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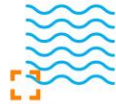
# AUDIENCE DEMAND STUDY RESULTS

Research to Support Cultural Planning  
November 2017



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Overview of Research Process

# **Audience Demand Study**






# Study Areas and Participants



## Study Areas

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- The study area for this analysis included Census block groups within a 45-minute drive time of downtown St. Louis.
  - The study area was segmented into three sub areas: City of St. Louis, St. Louis County, and the remaining region.
  - The map on the following page illustrates the study area.

## Participants

- The Regional Arts Council invited known arts and cultural organizations to participate in the study by contributing audience databases for analysis. A total of 38 organizations with the ability to provide data that could be geocoded by household addresses participated in the study.



# Audience Household Data Contributed


## Audience Household Physical Locations Supplied within Study Area (237,604; includes duplication across organizations)

Participating Organization	Household Count	Participating Organization	Household Count
Abhinaya - St. Louis	372	Museum of Contemporary Religious Art (St. Louis University)	2,487
The Bach Society of St. Louis	3,367	NEON	119
The Big Muddy Dance Company	2,005	New Jewish Theatre	1,029
The Black Rep	406	New Line Theatre	7,862
COCA - Center for Creative Arts	6,978	New Music Circle	499
Chamber Music Society of St. Louis	544	Opera Theatre of St. Louis	5,798
Circus Flora	3,240	Perennial	594
Confluence Chamber Orchestra	52	Sangeetha - St. Louis	231
Craft Alliance Center of Art + Design	2,517	The Sheldon Concert Hall and Art Galleries	10,673
Dance St. Louis	8,392	St. Louis Art Museum	16,457
December Press	240	St. Louis Cathedral Concerts	11,982
HEARding Cats Collective	34	St. Louis Chamber Chorus	3,256
Insight Theatre Company	672	St. Louis Children's Choir	580
Jazz St. Louis	9,161	St. Louis Civic Orchestra	102
Kemper Art Museum (Washington University in St. Louis)	996	The Rep (Repertory Theatre St. Louis)	16,689
Landmarks Association of St. Louis	839	St. Louis Symphony Orchestra	25,531
Max and Louie Productions	1,607	St. Louis University Museums and Galleries	1,731
Missouri Botanical Garden	53,109	Stray Dog Theatre	2,056
The Muny (Municipal Theatre Association of St. Louis)	27,850	Union Avenue Opera	7,547



# Process


Each of the 38 organizations listed above contributed last names and physical addresses from general mailing lists and/or audience lists from the current year and one year prior. In all cases the data records were tagged by organization, primary artistic discipline and sub-discipline, and geographic location.



## **Discipline codes included:**

- Performing Arts
- Visual Arts/Crafts
- Mixed Performing and Visual Arts Venues
- Other Arts/Cultural Activity

## **Sub-disciplines included (where possible):**


- 
- Dance
  - Music
  - Theatre
  - Opera
  - Other Performance Arts
  - Museum/Gallery
  - Other Arts/Cultural Activity

42 organizations submitted data for the analysis, but four did not have physical addresses of audience households and therefore could not be included in the analysis.




# Process

When possible, the data records were tagged also by level of engagement. In some cases organizations submitted multiple files for audiences such as members, donors, subscribers, and single-ticket buyers. In other cases only general mailing lists were supplied.



## Level of engagement codes include:

- General (mailing list or unknown)
  - High Touch (members, donors, subscribers, volunteers)
  - Low Touch (single-ticket buyers)
  - Education (students, not served through K-12 partnerships)
  - Artists
- 



# Process

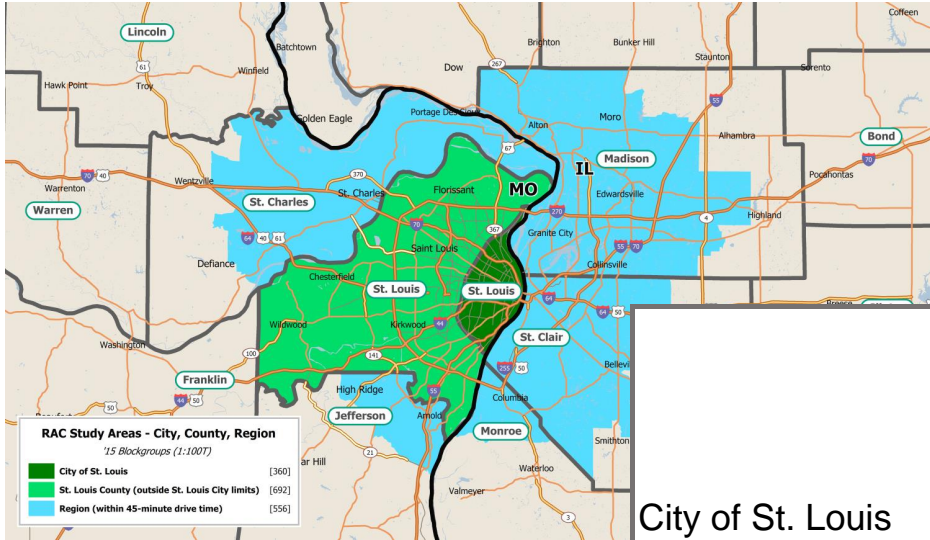
Each list was processed using software to standardize household address information, parse name field data, and create a code so that the records could be cross-referenced among the organizations. The records were then geocoded and tagged as being within the study area boundaries. From the 237,604 household records that fell within the study area boundaries, 156,097 were found to be unique. These unique households formed the database used for the analysis.

Affiliation Codes	Household Count
Performing Arts	104,590
Visual Arts	22,888
Mixed Discipline Centers	17,409
Other	53,674
Dance	10,198
Music	56,510
Theatre	51,722
Opera	11,882
Other performance	3,273
Museums	72,832
General lists	66,075
Educational lists	5,915
High touch patrons	74,024
Low touch patrons	57,569
Artists	472

The majority of records were provided by performing arts organizations with the bulk of those representing music and theatre disciplines. Museums were coded both by discipline as museums, making up 47% of the database records.

Most of the participating organizations submitted general mailing lists. As possible, records were coded by level of affiliation or type based on each list.

# Market Reach



	Study Area Household Counts	Households on RAC Study Lists	Market Reach
City of St. Louis	146,544	28,595	19.5%
St. Louis County	418,544	93,223	22.3%
Region	364,293	34,279	9.4%
Total Study Area	929,381	156,097	16.8%

# Market Reach by Types of Arts

Performing Arts			
	Study Area Household Counts	Households on RAC Study Lists	Market Reach
City of St. Louis	146,544	18,125	12.4%
St. Louis County	418,544	62,886	15.0%
Region	364,293	23,579	6.5%
Total Study Area	929,381	104,590	11.3%

Mixed Discipline Centers			
	Study Area Household Counts	Households on RAC Study Lists	Market Reach
City of St. Louis	146,544	4,100	2.8%
St. Louis County	418,544	11,258	2.7%
Region	364,293	2,051	0.6%
Total Study Area	929,381	17,409	1.9%

Visual Arts			
	Study Area Household Counts	Households on RAC Study Lists	Market Reach
City of St. Louis	146,544	4,776	3.3%
St. Louis County	418,544	15,419	3.7%
Region	364,293	2,693	0.7%
Total Study Area	929,381	22,888	2.5%

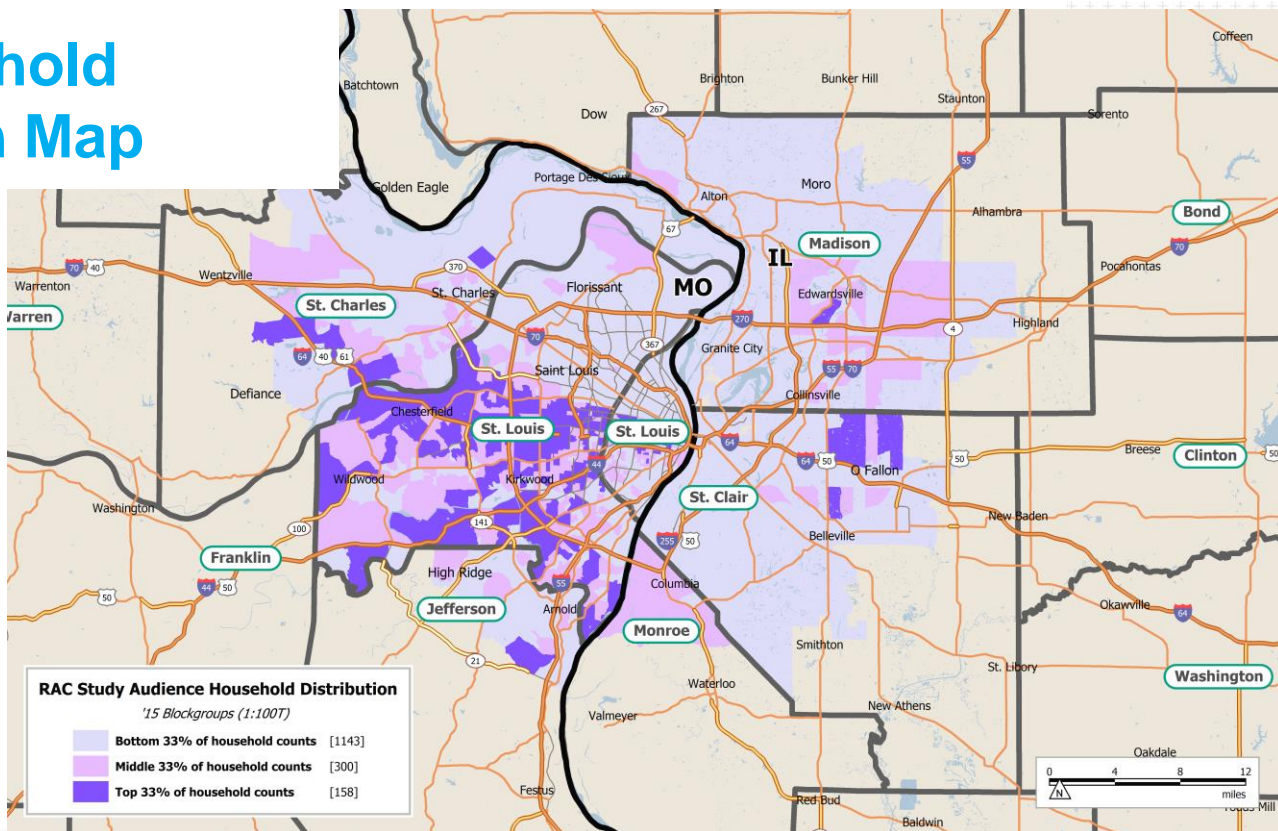
Other Arts			
	Study Area Household Counts	Households on RAC Study Lists	Market Reach
City of St. Louis	146,544	776	0.5%
St. Louis County	418,544	894	0.2%
Region	364,293	108	0.0%
Total Study Area	929,381	1,778	0.2%

## Market Reach by Types of Arts

Museums			
	Study Area Household Counts	Households on RAC Study Lists	Market Reach
City of St. Louis	146,544	13,949	9.5%
St. Louis County	418,544	45,067	10.8%
Region	364,293	13,816	3.8%
Total Study Area	929,381	72,832	7.8%

# Arts Household Distribution Map

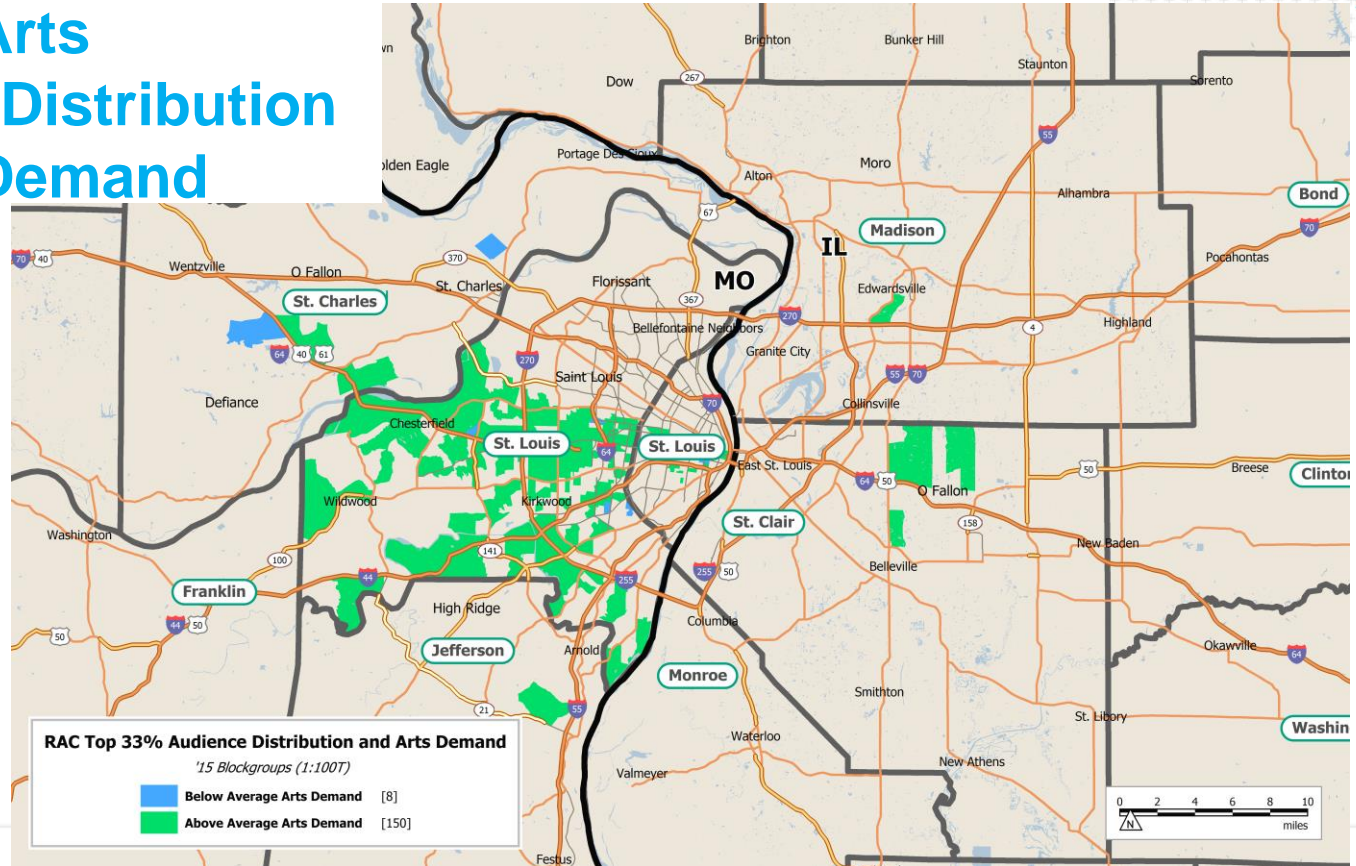
By distribution of arts audience households, the top third are located in 158 block groups shown in dark purple on the map. The remaining thirds are illustrated in lighter shades of purple. This map provides a visual representation of where arts audiences are located in higher versus lower numbers.





# Top 33% Arts Audience Distribution and Arts Demand

This map shows the top third of the audience household distribution strata as well as how households in that strata index for consumer arts demand. Areas in green illustrate where consumer demand is above average and blue is below average.

