

# The City of The Village of Douglas Michigan

Prepared by:



## Target Market Analysis The RETAIL Study

Draft Report  
April 19, 2019



Strategies and Retail Inventory  
Retail Market Study  
The City of the Village of Douglas | April 2019

The first few Infographics displayed in attached [section a](#) of this report summarize the inventory of existing retailers by category, and also identify the market potential for new establishments. LandUseUSA recommends that the City of Douglas consider the following retail strategies to improve the mix of choices that meet the needs of year-round residents, seasonal non-residents, and occasional visitors and vacationers.

**Total Market Potential – Retail Anchors and Merchants**

- Hardware store (up to 14,000 sf)
- Pharmacy (up to 8,000 sf)
- Automotive parts & supply store (up to 8,000 sf)
- Five-and-dime or general store (up to 8,000 sf)
- Camping and kayaking outfitters store (up to 4,000 sf)
- Small hobby and game stores (up to 2,000 sf)
- Party supplies, costumes, and event planning (up to 3,000 sf)
- Ready-to-assemble furniture (up to 6,000 sf)
- International specialty grocery store (up to 3,000 sf)
- Apparel and fashion accessories (up to 3,000 sf)

The list above includes typical square footages for the larger anchors like hardware, pharmacy, automotive parts, general stores, outfitters, and furniture. Several smaller shops could share space among the other categories. For examples, a small hobby shop might have 1,000 square feet, and a game and toy store could add 1,000 square feet, for a total of 2,000 square feet. In general, the total market potential for new retail space is in the range of 30,000 to 50,000 square feet.

*Retail and Merchants* - New retail anchors and merchants can be located either in the downtown or along the Blue Star Highway. However, any new buildings developed along Center Street should be guided by a new downtown subarea plan (and perhaps regulated by a hybrid or complete form-based code). At a minimum, the zoning ordinance should regulate the placement and ratios of parking, on-street parking, sidewalks, build-to lines, scale and height, facade treatments, exterior materials, etc.

Subarea plans and zoning can help address the future possibility of national chains seeking locations within the city. For example, a dollar store, chain pharmacy store, automotive parts, or thrift store might seek locations that allow them to build fragmented, free-standing stores with deep set-backs from the street and wrapped by parking fields. A proactive approach is recommended to ensure shallow set-backs, build-to lines, and parking at the back. These types of guidelines can help ensure that the new stores are helping create a sense of place and enjoyable shopping environment, and will help prevent the development of formats that undermine the city's unique character.



*Specialty Foods* – It is also recommended that the City of Douglas consider the following retail strategies to improve the mix of specialty food choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: 1) Small event facility with commercial kitchen that can be leased for special parties and occasions, and that can be catered. 2) Several restaurants with unique cuisine, theme, and entertainment value. 3) Specialty foods within the new International grocery store, such as locally grown and made, organic, whole foods, vitamins and supplements, prepared party trays, and novelty supplies.

One or two new restaurants are supportable in the market, but only if they offer unique cuisine, theme, and entertainment value. Only one restaurant is recommended at a new municipal marina, and it should be matched with at least one new restaurant in the downtown. The city should also anticipate interest from national chain and fast food restaurants, and should ensure that the regulating plans and ordinances are in-place to address that possibility.

*Entertainment Venues* – The City of Douglas should also consider the following strategies to improve the mix of choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: 1) Consistent with the Waterfront Plan, build a new municipal marina that can be programmed with year-round and transient boat slips, day cruises, fishing charters, boat rental, and novelty boating venues. 2) Incubate a vineyard that is located within or very close to the city and add a chapel and commercial kitchen that can be rented for special events and catered by the vineyard, local chefs, and/or restaurants/delis.

*Municipal Marina* – Aside from the existing boater's convenience and supply store at Tower Marine, additional retail is explicitly not recommended at a new municipal marina. Instead, trolleys and bike share programs should be added at the marina and docks, plus display boards of maps guiding marina patrons along clearly marked routes. The city's antique market, musical events, and any future farmers' market should stay in the downtown and should not be relocated out to a new marina. These amenities are needed to convert visitors into shoppers for downtown merchants.

Trolley, bicycle, and pedestrian routes into the downtown should be along the shortest distance across the Blue Star Highway, south to Center Street, and then east along Center Street. Non-vehicular traffic should not be diverted along the shoreline, because it risks bypassing the downtown and its merchants. (Important – please see the maps, planning resources, and three-page checklist provided in [section k](#)).

*Retail Sales Benchmarks* – Additional exhibits in [section a](#) are intended to provide guides and insight into retail sales and sales per square foot. These resources can help investors, developers, and prospective entrepreneurs understand the retail trade industry before building more commercial space or opening a new business.

The exhibits demonstrate variances in sales per square foot by retail category; sales per employee by total number of employees; total sales per store by county along Michigan's west shoreline; and annual growth of sales for Allegan County for retail, hotels and restaurants, and arts and entertainment venues. Additional information on national industry trends is also provided in attached [section e](#).

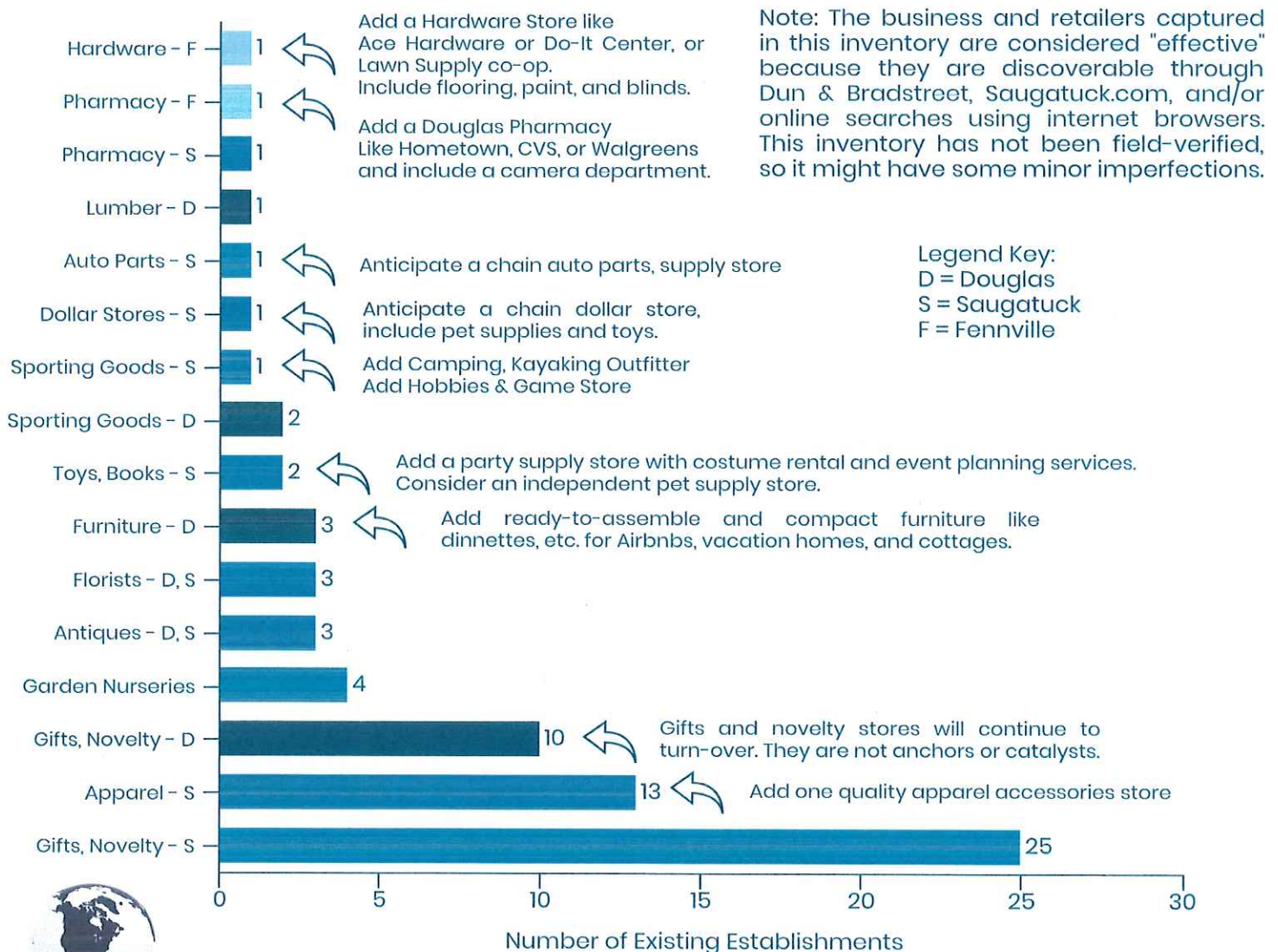


# Retail Inventory & Capacity | Douglas

A qualitative assessment of retail inventories and probable needs.

