



TheRetailCoach®

# DOWNTOWN 2 MILE RADIAL PSYCHOGRAPHIC PROFILE

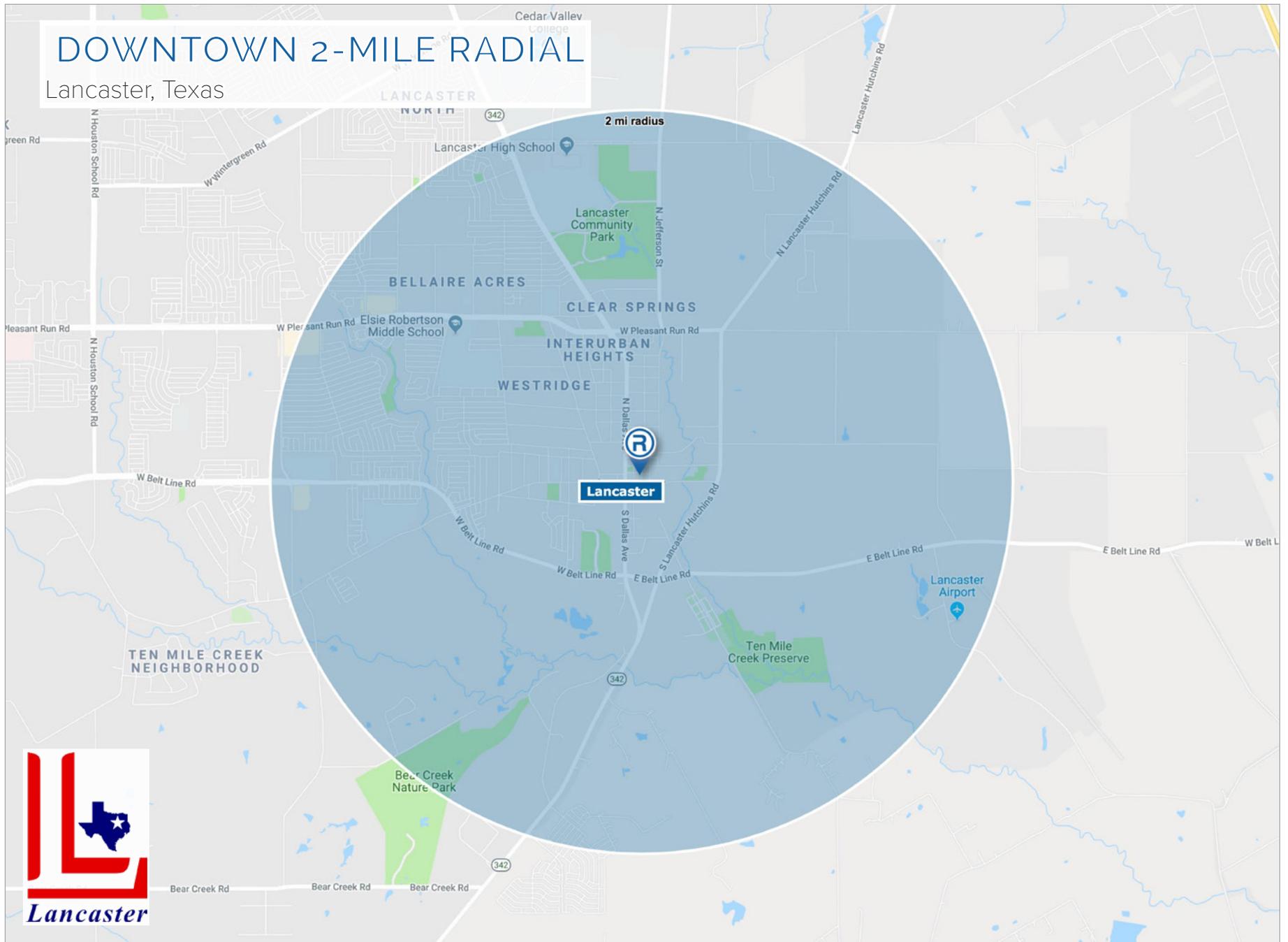
Lancaster, Texas

Prepared for  
City of Lancaster, Texas  
September 2018



# DOWNTOWN 2-MILE RADIAL

Lancaster, Texas



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## TAPESTRY SEGMENTATION PROFILE

### + WHAT IS TAPESTRY SEGMENTATION?

Tapestry Segmentation is a market segmentation system that classifies US neighborhoods based on their socioeconomic and demographic compositions. Tapestry is 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 67 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.