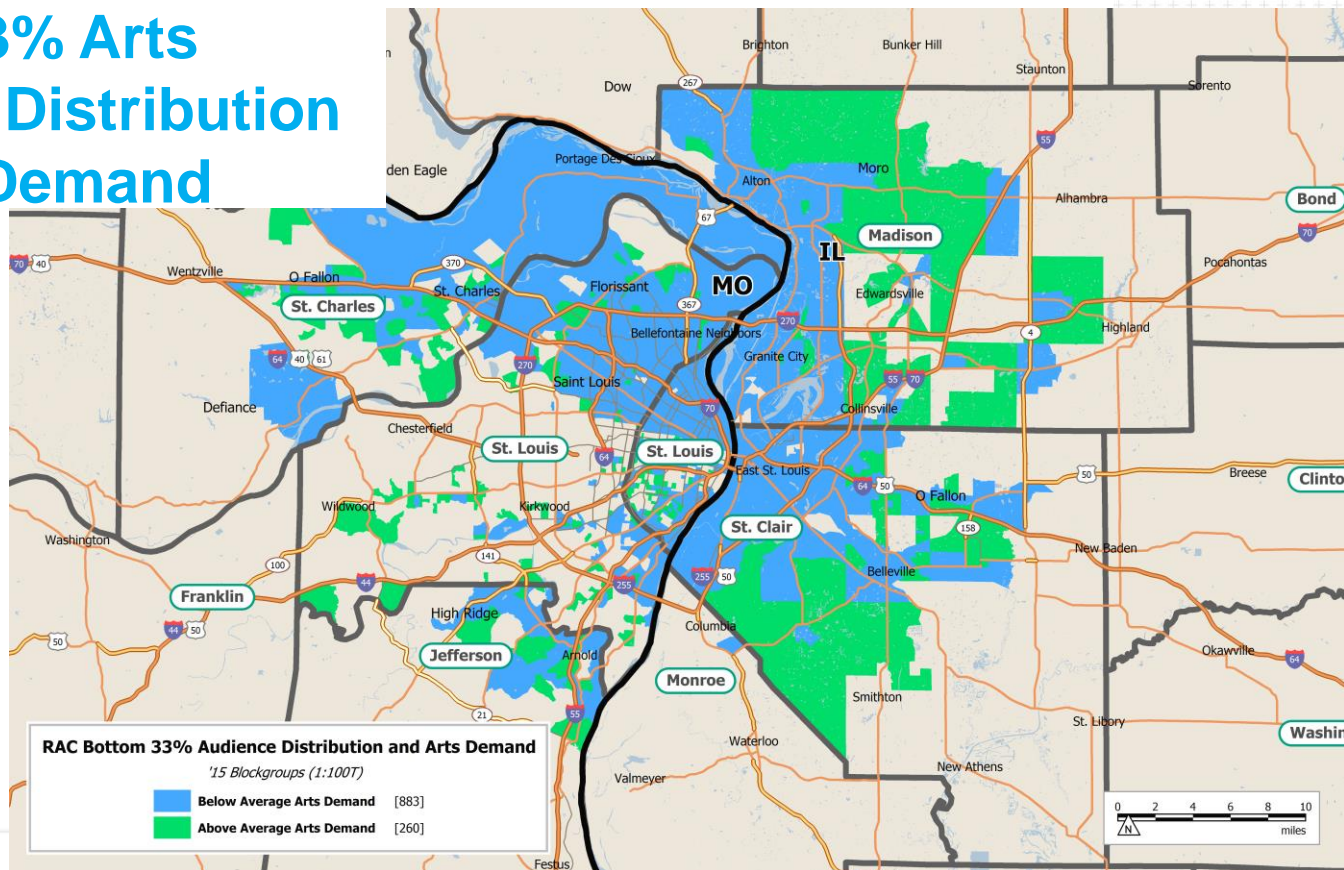






# Bottom 33% Arts Audience Distribution and Arts Demand

This map shows the bottom third of the audience household distribution strata as well as how households in that strata index for consumer arts demand. Areas in green illustrate where consumer demand is above average and blue is below average.







# Mosaic USA<sup>TM</sup> and arts Demand

Mosaic USA is a product of Experian

# Arts Demand Data

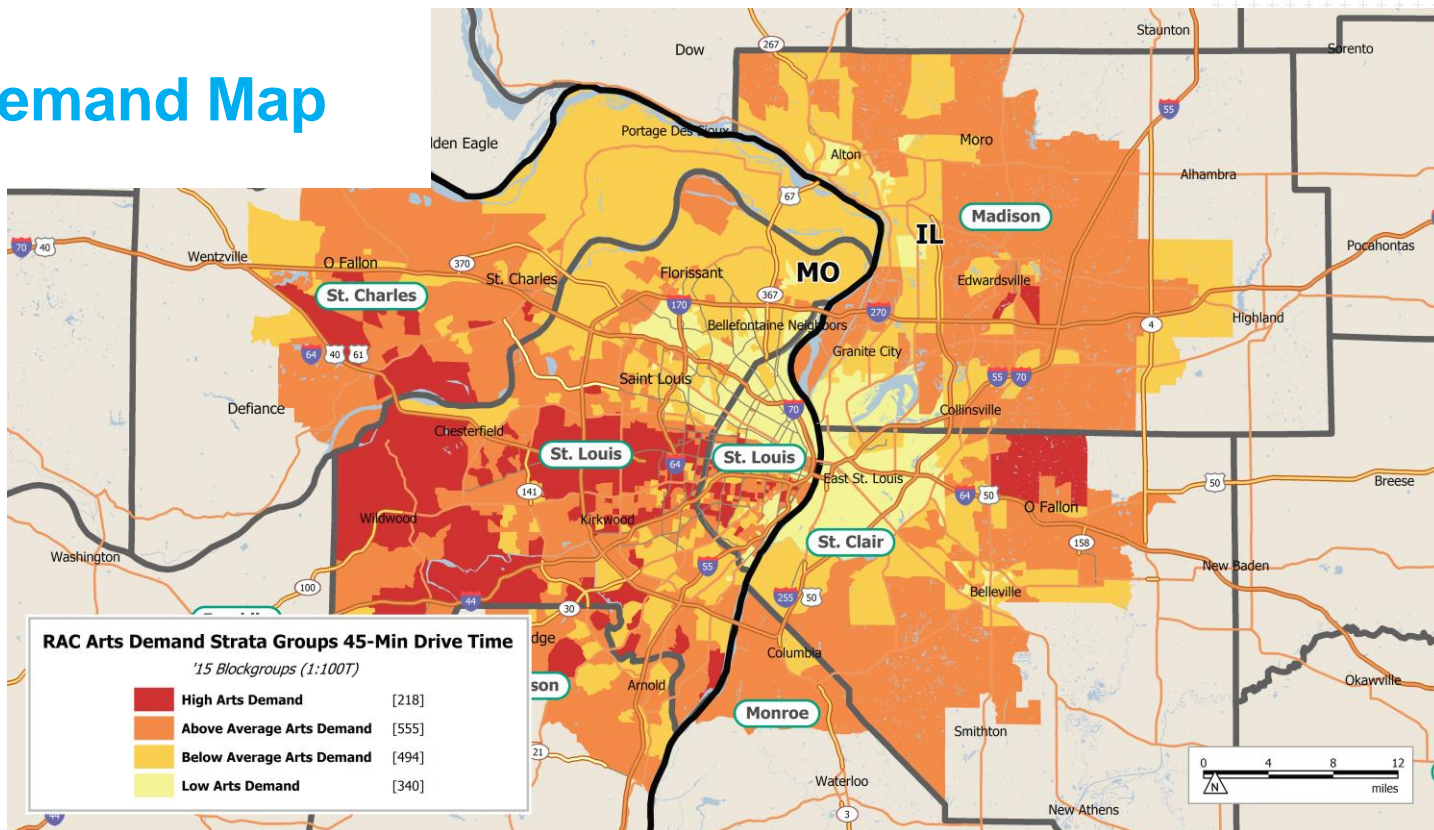
2016 Consumer Demand Index Data	City of St. Louis	St. Louis County	Remaining Region
Average "audience arts"	103	<b>112</b>	91
Average "participatory arts"	101	<b>103</b>	98
Visits art galleries	106	<b>118</b>	87
Visits museums	95	<b>111</b>	90
Attends dance performances	100	<b>103</b>	89
Attends classical music/opera performances	<b>124</b>	116	85
Attends other music performances	92	<b>107</b>	105
Attends live theater	90	<b>115</b>	93
Plays musical instrument	<b>107</b>	103	97
Paints or draws	<b>100</b>	95	96
Goes out dancing	<b>113</b>	105	98
Cooks for fun	106	<b>108</b>	103

Demand Indexes are a product of ESRI

Consumer demand was analyzed using ESRI market potential data for block groups in the study area. These indexes are based on a national average of 100.

This data was used to illustrate the demand in the study area as shown on the following map. It was also used to create four arts demand groups (high, above average below average and low). These demand groups were used to organize Mosaic group lifestyle segments that help to understand the characteristics of households residing in these areas.


# Arts Demand Map





# Data Analysis



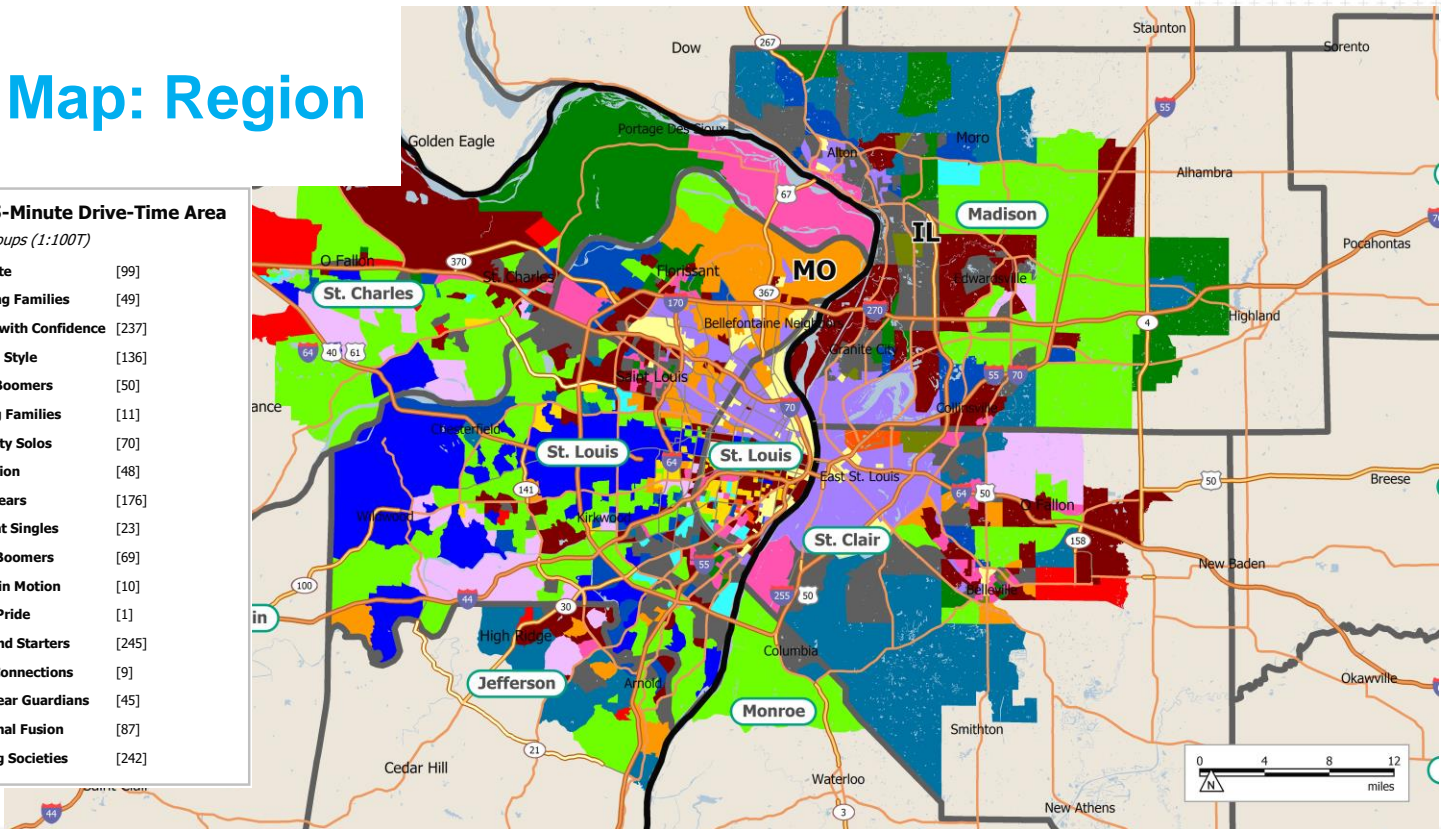
- Mosaic is a market segmentation system licensed through Experian.
  - Segments the household population into 19 “lifestyle” groups.
  - Geographic location links audience records to Mosaic data.
  - Mosaic and geography links local arts demand data to audience records.
- 
- 
- The maps on the following pages illustrated the dominant Mosaic groups in each block group in the study area. While a block group will likely contain multiple Mosaic types, the dominant group reflects the largest number of households in that area of geography.