## Key Recommendations

LandUseUSA recommends that the City of Douglas consider the following retail strategies to improve the mix of choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: Hardware, Pharmacy, Automotive Parts & Supplies, Dollar Store, Camping & Kayaking Outfitters, Hobby & Game Store, Party Supply and Event Planning Store, Ready-to-Assemble Furniture, International Specialty Grocery Store, and a quality Apparel Store. New retail anchors and merchants can go in the downtown or along the Blue Star Highway. However, any new buildings developed along Center Street should be guided by a new downtown subarea plan (and perhaps regulated by a form-based code). At a minimum, the zoning ordinance should regulate the placement and ratios of parking, on-street parking, sidewalks, build-to lines, scale and height, facade treatments, exterior materials, etc.



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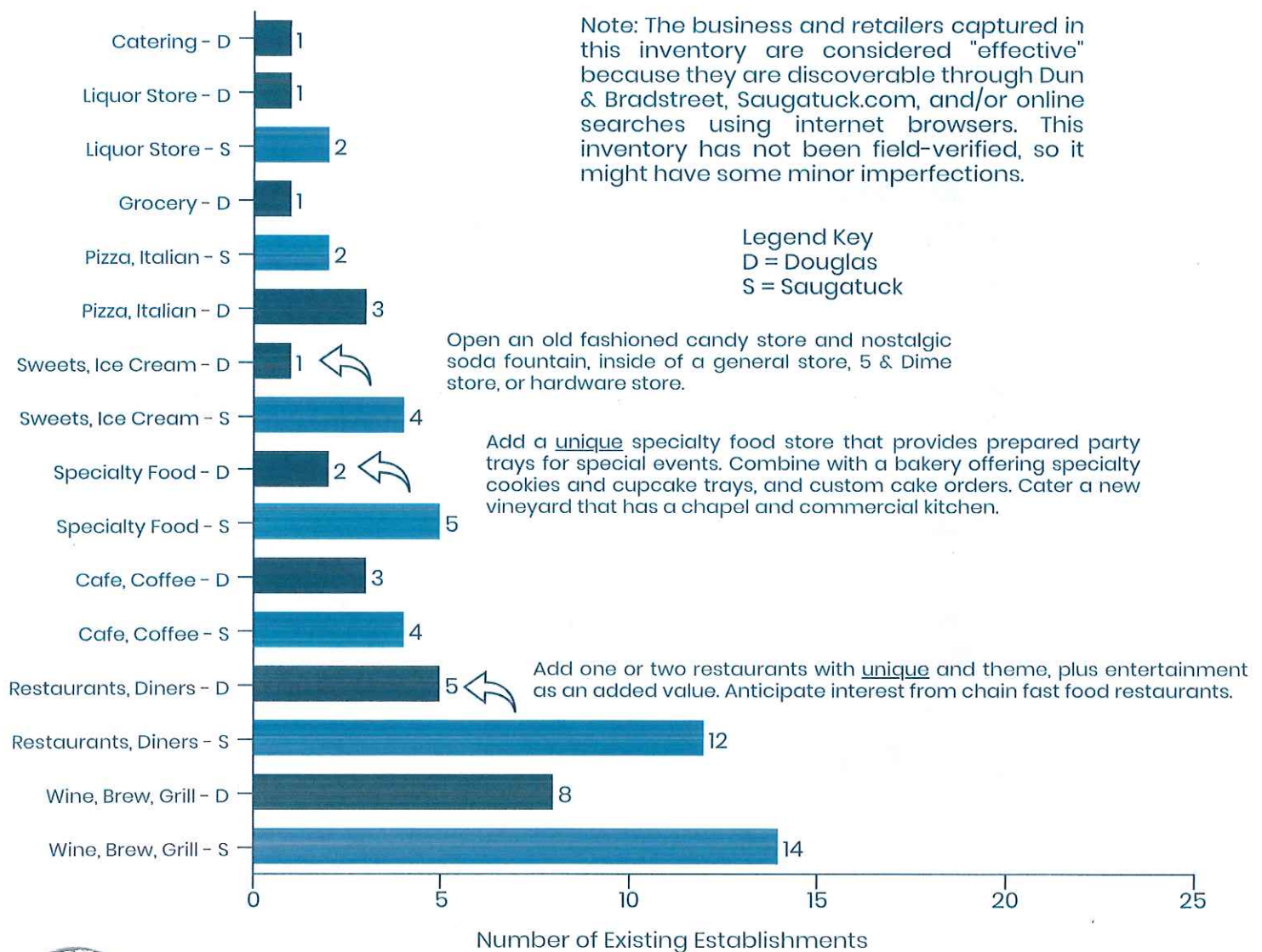
Analysis & exhibit prepared by LandUseUSA | Urban Strategies © on behalf of the City of the Village of Douglas, 2019.

# Eateries Inventory & Capacity | Douglas

A qualitative assessment of supply and probable needs among restaurants.

## Key Recommendations

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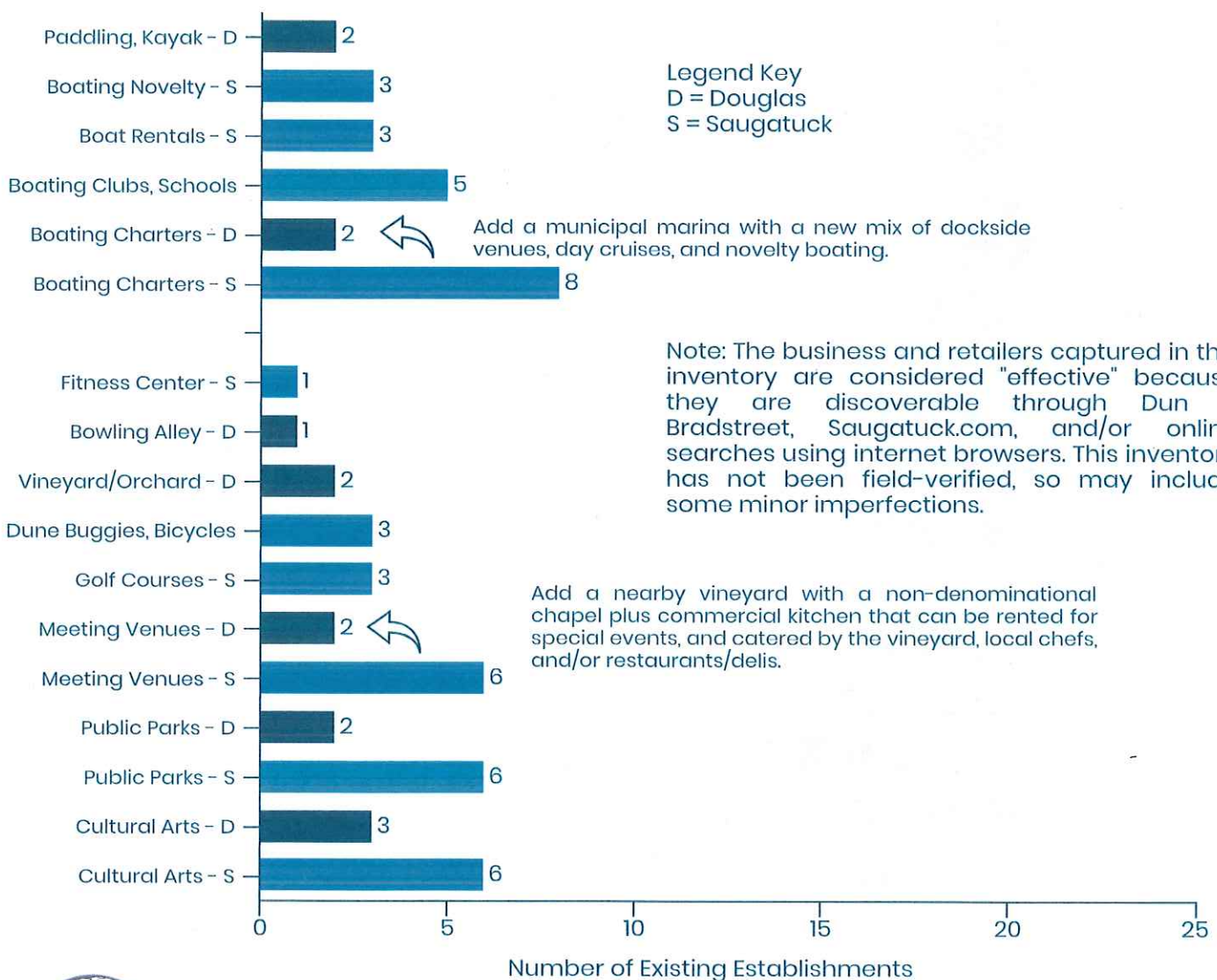


# Venues Inventory & Capacity | Douglas

Assessment of supply and probable needs among entertainment venues.