### + WHO SHOULD USE TAPESTRY SEGMENTATION?

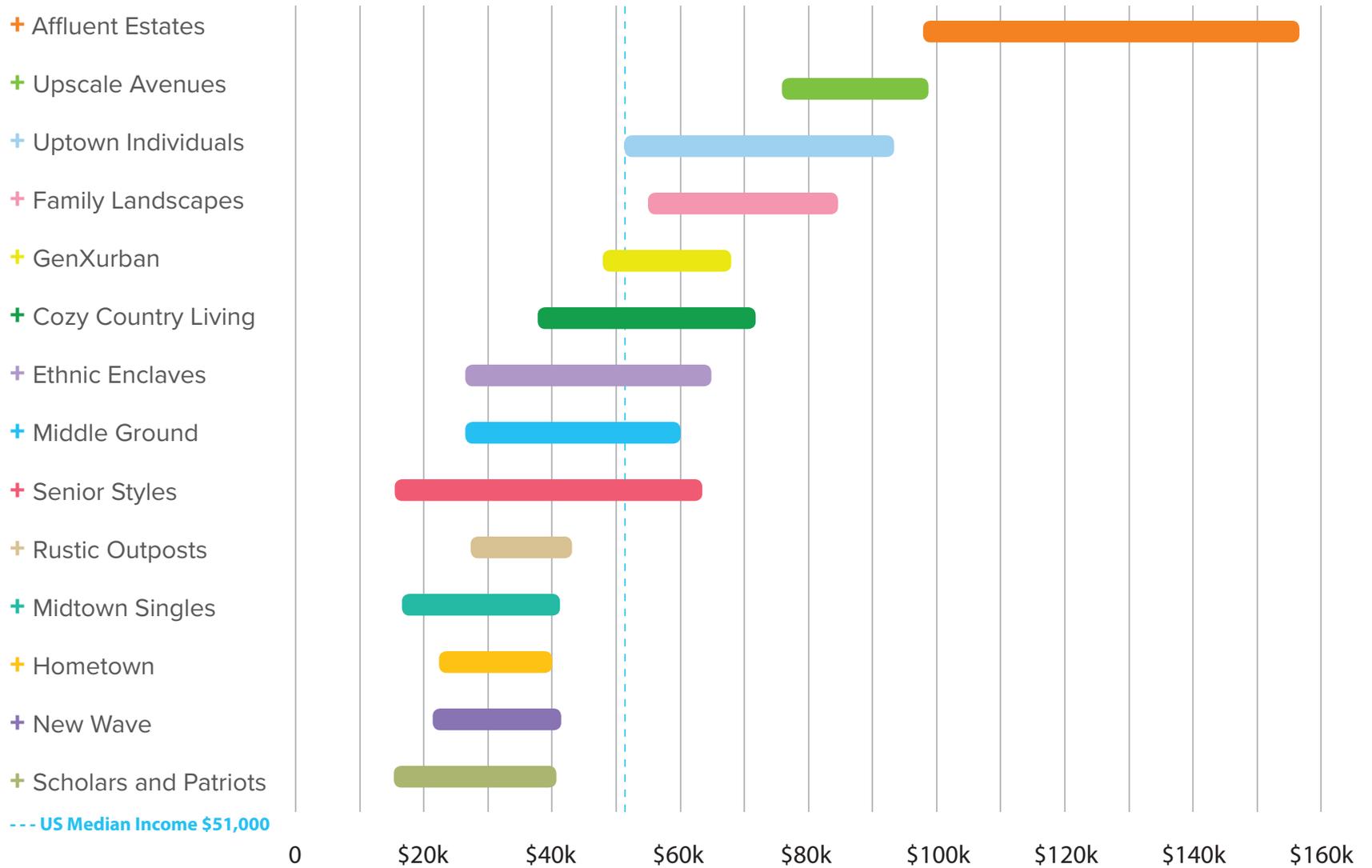
All companies, agencies, and organizations need to understand consumers/constituents in order to supply them with the right products and services and to reach them via their preferred media. These applications require a robust segmentation system that can accurately profile these diverse markets. The 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 SUMMARY GROUPS

Esri’s Tapestry Segmentation provides a robust, powerful portrait of the 67 US consumer markets. To provide a broader view of these 67 segments, Esri combined them into 14 LifeMode Summary Groups based on lifestyle and lifestage composition.

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

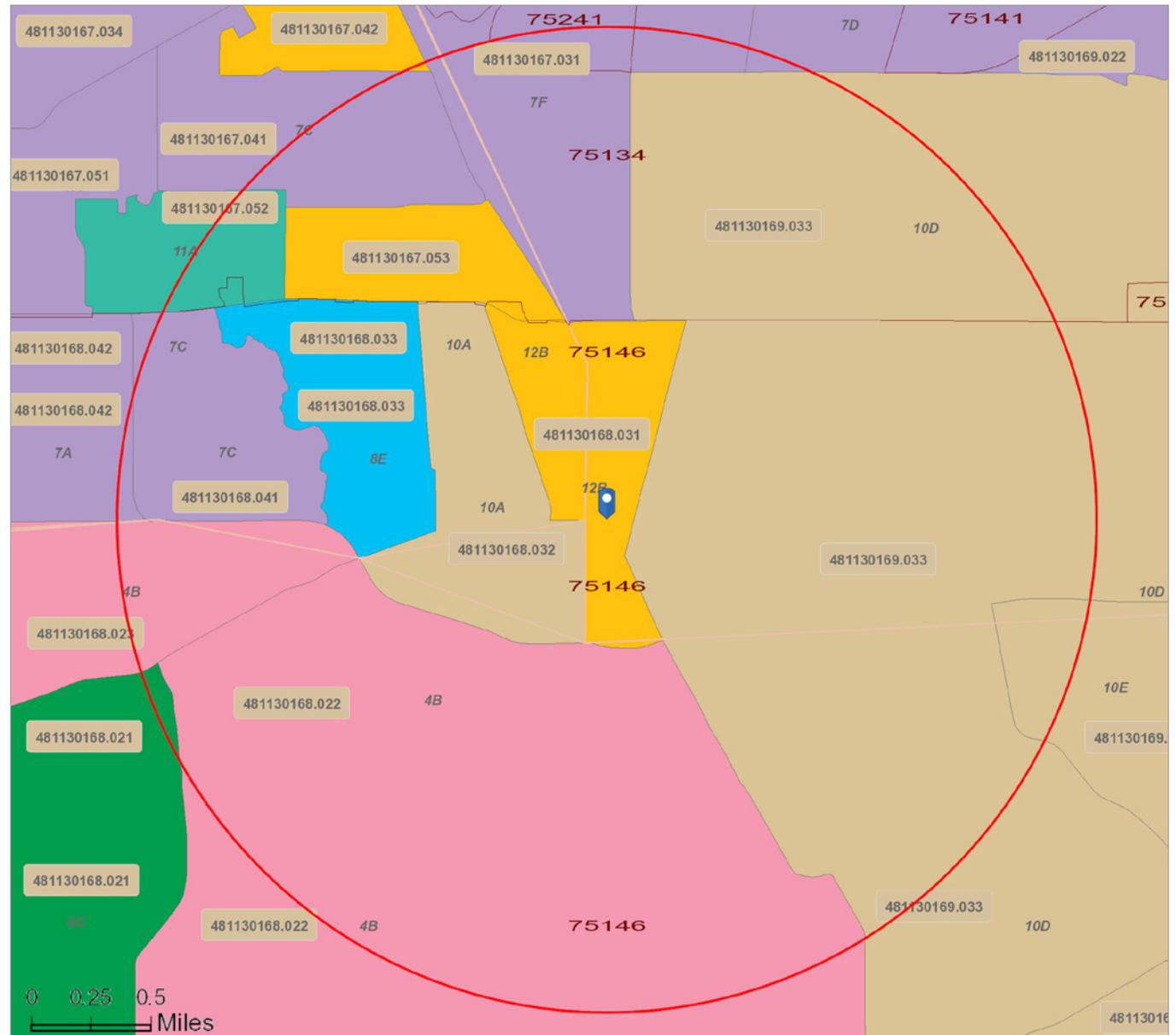
# INCOME RANGE OF LIFEMODE SUMMARY GROUPS