# Mosaic Map: Region

## RAC Mosaic St. Louis 45-Minute Drive-Time Area

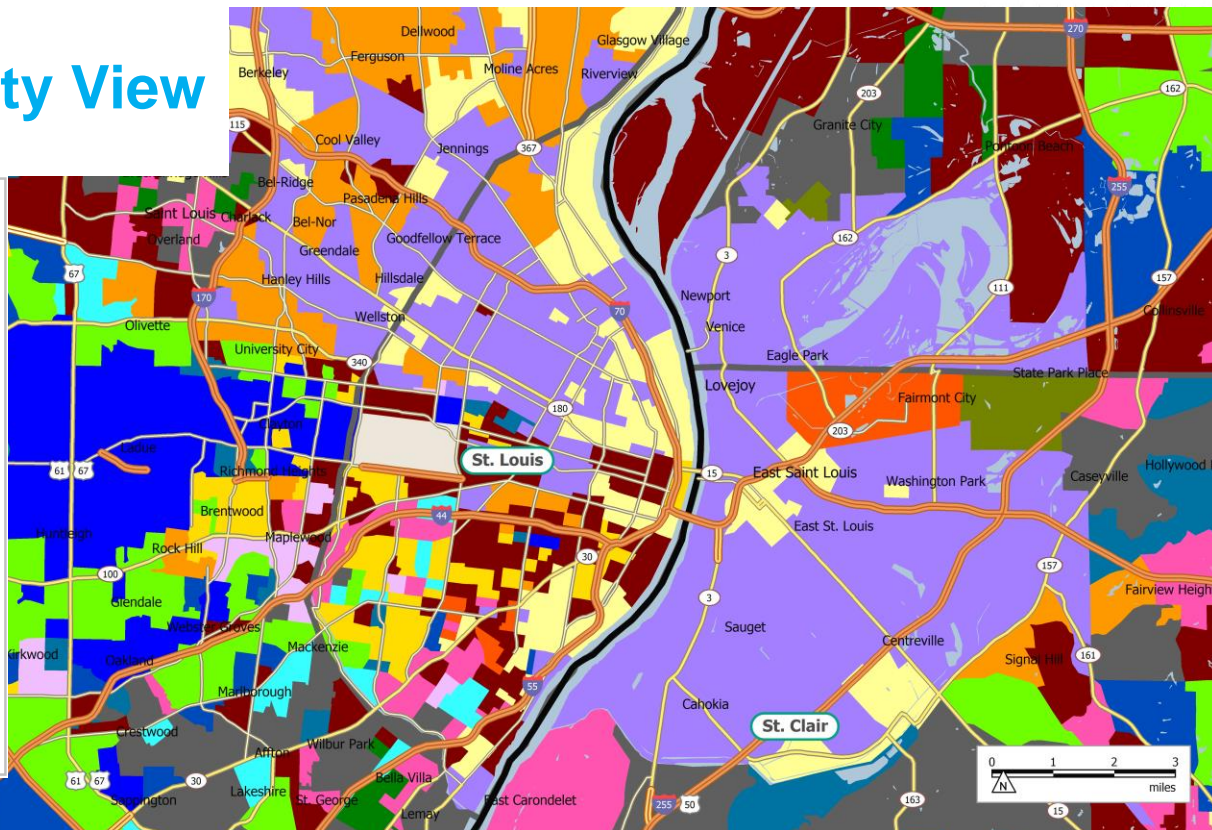
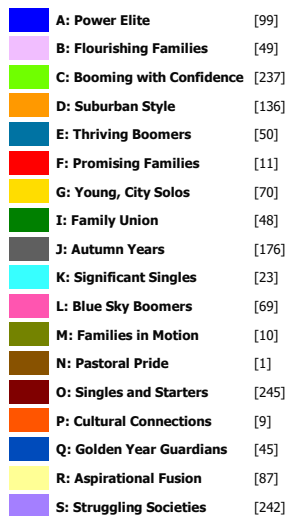
15 Blockgroups (1:100T)

<span style="color: blue;">■</span>	<b>A: Power Elite</b>	[99]
<span style="color: purple;">■</span>	<b>B: Flourishing Families</b>	[49]
<span style="color: green;">■</span>	<b>C: Booming with Confidence</b>	[237]
<span style="color: orange;">■</span>	<b>D: Suburban Style</b>	[136]
<span style="color: darkblue;">■</span>	<b>E: Thriving Boomers</b>	[50]
<span style="color: red;">■</span>	<b>F: Promising Families</b>	[11]
<span style="color: yellow;">■</span>	<b>G: Young, City Solos</b>	[70]
<span style="color: darkgreen;">■</span>	<b>I: Family Union</b>	[48]
<span style="color: grey;">■</span>	<b>J: Autumn Years</b>	[176]
<span style="color: cyan;">■</span>	<b>K: Significant Singles</b>	[23]
<span style="color: pink;">■</span>	<b>L: Blue Sky Boomers</b>	[69]
<span style="color: olive;">■</span>	<b>M: Families in Motion</b>	[10]
<span style="color: brown;">■</span>	<b>N: Pastoral Pride</b>	[1]
<span style="color: darkred;">■</span>	<b>O: Singles and Starters</b>	[245]
<span style="color: darkorange;">■</span>	<b>P: Cultural Connections</b>	[9]
<span style="color: blue;">■</span>	<b>Q: Golden Year Guardians</b>	[45]
<span style="color: yellow;">■</span>	<b>R: Aspirational Fusion</b>	[87]
<span style="color: purple;">■</span>	<b>S: Struggling Societies</b>	[242]





'15 Blockgroups (1:100T)

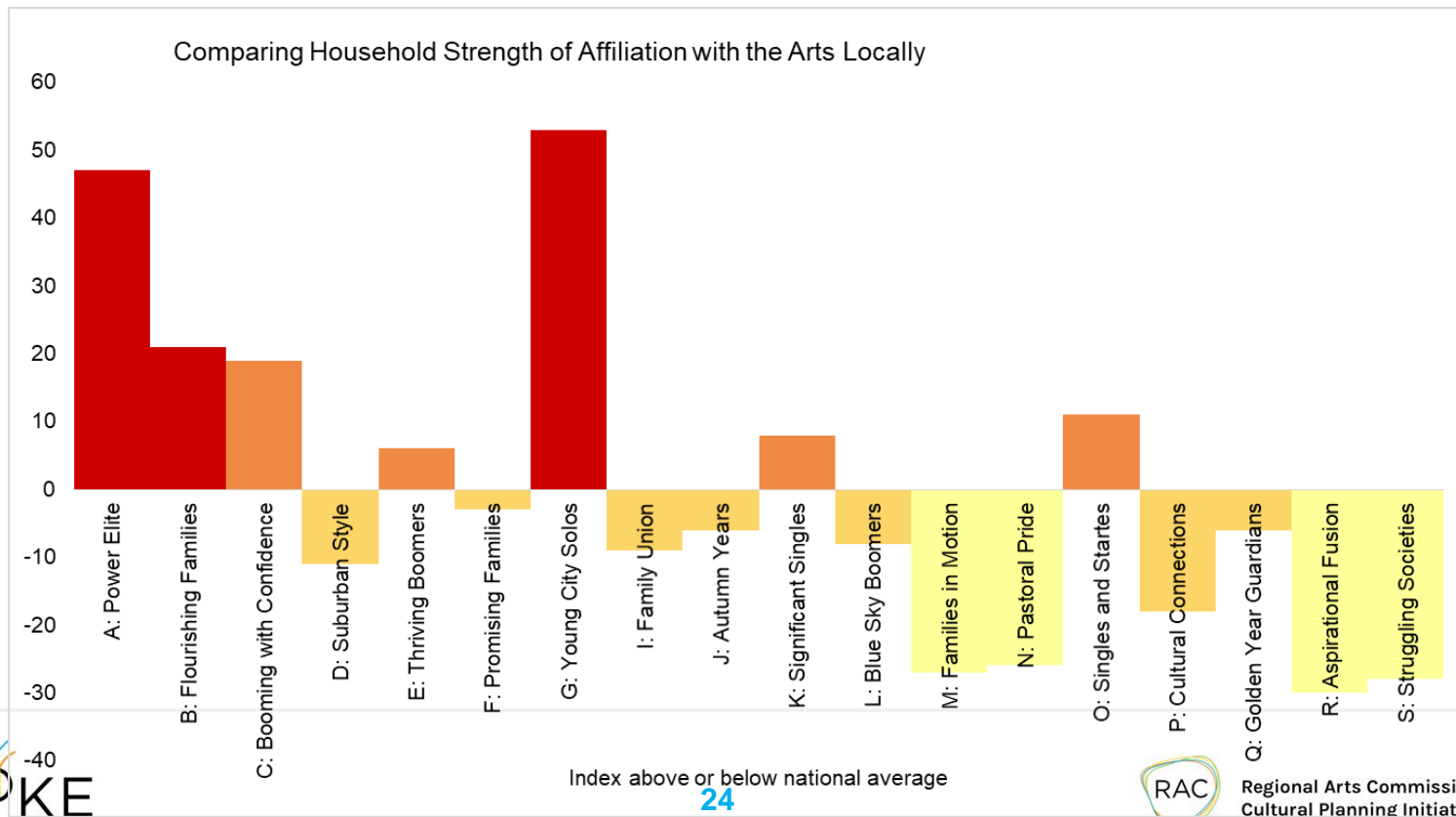


# Strata: Simplifying Demand and Lifestyle for Planning

Mosaic Groups	Arts Demand MPI	Households in the Study Area	%	Arts Demand Strata	Map Color Code
A: Power Elite	147	61,028	7%	High Demand	
B: Flourishing Families	121	41,515	4%	High Demand	
C: Booming with Confidence	119	173,941	19%	Above Average Demand	
D: Suburban Style	89	70,865	8%	Below Average Demand	
E: Thriving Boomers	106	33,367	4%	Above Average Demand	
F: Promising Families	97	12,829	1%	Below Average Demand	
G: Young City Solos	153	36,345	4%	High Demand	
I: Family Union	91	24,697	3%	Below Average Demand	
J: Autumn Years	94	102,983	11%	Below Average Demand	
K: Significant Singles	108	14,169	2%	Above Average Demand	
L: Blue Sky Boomers	92	30,986	3%	Below Average Demand	
M: Families in Motion	73	4,009	0.4%	Low Demand	
N: Pastoral Pride	74	353	0.04%	Low Demand	
O: Singles and Starters	111	163,398	18%	Above Average Demand	
P: Cultural Connections	82	2,984	0.3%	Below Average Demand	
Q: Golden Year Guardians	94	32,099	3%	Below Average Demand	
R: Aspirational Fusion	70	35,017	4%	Low Demand	
S: Struggling Societies	72	88,796	10%	Low Demand	
<b>Total Households</b>		<b>929,381</b>	<b>100%</b>		

As previously stated, Mosaic groups were organized into arts demand strata based on arts demand (market potential index). Those with high demand – index of 120 or higher are coded as red, 100-119 above average, 80-99 below average, and below 80 low demand.

# Localizing Data





# Study Area Demand and Reach

Arts Demand Index	Mosaic Household Types in Study Area	Number of Households in Study Area		Number of Households on RAC Audience Lists		Market Reach into Mosaic Household Types
		929,381		156,097		16.8%
			%		%	
153	G: Young City Solos	36,345	3.9%	13,552	8.7%	37.3%
147	A: Power Elite	61,028	6.6%	26,161	16.8%	42.9%
121	B: Flourishing Families	41,515	4.5%	9,082	5.8%	21.9%
119	C: Booming with Confidence	173,941	18.7%	39,825	25.5%	22.9%
111	O: Singles and Starters	163,398	17.6%	21,476	13.8%	13.1%
108	K: Significant Singles	14,169	1.5%	2,209	1.4%	15.6%
106	E: Thriving Boomers	33,367	3.6%	5,666	3.6%	17.0%
97	F: Promising Families	12,829	1.4%	1,796	1.2%	14.0%
94	J: Autumn Years	102,983	11.1%	13,065	8.4%	12.7%
94	Q: Golden Year Guardians	32,099	3.5%	5,181	3.3%	16.1%
92	L: Blue Sky Boomers	30,986	3.3%	2,983	1.9%	9.6%
91	I: Family Union	24,697	2.7%	2,109	1.4%	8.5%
89	D: Suburban Style	70,865	7.6%	7,523	4.8%	10.6%
82	P: Cultural Connections	2,984	0.3%	295	0.2%	9.9%
74	N: Pastoral Pride	353	0.0%	60	0.0%	17.0%
73	M: Families in Motion	4,009	0.4%	193	0.1%	4.8%
72	S: Struggling Societies	88,796	9.6%	3,538	2.3%	4.0%
70	R: Aspirational Fusion	35,017	3.8%	1,383	0.9%	3.9%
	<b>Total</b>	<b>929,381</b>	<b>100%</b>	<b>156,097</b>	<b>100%</b>	<b>16.8%</b>

# City of St. Louis Demand and Reach

		City of St. Louis		Households on RAC Study Lists		Market Reach
Arts Demand Index	Mosaic Household Types in Study Area	146,544		28,595		19.5%
			%		%	
153	G: Young City Solos	24,148	16.5%	9,077	31.7%	37.6%
147	A: Power Elite	1,947	1.3%	1,400	4.9%	71.9%
121	B: Flourishing Families	1,344	0.9%	790	2.8%	58.8%
119	C: Booming with Confidence	1,389	0.9%	520	1.8%	37.4%
111	O: Singles and Starters	39,229	26.8%	9,637	33.7%	24.6%
108	K: Significant Singles	3,727	2.5%	1,126	3.9%	30.2%
106	E: Thriving Boomers	2,151	1.5%	751	2.6%	34.9%
97	F: Promising Families	-	0.0%	-	-	-
94	J: Autumn Years	2,273	1.6%	236	0.8%	10.4%
94	Q: Golden Year Guardians	960	0.7%	52	0.2%	5.4%
92	L: Blue Sky Boomers	8,525	5.8%	975	3.4%	11.4%
91	I: Family Union	-	0.0%	-	0.0%	-
89	D: Suburban Style	4,831	3.3%	541	1.9%	11.2%
82	P: Cultural Connections	2,188	1.5%	280	1.0%	12.8%
74	N: Pastoral Pride	-	0.0%	-	0.0%	-
73	M: Families in Motion	-	0.0%	-	0.0%	-
72	S: Struggling Societies	33,525	22.9%	2,100	7.3%	6.3%
70	R: Aspirational Fusion	20,307	13.9%	1,110	3.9%	5.5%
	<b>Total</b>	<b>146,544</b>	<b>100%</b>	<b>28,595</b>	<b>100%</b>	<b>19.5%</b>

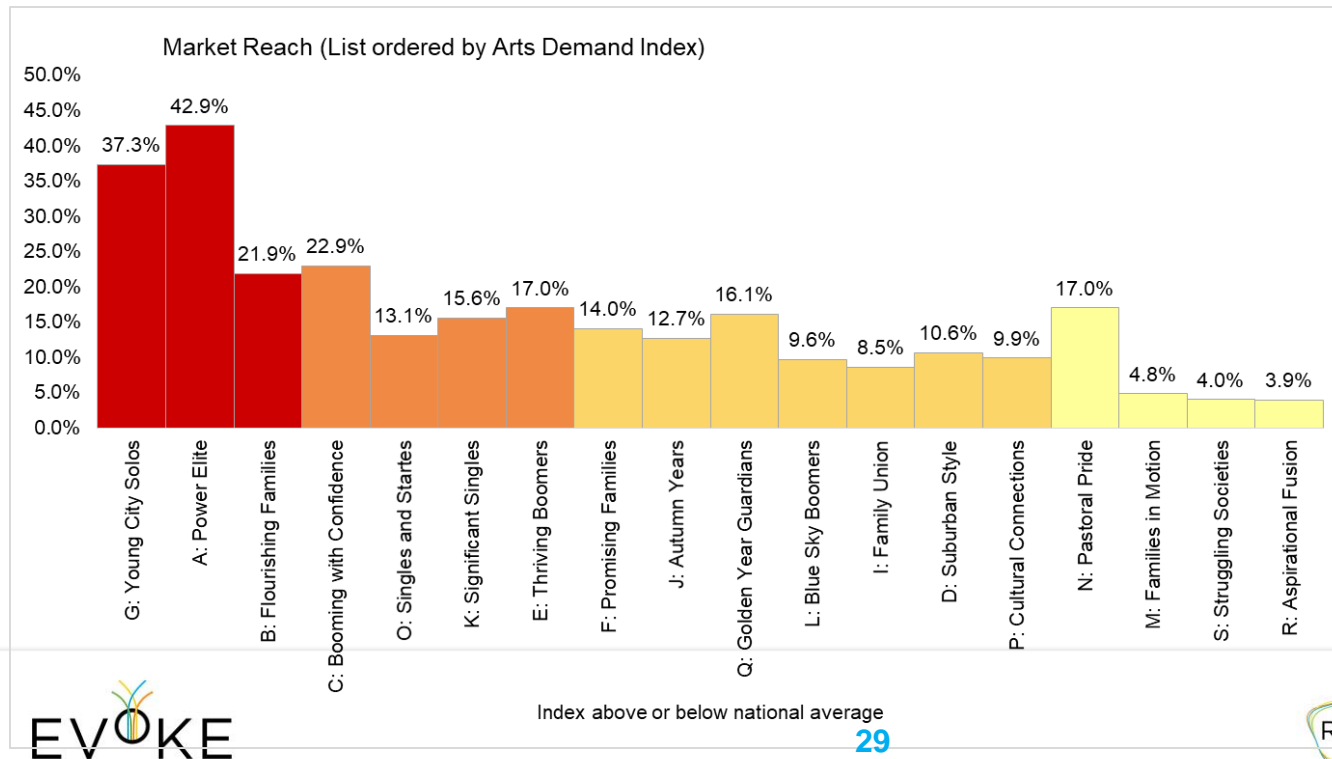
# St. Louis County Demand and Reach

		St. Louis County		Households on RAC Study Lists		Market Reach
Arts Demand Index	Mosaic Household Types in Study Area	418,544		93,223		22.3%
			%			
153	G: Young City Solos	10,702	2.6%	4,346	4.7%	40.6%
147	A: Power Elite	53,811	12.9%	24,228	26.0%	45.0%
121	B: Flourishing Families	14,075	3.4%	4,456	4.8%	31.7%
119	C: Booming with Confidence	82,870	19.8%	27,453	29.4%	33.1%
111	O: Singles and Starters	60,266	14.4%	7,134	7.7%	11.8%
108	K: Significant Singles	7,673	1.8%	710	0.8%	9.3%
106	E: Thriving Boomers	7,439	1.8%	2,912	3.1%	39.1%
97	F: Promising Families	834	0.2%	190	0.2%	22.8%
94	J: Autumn Years	43,793	10.5%	8,002	8.6%	18.3%
94	Q: Golden Year Guardians	17,217	4.1%	3,944	4.2%	22.9%
92	L: Blue Sky Boomers	11,388	2.7%	1,087	1.2%	9.5%
91	I: Family Union	14,492	3.5%	1,388	1.5%	9.6%
89	D: Suburban Style	57,787	13.8%	6,212	6.7%	10.7%
82	P: Cultural Connections	-	-	-	-	-
74	N: Pastoral Pride	-	0.0%	-	-	-
73	M: Families in Motion	413	0.1%	110	0.1%	26.6%
72	S: Struggling Societies	27,122	6.5%	882	0.9%	3.3%
70	R: Aspirational Fusion	8,662	2.1%	169	0.2%	2.0%
	<b>Total</b>	<b>418,544</b>	<b>100%</b>	<b>93,223</b>	<b>100%</b>	<b>22.3%</b>

