workers, employed primarily by the local government. Approximately one in five works in an office/administrative support position.

Residential

City Strivers residents live in densely populated, settled neighborhoods of major metropolitan areas, especially in New York City and Chicago. The home ownership rate is 31 percent. Nearly two-thirds of the households are located in the Northeast, with smaller concentrations in other regions of the United States. Approximately two-thirds of the households rent apartments in older, multi-unit buildings built before 1960. Small buildings with two to four units are more common in these neighborhoods. Because of their urban surroundings, many residents rely on public transportation; two in five households do not own a vehicle.

Preferences

The rental homes in City Strivers neighborhoods are moderately equipped with the essentials. The high cost of living and rent lowers discretionary income. Many residents carry renter's insurance. They shop at wholesale clubs for most of their groceries, baby products, and children's essentials. They prefer accessible grocery stores such as Pathmark and Stop & Shop. A multitude of department and clothing stores is nearby. They eat fast food at White Castle, Popeyes, Checkers, and Dunkin' Donuts.

Favorite stations include BET and cable movie channels such as Showtime, Cinemax, the Movie Channel, and Encore. They watch a lot of TV such as courtroom shows, talk shows, comedies, science fiction, boxing, and professional wrestling. They read music and bridal magazines and listen to urban, all-news, jazz, and variety radio. They attend professional football and basketball games, go to the movies, take trips to Atlantic City, and visit theme parks such as Six Flags. They also play tennis and basketball.

46 Rooted Rural



Segment Code46
Segment NameRooted Rural
LifeMode Summary GroupL12 American Quilt
Urbanization Summary GroupU11 Rural II

Demographic

The population of the *Rooted Rural* segment is slightly older, with a median age of 43.7 years; 50 percent are older than age 55. Married-couple families dominate these rural neighborhoods; however, 23 percent are singles who live alone. More of the married-couple families are empty nesters than those who have children. There is little ethnic diversity in the *Rooted Rural* segment; almost 90 percent of the residents are white.

Socioeconomic

The median household income is \$37,032. One-third of the households receive Social Security benefits. Although the agricultural industry is more prominent in this market than at the US level, many employed residents work in the service and manufacturing industry sectors. More than three in four people aged 25 or more have graduated from high school; 13 percent hold a bachelor's or graduate degree.

Residential

Although *Rooted Rural* neighborhoods are located in rural areas throughout the country, more than three-fifths of the households are found in the South. Housing types include single-family dwellings (70 percent of households) and mobile homes (26 percent). Home ownership is at 81 percent. Most of the housing units were built after 1970. A higher proportion of seasonal housing contributes to higher vacancy rates in these neighborhoods. Local residents tend to move infrequently.

Preferences

Rooted Rural residents are do-it-yourselfers. These settled families take pride in their homes and keep busy with home improvement and remodeling projects. They also take pride in their gardens, regularly buying lawn and garden insecticides, flower and vegetable seeds, and plants. Typical of their rural lifestyle, many have a lawn or garden tractor and ATVs and own an assortment of tools. They prefer domestic vehicles; most households own or lease a truck. Typically, a household member handles vehicle maintenance. Many homes have pets.

When families eat out, they prefer Ryan's Family Steakhouse, but they generally prepare meals at home with fresh vegetables from their gardens. Many homes own a separate freezer to store their produce. They shop for groceries and buy their favorite Folger's coffee at Winn-Dixie, Piggly Wiggly®, or a Wal-Mart Supercenter.

They hunt, fish, ride horseback, attend country music concerts, and go to car races. They read hunting and fishing magazines and listen to country music and auto racing on the radio. Many have a satellite dish so they can watch rodeo/bull riding, truck and tractor pulls, reality TV, auto races, and fishing programs as well as a variety of shows on CMT.

47 Las Casas



Segment Code47
Segment Name*Las Casas*
LifeMode Summary GroupL8 *Global Roots*
Urbanization Summary GroupU2 *Principal Urban Centers II*

Demographic

Las Casas residents are the latest wave of western "pioneers." Nearly half were born outside the United States; 84 percent are Hispanic. Households are dominated by families, mainly married couples with children (42 percent) and single-parent families (21 percent). The median age is 27.7 years; approximately 50 percent are younger than age 30. The average household size of 4.32 is the highest of the Tapestry segments.

Socioeconomic

The median household income is \$35,867. Most households derive their income from wages and salaries; some receive Supplemental Security Income or public assistance income. The service and manufacturing industry sectors provide most of the jobs for these residents. Many work part-time. Educational attainment levels are much lower than national levels. Fifty-two percent of the population aged 25-plus haven't graduated from high school; only 23 percent have attended college.

Residential

Las Casas neighborhoods are located primarily in California. Six in ten households rent. There is strong demand for housing in these neighborhoods; vacancy rates are lower than average. Housing is a mix of older apartment buildings, single-family dwellings, and townhomes. Most of the housing units were built before 1970.

Preferences

The large size of *Las Casas* households limits their discretionary income. The presence of children influences their spending habits. They live modest lifestyles. Many drive older vehicles. This is a strong market for purchases of baby and children's products. They typically shop for groceries at Ralphs, Vons, and the am/pm convenience store. They eat fast food at Carl's Jr., Del Taco, or Jack in the Box. Improving or remodeling their homes isn't important to them.

Typically, households own one TV set and do not subscribe to cable. They watch daytime or sports programs on TV, particularly soccer and weight lifting. Hispanic radio is, by far, their favorite radio format; however, they also listen to variety and contemporary hit radio programs. They play soccer and baseball or go to the movies.