## Key Recommendations

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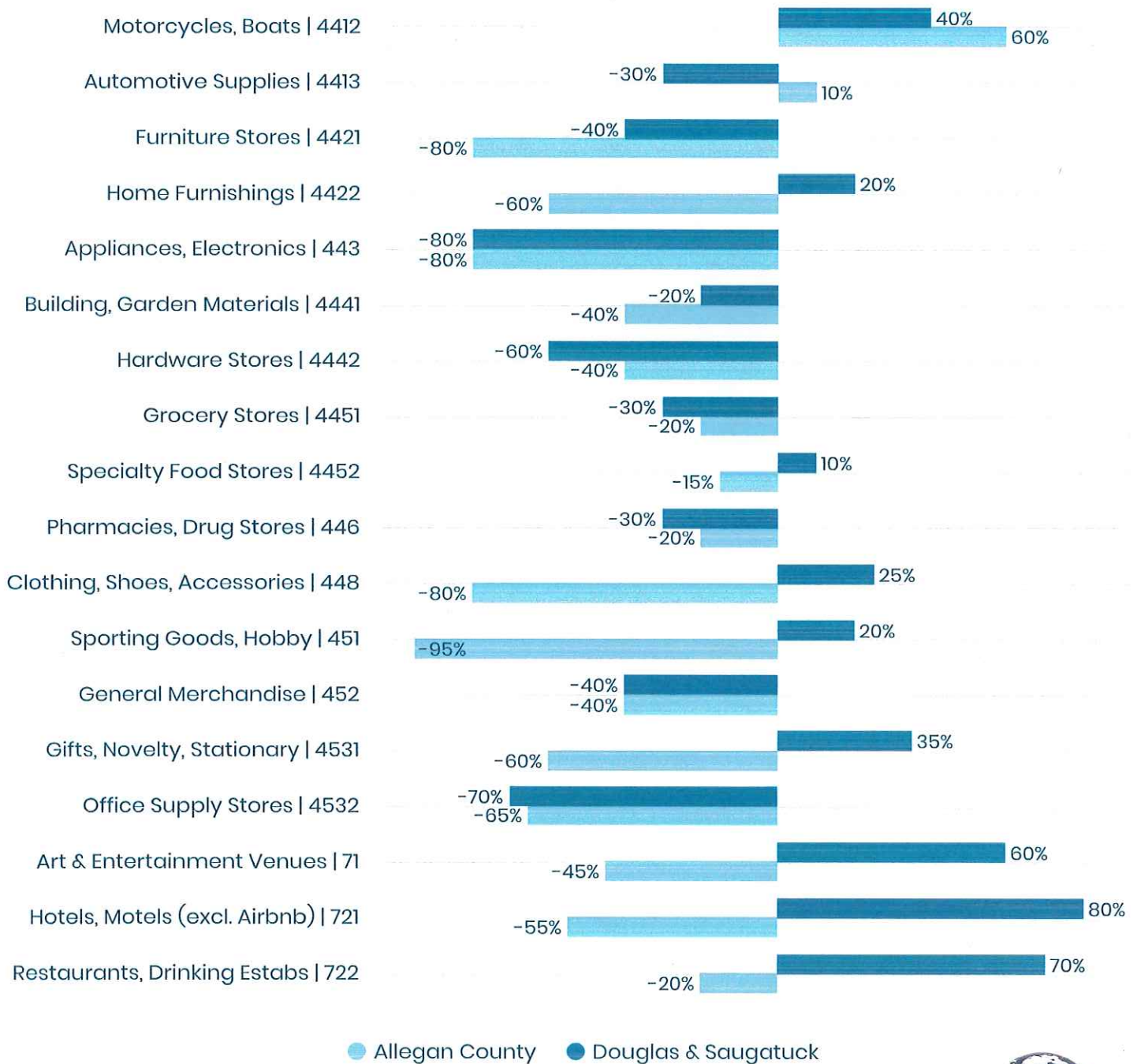
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# Net Leakage | Douglas & Saugatuck

Based on transacted sales compared to resident expenditure potential.

## Annual Net Import and Export Summary by Retail Category



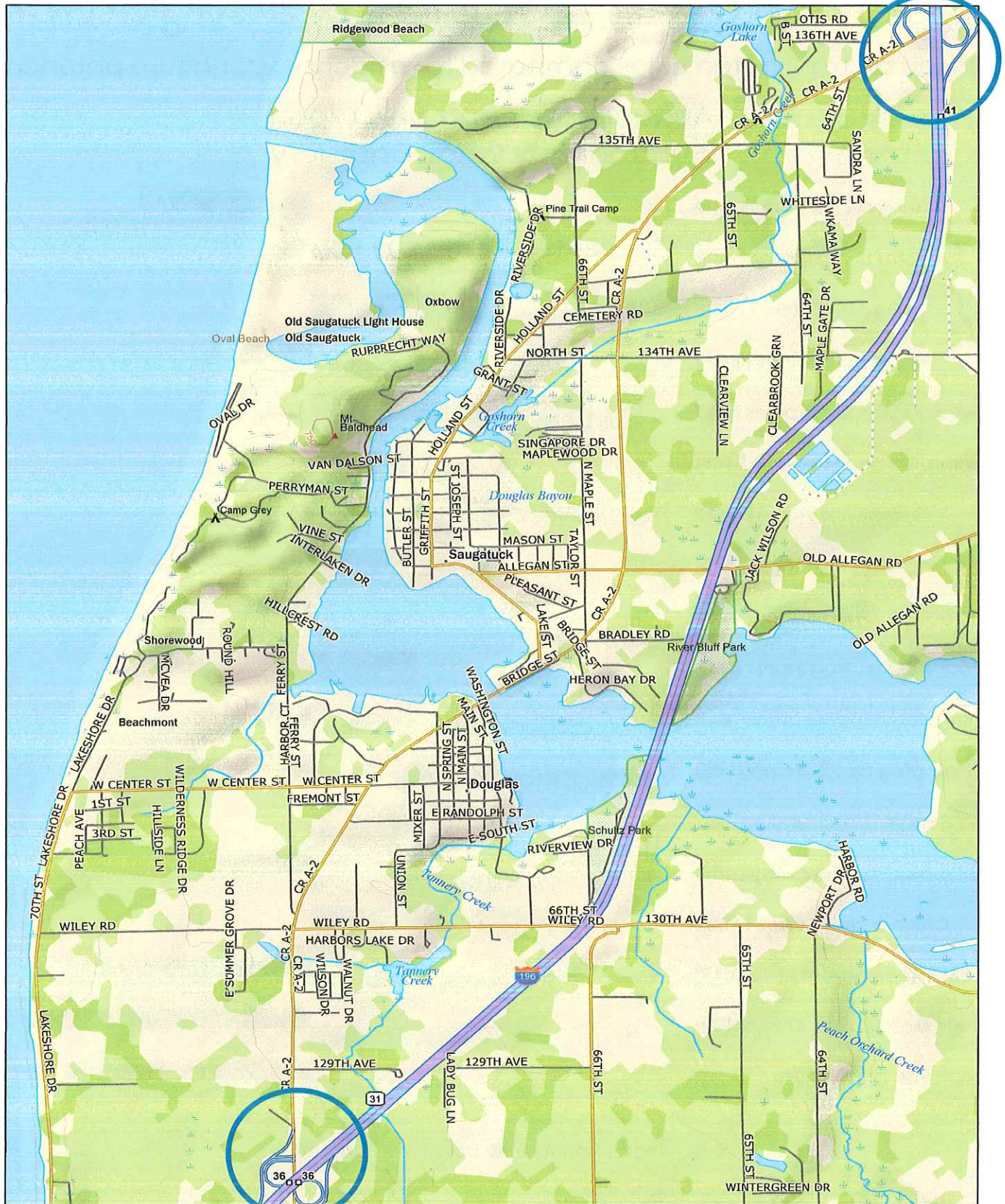
Underlying data provided by the Economic Census through 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



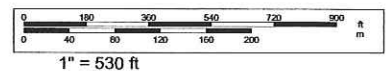
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# Geographic Setting and Highway Interchanges The Cities of Douglas and Saugatuck, Michigan



Underlying map provided by DeLorme XMap; exhibit created by  
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Retail Industry Trends  
The Retail Market Analysis  
The City of the Village of Douglas | April 2019

*Retail is Not "Dead"* – Mainstream media channels tend to promote the misconception that brick-and-mortar retail is somehow dead or dying – but this couldn't be farther from the truth. The reality is that shoppers are demanding an enjoyable shopping experience that engages all of the senses, and convention big-box formats have failed to deliver. Consumers are abandoning conventional chains and finding more enjoyable experiences online, and in traditional downtown districts. They are also exploring town centers and other urban places in search of unique merchandise, high service, convenience, and added value with restaurants and entertainment venues.

Many redundant and over-built retail formats have fallen out of favor with consumers; and some are now struggling after years of failing to keep up with the changing preferences of savvy shoppers. Value-priced big-box discount department stores, conventional department stores, national chains, and "category killers" have over-built stores to monopolize markets and demonstrate portfolio growth needed to satisfy demanding shareholders. Now they are attempting to correct the imbalance by closing redundant stores and right-sizing the locations that were over-built in the first place.

*Downtown Merchants Strategies* – The right-sizing and contracting of redundant big-box retail presents new opportunities for downtown districts and independent merchants. However, they must compete aggressively to win shoppers back. This involves a strategy of unique merchandise that cannot be found online (such as handmade, artisanal, locally grown, etc.), convenience, high levels of service, and a complete shopping experience that engages all of the senses. A lowest-price strategy is not necessary as long as these other elements can be successfully provided. Placemaking is an important and essential part of that process.

*Industry-Wide Trends are Healthy* – The exhibits in attached section e are intended to provide real data that demonstrates the overall good health of the retail trade industry. The exhibits include line charts showing normal fluctuations in same store sales from one decade to the next; gains in sales per square foot over time; stable retail expenditures as a share of income; and the halo effect of omni-channel marketing and sales platforms.