# Regional Demand and Reach

		Remaining Region		Households on RAC Study Lists		Market Reach
Arts Demand Index	Mosaic Household Types in Study Area	364,293		34,279		9.4%
			%			
153	G: Young City Solos	1,495	0.4%	129	0.4%	9%
147	A: Power Elite	5,270	1.4%	533	1.6%	10%
121	B: Flourishing Families	26,096	7.2%	3,836	11.2%	15%
119	C: Booming with Confidence	89,682	24.6%	11,852	34.6%	13%
111	O: Singles and Starters	63,903	17.5%	4,705	13.7%	7%
108	K: Significant Singles	2,769	0.8%	373	1.1%	13%
106	E: Thriving Boomers	23,777	6.5%	2,003	5.8%	8%
97	F: Promising Families	11,995	3.3%	1,606	4.7%	13%
94	J: Autumn Years	56,917	15.6%	4,827	14.1%	8%
94	Q: Golden Year Guardians	13,922	3.8%	1,185	3.5%	9%
92	L: Blue Sky Boomers	11,073	3.0%	921	2.7%	8%
91	I: Family Union	10,205	2.8%	721	2.1%	7%
89	D: Suburban Style	8,247	2.3%	770	2.2%	9%
82	P: Cultural Connections	796	0.2%	15	0.0%	2%
74	N: Pastoral Pride	353	0.1%	60	0.2%	17%
73	M: Families in Motion	3,596	1.0%	83	0.2%	2%
72	S: Struggling Societies	28,149	7.7%	556	1.6%	2%
70	R: Aspirational Fusion	6,048	1.7%	104	0.3%	2%
	<b>Total</b>	<b>364,293</b>	<b>100%</b>	<b>34,279</b>	<b>100%</b>	<b>9.4%</b>

# Market Reach – High to Low Arts Demand



# Mosaic and Types of Arts

	Performing Arts Households		Visual Arts Households		Mixed Discipline Centers		Other Arts	
Households	104,590		22,888		17,409		1,778	
		%		%		%		%
Power Elite	17,912	17.1%	6,323	27.6%	3,866	22.2%	361	20.3%
Flourishing Families	6,180	5.9%	851	3.7%	703	4.0%	53	3.0%
Booming with Confidence	27,113	25.9%	5,336	23.3%	3,622	20.8%	246	13.8%
Suburban Style	5,103	4.9%	874	3.8%	1,128	6.5%	76	4.3%
Thriving Boomers	3,851	3.7%	843	3.7%	501	2.9%	55	3.1%
Promising Families	1,276	1.2%	86	0.4%	87	0.5%	1	0.1%
Young City Solos	8,759	8.4%	2,403	10.5%	1,845	10.6%	357	20.1%
Family Union	1,424	1.4%	162	0.7%	172	1.0%	12	0.7%
Autumn Years	8,609	8.2%	1,222	5.3%	900	5.2%	78	4.4%
Significant Singles	1,408	1.3%	277	1.2%	232	1.3%	29	1.6%
Blue Sky Boomers	1,868	1.8%	296	1.3%	283	1.6%	31	1.7%
Families in Motion	125	0.1%	9	0.0%	15	0.1%	-	0.0%
Pastoral Pride	28	0.0%	3	0.0%	13	0.1%	-	0.0%
Singles and Starters	14,315	13.7%	2,845	12.4%	2,601	14.9%	350	19.7%
Cultural Connections	159	0.2%	33	0.1%	34	0.2%	5	0.3%
Golden Year Guardians	3,432	3.3%	744	3.3%	402	2.3%	42	2.4%
Aspirational Fusion	851	0.8%	170	0.7%	265	1.5%	34	1.9%
Struggling Societies	2,177	2.1%	411	1.8%	740	4.3%	48	2.7%
<b>Total</b>	<b>104,590</b>	<b>100%</b>	<b>22,888</b>	<b>100%</b>	<b>17,409</b>	<b>100%</b>	<b>1,778</b>	<b>100%</b>

# Mosaic and Types of Arts

	Museums	
<b>Households</b>	<b>72,832</b>	
		%
Power Elite	13,749	18.9%
Flourishing Families	3,905	5.4%
Booming with Confidence	18,864	25.9%
Suburban Style	2,964	4.1%
Thriving Boomers	2,729	3.7%
Promising Families	630	0.9%
Young City Solos	6,683	9.2%
Family Union	837	1.1%
Autumn Years	6,014	8.3%
Significant Singles	1,073	1.5%
Blue Sky Boomers	1,380	1.9%
Families in Motion	73	0.1%
Pastoral Pride	35	0.0%
Singles and Starters	9,250	12.7%
Cultural Connections	145	0.2%
Golden Year Guardians	2,573	3.5%
Aspirational Fusion	574	0.8%
Struggling Societies	1,354	1.9%
<b>Total</b>	<b>72,832</b>	<b>100%</b>



# Organizational Affiliation and Overlap



## Number of Organizational Affiliations

Number of Organizational Affiliations	Household Count	Percentage of Households
1 organization	112,627	72.2%
2 organizations	25,132	16.1%
3 organizations	9,365	6.0%
4 organizations	4,247	2.7%
5 organizations	2,110	1.4%
More than 5 organizations	2,616	1.7%
<b>Total</b>	<b>156,097</b>	<b>100%</b>

72% of households are affiliated with one organization.

28% of households studied are affiliated with more than one organization.

# Discipline Overlap

Percentage of Overlap (Columns)	Performing Arts (104,590)	Visual Arts (22,888)	Mixed Discipline Centers (17,409)	Other Arts (53,674)	Museums (n=72,832)
<b>Performing Arts</b>	100%	48%	36%	37%	35%
<b>Visual Arts</b>	11%	100%	15%	19%	31%
<b>Mixed Discipline Centers</b>	6%	12%	100%	7%	17%
<b>Other Arts</b>	19%	45%	21%	100%	73%
<b>Museums</b>	25%	98%	71%	99%	100%

Affiliation Factor	Performing Arts (104,590)	Visual Arts (22,888)	Mixed Discipline Centers (17,409)	Other Arts (53,674)	Museums (n=72,832)
<b>Performing Arts</b>	1.5	0.7	0.5	0.6	0.5
<b>Visual Arts</b>	0.7	6.8	1.0	1.3	2.1
<b>Mixed Discipline Centers</b>	0.5	1.0	9.0	0.6	1.5
<b>Other Arts</b>	0.6	1.3	0.6	2.9	2.1
<b>Museums</b>	0.5	2.1	1.5	2.1	2.1

# Sub-Discipline Overlap

Percentage of Overlap (Columns)	Dance (n=10,198)	Music (n=56,510)	Theatre (n=51,722)	Opera (n=11,882)	Other Performance (n=3,273)	Visual Art (n=22,888)	Other Art (n=1,778)
Dance	100%	5%	4%	9%	6%	6%	6%
Music	25%	100%	21%	40%	26%	34%	36%
Theatre	21%	19%	100%	32%	27%	27%	28%
Opera	11%	8%	7%	100%	8%	14%	16%
Other Performance	2%	2%	2%	2%	100%	2%	2%
Visual Art	14%	14%	12%	26%	13%	100%	68%
Other Art	1%	1%	1%	2%	1%	5%	100%
Affiliation Factor	Dance (n=10,198)	Music (n=56,510)	Theatre (n=51,722)	Opera (n=11,882)	Other Performance (n=3,273)	Visual Art (n=22,888)	Other Art (n=1,778)
Dance	15.3	0.7	0.6	1.4	1	1	1
Music	0.7	2.8	0.6	1.1	0.7	0.9	1
Theatre	0.6	0.6	3.0	1	0.8	0.8	0.8
Opera	1.4	1.1	1	13.1	1.1	1.8	2.1
Other Performance	1.0	0.7	0.8	1.1	47.7	0.9	1.2
Visual Art	1.0	0.9	0.8	1.8	0.9	6.8	4.6
Other Art	1.0	1	0.8	2.1	1.2	4.6	87.8





# Key Takeaways





# Market Reach

- Overall market reach shows room for growth.
    - Strongest reach is into St. Louis County (22%), followed by City of St. Louis (20%), then region at (9%)
      - NEA – 49% of adults participate by attending
    - Performing arts reach of 11% shows room for growth
      - NEA – 37% of adults participate in performing arts
    - Visual Arts reach of 3% shows room for growth
      - NEA – 39% of adults participate by attending visual arts
    - Museum specific reach is 8%
- 



*\*From the 2015 updated report on the Survey of Public Participation in the Arts, 2012. Participation at least once within a 12-month period.*




# Demand, Reach, and Strategy

- Top strata for market reach points to **strengthening** strategies
  - Highest reach in areas where consumer demand is above average, with a few exceptions
- Middle strata for market reach points to **broadening** strategies
  - Majority of areas show high demand with modest reach (broaden), but many are areas that show below average demand, but have modest reach (diversify)
- Bottom strata for market reach points to **diversifying and growth** strategies
  - Majority of areas show below average demand but some reach (diversify), areas with above average demand and low reach (broaden)




# Demand, Reach and Strategy



- Demand is a bit higher in St. Louis **County** for most types of arts experiences with a few exceptions
    - Demand for **classical music or opera** and **active participation** (playing music, making art, going out dancing) is higher in the City than the County.
  - The lowest demand (substantially below the national average) is clearly concentrated in north St. Louis City, in north County areas and in East St. Louis
  - Demand in the area outside of the County (still within 45-minutes of downtown St. Louis) is **below average** for everything other than “other music” and “cooking for fun”
  - High demand areas are 15% of market (strengthen)
  - Low demand areas are 18% of market (diversify)
  - Everything else ~67% is +/- average (broaden)
- 



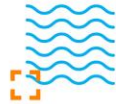
## Demand, Reach, and Strategy

- Lowest demand and reach is in very rural or very urban groups with substantially higher populations of color and lower income and education levels.
  - The “youngest” of the Mosaic groups with strong potential for audience development are more racially mixed than many others
  - Arts and culture has made good inroads to build on with populations less inclined towards “consumer” arts participation.
- 



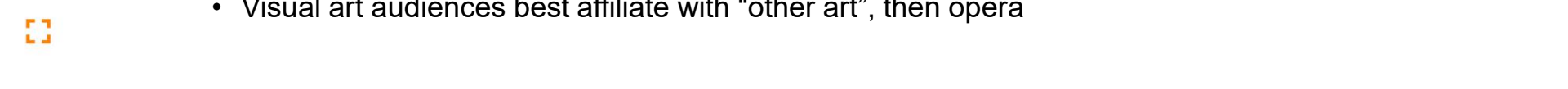


## Other Notable Numbers

- In the City
    - ~60%+ reach into Power Elites and Flourishing Families in the City (saturated)
    - ~20%-40% reach into two younger singles markets (not typical)
    - ~6% reach into City households most challenged economically, educationally (base to build)
    - ~30%-40% reach into typical mainly stable Boomer markets
  - In the County
    - ~30%-40% reach into top demand groups (pushing the limits)
    - ~9%-11% reach into “Significant Singles” & Singles an Starters, lower than in City
  - Organizational Overlap
    - 72% of households affiliated with one organization
- 



## Other notables

- Low overlap in organizational affiliation and low discipline overlap suggests multi-disciplinary and collaborative marketing strategies
    - Mixed discipline arts centers and visual arts are more inclined to have siloed audiences than performing arts, other arts, and museums
    - Dance audiences best affiliate with music, then theatre
    - Music audiences best affiliate with opera, then visual art
    - Theatre audiences best affiliate with opera, then other performance and visual art/other art
    - Opera audiences best affiliate with “other art”, then visual art
    - Visual art audiences best affiliate with “other art”, then opera
- 

# Summary: Target Strategies and Mosaic Groups

Arts Demand Group	Arts Demand Index	Mosaic Household Types in Study Area	Market Reach into Mosaic Household Types	Audience Development Strategy
High Arts Demand	153	G: Young City Solos	37.3%	Deepen, Broaden
	147	A: Power Elite	42.9%	Deepen, Broaden
	121	B: Flourishing Families	21.9%	Broaden, Deepen
Arts vs Broad Average Demand	119	C: Booming with Confidence	22.9%	Broaden, Deepen
	111	O: Singles and Starters	13.1%	Broaden, Diversify
	108	K: Significant Singles	15.6%	Broaden, Deepen
	106	E: Thriving Boomers	17.0%	Broaden, Deepen
	97	F: Promising Families	14.0%	Broaden, Diversify
	94	J: Autumn Years	12.7%	Broaden, Diversify
	94	Q: Golden Year Guardians	16.1%	Broaden, Deepen
	92	L: Blue Sky Boomers	9.6%	Diversify
	91	I: Family Union	8.5%	Diversify
	89	D: Suburban Style	10.6%	Broaden, Diversify
	82	P: Cultural Connections	9.9%	Diversify
Low Arts Demand	74	N: Pastoral Pride	17.0%	Broaden
	73	M: Families in Motion	4.8%	Diversify
	72	S: Struggling Societies	4.0%	Diversify
	70	R: Aspirational Fusion	3.9%	Diversify
		<b>Total</b>	<b>16.8%</b>	

The slide features a solid blue background with several decorative elements: a small triangle in the top left, a square with internal lines in the top right, a wavy line pattern on the right side, and a grid of dots in the bottom left. The main title is centered in white text.

# Strategy Discussion with Participants





## Planning Input – Discussion Questions Around Strategies for Audience Development

- On November 16, 2017 participants discussed the takeaways from the research and how they might be used to inform planning strategies
  - Thinking about strategies to **deepen, broaden, and diversify audience relationships** what efforts of your own or of others you know about anywhere are doing a great job at this? What would you like to try that you have not yet been able to? What would it take?