48 Great Expectations



Segment Code48
Segment Name*Great Expectations*
LifeMode Summary GroupL7 *High Hopes*
Urbanization Summary GroupU5 *Urban Outskirts I*

Demographic

Young singles who live alone and married-couple families dominate the *Great Expectations* market, although all household types are represented. The median age is 33.1 years. Some residents are just beginning their careers or family lives. Compared to the US figures, this segment has a higher proportion of residents who are in their 20s and a higher proportion of householders younger than 35 years. The ethnic diversity and racial composition of this segment are similar to US levels.

Socioeconomic

The median household income of \$35,406 is lower than the US median of \$50,227. Nearly half of the population aged 25 years and older has some postsecondary education; 18 percent hold a bachelor's or graduate degree. Most of the jobs come from the manufacturing, retail, and service industry sectors.

Residential

Great Expectations neighborhoods are located throughout the country, with higher proportions in the Midwest and South. Half own their homes; half rent. More than half of the households are single-family dwellings; approximately 40 percent are apartments in low- or mid-rise buildings. Most of the housing units in these older suburban neighborhoods were built before 1960.

Preferences

Great Expectations homeowners are not afraid to tackle smaller maintenance and remodeling projects, but they also enjoy a young and active lifestyle. They go out to dinner and to the movies. They do most of their grocery shopping at Wal-Mart Supercenters, Aldi, and Shop 'n Save. They throw Frisbees; play softball and pool; go canoeing; watch horror, science fiction, and drama films on DVD; and listen to country music, classic rock, and sports on the radio. They watch dramas, auto racing, and the evening news on TV. They occasionally eat at Arby's and Dairy Queen. They shop at major discount and department stores. They rarely travel. Focused on starting their careers, they're not investing for their retirement years.

49 Senior Sun Seekers



Segment Code49
Segment Name*Senior Sun Seekers*
LifeMode Summary GroupL5 *Senior Styles*
Urbanization Summary GroupU9 *Small Towns*

Demographic

Growing at a rate of 1.7 percent annually, *Senior Sun Seekers* neighborhoods are among the fastest growing in the nation. Their median age is 51.8 years, the third oldest population of the Tapestry segments. More than 6 in 10 are aged 55 years or older. Married couples without children and singles comprise 70 percent of all households. This segment is not ethnically diverse; approximately 87 percent are white.

Socioeconomic

Many *Senior Sun Seekers* residents are retired or are anticipating retirement. The median household income is \$35,560. More than half of the households receive Social Security benefits. Approximately one-third of the households also receive retirement income. Because a large proportion of the population is older, the education attainment is far lower than the US levels.

Residential

These neighborhoods are primarily in the South and West; 43 percent are in Florida. Escaping from cold winter climates, many *Senior Sun Seekers* residents have permanently relocated to warmer areas; others are "snowbirds" that move south for the winter. This market has the third highest proportion of seasonal housing of all the Tapestry segments. Favorite areas are in Florida, California, and Arizona. The home ownership rate is 77 percent. Single-family dwellings comprise almost half of the housing inventory; mobile homes comprise nearly 40 percent. Most housing was built after 1969.

Preferences

Senior Sun Seekers residents frequently take car trips and prefer to stay in reasonably priced motels or hotels such as Days Inn, Super 8, and Comfort Inn. They eat out frequently at family restaurants and fast-food establishments. They own all kinds of insurance including life, travel, long-term care, and personal liability. They consult with a financial advisor about their finances. They invest time and limited funds in home improvement projects such as painting and fencing the yard. Some enjoy gardening and working on their own landscaping projects. Many join veterans' clubs or fraternal orders and do charity work through these organizations. For health reasons, these seniors control their diet and take a variety of vitamins and dietary supplements. They will stop at nearby Circle K or Citgo Quik Mart convenience stores for a quick purchase.

Satellite TV is part of their daily routine; they watch game shows, dramas, news programs, home improvement shows, sitcoms, and golf tournaments. Favorite cable channels include CMT, TNT, and Turner Classic Movies. They also read fishing and hunting magazines, rent comedies on DVD, and occasionally listen to country radio. They also play bingo, visit theme parks, fish, and hunt.

50 Heartland Communities



Segment Code50
Segment Name*Heartland Communities*
LifeMode Summary GroupL5 *Senior Styles*
Urbanization Summary GroupU9 *Small Towns*

Demographic

Settled and close-knit, residents of *Heartland Communities* have a median age of 41.4 years. Approximately half of the residents have already retired, many in the same towns where they have lived and worked their whole lives. Nearly half are aged 55 years or older. Although married-couple families comprise nearly half of the household types and almost one-third are singles who live alone, other family types and shared housing are also represented. Children are found in 30 percent of the households. Diversity is minimal; nearly 9 in 10 residents are white.

Socioeconomic

The median household income is \$34,088. Two-thirds of the households earn wage and salary income, and 39 percent receive Social Security benefits. Employed residents work in occupations ranging from management positions to unskilled labor jobs; many are employed in service industries. The percentage of the population aged 25 years or older that has completed high school is higher than the US level; the percentage that has attended college is far lower than the US figure.

Residential

Home to six million people, *Heartland Communities* neighborhoods are found primarily in small towns scattered across the Midwest and South. Low-density neighborhoods dominate, with older homes in urban clusters and rural, nonfarm areas. More than half of the housing units were built before 1960. Home ownership is at 67 percent. More than three-fourths of the housing is single-family dwellings.

Preferences

Heartland Communities residents invest time and money in their cherished homes and communities. They take pride in their gardening skills and in growing their own vegetables. Many homes own a riding lawn mower to keep up their relatively large lots. Residents tackle home improvement projects such as exterior painting and faucet replacement and shop at Ace Hardware or Lowe's. Many residents order items from catalogs, QVC, and Avon sales representatives. They also shop at Wal-Mart or Kmart and buy groceries at Wal-Mart Supercenters. Favorite restaurants include Golden Corral and Cracker Barrel. The residents in this segment rarely travel by plane.