# DOWNTOWN 2 MILE RADIAL • LIFEMODE SUMMARY GROUPS MAP

Lancaster, Texas

- + L1 AFFLUENT ESTATES**  
Established wealth — educated, well-traveled married couples
- + L2 UPSCALE AVENUES**  
Prosperous, married couples in higher density neighborhoods
- + L3 UPTOWN INDIVIDUALS**  
Younger, urban singles on the move
- + L4 FAMILY LANDSCAPES**  
Successful younger families in newer housing
- + L5 GENXURBAN**  
Gen X in middle age; families with fewer kids and a mortgage
- + L6 COZY COUNTRY**  
Empty nesters in bucolic settings
- + L7 ETHNIC ENCLAVES**  
Established diversity — young, Hispanic homeowners with families
- + L8 MIDDLE GROUND**  
Lifestyles of thirtysomethings
- + L9 SENIOR STYLES**  
Senior lifestyles reveal the effects of saving for retirement
- + L10 RUSTIC OUTPOSTS**  
Country life with older families, older homes
- + L11 MIDTOWN SINGLES**  
Millennials on the move; single, diverse, and urban
- + L12 HOMETOWN**  
Growing up and staying close to home; single householders
- + L13 NEXT WAVE**  
Urban denizens; young, diverse, hardworking families
- + L14 SCHOLARS AND PATRIOTS**  
College campuses and military neighborhoods



# DOWNTOWN 2 MILE RADIAL • TOP TAPESTRY SEGMENTS

Lancaster, Texas

	TAPESTRY SEGMENTATION	HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	US HOUSEHOLDS PERCENT	CUMULATIVE PERCENT	INDEX
1	American Dreamers (7C)	27.5%	27.5%	1.5%	1.5%	1862
2	Front Porches (8E)	22.9%	50.4%	1.6%	3.1%	1,447
3	Southern Satellites (10A)	11.7%	62.1%	3.1%	6.2%	373
4	Home Improvement (4B)	10.0%	72.1%	1.7%	7.9%	585
5	Traditional Living (12B)	9.7%	81.8%	1.9%	9.8%	500
	<b>Subtotal</b>	<b>81.8%</b>		<b>9.8%</b>		
6	City Strivers (11A)	8.0%	89.8%	0.8%	10.6%	1,036
7	Family Foundations (12A)	6.8%	96.6%	1.0%	11.6%	657
8	Down the Road (10D)	1.7%	98.3%	1.1%	12.7%	152
9	Southwestern Families (7F)	1.7%	100.0%	0.8%	13.5%	204
	<b>Subtotal</b>	<b>18.2%</b>		<b>3.7%</b>		
	<b>Total</b>	<b>100.0%</b>		<b>13.6%</b>		<b>734</b>



LifeMode Group • Ethnic Enclaves

7C

# AMERICAN DREAMERS

Located throughout the South and West, most American Dreamers residents own their own homes, primarily single-family housing, farther out of the city where housing is more affordable.

Median household income is slightly below average (Index 94). The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. Spending is focused more on the members of the household than the home. Entertainment includes multiple televisions, movie rentals, and video games at home or visits to theme parks and zoos. This market is connected and adept at accessing what they want from the Internet.

US Household // 1,747,000

Average Household Size // 3.16

Median Age // 31.8

Median Household Income // \$48,000

## + OUR NEIGHBORHOOD

- American Dreamers residents are family-centric and diverse. Most are married couples with children of all ages or single parents; multigenerational homes are common (Index 201).
- Average household size is higher at 3.16 (Index 122).
- Residents tend to live further out from urban centers—more affordable single-family homes and more elbow room.
- Tenure is slightly above average with 65% owner occupancy; primarily single-family homes with more mortgages (Index 122) and slightly higher monthly costs (Index 122).
- Three quarters of all housing were built since 1970.
- Many neighborhoods are located in the urban periphery of the largest metropolitan areas across the South and West.
- Most households have one or two vehicles available and a longer commute to work.



## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- When dining out, these residents favor fast-food dining places such as Taco Bell or Wendy's, as well as family-friendly restaurants like Olive Garden, Denny's, or IHOP.
- Cell phones are preferred over landlines.
- Favorite channels include Animal Planet, MTV, Cartoon Network, and Disney, as well as programming on Spanish TV.
- Residents listen to urban or Hispanic radio.
- During the summer, family outings to theme parks are especially popular.

## + SOCIOECONOMIC TRAITS

- While nearly 16% have earned a college degree, the majority, or 63%, hold a high school diploma only or spent some time at a college or university.
- Unemployment is higher at 10.7% (Index 124); labor force participation is also higher at 67%.
- Most American Dreamers residents derive income from wages or salaries, but the rate of poverty is a bit higher in this market (Index 126).
- They tend to spend money carefully and focus more on necessities.
- They are captivated by new technology, particularly feature-rich smartphones.
- Connected: They use the Internet primarily for socializing but also for convenience, like paying bills online.