# Summary of Arts Group Deepening Strategies

- 
- Developing board to board mentoring and matchmaking program
  - Assistance with finding new board members
  - Creating a support group for board presidents
  - Providing board assessment consultations
  - Creating a “best practices” resources to share best practices in this area
  - Having a “go to” directory and FAQs for arts leaders
  - Presenting continuing education to deepen knowledge of what is presented
- 



# Summary of Arts Group Broadening Strategies




- 
- Developing symbiotic relationships between organizations of different types
  - Creating a “best practices” resources to share best practices in this area
  - Having a “go to” directory that facilitates networking among organizations seeking to collaborate
  - Community run-out opportunities for familiarization with programming
  - Broadening programming
  - Offering special ticketing programs for under 30 and seniors
  - Building on the concept of the “concert pass collaborations”- six organizations, six concerts no charge for students
  - Offering community workshops with accreditation and or audition process prep at no charge
  - Increasing tourism connections and strengthening RAC’s work in that area
  - Helping with facilitating press coverage
  - Have one separate comprehensive online calendar that publicizes arts and culture that is promoted to a wider audience





# Summary of Arts Group Diversifying Strategies



- Building on the music made together concept in schools
- Creating an arts education inventory and gap analysis leading to directory/database that is up to date
- Developing more curriculum linked programming
- Attracting different audiences through subject and content shifts (e.g. sports)
- Addressing transportation issues
- Harness the power of mommy bloggers and others
-  • Creating a fund to support arts journalism
- Host a day of art at Convention Center with RAC to showcase programs and offerings



# Mosaic Descriptions and Details

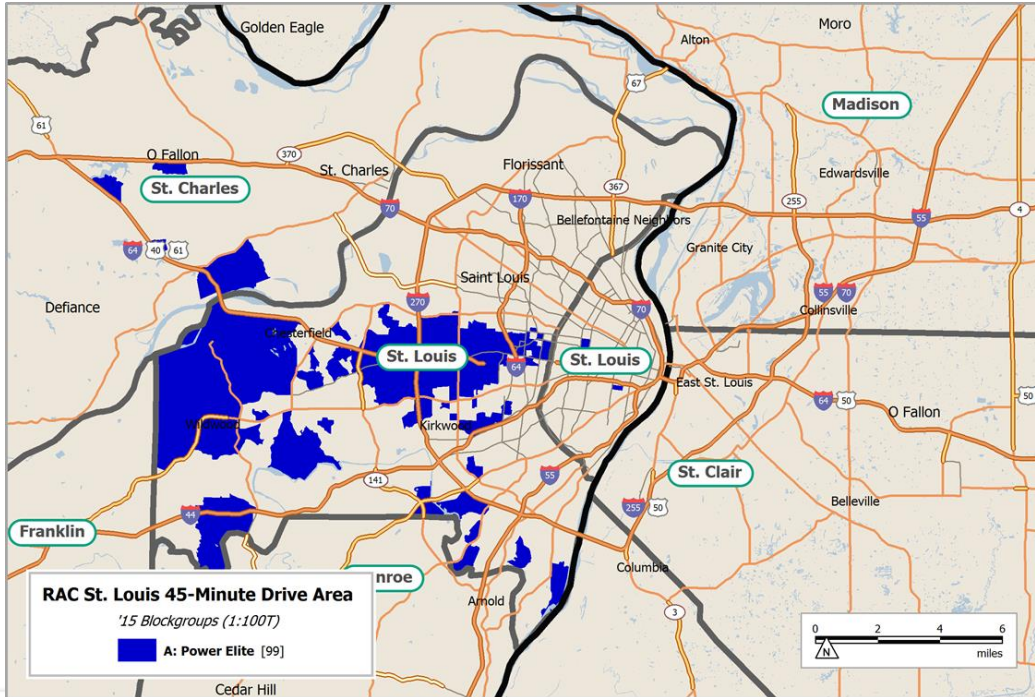
# Mosaic Groups and Page Numbers

The following pages include a map of the dominant areas for each Mosaic group, Experian narrative description, local Census demographics of the areas (2017 updates), index data, and the market research and strategies for audience development.

MOSAIC GROUP	PAGE	MOSAIC GROUP	PAGE
A. Power Elite	51	K. Significant Singles	87
B. Flourishing Families	55	L. Blue Sky Boomers	91
C. Booming with Confidence	59	M. Families in Motion	95
D. Suburban Style	63	N. Pastoral Pride	99
E. Thriving Boomers	67	O. Singles and Starters	103
F. Promising Families	71	P. Cultural Connections	107
G. Young City Solos	75	Q. Golden Year Guardians	111
I. Family Union	79	R. Aspirational Fusion	115
J. Autumn Years	83	S. Struggling Societies	119

There is no “H” group in this geographic area.

## A. Power Elite



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

# A. Power Elite

## Power Elite Neighborhoods in the Region - Market Reach 42.9%


### Audience Development Strategy - Deepen, Broaden

Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	78.0%	87.6%	91.4%	% No high school diploma	3.3%	2.4%	3.8%
% Black	12.5%	3.8%	3.2%	% High school diploma	8.3%	10.2%	17.2%
% American Indian/AK Native	0.3%	0.2%	0.1%	% Some college	15.4%	19.2%	29.7%
% Asian/Pacific Islander	5.9%	6.4%	3.0%	% College degree	34.7%	35.9%	30.9%
% Multi-racial/other	3.2%	2.0%	2.2%	% Graduate/professional degree	38.3%	32.4%	18.4%
				<b>Market Potential Index (Average: 147)</b>			
% Hispanic/Latino origin	3.4%	2.3%	2.1%	Average "audience arts"		<b>170</b>	
				Average "participatory arts"		<b>113</b>	
Median age	41.1	45.1	43.6	Visits art galleries		<b>206</b>	
Median household income	\$80,308	\$133,697	\$101,605	Visits museums		<b>194</b>	
Average household income	\$131,361	\$185,159	\$133,314	Attends dance performances		<b>131</b>	
				Attends classical music/opera performances		<b>189</b>	
% Households w/persons < age 18	11.7%	32.7%	33.4%	Attends other music performances		<b>127</b>	
				Attends live theater		<b>176</b>	
% Unemployed	1.3%	1.6%	1.3%	Plays musical instrument		<b>122</b>	
				Paints or draws		<b>105</b>	
% Housing units owner occupied	43.9%	82.9%	84.9%	Goes out dancing		<b>102</b>	
% Housing units renter occupied	41.6%	12.7%	11.8%	Cooks for fun		<b>123</b>	




## A. Power Elite

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



With their deep pockets, they own property in some of America's most sought-after addresses - from the contemporary mansions of Beverly Hills, Calif. to the sprawling waterfront estates of Old Greenwich, Conn . Many paid more than a million dollars for their dream homes. While many have settled in the greener-belt suburbs of big cities, significant numbers also enjoy private, in- town residences, their homes protected by iron gates and well-tended shrubbery, the backyards dominated by swimming pools and tennis courts. With nearly half the adults holding advanced degrees, Power Elite reflect a society of white- collar and entrepreneurial types, as well as dual-earners who have worked their way to the top. They're nearly twice as likely as average Americans to have jobs in business, law, science and technology. Nearly a third of this group's households earn more than \$250,000 annually. Now at the peak of their careers, many are starting to contemplate comfortable life investments, as more than half already own secondary or vacation homes.



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



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

Unsurprisingly, they are adopters of all the latest and greatest technology.

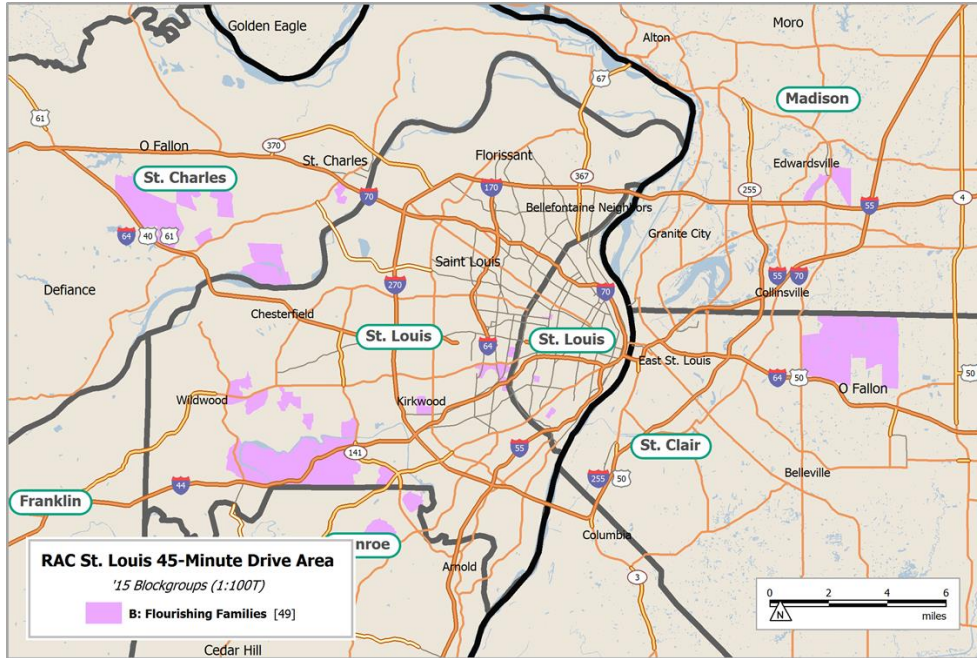
To satisfy their curiosity about the world, they travel widely in the U.S. and abroad, visiting virtually every country that can be reached by plane, train or cruise ship. They travel in style; they're more than twice as likely as average Americans to have spent more than \$5,000 on their last trip,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

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

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



## B. Flourishing Families



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

## B. Flourishing Families


Flourishing Families Neighborhoods in the Region - Market Reach 21.9%							
Audience Development Strategy - Broaden, Deepen							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	77.6%	87.2%	86.7%	% No high school diploma	8.4%	3.6%	2.8%
% Black	18.2%	4.5%	5.7%	% High school diploma	20.0%	13.6%	18.7%
% American Indian/AK Native	0.1%	0.2%	0.2%	% Some college	31.3%	27.2%	28.8%
% Asian/Pacific Islander	1.4%	5.4%	4.7%	% College degree	24.0%	34.5%	29.9%
% Multi-racial/other	2.7%	2.7%	2.7%	% Graduate/professional degree	16.2%	21.1%	19.7%
				Market Potential Index (Average: 121)			
% Hispanic/Latino origin	2.3%	2.6%	2.8%	Average "audience arts"	128		
Median age	37.7	38.6	37.1	Average "participatory arts"	112		
Median household income	\$54,207	\$97,352	\$102,720	Visits art galleries	123		
Average household income	\$66,808	\$114,280	\$117,511	Visits museums	139		
% Households w/persons < age 18	24.2%	36.8%	43.2%	Attends dance performances	120		
% Unemployed	3.2%	1.7%	2.5%	Attends classical music/opera performances	125		
% Housing units owner occupied	63.2%	78.7%	84.4%	Attends other music performances	131		
% Housing units renter occupied	25.2%	18.0%	12.8%	Attends live theater	128		
				Plays musical instrument	117		
				Paints or draws	102		
				Goes out dancing	107		
				Cooks for fun	120		



## B. Flourishing Families

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

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



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



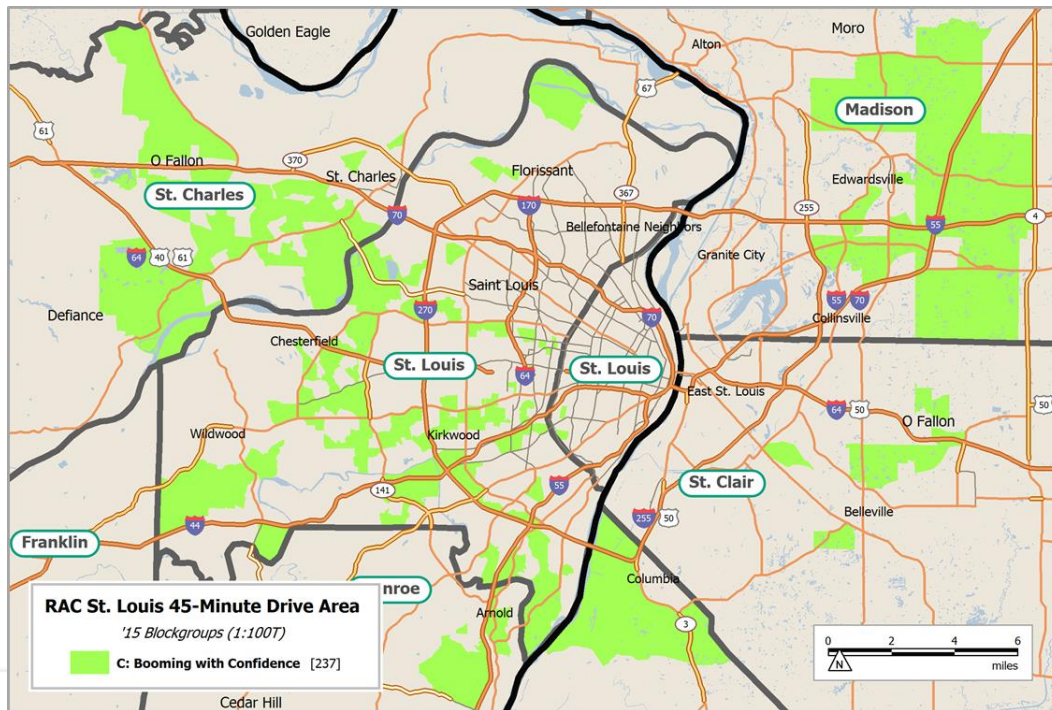
With kids of all ages in this group, their leisure activities revolve around family-friendly fun. These households are big on sports of all sorts. Some are outdoor sport enthusiasts and like cycling, skiing, ice skating, mountain biking and backpacking. Others focus on a round of golf or playing a match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

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

The multitasking Flourishing Families have little time to devote to traditional media. They're only average fans of TV, radio, newspapers and magazines; much of their news-gathering now takes place on the Internet. However, they do like watching sitcoms, dramas and reality programs; their favorite cable networks include ESPN, DIY and Cartoon Network. Their taste in magazines runs toward Entertainment Weekly, Real Simple and Road & Track. They no longer enjoy most TV commercials, noting that they think advertising to children is wrong. They're more receptive to online ads, however; they're willing to click on email ads, use sponsored Websites and check out links. These active families also notice ads in movie theaters.