Heartland Communities residents have a distinctly country lifestyle. They go hunting and fishing. They also read gardening, fishing, and hunting magazines and listen to country music and auto races on the radio. Reading two or more Sunday newspapers is important to them. Some join fraternal orders or religious clubs and even get involved with local politics. Many *Heartland Communities* households subscribe to cable and usually watch news programs and movies on TV.

51 Metro City Edge



Segment Code51
Segment NameMetro City Edge
LifeMode Summary GroupL3 *Metropolis*
Urbanization Summary GroupU6 *Urban Outskirts II*

Demographic

Married couples, single parents, and multigenerational families are the household types found in *Metro City Edge* neighborhoods. Grandparents are caregivers in 4 percent of these households, twice the US rate. The median age of this segment is 30.8 years because of the children, including adult children who still live at home. The average family size of 3.5 is slightly higher than the US average. Seventy-two percent of the residents are black; 17.3 percent are white; and 4 percent are American Indian—four times the US level.

Socioeconomic

The median household income for this segment is \$29,269. Although 78 percent of households derive income from wages and salaries, 9 percent receive public assistance and 9 percent receive Supplemental Security Income. Nearly half of employed residents work in service industries. One in ten residents aged 25 years or older have a bachelor's or graduate degree; four in ten have attended college.

Residential

Metro City Edge residents live in older suburban neighborhoods of large metropolitan cities, primarily in the Midwest and South. Sixty-eight percent live in single-family homes; 14 percent live in buildings with two to four units. The home ownership rate is 49 percent. Although home prices are relatively inexpensive, many families are young, unsettled, and still renting. Seventy percent of the housing units were built before 1970.

Preferences

Metro City Edge residents must spend their money wisely to ensure the welfare of their children. They tend to shop for groceries at Piggly Wiggly, Kroger, and Aldi but will go to superstores and wholesalers for bulk purchases of household and children's items. Some will have their vehicles serviced at auto parts chains. They eat at fast-food or family-style restaurants such as Old Country Buffet or Ryan's.

They watch sitcoms, movies, news programs, courtroom shows, and sports such as pro wrestling on TV. Accessing the Internet at home isn't important. They go to the movies and professional football games and play basketball. They read music and baby magazines and listen to urban and contemporary hit radio.

44 Urban Melting Pot



Segment Code44
Segment Name*Urban Melting Pot*
LifeMode Summary GroupL8 *Global Roots*
Urbanization Summary GroupU1 *Principal Urban Centers I*

Demographic

Recently settled immigrants live in ethnically rich *Urban Melting Pot* neighborhoods. More than half of the population is foreign born; half of these have come to the United States in the last 10 years. The median age is 36.3 years, slightly younger than the US median of 37.2. Distinctly diverse, more than one in four are Hispanic. Whites represent 47 percent of the population; Asians, 30 percent; and 6 percent are multiracial. Household types are equally diverse: 45 percent are married couple families; 30 percent are singles who live alone; single parents, other family types, and shared households also live in these neighborhoods.

Socioeconomic

The median household income is \$39,570. Wages and salaries provide income for most households. Some receive income from Supplemental Security Income and public assistance. As expected in a large urban center, the educational attainment levels vary. Although the proportion of the population aged 25 years and older who have no high school diploma is high compared to that of the United States, the proportion with a bachelor's or graduate degree is comparable to the US level. Twenty percent are enrolled in college or graduate school. Although the cost of urban living is high, generally, urban areas provide better employment opportunities. Nearly half of the employed residents work in the service industry sectors.

Residential

Three-fourths of *Urban Melting Pot* households rent. Half of these housing units were built before 1950. Most of these neighborhoods are located in the high-density, urban canyons of large cities; 70 percent are in New York, and 16 percent are in California. *Urban Melting Pot* neighborhoods are the second most densely populated of the Tapestry segments. Because transportation is widely accessible, 47 percent of the households don't own a vehicle.

Preferences

Fashion conscious yet cost conscious, *Urban Melting Pot* residents love to shop. Macy's is one of their favorite shopping haunts, but they shop at other upscale retailers, as well as warehouse/club stores, especially for clothes and jewelry.

Distance does not deter these residents from contacting family living outside the United States. They keep in touch with phone calls and foreign travel. Because so many rent, some households need to wash clothes at laundromats.

In their spare time, they go to the beach, visit theme parks, gamble at casinos such as those in Atlantic City, and buy lottery tickets. They watch news programs and movies on TV. They would rather see professional sports on TV than college games; they really like to watch baseball games. They listen to contemporary hit, all-news, Hispanic, and soft rock radio.

45 City Strivers



Segment Code45
Segment NameCity Strivers
LifeMode Summary GroupL3 *Metropolis*
Urbanization Summary GroupU2 *Principal Urban Centers II*

Demographic

Residents of this young, relatively diverse urban market have a median age of 33.7 years and a 68 percent mix of family types, such as married couples, single parents, and other families. Nearly eight in ten residents are black.

Socioeconomic

The median household income is \$37,034. Some households receive Supplemental Security Income or public assistance income. Education attainment levels are below those of the United States; approximately 43 percent of residents aged 25 years and older have attended college. Approximately half of employed residents work in the service and health care industry sectors in the city. Twenty-two percent of the residents who are employed are government workers, employed primarily by the local government. Approximately one in five works in an office/administrative support position.

Residential

City Strivers residents live in densely populated, settled neighborhoods of major metropolitan areas, especially in New York City and Chicago. The home ownership rate is 31 percent. Nearly two-thirds of the households are located in the Northeast, with smaller concentrations in other regions of the United States. Approximately two-thirds of the households rent apartments in older, multi-unit buildings built before 1960. Small buildings with two to four units are more common in these neighborhoods. Because of their urban surroundings, many residents rely on public transportation; two in five households do not own a vehicle.