## + 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:**

\$130,000

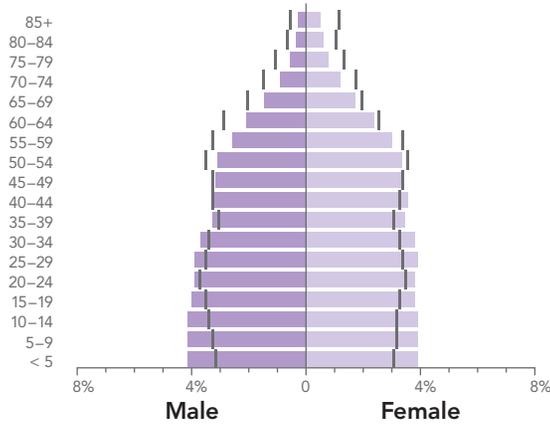
US Median: \$177,000



## AGE BY SEX (Esri data)

**Median Age: 31.8** US: 37.6

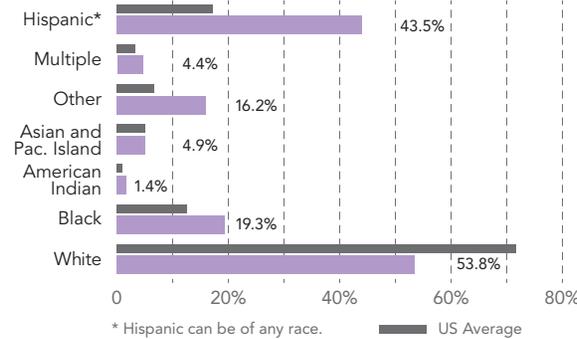
I Indicates US



## 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).

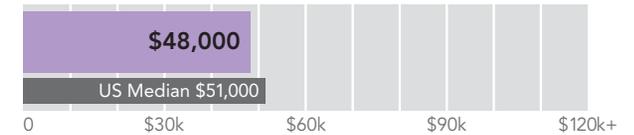
**Diversity Index: 83.3** US: 62.1



## 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.

### Median Household Income

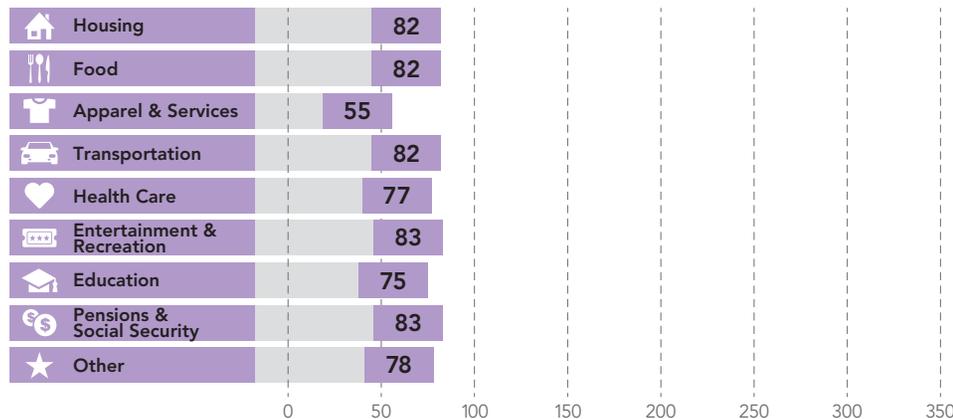


### Median Net Worth



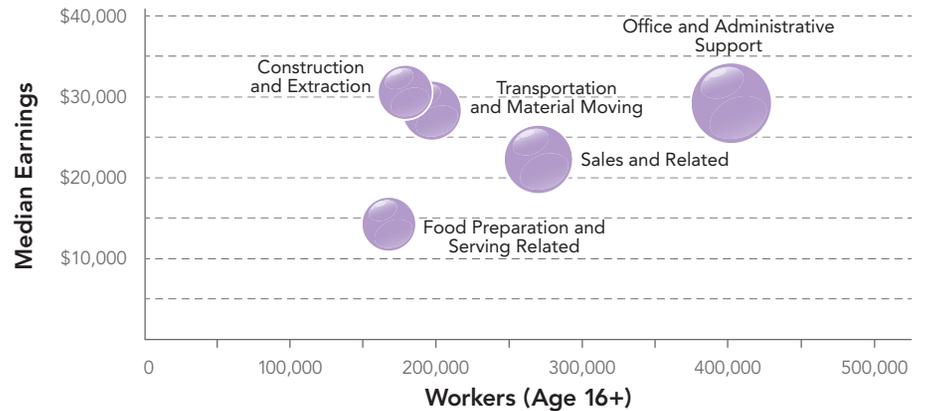
## AVERAGE HOUSEHOLD BUDGET INDEX

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 • Middle Ground

# 8E FRONT PORCHES

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. 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. Residents enjoy their automobiles and like cars that are fun to drive. Income and net worth are well below the US average, and many families have taken out loans to make ends meet.

US Household // 1,910,000  
Average Household Size // 2.55  
Median Age // 34.2  
Median Household Income // \$39,000

## + 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.



8E

## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- Go online for gaming, online dating, and chat rooms.
- Use their cell phones to redeem mobile coupons and listen to hip-hop and R&B music.
- Drink energy and sports drinks.
- Participate in leisure activities including sports, indoor water parks, bingo, and video games.
- Watch Comedy Central, Nickelodeon, and PBS Kids Sprout.

## + SOCIOECONOMIC TRAITS

- Composed of a blue-collar work force with a strong labor force participation rate, but unemployment is high at 11%.
- 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.