*Halo Effect of Omni-Channels* – On the latter topic of omni-channel sales, an exhibit is attached to demonstrate the concept of using internet and online sales to build brand and store loyalty, which generates repeat shopping and higher sales overall. Online sales can help build brand loyalty and actually bring shoppers into brick-and-mortar stores to explore products and merchandise – which they might still buy online. Local merchants in downtown Douglas should each have a website, profile through social media platforms, and a system for accepting phone orders with ease. After these channels are in place and operating smoothly, the next step is to also enable online orders through the primary website.



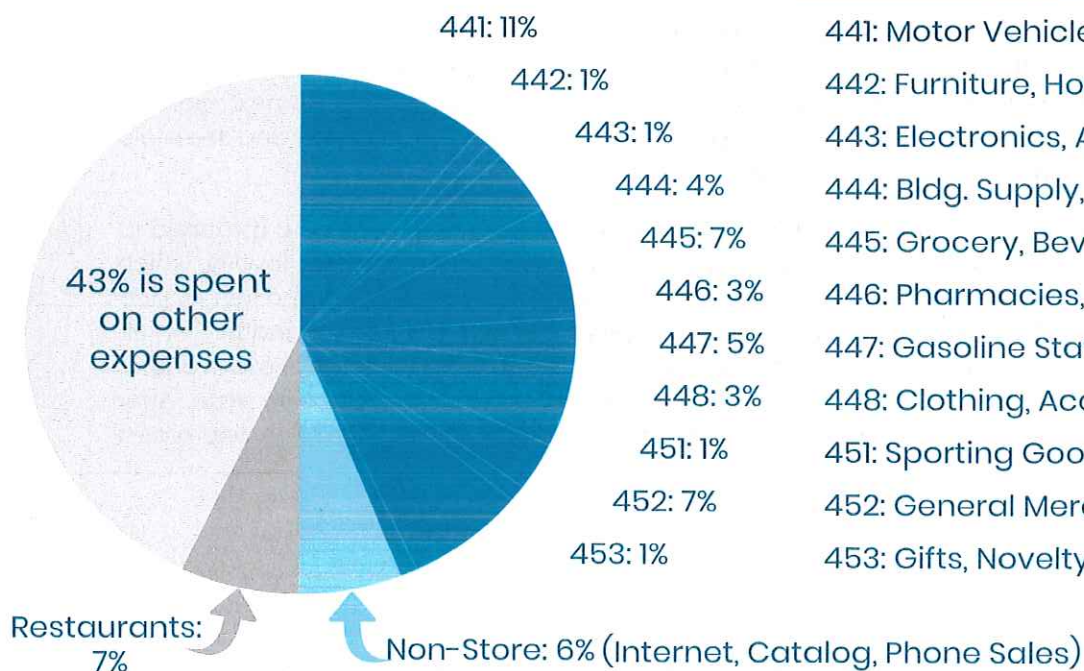
# Expenditures as a Share of Income



## 2019 Annual Expenditures As a Share of Per Capita Income by Retail Category | Michigan

### Retail Trade Categories (49% of Spending)

- 441: Motor Vehicles and Parts Dealers (11%)
- 442: Furniture, Home Furnishings Stores (1%)
- 443: Electronics, Appliance Stores (1%)
- 444: Bldg. Supply, Hardware, Garden (4%)
- 445: Grocery, Beverage Stores (7%)
- 446: Pharmacies, Drug Stores (3%)
- 447: Gasoline Stations, Convenience (5%)
- 448: Clothing, Accessory, Shoe Stores (3%)
- 451: Sporting Goods, Hobby Stores (1%)
- 452: General Merchandise Stores (7%)
- 453: Gifts, Novelty, Books, Office Supply (1%)



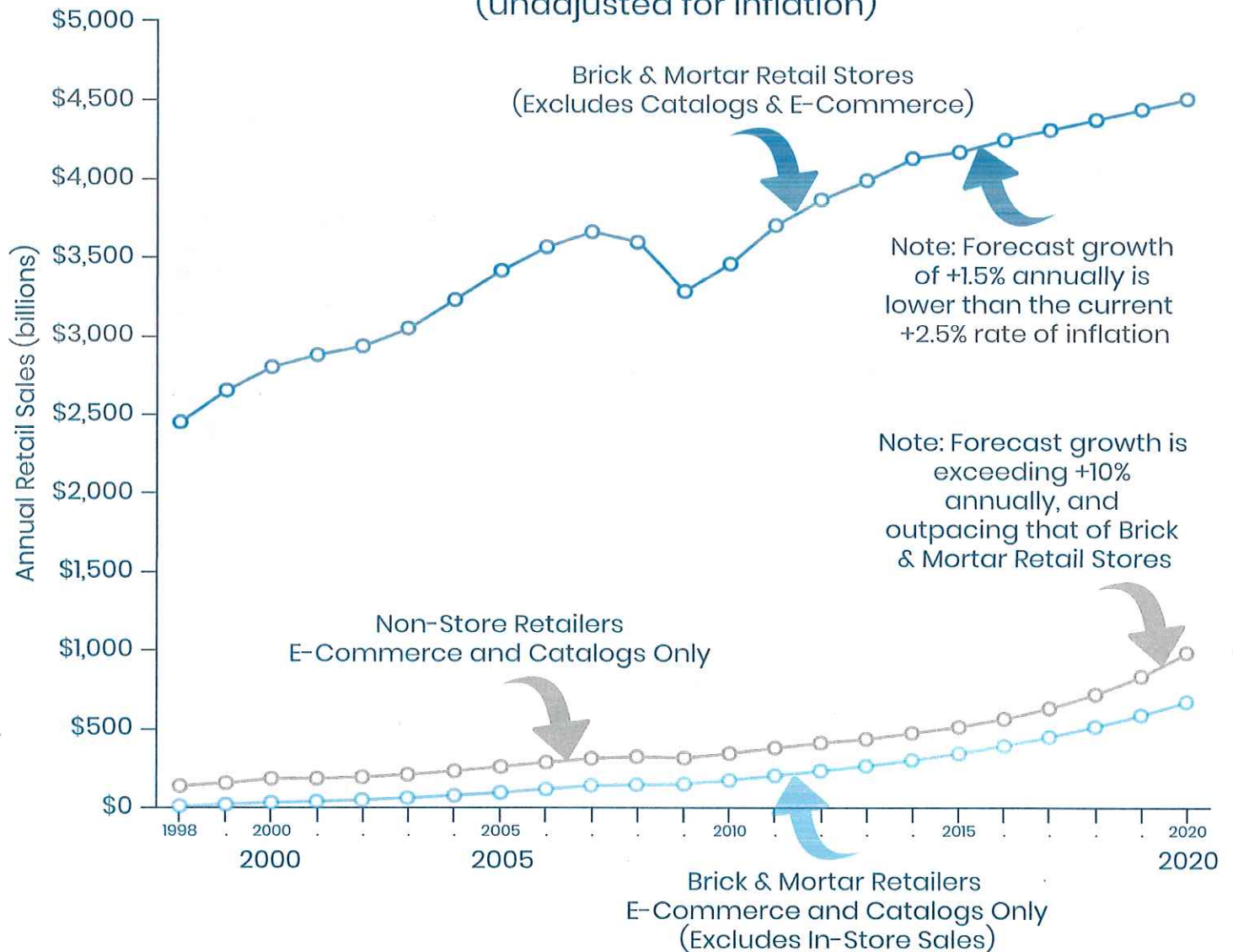
Underlying data represents estimates only; analysis based on the U.S. Census Bureau's Advance Monthly Retail Trade Survey through 2018. Prepared by LandUseUSA | Urban Strategies © with full copyrights and all rights reserved.



# Retail Sales with E-Commerce | USA

Demonstrating low but accelerating online and catalog sales

Annual Retail Sales (billions)  
By Type, Including E-Commerce  
The United States  
(unadjusted for inflation)



Underlying data represents estimates only; analysis based on the U.S. Census Bureau's Annual Monthly Retail Trade Survey through 2016. Prepared by LandUseUSA | Urban Strategies © with full copyrights and all rights reserved.



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# The Halo Effect of Omni Channels

Consumers demonstrate the highest loyalty to brick-and-mortar stores that have websites, social media pages, and easy phone and internet ordering.

## Single Channels



## Omni Channel



## The Halo Effect



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Target Market Analysis  
The Retail Market Analysis  
The City of the Village of Douglas | April 2019

*71 Lifestyle Clusters* – Exhibits in attached [section f](#) are intended to emphasize the value of having a downtown district that is linked to a waterfront with amenities and entertainment venues. There is good evidence that residents living along Michigan's Great Lakes Shorelines are more likely to dine out and take advantage of recreational venues like trails, beaches, and marinas. Households living in downtowns and other urban places are also more likely to visit brewpubs, local merchants, restaurants, and theaters.

*Douglas Lifestyle Clusters* – The local market has 268 resident households in the "Booming and Consuming" lifestyle cluster, plus 42 households in the "Golf Carts and Gourmets" category, 19 households in the "Platinum and Prosperity" category, and 52 "Reaping Rewards" households. These groups are important because they are relatively affluent and big-spenders on retail. However, they also tend to live in detached houses in suburban locations. They are rarely found living in downtowns or urban neighborhoods nearby.