Preferences

The rental homes in *City Strivers* neighborhoods are moderately equipped with the essentials. The high cost of living and rent lowers discretionary income. Many residents carry renter's insurance. They shop at wholesale clubs for most of their groceries, baby products, and children's essentials. They prefer accessible grocery stores such as Pathmark and Stop & Shop. A multitude of department and clothing stores is nearby. They eat fast food at White Castle, Popeyes, Checkers, and Dunkin' Donuts.

Favorite stations include BET and cable movie channels such as Showtime, Cinemax, the Movie Channel, and Encore. They watch a lot of TV such as courtroom shows, talk shows, comedies, science fiction, boxing, and professional wrestling. They read music and bridal magazines and listen to urban, all-news, jazz, and variety radio. They attend professional football and basketball games, go to the movies, take trips to Atlantic City, and visit theme parks such as Six Flags. They also play tennis and basketball.

46 Rooted Rural



Segment Code46
Segment NameRooted Rural
LifeMode Summary GroupL12 American Quilt
Urbanization Summary GroupU11 Rural II

Demographic

The population of the *Rooted Rural* segment is slightly older, with a median age of 43.7 years; 50 percent are older than age 55. Married-couple families dominate these rural neighborhoods; however, 23 percent are singles who live alone. More of the married-couple families are empty nesters than those who have children. There is little ethnic diversity in the *Rooted Rural* segment; almost 90 percent of the residents are white.

Socioeconomic

The median household income is \$37,032. One-third of the households receive Social Security benefits. Although the agricultural industry is more prominent in this market than at the US level, many employed residents work in the service and manufacturing industry sectors. More than three in four people aged 25 or more have graduated from high school; 13 percent hold a bachelor's or graduate degree.

Residential

Although *Rooted Rural* neighborhoods are located in rural areas throughout the country, more than three-fifths of the households are found in the South. Housing types include single-family dwellings (70 percent of households) and mobile homes (26 percent). Home ownership is at 81 percent. Most of the housing units were built after 1970. A higher proportion of seasonal housing contributes to higher vacancy rates in these neighborhoods. Local residents tend to move infrequently.

Preferences

Rooted Rural residents are do-it-yourselfers. These settled families take pride in their homes and keep busy with home improvement and remodeling projects. They also take pride in their gardens, regularly buying lawn and garden insecticides, flower and vegetable seeds, and plants. Typical of their rural lifestyle, many have a lawn or garden tractor and ATVs and own an assortment of tools. They prefer domestic vehicles; most households own or lease a truck. Typically, a household member handles vehicle maintenance. Many homes have pets.

When families eat out, they prefer Ryan's Family Steakhouse, but they generally prepare meals at home with fresh vegetables from their gardens. Many homes own a separate freezer to store their produce. They shop for groceries and buy their favorite Folger's coffee at Winn-Dixie, Piggly Wiggly®, or a Wal-Mart Supercenter.

They hunt, fish, ride horseback, attend country music concerts, and go to car races. They read hunting and fishing magazines and listen to country music and auto racing on the radio. Many have a satellite dish so they can watch rodeo/bull riding, truck and tractor pulls, reality TV, auto races, and fishing programs as well as a variety of shows on CMT.

47 Las Casas



Segment Code47
Segment NameLas Casas
LifeMode Summary GroupL8 *Global Roots*
Urbanization Summary GroupU2 *Principal Urban Centers II*

Demographic

Las Casas residents are the latest wave of western “pioneers.” Nearly half were born outside the United States; 84 percent are Hispanic. Households are dominated by families, mainly married couples with children (42 percent) and single-parent families (21 percent). The median age is 27.7 years; approximately 50 percent are younger than age 30. The average household size of 4.32 is the highest of the Tapestry segments.

Socioeconomic

The median household income is \$35,867. Most households derive their income from wages and salaries; some receive Supplemental Security Income or public assistance income. The service and manufacturing industry sectors provide most of the jobs for these residents. Many work part-time. Educational attainment levels are much lower than national levels. Fifty-two percent of the population aged 25-plus haven’t graduated from high school; only 23 percent have attended college.

Residential

Las Casas neighborhoods are located primarily in California. Six in ten households rent. There is strong demand for housing in these neighborhoods; vacancy rates are lower than average. Housing is a mix of older apartment buildings, single-family dwellings, and townhomes. Most of the housing units were built before 1970.

Preferences

The large size of Las Casas households limits their discretionary income. The presence of children influences their spending habits. They live modest lifestyles. Many drive older vehicles. This is a strong market for purchases of baby and children’s products. They typically shop for groceries at Ralphs, Vons, and the am/pm convenience store. They eat fast food at Carl’s Jr., Del Taco, or Jack in the Box. Improving or remodeling their homes isn’t important to them.

Typically, households own one TV set and do not subscribe to cable. They watch daytime or sports programs on TV, particularly soccer and weight lifting. Hispanic radio is, by far, their favorite radio format; however, they also listen to variety and contemporary hit radio programs. They play soccer and baseball or go to the movies.

48 Great Expectations



Segment Code48
Segment Name*Great Expectations*
LifeMode Summary GroupL7 *High Hopes*
Urbanization Summary GroupU5 *Urban Outskirts I*

Demographic

Young singles who live alone and married-couple families dominate the *Great Expectations* market, although all household types are represented. The median age is 33.1 years. Some residents are just beginning their careers or family lives. Compared to the US figures, this segment has a higher proportion of residents who are in their 20s and a higher proportion of householders younger than 35 years. The ethnic diversity and racial composition of this segment are similar to US levels.