## + 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;  
Multiunits

### Average Rent:

\$890

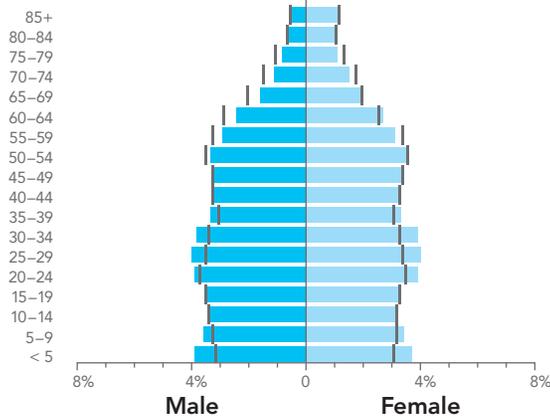
US Average \$990



## AGE BY SEX (Esri data)

**Median Age: 34.2** US: 37.6

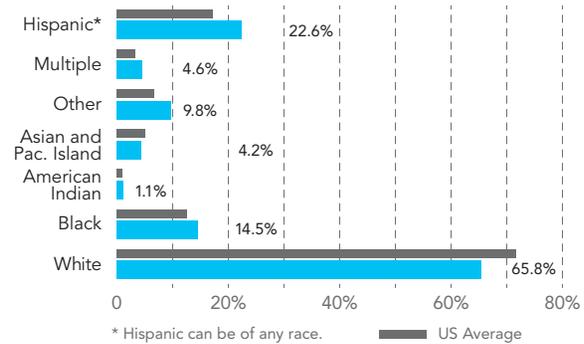
| Indicates US



## 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: 70.4** US: 62.1



## INCOME AND NET WORTH

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### Median Household Income

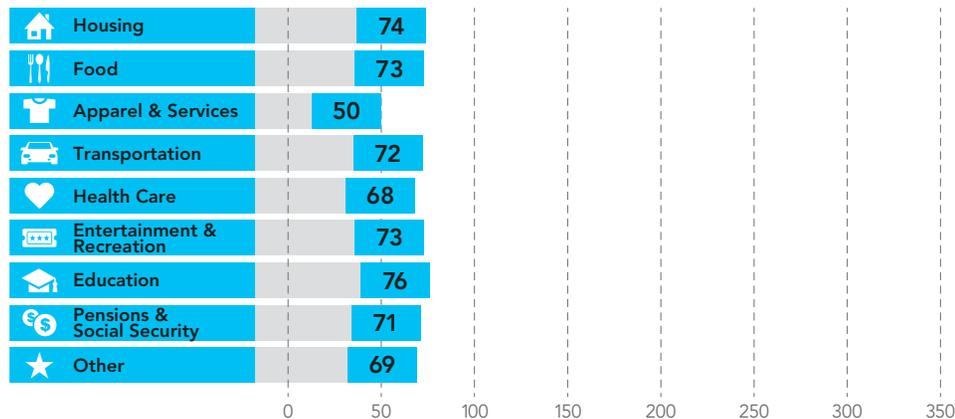


### Median Net Worth



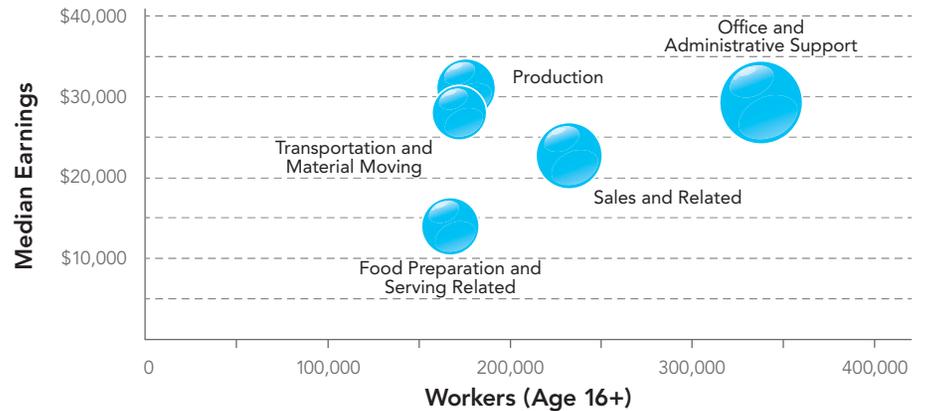
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## OCCUPATION BY EARNINGS

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 • Rustic Outposts

10A

# SOUTHERN SATELLITES

Southern Satellites is the second largest market found in rural settlements but within metropolitan areas located primarily in the South.

This market is typically nondiverse, slightly older, settled married-couple families, who own their homes. Almost two-thirds of the homes are single-family structures; a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. Residents enjoy country living, preferring outdoor activities and DIY home projects.

US Household // 3,775,000

Average Household Size // 2.65

Median Age // 39.7

Median Household Income // \$44,000

## + OUR NEIGHBORHOOD

- About 79% of households are owned.
- Married couples with no children are the dominant household type, with a number of multigenerational households (Index 112).
- Most are single-family homes (65%), with a number of mobile homes (Index 523).
- Most housing units were built in 1970 or later.
- Most households own 1 or 2 vehicles, but owning 3+ vehicles is common (Index 146).



10A

## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- Usually own a truck; likely to service it themselves.
- Frequent the convenience store, usually to fill up a vehicle with gas.
- Typical household has a satellite dish.
- Work on home improvement and remodeling projects.
- Own a pet, commonly a dog.
- Participate in fishing and hunting.
- Prefer to listen to country music and watch Country Music Television (CMT).
- Read fishing/hunting and home service magazines.
- Partial to eating at low-cost family restaurants and drive-ins.
- Use Walmart for all their shopping needs (groceries, clothing, pharmacy, etc.).

## + SOCIOECONOMIC TRAITS

- Education: almost 40% have a high school diploma only (Index 137); 41% have college education (Index 72).
- Unemployment rate is 9.2%, slightly higher than the US rate.
- Labor force participation rate is 59.7%, slightly lower than the US.
- These consumers are more concerned about cost rather than quality or brand loyalty.
- They tend to be somewhat late in adapting to technology.
- They obtain a disproportionate amount of their information from TV, compared to other media.

## + 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;  
Mobile Homes

### Median Value:

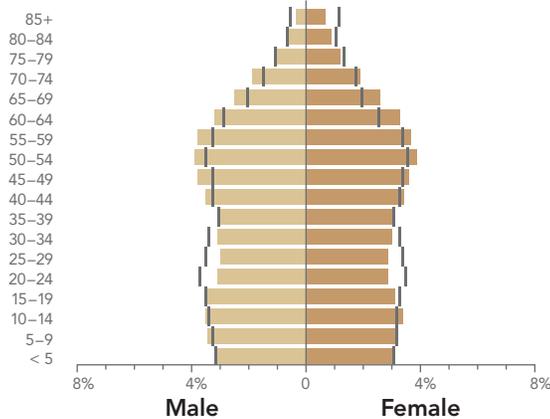
\$119,000  
US Median: \$177,000



## AGE BY SEX (Esri data)

**Median Age: 39.7** US: 37.6

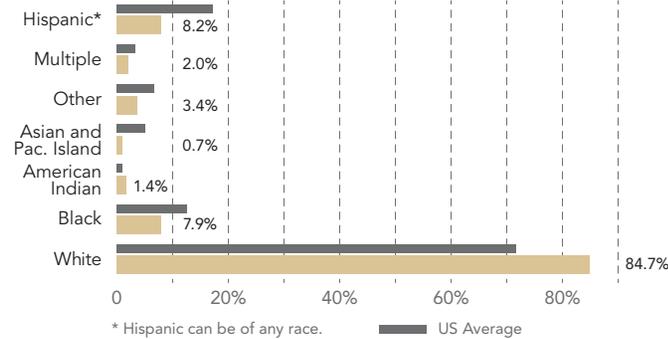
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## RACE AND ETHNICITY (Esri data)