*The Link to Urban Housing* – To support more retail space, the City of Douglas should also focus on providing more urban housing choices that will meet the needs and expectations of urbanites inclined to live in the downtowns – and shop its merchants. LandUseUSA recommends that urban townhouses and lofts be pursued in the downtown to bring more residents within walking distance of the shops. These urbanites are more inclined to shop the downtown merchants than drive to regional shopping destinations like Holland or Grand Rapids.

*Prevalent Lifestyle Clusters* – In the City of Douglas, the most prevalent "urbanite" target market and resident shopper is the "Digitally Dependent" category, currently represented by only 20 households. Other groups like "Wired for Success", "Bohemian Groove", "Rooted Flower Power", and "Urban Ambition" are under-represented but are growth opportunities for both downtown housing and patrons for merchants and eateries. The two industries of housing and retail and intertwined, and both are needed to foster economic growth and progress for the downtown.

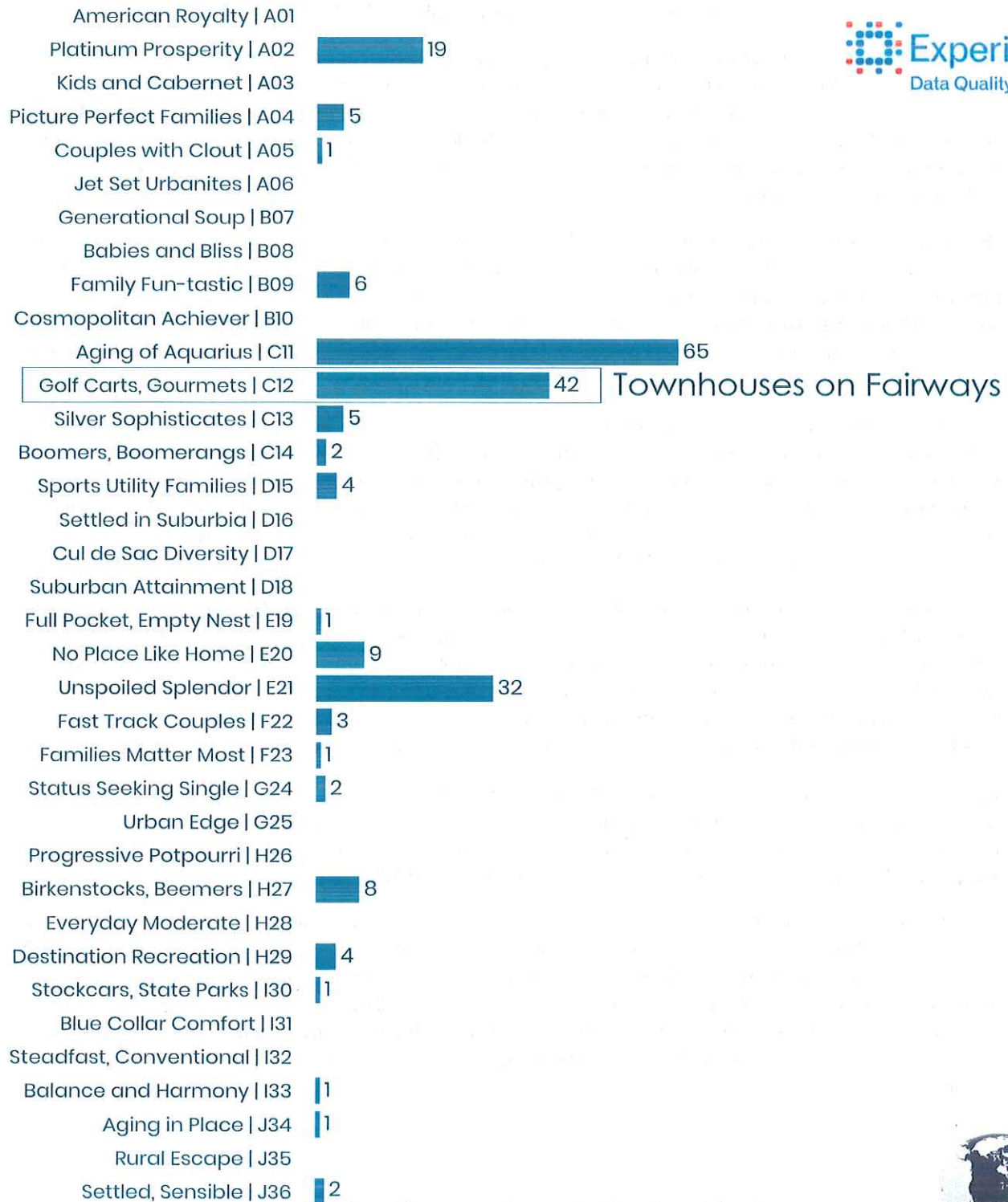
*Target Market Profiles* – Narratives describing the city's most prevalent lifestyle clusters are provided in attached [section g](#). A profile of the most affluent households from the Chicago metro area is also provided. The Chicago profile is explained in greater detail within the Residential Target Market Analysis (a companion report to this retail study).

*Chicago Urbanites are Targets* – There are about 23 households owning property in Douglas who are actually living in Chicago, and they are also classified as "Urban Edge" households. In addition, another 14 households are characterized as "Jet Set Urbanites". These two groups of urbanites represent excellent targets for downtown housing choices and spending on downtown merchants. They represent ideal growth opportunities for the city's downtown investors and developers, and particularly for converting property owners into seasonal and year-round residents.



# 1-36 Lifestyle Clusters | Douglas

All established households reporting the City of Douglas as their primary residence.

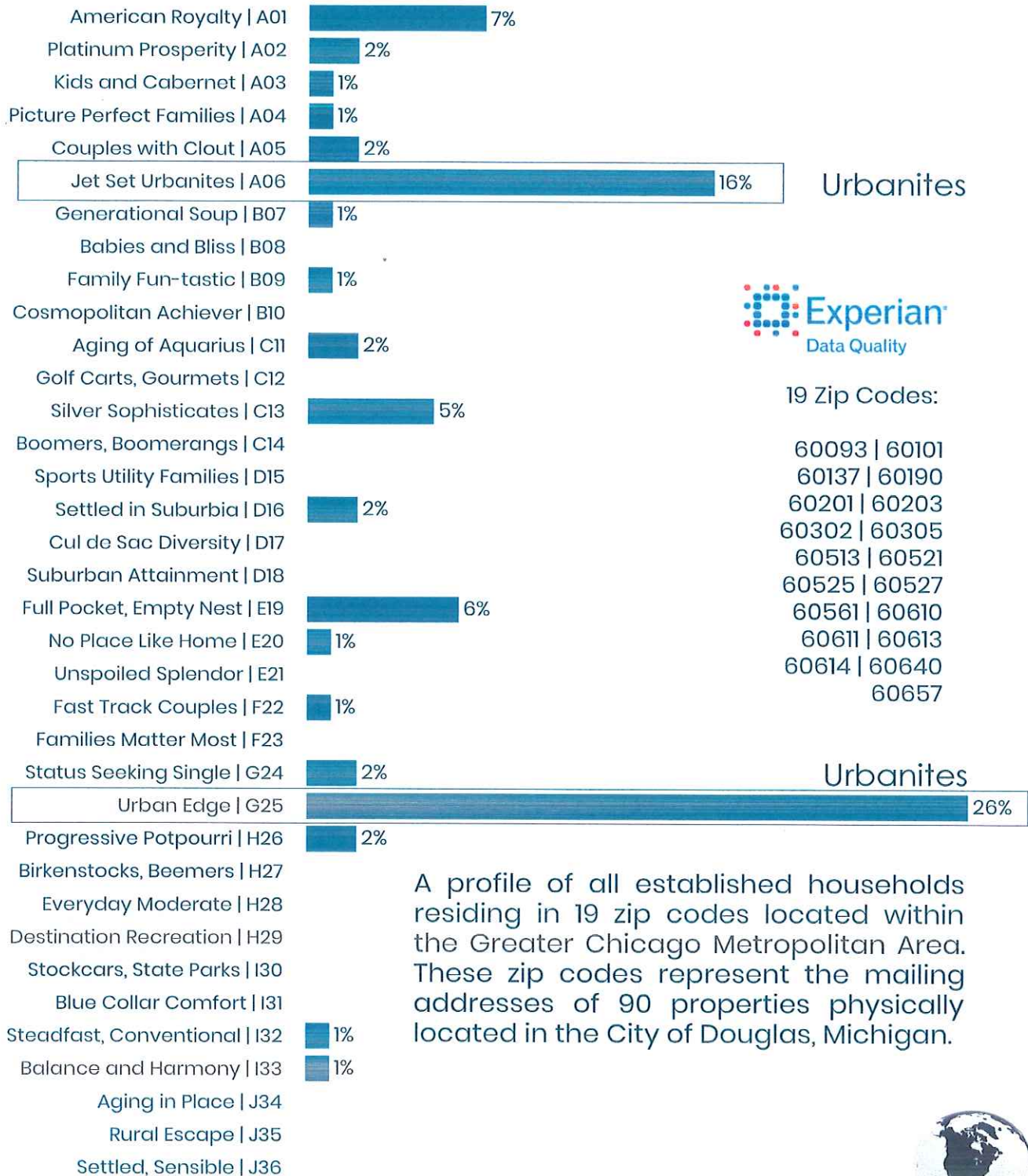


Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through the year 2018.  
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# 1-36 Lifestyle Clusters | Metro Chicago IL

Owners of 90 properties located in Douglas, but mailing addresses in Metro Chicago.