Socioeconomic

The median household income of \$35,406 is lower than the US median of \$50,227. Nearly half of the population aged 25 years and older has some postsecondary education; 18 percent hold a bachelor's or graduate degree. Most of the jobs come from the manufacturing, retail, and service industry sectors.

Residential

Great Expectations neighborhoods are located throughout the country, with higher proportions in the Midwest and South. Half own their homes; half rent. More than half of the households are single-family dwellings; approximately 40 percent are apartments in low- or mid-rise buildings. Most of the housing units in these older suburban neighborhoods were built before 1960.

Preferences

Great Expectations homeowners are not afraid to tackle smaller maintenance and remodeling projects, but they also enjoy a young and active lifestyle. They go out to dinner and to the movies. They do most of their grocery shopping at Wal-Mart Supercenters, Aldi, and Shop 'n Save. They throw Frisbees; play softball and pool; go canoeing; watch horror, science fiction, and drama films on DVD; and listen to country music, classic rock, and sports on the radio. They watch dramas, auto racing, and the evening news on TV. They occasionally eat at Arby's and Dairy Queen. They shop at major discount and department stores. They rarely travel. Focused on starting their careers, they're not investing for their retirement years.

49 Senior Sun Seekers



Segment Code49
Segment NameSenior Sun Seekers
LifeMode Summary GroupL5 Senior Styles
Urbanization Summary GroupU9 Small Towns

Demographic

Growing at a rate of 1.7 percent annually, *Senior Sun Seekers* neighborhoods are among the fastest growing in the nation. Their median age is 51.8 years, the third oldest population of the Tapestry segments. More than 6 in 10 are aged 55 years or older. Married couples without children and singles comprise 70 percent of all households. This segment is not ethnically diverse; approximately 87 percent are white.

Socioeconomic

Many *Senior Sun Seekers* residents are retired or are anticipating retirement. The median household income is \$35,560. More than half of the households receive Social Security benefits. Approximately one-third of the households also receive retirement income. Because a large proportion of the population is older, the education attainment is far lower than the US levels.

Residential

These neighborhoods are primarily in the South and West; 43 percent are in Florida. Escaping from cold winter climates, many *Senior Sun Seekers* residents have permanently relocated to warmer areas; others are “snowbirds” that move south for the winter. This market has the third highest proportion of seasonal housing of all the Tapestry segments. Favorite areas are in Florida, California, and Arizona. The home ownership rate is 77 percent. Single-family dwellings comprise almost half of the housing inventory; mobile homes comprise nearly 40 percent. Most housing was built after 1969.

Preferences

Senior Sun Seekers residents frequently take car trips and prefer to stay in reasonably priced motels or hotels such as Days Inn, Super 8, and Comfort Inn. They eat out frequently at family restaurants and fast-food establishments. They own all kinds of insurance including life, travel, long-term care, and personal liability. They consult with a financial advisor about their finances. They invest time and limited funds in home improvement projects such as painting and fencing the yard. Some enjoy gardening and working on their own landscaping projects. Many join veterans’ clubs or fraternal orders and do charity work through these organizations. For health reasons, these seniors control their diet and take a variety of vitamins and dietary supplements. They will stop at nearby Circle K or Citgo Quik Mart convenience stores for a quick purchase.

Satellite TV is part of their daily routine; they watch game shows, dramas, news programs, home improvement shows, sitcoms, and golf tournaments. Favorite cable channels include CMT, TNT, and Turner Classic Movies. They also read fishing and hunting magazines, rent comedies on DVD, and occasionally listen to country radio. They also play bingo, visit theme parks, fish, and hunt.

50 Heartland Communities



Segment Code50
Segment Name*Heartland Communities*
LifeMode Summary GroupL5 *Senior Styles*
Urbanization Summary GroupU9 *Small Towns*

Demographic

Settled and close-knit, residents of *Heartland Communities* have a median age of 41.4 years. **Approximately half of the residents have** already retired, **many in the same towns where they have** lived and worked **their whole lives.** Nearly half are **aged 55** years or older. Although married-couple families comprise nearly half of the household types and almost one-third are singles who live alone, other family types and shared housing are also represented. Children are found in 30 percent of the households. Diversity is minimal; nearly 9 in 10 residents are white.

Socioeconomic

The median household income is \$34,088. Two-thirds of the households earn wage and salary income, and 39 percent receive Social Security benefits. Employed residents work in occupations ranging from management positions to unskilled labor jobs; many are employed in service industries. The percentage of the population aged 25 years or older that has completed high school is higher than the US level; the percentage that has attended college is far lower than the US figure.

Residential

Home to six million people, *Heartland Communities* neighborhoods are found primarily in small towns scattered across the Midwest and South. Low-density neighborhoods dominate, with older homes in urban clusters and rural, nonfarm areas. More than half of the housing units were built before 1960. Home ownership is at 67 percent. More than three-fourths of the housing is single-family dwellings.

Preferences

Heartland Communities residents invest time and money in their cherished homes and communities. They take pride in their gardening skills and in growing their own vegetables. Many homes own a riding lawn mower to keep up their relatively large lots. Residents tackle home improvement projects such as exterior painting and faucet replacement and shop at Ace Hardware or Lowe's. Many residents order items from catalogs, QVC, and Avon sales representatives. They also shop at Wal-Mart or Kmart and buy groceries at Wal-Mart Supercenters. Favorite restaurants include Golden Corral and Cracker Barrel. The residents in this segment rarely travel by plane.

Heartland Communities residents have a distinctly country lifestyle. They go hunting and fishing. They also read gardening, fishing, and hunting magazines and listen to country music and auto races on the radio. Reading two or more Sunday newspapers is important to them. Some join fraternal orders or religious clubs and even get involved with local politics. Many *Heartland Communities* households subscribe to cable and usually watch news programs and movies on TV.