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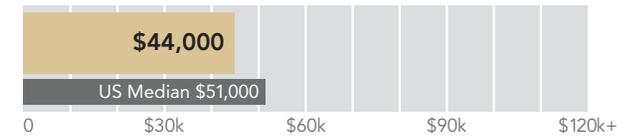
**Diversity Index: 38.6** US: 62.1



## 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.

### Median Household Income

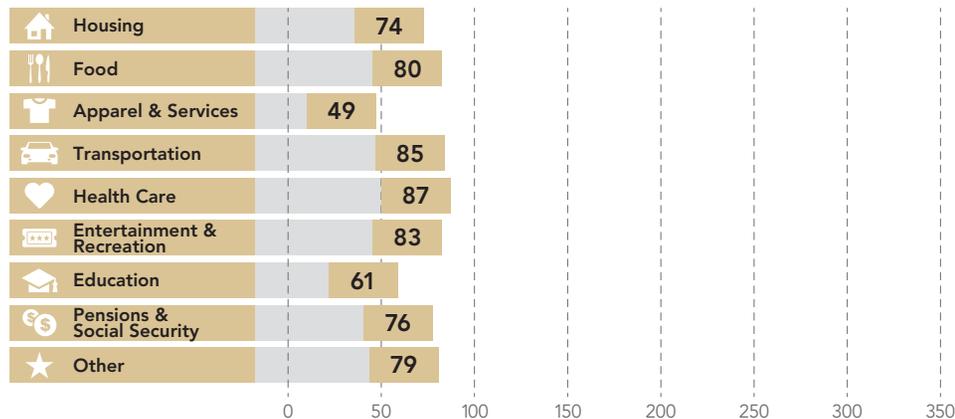


### Median Net Worth



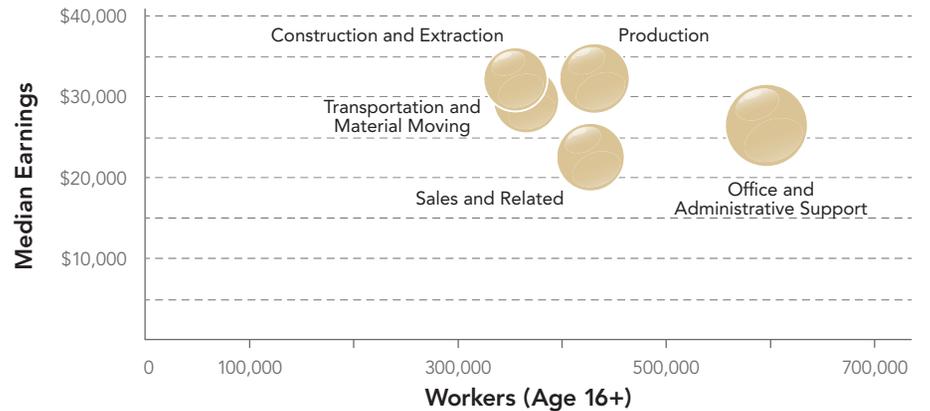
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## OCCUPATION BY EARNINGS

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 • Family Landscapes

# 4B HOME IMPROVEMENT

Married-couple families occupy well over half of these suburban households.

Most Home Improvement residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects.

US Household // 2,058,000  
Average Household Size // 2.86  
Median Age // 37.0  
Median Household Income // \$67,000

## + OUR NEIGHBORHOOD

- These are low density suburban neighborhoods.
- Eight of every 10 homes are traditional single-family dwellings, owner occupied.
- Majority of the homes were built between 1970 and 2000.
- More than half of the households consist of married-couple families; another 12% include single-parent families.



4B

## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- Enjoy working on home improvement projects and watching DIY networks.
- Make frequent trips to warehouse/club and home improvement stores in their minivan or SUV.
- Own a giant screen TV with fiber-optic connection and premium cable; rent DVDs from Redbox or Netflix.
- Very comfortable with new technology; embrace the convenience of completing tasks on a mobile device.
- Enjoy dining at Chili's, Chick-fil-A, and Panera Bread.
- Frequently buy children's clothes and toys.

## + SOCIOECONOMIC TRAITS

- Higher participation in the labor force and lower unemployment than US levels; most households have 2+ workers.
- Cautious consumers that do their research before buying, they protect their investments.
- Typically spend 4–7 hours per week commuting, and, therefore, spend significant amounts on car maintenance (performed at a department store or auto repair chain store).
- They are paying off student loans and second mortgages on homes.
- They spend heavily on eating out, at both fast-food and family restaurants.
- They like to work from home, when possible.

## + HOUSING

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### Typical Housing:

Single Family

### Median Value:

\$174,000

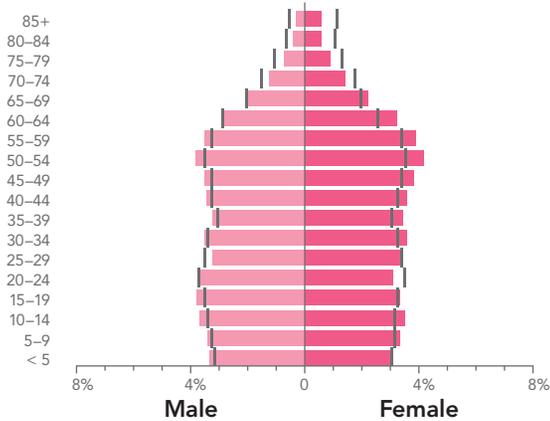
US Median: \$177,000



## AGE BY SEX (Esri data)

**Median Age: 37.0** US: 37.6

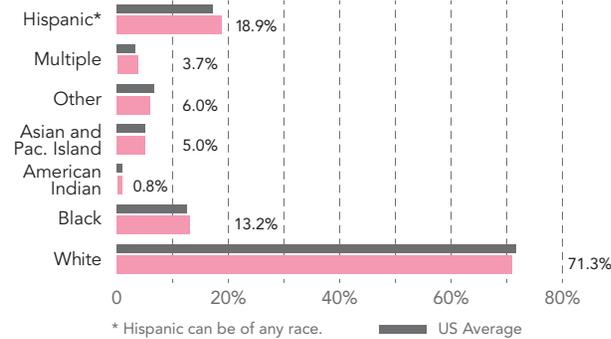
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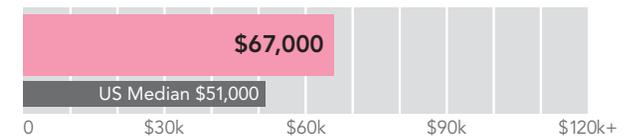
**Diversity Index: 63.4** US: 62.1