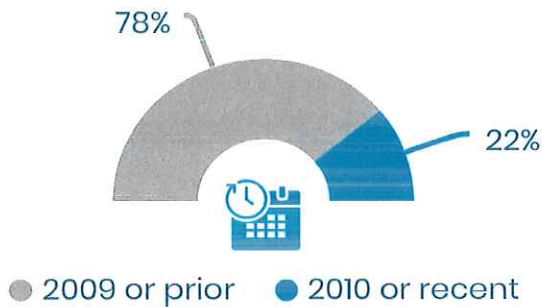




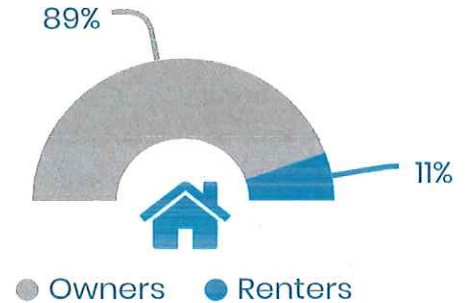
# Golf Carts & Gourmets | C12

Lifestyles and Housing Preferences | National Averages

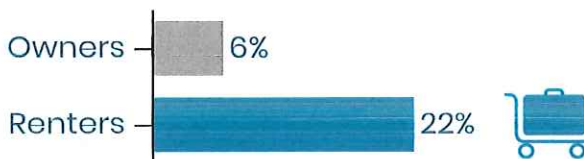
### Units by Decade Built



### Households by Tenure



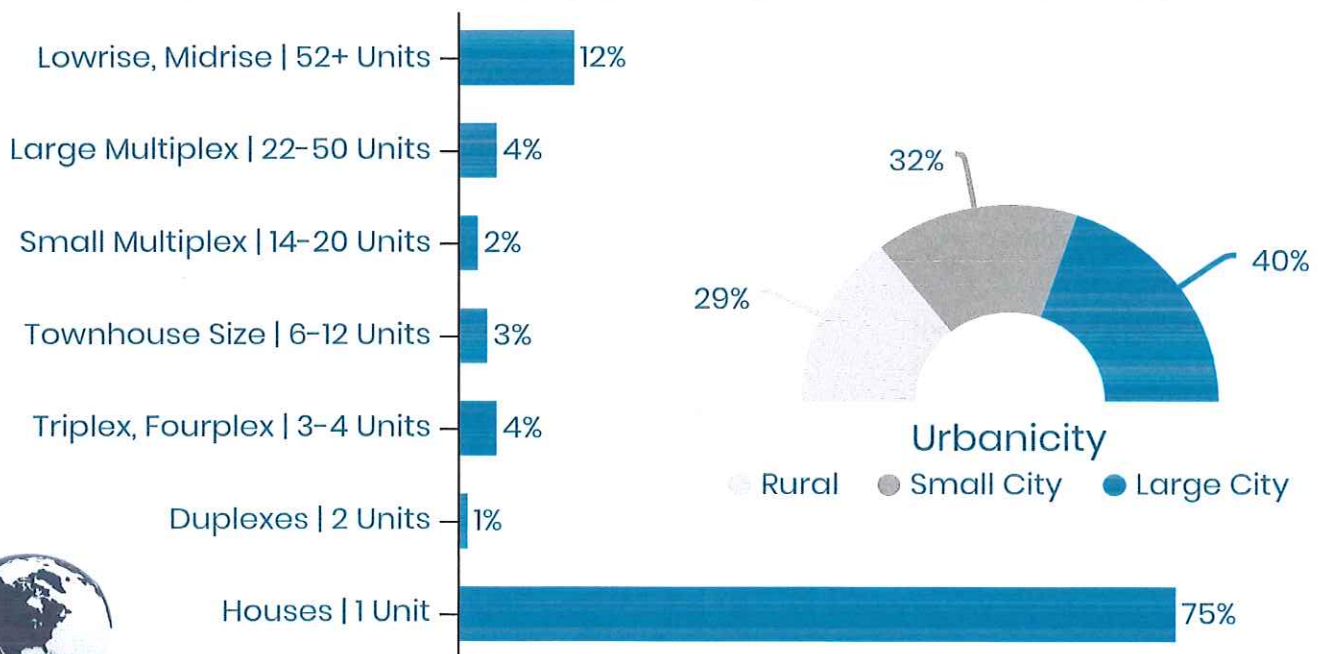
### Share that Moves each Year



### Median Household Income



### Inclination for Units by Building Size and Urbanicity



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## Golf Carts & Gourmets | C12

### Upscale retirees and empty-nesters in comfortable communities

About 75% the Golf Carts & Gourmet householders are 65 years of age and better. They are retirees living in relative comfort. Most of these households are married couples without children enjoying active retirements. However, many of these educated residents choose to work past retirement and are earning solid paychecks from professional and technical occupations. With their salaries, pensions and investments, these households report high incomes and they can afford newer homes and townhouses in beachfront retirement resorts.

Golf Carts & Gourmet households feel they have put in their time raising families and working hard and they are ready to enjoy the finer things in life. They like going out to restaurants, plays, classical concerts and casinos. They have the time and money to travel and they especially enjoy taking cruises and visiting friends and relatives around the country. These active seniors try to stay fit by golfing, playing tennis and swimming. Around their homes, they lead quiet lives, including reading books and newspapers, playing cards and cooking for fun.

With their solid incomes, these households like to frequent malls and shop at reputable department stores like Nordstrom and Dillard's. These traditionalists buy clothes that are conservative and high-quality. However, they also like their possessions to make a statement, and they seek out designer labels to convey a sense of status. While they care about having a healthy diet, they also consider themselves foodies who like foreign foods and spicy dishes, especially if served in an artistic way.

These maturing households will always be fans of traditional media. They read newspapers from cover to cover and subscribe to venerable magazines that cover travel, sports, business and senior topics. They tune in to the radio for news and music, especially stations that play easy listening and golden oldies of the 1960s and 70s. They consider television their favorite form of entertainment, preferring movies, dramas and how-to programs. By contrast, they are still a little nervous around newer media sites offering movies and music. They'll go online for news and information, and particularly stock quotes, medical research, and map directions. However, these households do not download music, watch video streams, or participate in online gaming. Streaming television and radio stations are not recommended for brand messaging targeted at these households.

Golf Carts & Gourmet households are more of a conservative bastion on political issues as well. They describe themselves as people of faith who attend religious services. A majority belong to the Republican Party despite some pockets of liberals and Independents. Many have a global awareness and give generously to health, educational and cultural groups.

However, that philanthropy is tempered by a fiscal conservatism. These households have amassed large nest eggs and are typically drawing down their retirement accounts. In order to maintain their comfortable standard of living, they carry plenty of insurance and umbrella coverage to protect their substantial assets.

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Affluent singles and couples living high-rise fashionable lives and with a big city-style

Jet Set Urbanites are metropolitan sophisticates and an affluent mix of singles and couples pursuing high-rise lifestyles. These residents, mostly childless mid-aged professionals, have graduate degrees and high incomes from offices with a view. Their careers are in business, finance, legal and health. They pay plenty to live in the luxurious apartments and condos in some of the country's priciest cities like New York, Chicago and San Francisco.

Jet Set Urbanites take advantage of their urban landscape. They are performing arts fans who frequent the theater, dance performances and a range of musical concerts. They like nightlife and enjoy going to comedy clubs, movies and ethnic restaurants. These workaholics try to stay fit, by working out in gyms and private clubs where they do aerobics, cardio and weights. They like to take clients and dates to sports events, particularly professional basketball games. To get away from it all, they routinely travel to foreign settings where they enjoy museums, restaurants and exclusive hotels.

As shoppers, Jet Set Urbanites are not inclined to shop or present themselves as Fashionistas. They do not frequent department stores, preferring more intimate and upscale specialty shops. Because many lack cars, they tend to shop online. They own stocks and mutual funds. Philanthropic and progressive, they support a range of non-profit groups and are generous with their money, especially for charities involved with health issues, welfare, the arts, education and public broadcasting.

Jet Set Urbanites are classic urban liberals, although 25% are not registered to vote. They are overwhelmingly Democratic in their political affiliation, and they support a progressive social agenda. They describe themselves as risk-takers who like to sample new products and fashion, experimenting with different styles and exotic cuisines, yet they rank high as conformists who stick to the status quo. They have enough money to indulge their tastes, and they don't mind paying for high-quality brands. However, they also care about environmental issues, and they tend to recycle, buy organic foods and look for smart green products.

Jet Set Urbanites are especially reachable. These educated households remain big fans of newspapers and magazines, particularly for the coverage of news, business, fashion and travel. They tune in to radio apps and stations every day for news, news/talk programming and for the occasional Pop or R&B fix. They are especially a receptive Addressable television market with 80% preferring to learn about brands during their broadcast television programs or while streaming movies and shows online. And when it comes to mobile and online display ads, this audience is increasingly paying attention and appreciating those timely brand offerings.