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

## C. Booming with Confidence



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

## C. Booming with Confidence

### Booming with Confidence Neighborhoods in the Region - Market Reach 22.9%

#### Audience Development Strategy - Broaden, Deepen

Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	96.8%	87.5%	89.9%	% No high school diploma	6.2%	3.6%	5.1%
% Black	0.1%	5.1%	4.9%	% High school diploma	19.3%	16.2%	24.4%
% American Indian/AK Native	0.1%	0.2%	0.2%	% Some college	23.2%	25.3%	33.0%
% Asian/Pacific Islander	1.3%	5.1%	2.4%	% College degree	29.2%	31.4%	23.5%
% Multi-racial/other	1.7%	2.1%	2.6%	% Graduate/professional degree	22.1%	23.5%	14.0%
				<b>Market Potential Index (Average: 119)</b>			
% Hispanic/Latino origin	3.0%	2.3%	2.7%	Average "audience arts"		<b>127</b>	
				Average "participatory arts"		<b>107</b>	
Median age	43.1	44.6	41.3	Visits art galleries		<b>126</b>	
Median household income	\$96,445	\$95,244	\$86,671	Visits museums		<b>132</b>	
Average household income	\$107,625	\$118,836	\$102,093	Attends dance performances		<b>118</b>	
				Attends classical music/opera performances		<b>125</b>	
% Households w/persons < age 18	21.2%	29.8%	35.9%	Attends other music performances		<b>130</b>	
				Attends live theater		<b>133</b>	
% Unemployed	1.3%	1.8%	3.0%	Plays musical instrument		<b>112</b>	
				Paints or draws		<b>100</b>	
% Housing units owner occupied	78.7%	83.4%	84.2%	Goes out dancing		<b>104</b>	
% Housing units renter occupied	12.3%	13.0%	12.7%	Cooks for fun		<b>113</b>	






## C. Booming with Confidence

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

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



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

Booming with Confidence tend to have sophisticated tastes. With their well-appointed homes, solid incomes and diversified portfolios, they can afford to live the good life. They like to spend on nightlife, going to plays, concerts, movies and restaurants. On weekends, they can be seen touring museums and antique shops, always on the lookout for objects to add to their collections.





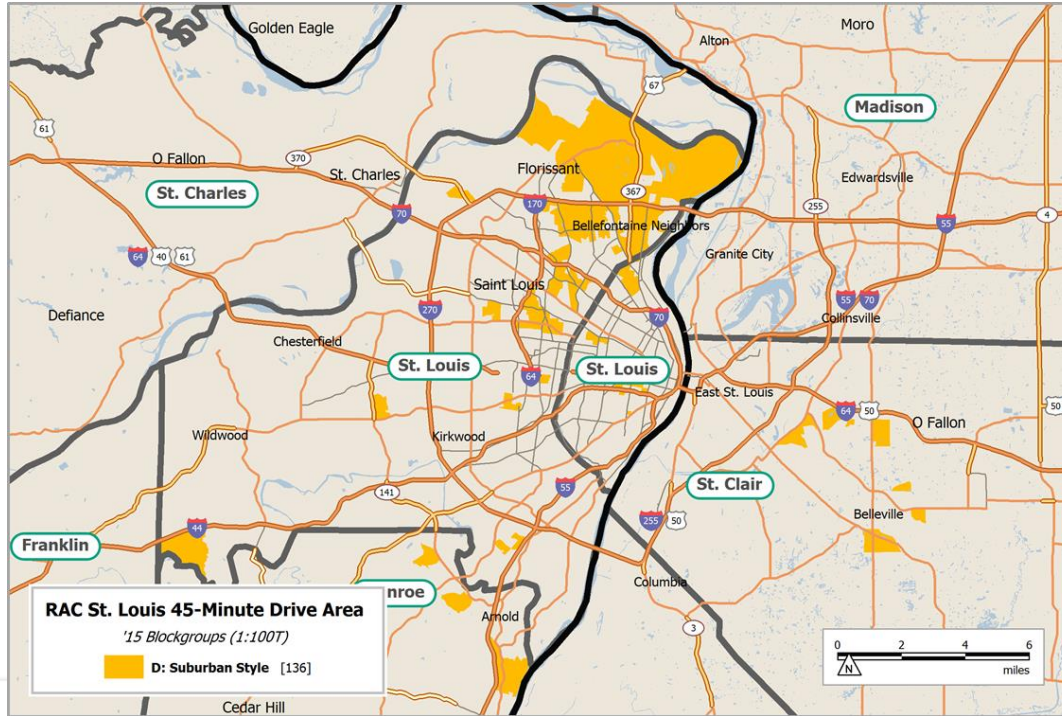
They travel widely, taking getaways to Caribbean beaches and visiting nearly every country in Europe at more than twice the national average. At home, they like to relax by reading, gardening and entertaining friends and family. Their end tables are stacked with old copies of Smithsonian, The New Yorker, Gourmet and Metropolitan Home.

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

Despite their busy lifestyles, Booming with Confidence make time for traditional media. They watch an average amount of TV, enjoying the programming on cable networks like A&E, CNN, ESPN, History, National Geographic, TCM and the Travel Channel. Radio is popular among these daily commuters, especially the stations that offer news, sports, classic hits, golden oldies and classical music. Among Booming with Confidence households, though, nothing compares to their obsession with traditional print media. They read daily newspapers from cover to cover and subscribe to science, travel and news magazines. No fans of advertising, they will, nevertheless, read ads in print media and are receptive to the messages that appear in movie theaters.

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

## D. Suburban Style



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

## D. Suburban Style

### Suburban Style Neighborhoods in the Region - Market Reach 10.6%

#### Audience Development Strategy - Broaden, Diversify


Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	13.6%	33.1%	74.4%	% No high school diploma	14.7%	9.3%	7.7%
% Black	82.1%	62.4%	20.6%	% High school diploma	27.4%	27.0%	29.3%
% American Indian/AK Native	0.1%	0.2%	0.2%	% Some college	31.9%	35.1%	35.5%
% Asian/Pacific Islander	1.6%	1.4%	1.7%	% College degree	13.9%	17.2%	17.3%
% Multi-racial/other	2.6%	2.8%	3.0%	% Graduate/professional degree	12.2%	11.4%	10.2%
				<b>Market Potential Index (Average: 89)</b>			
% Hispanic/Latino origin	1.4%	1.7%	3.1%	Average "audience arts"		<b>86</b>	
				Average "participatory arts"		<b>94</b>	
Median age	40.1	40.7	39.9	Visits art galleries		<b>82</b>	
Median household income	\$38,463	\$55,422	\$63,440	Visits museums		<b>70</b>	
Average household income	\$50,921	\$65,606	\$73,270	Attends dance performances		<b>104</b>	
				Attends classical music/opera performances		<b>74</b>	
% Households w/persons < age 18	31.5%	32.9%	31.2%	Attends other music performances		<b>90</b>	
				Attends live theater		<b>96</b>	
% Unemployed	5.1%	5.1%	3.3%	Plays musical instrument		<b>86</b>	
				Paints or draws		<b>75</b>	
% Housing units owner occupied	51.0%	74.2%	74.1%	Goes out dancing		<b>114</b>	
% Housing units renter occupied	32.1%	20.7%	19.4%	Cooks for fun		<b>101</b>	





## D. Suburban Style

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

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




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



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

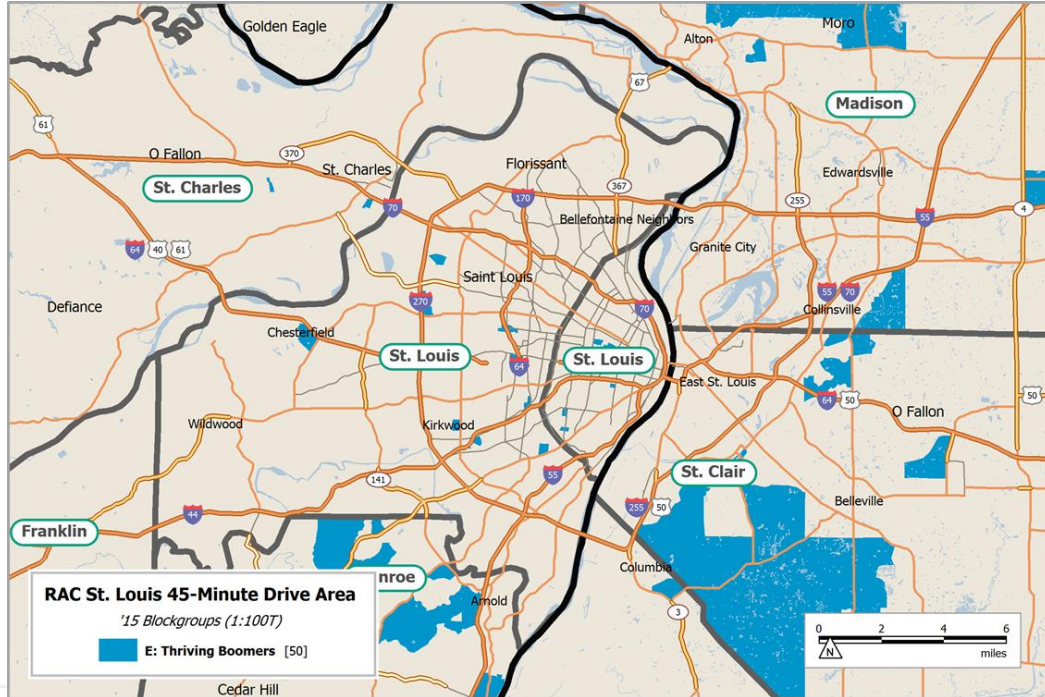
With their mix of solid incomes and educations, Suburban Style tend to be fashion-forward consumers who like to check out new styles and products. Children influence the marketplace patterns, as seen in the group's embrace of people-moving vehicles like SUVs and minivans and their tendency to patronize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



The busy families in Suburban Style make only an average market for most media. However, they watch premium TV channels like Speed, IFC, BET and TV Land. They spend a lot of time in their cars listening to radio stations that air news, sports and classic and modern rock. Though their interest in most print media seems to be waning, they still like to read magazines that cover parenting, health, food, entertainment and the African-American community. More and more, they're getting their news and entertainment from the Internet. While they're ambivalent about advertising on most traditional channels, they do respond to email ads, sponsored Websites and links.

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

## E. Thriving Boomers



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



## E. Thriving Boomers

Thriving Boomers Neighborhoods in the Region - Market Reach 17.0%							
Audience Development Strategy - Broaden, Deepen							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	66.5%	77.1%	93.5%	% No high school diploma	6.2%	2.9%	7.7%
% Black	27.5%	11.1%	2.9%	% High school diploma	12.6%	19.2%	32.3%
% American Indian/AK Native	0.2%	0.3%	0.2%	% Some college	29.4%	26.1%	35.1%
% Asian/Pacific Islander	3.2%	8.5%	1.0%	% College degree	25.9%	27.6%	16.6%
% Multi-racial/other	2.7%	3.0%	2.4%	% Graduate/professional degree	25.9%	24.2%	8.3%
				<b>Market Potential Index (Average: 106)</b>			
% Hispanic/Latino origin	2.1%	4.4%	2.3%	Average "audience arts"	<b>108</b>		
				Average "participatory arts"	<b>103</b>		
Median age	38.6	44.5	42.3	Visits art galleries	<b>105</b>		
Median household income	\$50,428	\$60,942	\$67,960	Visits museums	<b>113</b>		
Average household income	\$74,548	\$81,927	\$80,901	Attends dance performances	<b>91</b>		
				Attends classical music/opera performances	<b>110</b>		
% Households w/persons < age 18	15.6%	19.0%	31.5%	Attends other music performances	<b>116</b>		
				Attends live theater	<b>111</b>		
% Unemployed	1.5%	1.9%	4.2%	Plays musical instrument	<b>108</b>		
				Paints or draws	<b>102</b>		
% Housing units owner occupied	46.6%	46.2%	80.5%	Goes out dancing	<b>96</b>		
% Housing units renter occupied	40.9%	48.5%	14.2%	Cooks for fun	<b>107</b>		






## E. Thriving Boomers

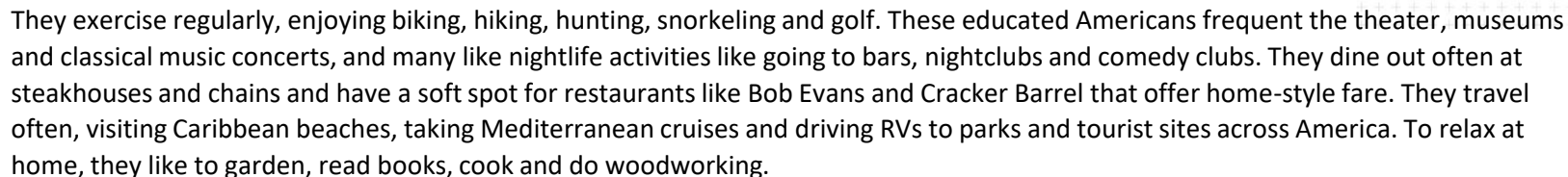
The households in Thriving Boomers feature empty-nesting couples in their 50s and 60s who long ago fled the cities for quiet towns and upper middle-class resort communities. Most of the households contain childless couples who've lived at the same address for over a decade and are now beginning to contemplate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

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



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


Half of Thriving Boomers may be grandparents, but they've hardly retired to a rocking chair. Many are much different than preceding generations at the same point in life.



They exercise regularly, enjoying biking, hiking, hunting, snorkeling and golf. These educated Americans frequent the theater, museums and classical music concerts, and many like nightlife activities like going to bars, nightclubs and comedy clubs. They dine out often at steakhouses and chains and have a soft spot for restaurants like Bob Evans and Cracker Barrel that offer home-style fare. They travel often, visiting Caribbean beaches, taking Mediterranean cruises and driving RVs to parks and tourist sites across America. To relax at home, they like to garden, read books, cook and do woodworking.

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

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



Thriving Boomers are selective media consumers, though they embrace both traditional and new media. They're among the top readers of newspapers, especially the travel, science, movie and editorial sections. These outdoorsy folks like to read fishing and hunting magazines along with newsweeklies and automotive publications. They listen to the radio fairly often, tuning in to golden oldies, classic rock, adult contemporary and news talk stations. They're especially fond of TV news, documentaries, history programs, dramas and how-to programs aired on cable channels like History, HGTV, TCM, the Travel Channel and Fox News. They're no fans of TV commercials - or most advertising for that matter - but they respond to billboards and links on the Internet.

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

**RAC St. Louis 45-Minute Drive Area**  
*'15 Blackgroups (1:100T)*

**F: Promising Families [11]**

The map shows the St. Louis area with various cities and highways. Red shaded regions indicate areas with 'F: Promising Families'. The map includes a scale bar (0 to 6 miles) and a north arrow.

Regional Arts Commission of St. Louis  
Cultural Planning Initiative

## F. Promising Families


Promising Families Neighborhoods in the Region - Market Reach 14.0%							
Audience Development Strategy - Broaden, Diversify							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	n/a	84.4%	90.4%	% No high school diploma	n/a	1.4%	7.3%
% Black	n/a	4.5%	4.6%	% High school diploma	n/a	16.9%	26.5%
% American Indian/AK Native	n/a	0.1%	0.3%	% Some college	n/a	34.6%	31.9%
% Asian/Pacific Islander	n/a	8.7%	2.0%	% College degree	n/a	26.2%	22.7%
% Multi-racial/other	n/a	2.3%	2.8%	% Graduate/professional degree	n/a	21.0%	11.7%
				Market Potential Index (Average: 97)			
% Hispanic/Latino origin	n/a	2.6%	3.0%	Average "audience arts"	95		
				Average "participatory arts"	100		
Median age	n/a	40.1	36.0	Visits art galleries	88		
Median household income	n/a	\$97,131	\$74,122	Visits museums	99		
Average household income	n/a	\$99,748	\$84,889	Attends dance performances	92		
				Attends classical music/opera performances	85		
% Households w/persons < age 18	n/a	37.2%	36.4%	Attends other music performances	108		
				Attends live theater	97		
% Unemployed	n/a	0.4%	2.9%	Plays musical instrument	100		
				Paints or draws	99		
% Housing units owner occupied	n/a	92.2%	84.3%	Goes out dancing	100		
% Housing units renter occupied	n/a	4.6%	13.1%	Cooks for fun	101		



## F. Promising Families

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

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



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



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

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

Promising Families have only selective interest in media, with most of their program choices reflecting their preoccupation with childrearing. They seem to have given up on subscribing to newspapers and they have below-average interest in magazines. However, they will make an exception for parenting, sports and men's magazines such as Baby Talk, ESPN, Maxim and Parents. They listen to the radio, especially during drive-time, to stations that offer sports, modern rock, adult contemporary and contemporary hit songs. On TV, they're big fans of sitcoms, reality programs and animation, especially shows that appear on Nickelodeon, Disney, Cartoon Network and Comedy Central. In this group, the parents enjoy watching "SpongeBob SquarePants" almost as much as their kids.