51 Metro City Edge



Segment Code51
Segment NameMetro City Edge
LifeMode Summary GroupL3 Metropolis
Urbanization Summary GroupU6 Urban Outskirts II

Demographic

Married couples, single parents, and multigenerational families are the household types found in *Metro City Edge* neighborhoods. Grandparents are caregivers in 4 percent of these households, twice the US rate. The median age of this segment is 30.8 years because of the children, including adult children who still live at home. The average family size of 3.5 is slightly higher than the US average. Seventy-two percent of the residents are black; 17.3 percent are white; and 4 percent are American Indian—four times the US level.

Socioeconomic

The median household income for this segment is \$29,269. Although 78 percent of households derive income from wages and salaries, 9 percent receive public assistance and 9 percent receive Supplemental Security Income. Nearly half of employed residents work in service industries. One in ten residents aged 25 years or older have a bachelor's or graduate degree; four in ten have attended college.

Residential

Metro City Edge residents live in older suburban neighborhoods of large metropolitan cities, primarily in the Midwest and South. Sixty-eight percent live in single-family homes; 14 percent live in buildings with two to four units. The home ownership rate is 49 percent. Although home prices are relatively inexpensive, many families are young, unsettled, and still renting. Seventy percent of the housing units were built before 1970.

Preferences

Metro City Edge residents must spend their money wisely to ensure the welfare of their children. They tend to shop for groceries at Piggly Wiggly, Kroger, and Aldi but will go to superstores and wholesalers for bulk purchases of household and children's items. Some will have their vehicles serviced at auto parts chains. They eat at fast-food or family-style restaurants such as Old Country Buffet or Ryan's.

They watch sitcoms, movies, news programs, courtroom shows, and sports such as pro wrestling on TV. Accessing the Internet at home isn't important. They go to the movies and professional football games and play basketball. They read music and baby magazines and listen to urban and contemporary hit radio.

Home Town



Segment Code53
Segment NameHome Town
LifeMode Summary GroupL11 *Factories and Farms*
Urbanization Summary GroupU8 *Suburban Periphery II*

Demographic

Home Town households are a mix of married-couple families, singles who live alone, and single-parent families. With a median age of 33.8 years, this is a slightly younger market than the United States as a whole. However, one in three is aged 65 years or older. Many families encompass two generations who have lived and worked in the community; their children plan to do the same. Seventy-two percent of the residents are white; 15 percent are black.

Socioeconomic

The median household income is \$29,688. Although 73 percent of households derive income from wages and salaries, some rely on Supplemental Security Income and public assistance for support. The manufacturing, retail trade, and service industry sectors are the primary sources of employment for these residents. Overall, educational attainment is lower for *Home Town* than for the United States. Only 8 percent hold a bachelor's or graduate degree; 34 percent have attended college.

Residential

Change is rare in these low-density, settled neighborhoods, located primarily in the Midwest and South. *Home Town* residents may move from one house to another, but they seldom cross the county line. Seventy-three percent of homes are single-family dwellings, and 11 percent are two- to four-unit structures. Home ownership is at 54 percent. The average gross rent is two-thirds of the US average. Because the population in these neighborhoods hardly grows, new construction is scarce. Most of the housing was built before 1970.

Preferences

Home Town residents savor their quasi-country lifestyle by spending time outdoors fishing and playing football. Indoors, they play video games or watch TV favorites such as courtroom programs, wrestling, or reality shows. Internet access and cell phone use are less important here than in other markets.

They shop for groceries at Kroger, Aldi, and Wal-Mart Supercenters. They buy clothes at discount department stores such as Wal-Mart and Kmart, typically located in small local malls. When they eat out, they go to Bob Evans and Ryan's family restaurants or fast-food places.

54 Urban Rows



Segment Code54
Segment Name*Urban Rows*
LifeMode Summary GroupL3 *Metropolis*
Urbanization Summary GroupU2 *Principal Urban Centers II*

Demographic

The *Urban Rows* population of approximately 1.1 million people, the smallest of all the Tapestry segments, is still shrinking due to urban renewal programs. The median age is 32.5 years. Household types include married couples, single-parent families, and other families. Grandparents are caregivers in many households; many homes are multigenerational. Nearly 7 in 10 residents are black, and 2 in 10 are white. Twelve percent of the population is Hispanic.

Socioeconomic

The median household income is \$30,698. Some households supplement their wage and salary income with Supplemental Security Income or public assistance. Nearly half of the employed residents work in white-collar occupations. Approximately 20 percent of the employed residents work in the health care industry; 10 percent have local government jobs. Educational attainment is below the US level; 33 percent of the residents have attended college versus half of the US population aged 25 years or older who have attended college.

Residential

These neighborhoods are primarily in the Northeast, with a much smaller concentration in the South. Two-thirds of the households are in Pennsylvania; one-fifth are in Maryland. Row houses and single-family dwellings comprise 76 percent of the households in *Urban Rows*. These homes are characteristic of housing in large, mid-Atlantic cities such as Philadelphia and Baltimore. Built decades ago, 52 percent of *Urban Rows* houses are owner occupied. Gentrification is beginning, although the housing vacancy rate of 19 percent in these neighborhoods is still higher than the US rate. Most housing units were built before 1950. Many residents rely on public transportation; 14 percent commute an hour or more to work. Forty-one percent of households do not own a vehicle, and 41 percent own only one vehicle.

Preferences

Because many homes have been in the family for generations, very few households hold a mortgage. Relatively few homes have air conditioning or central heating; others rely on separate room air conditioners, ceiling fans, and space heaters. They shop regularly for groceries at Giant or the local Wawa for convenience items.