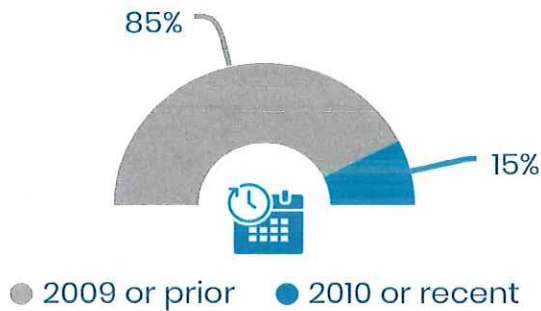
To resonate with these households, use messages that appeal to their impulsive spending habits as well as their inability to pass up something novel or that emanates their ideals for a smaller carbon footprint.

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# Jet Set Urbanites, Big Cities | A06

Lifestyles and Housing Preferences | National Averages

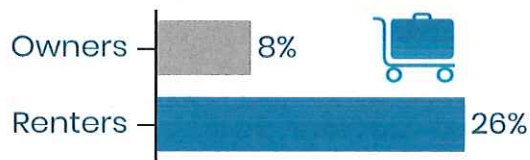
## Units by Decade Built



## Households by Tenure



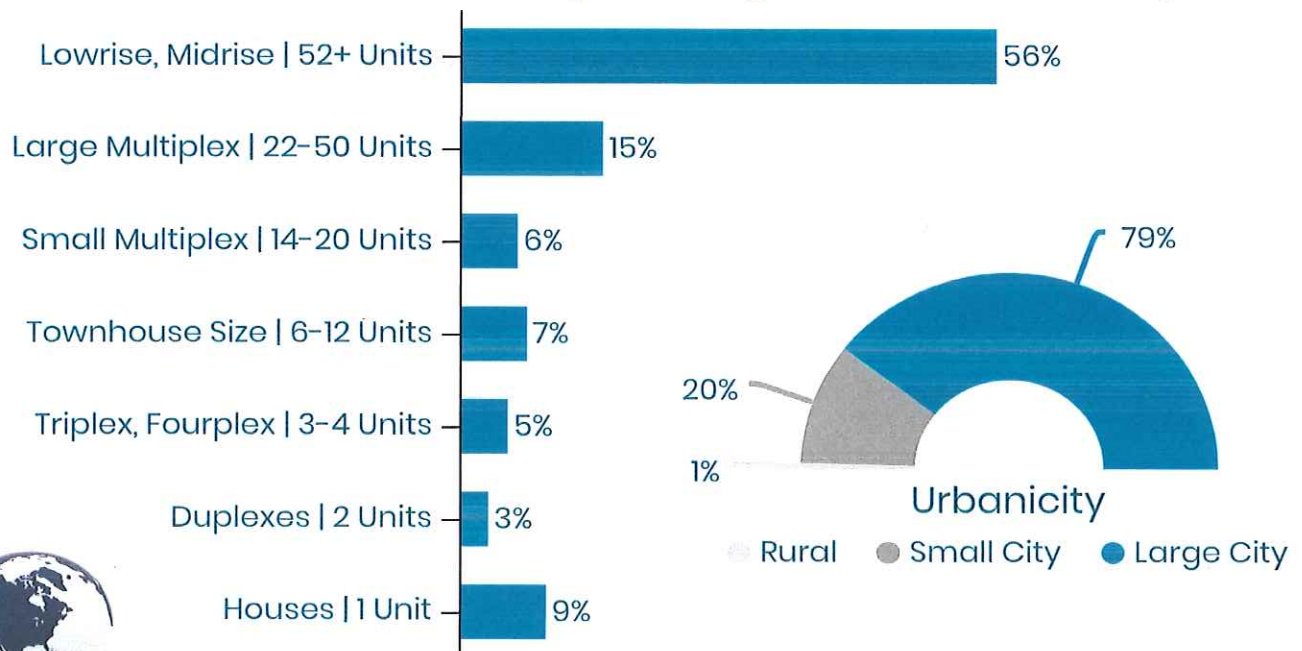
## Share that Moves each Year



## Median Household Income



## Inclination for Units by Building Size and Urbanicity



**LandUseUSA**  
UrbanStrategies

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Younger, up-and-coming singles, big city lifestyles located in urban neighborhoods

Urban Edge households tend to be unmarried single Millennials living in the funky neighborhoods of the nation's larger cities. Found in iconic urban neighborhoods in metro cities, they thrive in settings known for their cafes, nightclubs, and cultural arts venues. Most are college educated, in their 20s, and living in lofts and urban apartments. They can afford luxury lofts in gentrified buildings, supported by good-paying jobs in business, sales, the arts, and public policy. However, most care less about their residences than their locations near great ethnic restaurants, hip boutiques, trendy music clubs, and other like-minded singles.

Urban Edge households enjoy being on the cutting edge of culture and enjoy the energy only city life can bring. They head out to plays, movies and concerts. They like to read books and take continuing education courses. To keep looking their best, they devote hours each week to keeping fit. They are not just denizens of local health clubs; they adopt and are the first to try the newest in health food trends. During the week, they'll show up for drinks or dinner toting a gym bag and briefcase.

Not surprisingly, these households are liberal in their outlook. They tend to vote Democratic and proudly support a left-wing agenda. They do not conform to the expectation that they should attend weekly church services.

Urban Edge households are fashion-forward shoppers. They shop local boutiques and national chains alike. They are likely to drive an hour to find a new style to adopt, especially if a brand engages them with an incentive. Despite living in some of the nation's most expensive cities, they still like to keep within a budget and don't expect to spend more on household essentials or big ticket items this coming year. Thus knowing what makes them tick is even more important for marketers. Many Urban Edge consumers are somewhat financially savvy and have some type of investment. Over 75% of these households have a credit card.

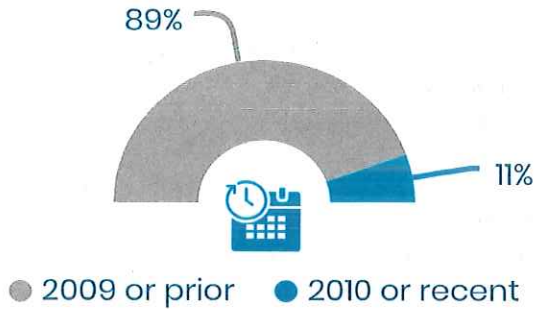
Urban Edge consumers make great Omni-channel audiences. They prefer learning about brands overwhelmingly while streaming or watching television. Internet radio streaming apps are another way to successfully engage these Millennial households. Mobile and online displays are also preferred means of engaging with brands, as well as trendy offering by email.

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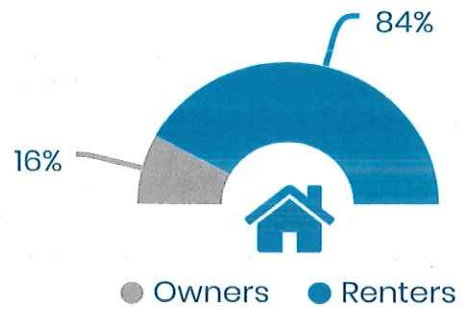
# Urban Edge | G25

Lifestyles and Housing Preferences | National Averages

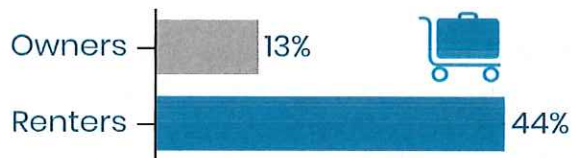
### Units by Decade Built



### Households by Tenure



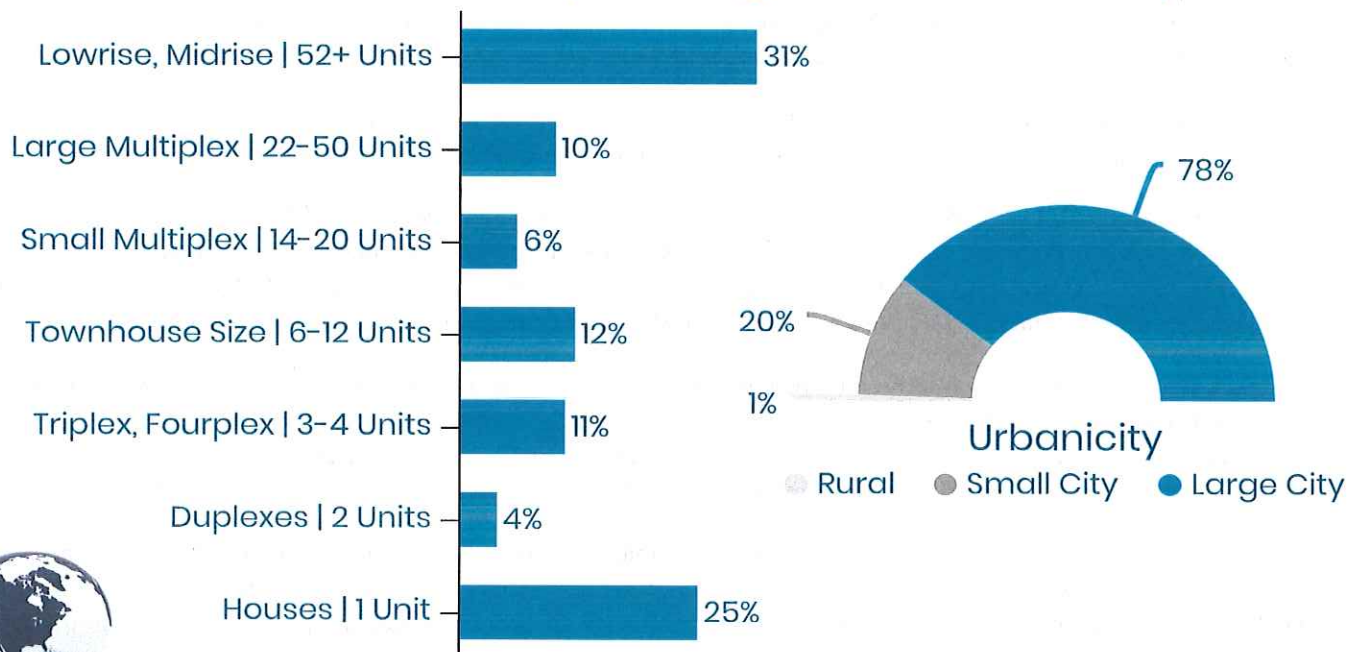
### Share that Moves each Year



### Median Household Income



### Inclination for Units by Building Size and Urbanicity



LandUseUSA  
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# Half of all Lifestyle Clusters | Nationwide