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



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





## G. Young City Solos

Young City Solos Neighborhoods in the Region - Market Reach 37.3%							
Audience Development Strategy - Deepen, Broaden							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Block Groups	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Block Groups
% White	82.6%	77.4%	86.1%	% No high school diploma	5.9%	2.1%	5.9%
% Black	9.8%	8.9%	6.2%	% High school diploma	16.2%	11.5%	13.6%
% American Indian/AK Native	0.2%	0.1%	0.3%	% Some college	28.2%	20.8%	32.2%
% Asian/Pacific Islander	4.0%	10.2%	3.8%	% College degree	26.8%	34.3%	36.0%
% Multi-racial/other	3.4%	3.3%	3.6%	% Graduate/professional degree	22.8%	31.4%	12.4%
				<b>Market Potential Index (Average: 153)</b>			
% Hispanic/Latino origin	3.7%	3.5%	3.2%	Average "audience arts"	<b>165</b>		
				Average "participatory arts"	<b>136</b>		
Median age	36.6	37.2	36.7	Visits art galleries	<b>185</b>		
Median household income	\$55,053	\$71,107	\$68,193	Visits museums	<b>179</b>		
Average household income	\$73,238	\$95,867	\$80,322	Attends dance performances	<b>123</b>		
				Attends classical music/opera performances	<b>217</b>		
% Households w/persons < age 18	16.4%	20.2%	19.9%	Attends other music performances	<b>138</b>		
				Attends live theater	<b>147</b>		
% Unemployed	1.5%	1.7%	1.7%	Plays musical instrument	<b>161</b>		
				Paints or draws	<b>123</b>		
% Housing units owner occupied	46.4%	56.2%	64.9%	Goes out dancing	<b>124</b>		
% Housing units renter occupied	39.6%	39.4%	32.7%	Cooks for fun	<b>138</b>		




## G. Young City Solos

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

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

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



Young City Solos lead fast-paced and active lifestyles. These unmarried folks devote a lot of their discretionary cash to nightlife activities, often going to bars, nightclubs, plays, dance performances, concerts and rock shows. They keep their healthy lifestyles by staying fit and joining a health club to make use of the cardio machines, weights and yoga classes.



They like to jog, play tennis, bike, hike and swim. They dine out often at white-tablecloth restaurants, where they like gourmet food and dishes presented like art. Although they travel as much as the average, many have gone abroad in the last three years to visit Europe, Asia and the Caribbean. They like visiting places that allow them to meet new people and experience different cultures.

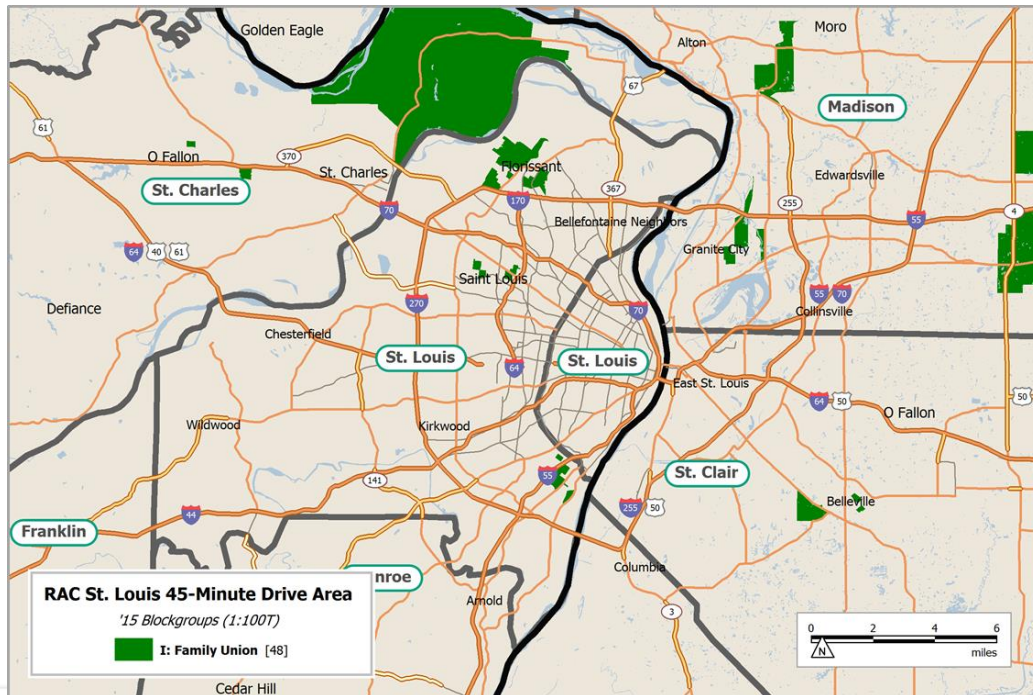
As a result of their typically small homes and even smaller closets, Young City Solos would hardly qualify as shopaholics. They're infrequent consumers who prefer local boutiques to national chains, though they will go to discount retailers. Despite their youth, they're financially experienced and have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

Multitasking Young City Solos don't have much time for traditional media. They rarely subscribe to newspapers. They're often too busy to sit down to watch TV. They don't often listen to the radio, though they do like tuning in to stations that offer news, talk, hot adult contemporary music, classic hits and contemporary hits. Though they're not big on print media, they will subscribe to magazines such as Fortune, Food & Wine, The New Yorker, Marie Claire and Men's Health. They prefer the Internet for entertainment and they note that they're spending less time with other media because of it.



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

# I. Family Union



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

There is no "H" group in the area.

# I. Family Union

There is no "H" group in the area.


Family Union Neighborhoods in the Region - Market Reach 8.5%							
Audience Development Strategy - Diversify							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	n/a	82.2%	93.0%	% No high school diploma	n/a	8.8%	8.4%
% Black	n/a	12.5%	3.6%	% High school diploma	n/a	35.6%	36.6%
% American Indian/AK Native	n/a	0.2%	0.2%	% Some college	n/a	33.5%	36.4%
% Asian/Pacific Islander	n/a	1.6%	0.6%	% College degree	n/a	15.2%	12.4%
% Multi-racial/other	n/a	3.6%	2.5%	% Graduate/professional degree	n/a	7.0%	6.1%
				<b>Market Potential Index (Average: 91)</b>			
% Hispanic/Latino origin	n/a	3.0%	2.7%	Average "audience arts"	85		
Median age	n/a	39.6	42.1	Average "participatory arts"	99		
Median household income	n/a	\$56,890	\$62,764	Visits art galleries	93		
Average household income	n/a	\$65,502	\$70,549	Visits museums	90		
				Attends dance performances	54		
% Households w/persons < age 18	n/a	31.4%	30.1%	Attends classical music/opera performances	73		
				Attends other music performances	106		
% Unemployed	n/a	3.6%	3.7%	Attends live theater	94		
				Plays musical instrument	97		
% Housing units owner occupied	n/a	82.4%	75.8%	Paints or draws	106		
% Housing units renter occupied	n/a	12.4%	18.4%	Goes out dancing	87		
				Cooks for fun	105		



# I. Family Union

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

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



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



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

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

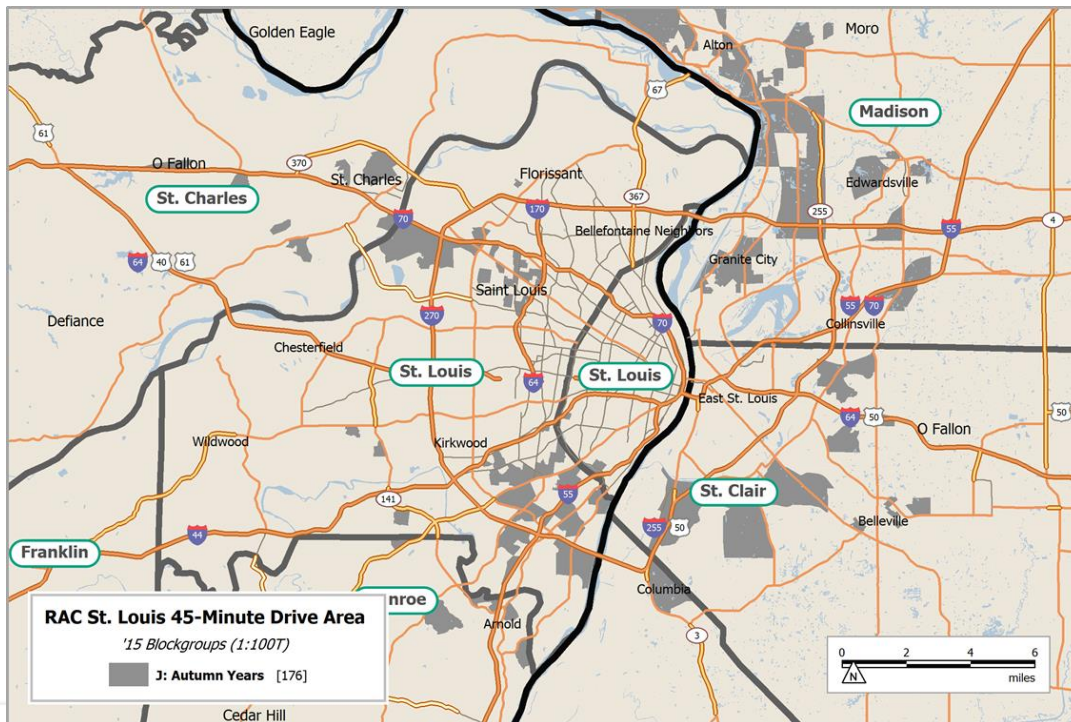
Family Union thrive on traditional media. They listen to the radio, especially stations that play salsa, Latin ballads, Mexican music, modern rock and classic rock. They like joining their children to watch Disney, Nickelodeon and MTV2. Though they have subscription rates for newspapers, they do enjoy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



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



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



## J. Autumn Years

### Autumn Years Neighborhoods in the Region - Market Reach 12.7%

#### Audience Development Strategy - Broaden, Diversify


Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	91.6%	88.2%	89.7%	% No high school diploma	9.2%	8.1%	8.4%
% Black	0.6%	5.8%	6.4%	% High school diploma	29.0%	28.5%	33.3%
% American Indian/AK Native	0.4%	0.2%	0.3%	% Some college	31.4%	31.0%	35.3%
% Asian/Pacific Islander	4.8%	2.8%	1.0%	% College degree	21.2%	21.6%	15.6%
% Multi-racial/other	2.6%	3.0%	2.7%	% Graduate/professional degree	9.2%	10.9%	7.4%
				<b>Market Potential Index (Average: 94)</b>			
% Hispanic/Latino origin	3.0%	3.3%	2.8%	Average "audience arts"	<b>91</b>		
Median age	40.1	43.2	41.6	Average "participatory arts"	<b>100</b>		
Median household income	\$58,004	\$61,992	\$58,257	Visits art galleries	<b>87</b>		
Average household income	\$63,691	\$73,285	\$70,795	Visits museums	<b>93</b>		
% Households w/persons < age 18	23.3%	26.5%	28.1%	Attends dance performances	<b>78</b>		
% Unemployed	1.9%	2.9%	4.7%	Attends classical music/opera performances	<b>79</b>		
% Housing units owner occupied	77.3%	80.1%	72.8%	Attends other music performances	<b>111</b>		
% Housing units renter occupied	12.8%	15.4%	20.8%	Attends live theater	<b>97</b>		
				Plays musical instrument	<b>102</b>		
				Paints or draws	<b>101</b>		
				Goes out dancing	<b>92</b>		
				Cooks for fun	<b>104</b>		



## J. Autumn Years

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

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



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



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

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

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

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

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



## K. Significant Singles

Significant Singles Neighborhoods in the Region - Market Reach 15.6%%							
Audience Development Strategy - Broaden, Deepen							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	86.4%	81.2%	89.2%	% No high school diploma	12.2%	10.9%	6.9%
% Black	7.5%	9.1%	4.8%	% High school diploma	20.1%	29.6%	35.6%
% American Indian/AK Native	0.2%	0.2%	0.3%	% Some college	26.6%	28.7%	34.7%
% Asian/Pacific Islander	2.0%	6.1%	1.7%	% College degree	23.6%	19.1%	15.8%
% Multi-racial/other	3.9%	3.5%	4.0%	% Graduate/professional degree	17.4%	11.6%	7.0%
				Market Potential Index (Average: 108)			
% Hispanic/Latino origin	4.2%	3.7%	5.4%	Average "audience arts"	108		
				Average "participatory arts"	107		
Median age	39.5	40.4	38.5	Visits art galleries	112		
Median household income	\$49,141	\$45,523	\$48,174	Visits museums	106		
Average household income	\$64,402	\$67,047	\$63,347	Attends dance performances	95		
				Attends classical music/opera performances	128		
% Households w/persons < age 18	17.8%	22.8%	25.4%	Attends other music performances	105		
				Attends live theater	105		
% Unemployed	3.1%	2.4%	6.4%	Plays musical instrument	112		
				Paints or draws	101		
% Housing units owner occupied	38.4%	46.1%	45.8%	Goes out dancing	102		
% Housing units renter occupied	47.5%	49.8%	48.7%	Cooks for fun	114		






## K. Significant Singles

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

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



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



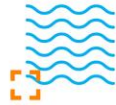


Despite their modest incomes, Significant Singles enjoy active, urbane lifestyles. Many of these middle-age men and women long ago gave up on the singles bar scene but they still like to take advantage of their city settings and mingle with other singles at health clubs, adult-education classes and comedy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

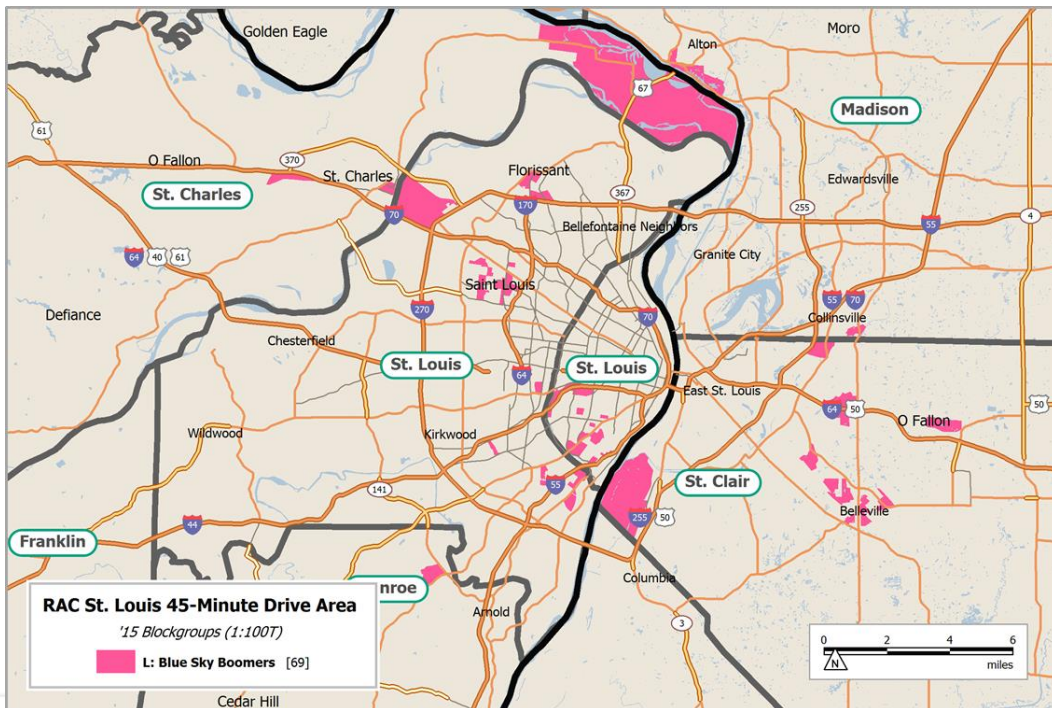
As consumers, Significant Singles seem to have champagne tastes on beer budgets. They tell researchers that they like to buy new fashion every season in order to make a unique statement with their outfits. However, they also admit that they're price-sensitive shoppers who go to discount and mid-market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

Most media garner only moderate interest among Significant Singles. These households listen to the radio, typically tuning in stations that play modern rock and contemporary hits. They have below-average interest in TV, though they prefer cable channels such as AMC, Oxygen, Style, BET and CNBC. They're more likely than average to read newspapers, mostly for the entertainment, fashion, movies and classified sections. They declare that magazines are their main source of entertainment, noting they're especially fond of gaming, computing, music and epicurean titles. On their living room coffee tables, back issues of *Self*, *Shape*, *Vogue* and *Vanity Fair* form neat stacks next to their laptops, coffee mugs and free weights.