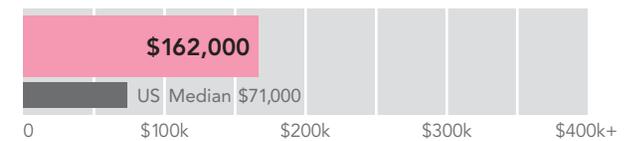
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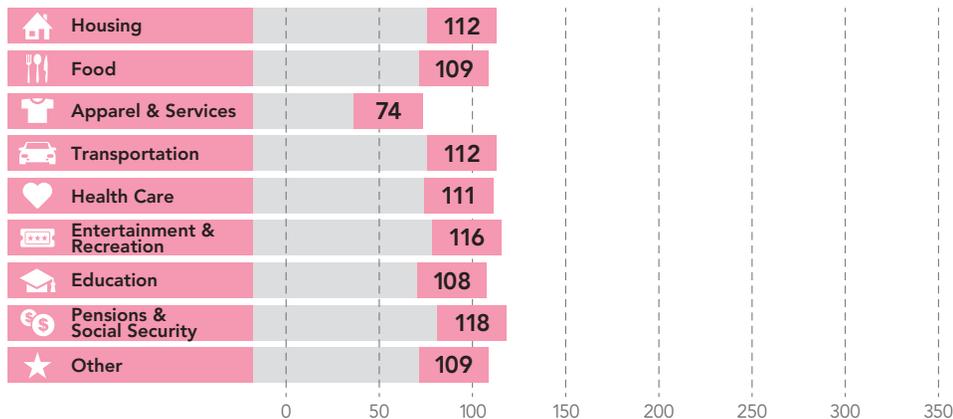


### Median Net Worth



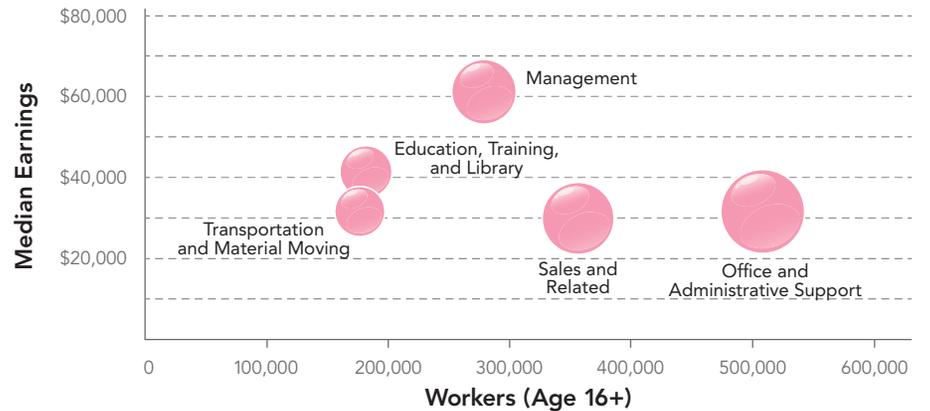
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## OCCUPATION BY EARNINGS

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 • Hometown

# 12B TRADITIONAL LIVING

Residents in this segment live primarily in low-density, settled neighborhoods in the Midwest.

The households are a mix of married-couple families and singles. Many families encompass two generations who have lived and worked in the community; their children are likely to follow suit. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. This is a younger market—beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun.

US Household // 2,369,000  
Average Household Size // 2.50  
Median Age // 34.8  
Median Household Income // \$37,000

## + OUR NEIGHBORHOOD

- Married couples are the dominant household type, but fewer than expected from the younger age profile and fewer with children (Index 79); however, there are higher proportions of single-parent (Index 146) and single-person households (Index 112).
- Average household size is slightly lower at 2.50.
- Homes are primarily single family or duplexes in older neighborhoods, built before 1940 (Index 183).
- Most neighborhoods are located in lower-density urban clusters of metro areas throughout the Midwest and South.
- Average commuting time to work is slightly shorter (Index 88).
- Households have one or two vehicles.



## + MARKET PROFILE

*(Consumer preferences are estimated from data by GfK MRI)*

- They shop for groceries at discount stores such as Walmart supercenters; Kmart is also a favorite for apparel and sundry household and personal care products.
- Convenience stores are commonly used for fuel or picking up incidentals like lottery tickets.
- They tend to carry credit card balances, have student loans, and pay bills in person.
- Half of households have abandoned landlines for cell phones only.
- They watch their favorite channels including QVC, CMT, and Game Show Network.
- They're fast food devotees.
- They enjoy outdoor activities such as camping and taking trips to the zoo.

## + SOCIOECONOMIC TRAITS

- Over 70% have completed high school or some college.
- Unemployment is higher at 10.9% (Index 127); labor force participation is also a bit higher at 64.6%.
- Over three quarters of households derive income from wages and salaries, augmented by Supplemental Security Income (Index 122) and public assistance (Index 149).
- Cost-conscious consumers that are comfortable with brand loyalty, unless the price is too high.
- Connected and comfortable with the Internet, they are more likely to participate in online gaming or to access dating websites.
- TV is seen as the most trusted media.