Because Internet access is not widespread in *Urban Rows* neighborhoods, most residents go online at school or the public library. Many prefer satellite TV to cable. They watch a lot of daytime TV shows, sitcoms, and sports programs. Music is a big part of their daily lives. They download music from the Internet, read music magazines, and listen to urban and contemporary hit radio. They get their news from the tabloids and radio. They rarely eat out but enjoy going to the movies. Big basketball fans, they play and attend professional games when they can. They also play football.

55 College Towns



Segment Code55
Segment Name*College Towns*
LifeMode Summary GroupL6 *Scholars and Patriots*
Urbanization Summary GroupU6 *Urban Outskirts II*

Demographic

With a median age of 24.4 years, *College Towns* is the third youngest of all the Tapestry segments. Most residents are aged between 18 and 34 years and live in single-person or shared households. One-fourth of households are occupied by married-couple families. The race profile of this market is somewhat similar to the US profile. Approximately three-fourths of the residents are white.

Socioeconomic

College Towns residents are focused on their education; 59 percent are enrolled in college or graduate school. After graduation, other residents stayed on to teach or do research. Because many students only work part-time, the median household income of \$32,360 ranks near the low end. Most of the employed residents work in the service industry, holding on- and off-campus jobs in educational services, health care, and food preparation.

Residential

One in seven *College Towns* residents lives in a dorm on campus. Students in off-campus housing live in low-income apartment rentals. Thirty percent of housing is owner-occupied, typically by town residents, who live with their families in single-family dwellings. One-third of the housing is single-family structures.

Preferences

Convenience dictates food choices; they usually buy ready-made, easy-to-prepare, or frozen meals, frozen pasta, pizza crusts, and peanut butter and jelly at the closest grocery store. With their busy lifestyles, they frequently eat out or order in from fast-food restaurants, particularly McDonald's, Wendy's, and pizza outlets during the week; however, many cook at home over the weekend. They buy books online and in stores. They have student loans and bank online or by ATM. These computer-savvy students own laptop computers or expensive desktop personal computers and the peripherals to match. Connecting to the Internet is essential; they go online to research assignments, look for jobs, check e-mail, and download music. Keeping in touch is also important; they buy and use cell phones and accessories.

New to living on their own, many *College Towns* residents purchase bedding, bath, and cooking products. They own few appliances but, at a minimum, have a microwave oven, a toaster, and an upright vacuum cleaner. Their lifestyle is very casual. They rank high for participating in nearly every outdoor sport and athletic activity.

College Towns residents attend country music and rock concerts and college basketball and football games, play pool, and go to movies and bars. They also participate in public activities including fund-raising and volunteer work. They usually listen to alternative music on their MP3 players, tune in to public radio, and watch MTV and Comedy Central on cable TV. They shop at discount stores but prefer to buy branded clothes from Old Navy, Gap, and Target.

56 Rural Bypasses



Segment Code56
Segment Name*Rural Bypasses*
LifeMode Summary GroupL11 *Factories and Farms*
Urbanization Summary GroupU11 *Rural II*

Demographic

The age and household composition of the *Rural Bypasses* market is very similar to US distributions. Half of the households consist of married-couple families, 15 percent are single-parent families, and 7 percent are other family types. One-fourth of the households consist of a single person. The median age for this segment is 39.6 years, near the US median of 37.2 years. Fifty-eight percent of the residents are white; 35.5 percent are black.

Socioeconomic

The median household income is \$27,231. Wages and salaries provide the primary sources of income; however, many depend upon Social Security, Supplemental Security Income, and public assistance for support. Overall, two in three residents aged 25 years and older have graduated from high school; the population with a bachelor's degree is one-third that of the US level. Employed residents work in a variety of occupations, with a slightly higher percentage in blue-collar occupations. Higher-than-average proportions of employed residents work in the agricultural, mining, manufacturing, and construction industry sectors.

Residential

Open space, undeveloped land, and farmland are found in *Rural Bypasses* neighborhoods, located almost entirely in the South. Families live in small towns along country back roads. Residents enjoy the open air in these sparsely populated neighborhoods. Most houses are modest, single-family dwellings; 30 percent are mobile homes. Home ownership is at 73 percent. Most housing in this market was built after 1969.

Preferences

Typical of their country lifestyle, *Rural Bypasses* residents prefer to drive trucks and SUVs and listen to country radio. To save money, they eat at home and maintain their homes and gardens themselves. In areas with no cable access, some residents install satellite dishes to watch TV. They frequently watch sports on TV, NASCAR and other auto races, college football games, and fishing programs. They read fishing and hunting magazines. Conservative with their long-distance calls, resident demand for cost-effective cellular services is growing. They shop at discount stores, preferably at Wal-Mart. They also order from catalogs and from their Avon representatives. They shop at home improvement stores such as Lowe's and fill prescriptions at the local Wal-Mart Pharmacy instead of regular pharmacies. This is the top Tapestry segment to own and/or buy new motorcycles.

58 NeWest Residents



Segment Code58
Segment Name*NeWest Residents*
LifeMode Summary GroupL8 *Global Roots*
Urbanization Summary GroupU2 *Principal Urban Centers II*

Demographic

Hispanic cultures dominate this family oriented segment; three-quarters of the population is Hispanic. With 4.1 people, the *NeWest Residents* segment household has the third largest family size of all the Tapestry segments. Families dominate this market. Children live in 54 percent of the households, in married-couple or single-parent families. Another 19 percent are married-couple families with no children living at home and other family types. The median age is 27.3 years. Dependent children are 36 percent of the population; more than one-third is younger than age 35. Approximately half of this young population is foreign born, more than half of whom have arrived in the United States in the last 10 years. Forty percent of the residents are white, 40 percent defined as other races, and 6 percent are multiracial populations. *NeWest Residents* is one of the most diverse of the Tapestry segments.