## A01 – J36 | Better-to-Upper Incomes

- A01 | American Royalty - Wealthy influential couples and families in prestigious communities - Suburbs.
- A02 | Platinum Prosperity - Wealthy and established empty-nesting couples - Suburbs.
- A03 | Children & Cabernet - Prosperous, middle-aged married couples focused on their children's lives - Suburbs.
- A04 | Picture Perfect Families - Established families of child-raising households in wealthy communities - Suburbs.
- A05 | Couples with Clout - Middle-aged childless couples living in affluent areas - Metros.
- A06 | Jet Set Urbanites - Mix of affluent singles and couples enjoying diverse neighborhoods - Urban.
  
- B07 | Generational Soup - Affluent couples and multi-generational families, wide range of lifestyles - Suburbs.
- B08 | Babies & Bliss - Middle-aged couples with large families and active lives - Suburbs.
- B09 | Family Funtastic - Upscale, middle-aged families with busy lives focused on older children - Satellite Cities.
- B10 | Cosmopolitan Achievers - Affluent middle-aged, established couples & families, dynamic lifestyles - Metros.
  
- C11 | Aging of Aquarius, Settled - Upscale boomer couples settled in detached houses - Cities, Nearby Suburbs.
- C12 | Golf Carts & Gourmets - Upscale retirees & empty-nesters in comfortable golf communities - Urban Edges.
- C13 | Silver Sophisticates - Mature, upscale couples & singles in larger detached houses - Suburbs.
- C14 | Boomers & Boomerangs - Baby boomer adults with young adult children sharing their house - Suburbs.
  
- D15 | Sports Utility Families - Upscale, multi-generational, middle-aged families, active lifestyles - Outer Suburbs.
- D16 | Settled in Suburbia - Upper-middle-income diverse families & empty nesters - Established Suburbs.
- D17 | Cul de Sac Diversity - Culturally diverse, middle-aged families settling into emerging communities - Suburbs.
- D18 | Suburban Attainment - Upper middle-class couples and families moving to newer communities - Suburbs.
  
- E19 | Full Pockets & Empty Nests - Empty-nesters, discretionary income and sophisticated lifestyles - Most Cities.
- E20 | No Place Like Home - Middle-to-upper income, multi-generational households, detached houses - Urban Edges.
- E21 | Unspoiled Splendor - Comfortably established baby boomer couples, detached houses - Small Cities, Rural.
- F22 | Fast Track Couples - Young, upwardly-mobile couples with active lifestyles - Inner Suburbs.
- F23 | Families Matter Most - Young, middle-to-upper income families with active, family-focused lives - Suburbs.
  
- G24 | Status Seeking Singles - Young, upwardly-mobile singles balancing work and leisure - Metros, Urban.
- G25 | Urban Edge - Younger, up-and-coming singles living big-city lifestyles - Largest Metros.
  
- H26 | Progressive Potpourri - Mature couples with comfortable and active lives - Suburbs.
- H27 | Birkenstocks & Beemers - Middle-to-upper income couples living leisurely lifestyles - Small Cities.
- H28 | Everyday Moderates - Multi-cultural couples & families choosing modest lifestyles - Suburbs to Mid-sized Cities.
- H29 | Destination Recreation - Middle-aged couples working hard to support active lifestyles - Small Cities, Suburbs.
  
- I30 | Stockcars & State Parks - Middle-income couples & families seeking affordable entertainment - Small Cities.
- I31 | Blue Collar Comfort - Middle-income families working solid, blue-collar jobs - Small Cities.
- I32 | Steadfast Conventionalists - Conventional Gen-X families in conventional detached houses - Coastal Cities.
- I33 | Balance & Harmony - Middle-income families with lively lifestyles - City-Centric Neighborhoods.
  
- J34 | Aging in Place Already - Middle-income seniors established in their homes, preferring to stay - Suburban.
- J35 | Rural Escape - Older, middle-income couples & singles, living modestly, comfortably - Small Cities, Rural Edges.
- J36 | Settled & Sensible - Older, middle-income, empty nest couples & singles living sensibly - City Neighborhoods.



## Half of all Lifestyle Clusters | Nationwide K37 – S71 | Lower-to-Moderate Incomes

- K37 | Wired for Success - Young, middle-income singles and couples living socially-active lives - Cities.
- K38 | Gotham Blend - Middle-aged, middle-income singles & couples with big city lifestyles - Urban, Large Cities.
- K39 | Metro Fusion - Middle-aged singles living active lifestyles with a wide range of backgrounds - Urban.
- K40 | Bohemian Groove - Older, unattached singles enjoying settled lives in detached houses - Urban Neighborhoods.
- L41 | Booming & Consuming - Older empty nester couples and singles enjoying relaxed lifestyles - Small Cities.
- L42 | Rooted Flower Power - Middle-income baby boomer singles & couples, rooted & nearing retirement - Suburban.
- L43 | Homemade Happiness - Middle-income baby boomers in detached houses - Small Cities, Rural.
- M44 | Red, White, Bluegrass - Middle-income families with diverse household dynamics - Rural.
- M45 | Infants and Debit Cards - Young, working families & single parents in small houses - Urban Neighborhoods.
- N46 | True Grit Americans - Older, middle-income households located in nation's mid-section - Small Cities, Rural.
- N47 | Countrified Pragmatics - Middle-income couples and singles with casual lifestyles - Rural.
- N48 | Rural Country Bliss - Middle-income, multi-generational families in the nation's south - Small Cities, Rural.
- N49 | Touch of Tradition - Working, middle-aged couples and singles in detached houses - Rural.
- O50 | Full Steam Ahead - Young and middle-aged singles on the move forward and upward - Mid-Sized Cities.
- O51 | Digital Dependents - Gen-X and Gen-Y singles living digitally-driven lifestyles - Urban.
- O52 | Urban Ambition - Gen-Y singles, some with children, moving into urban places - Mid-Sized Cities, Urban.
- O53 | Colleges & University Affiliates - Young singles, alumni, recent grads, staff connected to colleges - College Towns.
- O54 | Striving Single Scene - Young singles, upwardly mobile, aspiring in early careers - City Centers, Urban.
- O55 | Family Troopers - Families & single parents, with current or recent connections to the military - Nationwide.
- P56 | Mid-Scale Medley - Middle-aged, moderate-income singles, many starting over - Mid-Sized Cities.
- P57 | Modest Metro Means - Moderate-income singles settled in moderate communities - Inner-City Neighborhoods.
- P58 | Heritage Heights - Moderate-income singles & families settled in apartments - Urban, Compact Neighborhoods.
- P59 | Expanding Horizons - Middle-aged, middle-income families - Border Towns.
- P60 | Striving Forward - Moderate-income families & single parents in newer communities - Urban Edges.
- P61 | Humble Beginnings - Multi-cultural singles, some with children, starting in apartments - Inner-Cities, Urban.
- Q62 | Reaping Rewards - Retired couples and widowed singles living relaxed, quiet lives in detached houses - Suburban.
- Q63 | Footloose and Family Free - Older couples and widowed singles living active, comfortable lives - Urban Edges.
- Q64 | Town Elders & Leaders - Elders and community leaders settled into small houses and living frugally - Small Cities.
- Q65 | Senior Discounts & Towers - Low-income seniors in apartments with some rent assistance - Metros, City Edges.
- R66 | Daring to Dream - Aspiring young couples & singles, some with children, just starting out - Inner-City, Urban.
- R67 | Hoping Tomorrow - Hopeful, young, single parents with low-incomes, living in apartments - Mid-Sized Cities.
- S68 | Small Towns & Shallow Pockets - Older, low-income empty nesters & singles, tight budgets. - Small Satellite Cities.
- S69 | Urban Survivors - Older, low-income singles, some with children, settled & living modestly - Urban Neighborhoods.
- S70 | Tight Money - Middle-aged, low-income, unattached singles seeking to move upward - Small Cities, Urban Edges.
- S71 | Tough Times - Older, low-income singles, struggling to get by, apartments - Inner-Cities, Compact Neighborhoods.