## + 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:

\$79,000

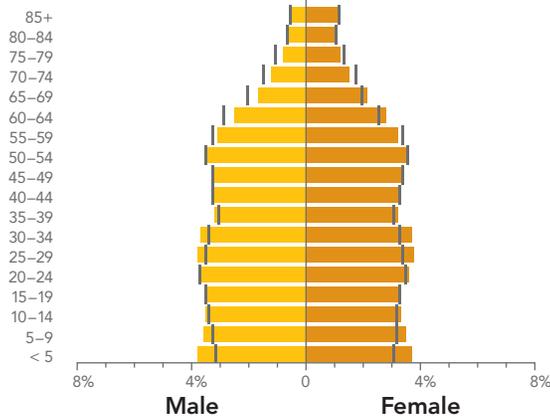
US Median: \$177,000



## AGE BY SEX (Esri data)

**Median Age: 34.8** US: 37.6

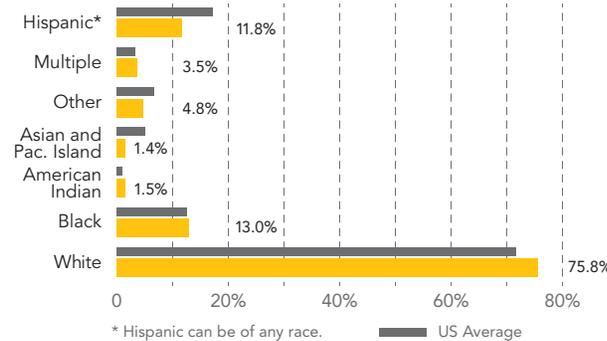
I Indicates US



## 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).

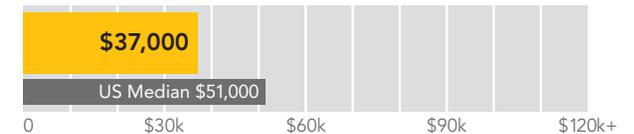
**Diversity Index: 53.1** US: 62.1



## 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.

### Median Household Income

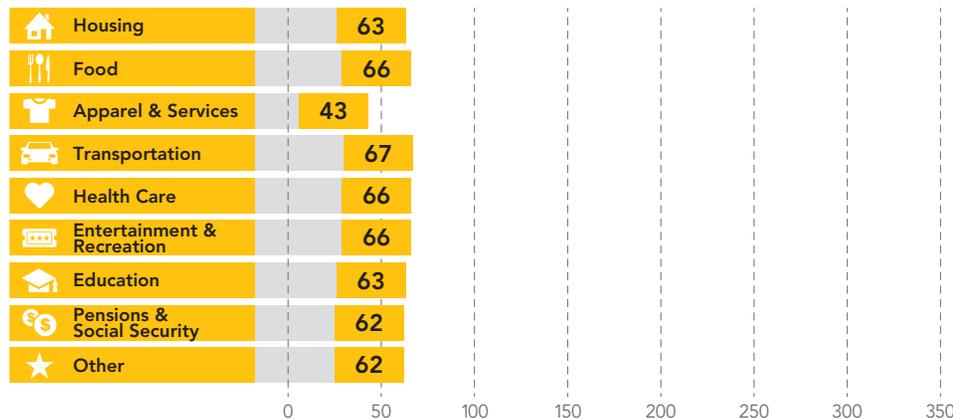


### Median Net Worth



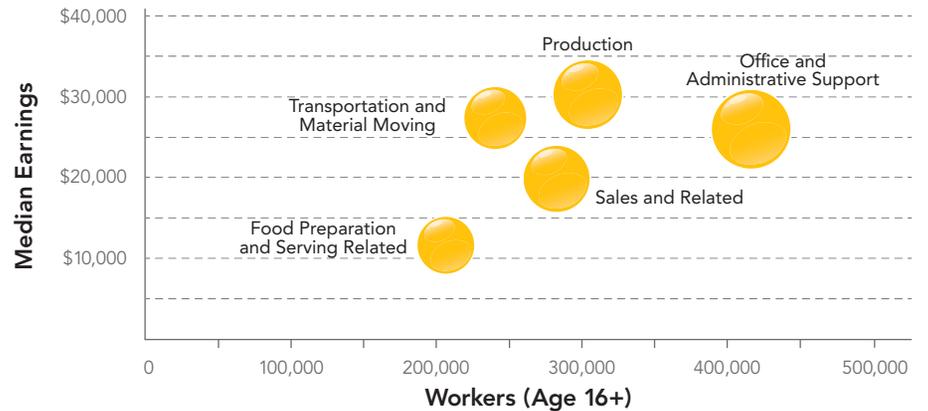
## AVERAGE HOUSEHOLD BUDGET INDEX

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.





# ABOUT THE RETAIL COACH

The Retail Coach, LLC, is a national retail analytics and locational intelligence firm that specializes in all aspects of retail market analyses and recruitment, from “macro to micro” trade area assessment to actively recruiting retailers on behalf of our clients.

Through its unique Retail360® process, The Retail Coach offers a dynamic system of products and services that better enable communities to maximize their retail development potential.



C. Kelly Cofer  
President & CEO  
The Retail Coach, LLC

## Retail360®

Providing more than simple data reports of psychographic and demographic trends, The Retail Coach goes well beyond other retail consulting and market research firms’ offerings by combining current national and statewide demographics and trend data with real-world, “on-the-ground” data gathered through extensive visits within our clients’ communities.

Every community is different, and there is no “one size fits all” retail recruitment solution. Compiling the gathered data into client-tailored information packets that are uniquely designed for, and targeted to, specific retailers and restaurants who meet the community’s needs helps assure our clients that they are receiving the latest and best information for their retail recruitment efforts—all with personal service and coaching guidance that continues beyond the initial project scope and timeline.

Our Retail360® process assures that communities get timely, accurate and relevant information. Translating that data into the information that retailers need and seek assures our clients even better possibilities for tremendous retail growth and success.

### The Retail Coach –

*“It’s not about data. It’s about your success.”*



# ACKNOWLEDGEMENTS

The observations, conclusions and recommendations contained in this study are solely those of The Retail Coach, LLC and should not be construed to represent the opinions of others, including its clients, or any other entity prior to such entity's express approval of this study.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.

Sources used in completing this study include: infoUSA™, Applied Geographic Solutions, Environics Analytics 2018, ESRI 2018, U.S. Census Bureau, Economy.com, Spatial Insights Inc., Urban Land Institute, CensusViewer.com, International Council of Shopping Centers, and/or U.S. Bureau of Labor and Statistics.

To better represent current data, where applicable, portions of estimated actual sales may be calculated using an average sales per square foot model.

Mapping data is provided by MapInfo, Nielsen, ESRI and/or Microsoft Corporation.

All information furnished is from sources deemed reliable and is submitted subject to errors, omissions, change of terms and/or conditions.