Socioeconomic

Most *NeWest Residents* are not only new to the United States, they're also building their careers and starting their families. They arrived in the country with few funds but have begun to save their hard-earned dollars. Language is a significant barrier for many; this segment has the highest concentration of households who speak a language other than English. Forty-nine percent of residents aged 25 years and older have not completed high school. Lack of education limits their employment options. Most employed residents work in service and skilled labor jobs. Higher-than-average proportions of employed residents work in the construction, manufacturing, accommodation/food services, administrative services, other services, and agricultural industry sectors. Some households receive Supplemental Security Income or public assistance. The median household income for this segment is \$26,983.

Residential

Most *NeWest Residents* rent apartments in mid- or high-rise buildings in major cities, chiefly in the West and South. California has the largest concentration of households, followed by Texas. The average gross rent is 15 percent below the US level. Most housing units in these neighborhoods were built before 1980. Home ownership is at 17 percent.

Preferences

Putting their children first, *NeWest Residents* lead a strong, family-oriented lifestyle that emphasizes buying groceries and baby and children's products. They usually buy only the essentials such as baby food, baby supplies, baby car seats, and children's clothing. They shop for groceries at Vons and Ralphs but will stop at local convenience stores for milk, juice drinks, and nonprescription drugs. To save money, they prepare meals from scratch at home; however, they still enjoy eating occasionally at fast-food restaurants such as Carl's Jr. and Del Taco. They pay with cash; few have or use credit cards. Because most of them rent, they don't garden or buy big-ticket furniture pieces. Few have Internet access; they own one TV set and don't consider cable TV a necessity. To help their children become more fluent in English, parents will buy word and sound games. In their free time, they read magazines. Soccer is part of their culture; they watch it on TV, play it, and attend matches. They listen to Hispanic radio.

59 Southwestern Families



Segment Code59
Segment Name*Southwestern Families*
LifeMode Summary GroupL9 *Family Portraits*
Urbanization Summary GroupU6 *Urban Outskirts II*

Demographic

A mix of family types comprise 80 percent of the households in *Southwestern Families* neighborhoods. These young families form the foundation of Hispanic life in the Southwest. Children are the center of these households that are composed mainly of married couples with children and single-parent families. The average family size is 3.97, the fourth largest among all the Tapestry Segmentation. The rest of the households in these neighborhoods are married couples with no children living at home and other families. Grandparents are caregivers in some of these households. The median age of this young market is 29.2 years. Ethnic diversity is high; 83 percent of the residents are Hispanic. Diversity is also evident in the 28 percent of foreign-born residents who immigrated before 1990. Fifty-six percent of the residents are white, 30 percent are of other race populations, and 5 percent are American Indian populations. At five times the US level, *Southwestern Families* has the highest percentage of American Indian population of the Tapestry segments.

Socioeconomic

The median household income for this segment is \$26,058. They carefully budget their income month to month to pay for the upkeep of their homes and families. Ten percent receive Supplemental Security Income; 10 percent receive public assistance. Recent arrivals and older generations are language-isolated. Educational attainment levels are low; nearly 50 percent of residents aged 25 years and older have not graduated from high school. Most employed residents work in blue-collar and service jobs. Higher-than-average proportions of employed residents work in the construction, accommodation/food services, administrative and other services, agricultural, and mining industry sectors.

Residential

As the segment name implies, *Southwestern Families* communities are located almost entirely in the Southwest; 72 percent of these households are in Texas. Home ownership is important to these settled, suburban folks; more than two-thirds own their homes. Residents live in small, modest, primarily single-family homes. Eleven percent live in mobile homes in rural, nonfarm areas.

Preferences

Southwestern Families residents frequently buy baby and children's products such as disposable diapers and infant formula. To record family events, many will buy cameras.

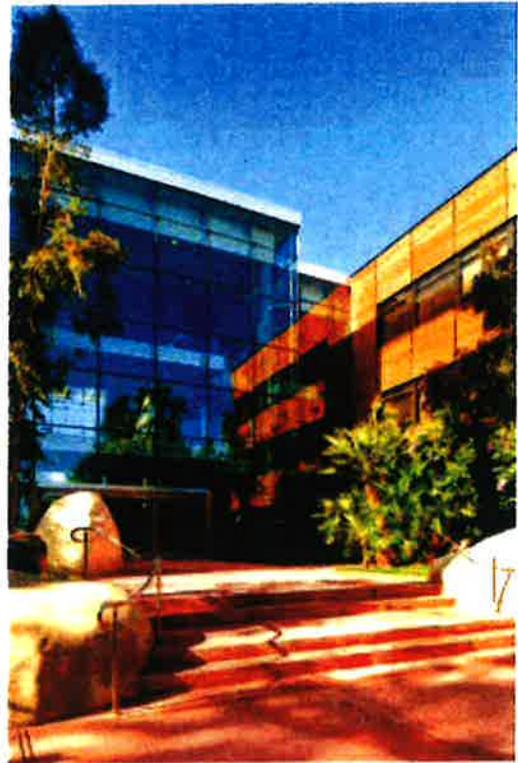
They buy clothes and occasionally shop for groceries at discount stores. Many also fill prescriptions there or at Walgreens and Wal-Mart. They shop for groceries at Albertson's, Kroger, and Vons. They buy used cars; car-savvy residents will fix and replace old car parts such as shocks, struts, and mufflers.

Cable subscriptions are low even though service is available. When they buy a TV, they will choose a large-screen TV—42" and bigger. They listen to Hispanic and contemporary hits radio. TV and radio are the best media to reach them instead of newspapers or magazines.



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