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



## L. Blue Sky Boomers



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

# L. Blue Sky Boomers

## Blue Sky Boomers Neighborhoods in the Region - Market Reach 9.6%

### Audience Development Strategy - Diversify


Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	84.7%	82.4%	79.1%	% No high school diploma	13.4%	11.0%	11.6%
% Black	6.6%	10.4%	15.7%	% High school diploma	28.0%	31.6%	29.2%
% American Indian/AK Native	0.2%	0.3%	0.4%	% Some college	30.1%	34.8%	39.0%
% Asian/Pacific Islander	4.1%	2.6%	1.1%	% College degree	18.0%	15.8%	13.2%
% Multi-racial/other	4.3%	4.3%	3.8%	% Graduate/professional degree	10.5%	6.8%	7.0%
				<b>Market Potential Index (Average: 92)</b>			
% Hispanic/Latino origin	4.9%	4.6%	3.2%	Average "audience arts"	86		
Median age	38.2	41.4	40.6	Average "participatory arts"	102		
Median household income	\$48,019	\$48,771	\$41,789	Visits art galleries	90		
Average household income	\$56,956	\$58,315	\$55,180	Visits museums	85		
				Attends dance performances	72		
% Households w/persons < age 18	22.5%	24.9%	24.9%	Attends classical music/opera performances	78		
				Attends other music performances	102		
% Unemployed	2.5%	3.0%	4.8%	Attends live theater	87		
				Plays musical instrument	100		
% Housing units owner occupied	61.0%	70.6%	56.6%	Paints or draws	107		
% Housing units renter occupied	26.0%	23.5%	34.1%	Goes out dancing	94		
				Cooks for fun	106		



## L. Blue Sky Boomers

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

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



Most Blue Sky Boomers are high-school educated and work at a mix of sales, service-sector, professional and blue-collar jobs, though nearly one-quarter of households contains a retiree. Unlike their seasonal neighbors, they earn lower-middle-class incomes, averaging about \$55,000. However, because their expenses are low and their mortgages mostly paid off, many enjoy casual and comfortable lifestyles in their bucolic settings.

Located in surroundings like theirs, no one would fault Blue Sky Boomers for spending much of their leisure time outdoors. These households enjoy fishing, boating, hiking, hunting and gardening. However, they also have enough money - thanks, in part, to conservative investments - to travel regularly by car and RV to domestic locations.



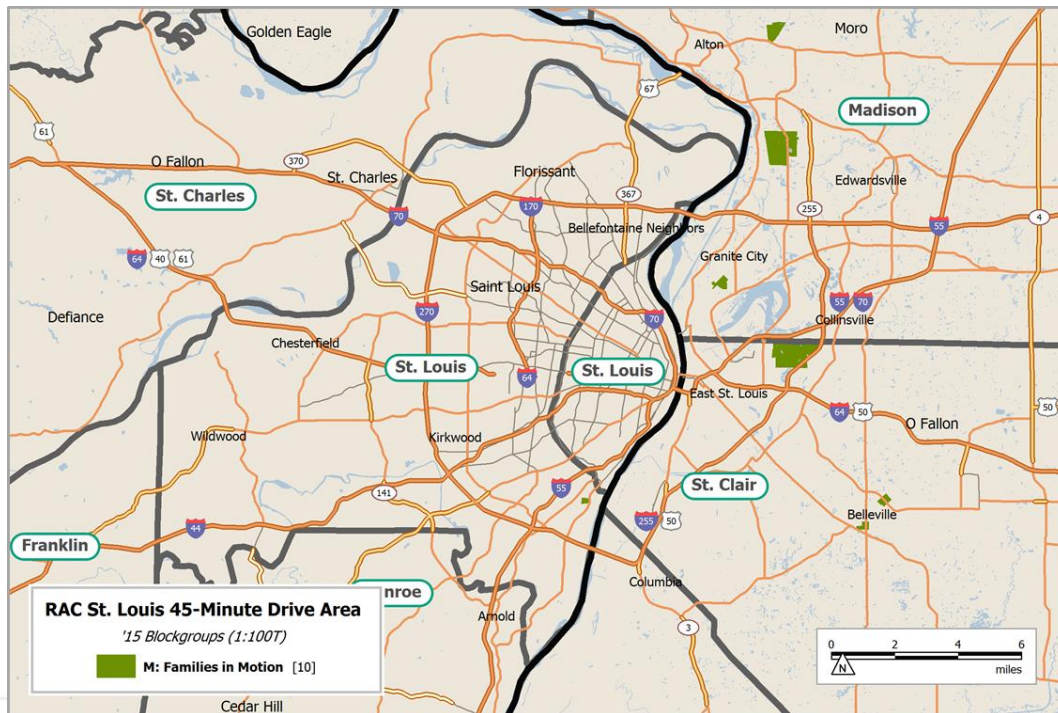
Their social lives typically revolve around their churches, clubs and unions. For a splurge, they'll go out to home-style and casual restaurants, take in a music concert or head to a weekend NASCAR race. When they want to relax, they like to read books, listen to music - from bluegrass to soul to classical music - do woodworking and needlework or have friends over for cards. These are the households that haven't forgotten the art of baking from scratch.

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

In Blue Sky Boomers, traditional media still reigns supreme. To keep up with local news, many subscribe to a daily newspaper and read it from cover to cover. They also read magazines, especially those that reflect their down-home lifestyle, including titles like Country Living, Family Handyman, Ladies' Home Journal and Reader's Digest. This aging generation never lost their interest in music, listening to radio stations that play country music, golden oldies and classic rock. However, many consider TV their chief form of entertainment, tuning in to newscasts, game shows, dramas, how-to shows and history programs. They dislike most forms of advertising, opting out of direct-mail lists and avoiding TV commercials as much as possible. Many tend to be okay with the billboard advertising tucked into the landscape near their homes, though.

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

## M. Families in Motion



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



## M. Families in Motion

Families in Motion Neighborhoods in the Region - Market Reach 4.8%							
Audience Development Strategy - Diversify							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	n/a	92.7%	84.4%	% No high school diploma	n/a	35.7%	15.5%
% Black	n/a	0.8%	7.9%	% High school diploma	n/a	39.4%	41.3%
% American Indian/AK Native	n/a	0.4%	0.4%	% Some college	n/a	15.9%	34.6%
% Asian/Pacific Islander	n/a	0.5%	0.5%	% College degree	n/a	6.9%	6.2%
% Multi-racial/other	n/a	5.6%	6.8%	% Graduate/professional degree	n/a	2.2%	2.5%
				Market Potential Index (Average: 73)			
% Hispanic/Latino origin	n/a	5.0%	10.0%	Average "audience arts"	63		
				Average "participatory arts"	87		
Median age	n/a	36.1	36.7	Visits art galleries	45		
Median household income	n/a	\$45,130	\$39,966	Visits museums	54		
Average household income	n/a	\$45,260	\$46,479	Attends dance performances	75		
				Attends classical music/opera performances	55		
% Households w/persons < age 18	n/a	32.4%	32.6%	Attends other music performances	94		
				Attends live theater	56		
% Unemployed	n/a	4.5%	6.8%	Plays musical instrument	83		
				Paints or draws	84		
% Housing units owner occupied	n/a	68.1%	52.7%	Goes out dancing	89		
% Housing units renter occupied	n/a	24.1%	35.7%	Cooks for fun	91		






## M. Families in Motion

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

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



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

Life in Families in Motion looks a lot like it did a half-century ago. These young families enjoy a lot of outdoor activities, including swimming, fishing, camping, hunting and hiking. On weekends many take their kids to movies, bowling alleys and fast-food restaurants.



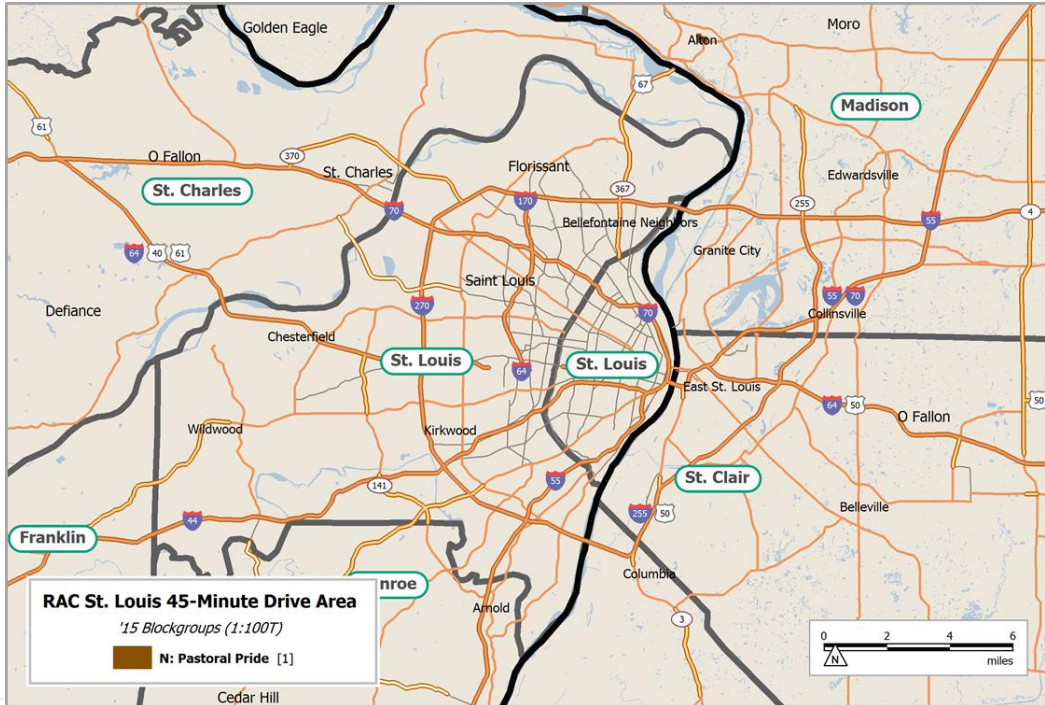
At their homes, the adults like to gather together to play cards and games after enjoying a home-cooked meal. For vacations, they pile their kids into their trucks, SUVs and RVs and head to family-friendly motels and campgrounds near a theme park, state fair, zoo or aquarium. If there's a NASCAR racetrack nearby, so much the better.

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

With their busy leisure lives, these households have selective media tastes. They like to stay informed listening to radio, tuning in to stations that offer news as well as golden oldies, country, religious and adult contemporary music. They're average fans of TV, though they often watch programs with their kids on children's cable channels like Disney, Nickelodeon, ABC Family and the Cartoon Network. While they're not big on print media, they do subscribe to a number of magazines, including American Baby, Outdoor Life, ESPN and Family Handyman. Some have little patience for advertising, but many are receptive to messages on billboards, in movie theaters and over the Internet - whether as email, sponsored searches or links.

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

## N. Pastoral Pride



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

# N. Pastoral Pride

## Pastoral Pride Neighborhoods in the Region - 17.0%

### Audience Development Strategy - Broaden


Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	n/a	n/a	50.2%	% No high school diploma	n/a	n/a	1.3%
% Black	n/a	n/a	42.3%	% High school diploma	n/a	n/a	29.0%
% American Indian/AK Native	n/a	n/a	0.3%	% Some college	n/a	n/a	52.3%
% Asian/Pacific Islander	n/a	n/a	0.7%	% College degree	n/a	n/a	10.2%
% Multi-racial/other	n/a	n/a	6.5%	% Graduate/professional degree	n/a	n/a	7.2%
				<b>Market Potential Index (Average: 74)</b>			
% Hispanic/Latino origin	n/a	n/a	1.6%	Average "audience arts"		<b>61</b>	
				Average "participatory arts"		<b>92</b>	
Median age	n/a	n/a	35.5	Visits art galleries		<b>38</b>	
Median household income	n/a	n/a	\$30,171	Visits museums		<b>51</b>	
Average household income	n/a	n/a	\$44,462	Attends dance performances		<b>67</b>	
				Attends classical music/opera performances		<b>36</b>	
% Households w/persons < age 18	n/a	n/a	30.0%	Attends other music performances		<b>115</b>	
				Attends live theater		<b>60</b>	
% Unemployed	n/a	n/a	0.0%	Plays musical instrument		<b>85</b>	
				Paints or draws		<b>88</b>	
% Housing units owner occupied	n/a	n/a	59.4%	Goes out dancing		<b>98</b>	
% Housing units renter occupied	n/a	n/a	32.6%	Cooks for fun		<b>97</b>	



## N. Pastoral Pride

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

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



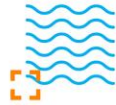
Getting a college education is not a priority in Pastoral Pride. In high school, sports are bigger than academics. Most household heads earned a high school diploma, but only 10 percent have gone on to receive a college degree. That level of education is sufficient to land a blue-collar or service-sector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



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

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

In their remote communities, Pastoral Pride are average media fans. Many subscribe to newspapers and pay particular attention to the front page, editorial and classified sections. They describe magazines as a main source of entertainment, reading a mix of entertainment, women's and home-based titles that reflect their down-home lifestyle: Redbook, Country Living, Ebony, Family Circle, Woman's World and Hot Rod. They listen to radio stations that offer news as well as traditional country, album-oriented rock, gospel and bluegrass music. On TV, they tune in cable networks like CMT, Hallmark, DIY, truTV and the Lifetime Movie Channel. They find most advertising annoying, but ads on billboards, in movie theaters and in emails are less so. While the Internet hasn't changed their lives, they do recognize its potential for communicating with friends, family and strangers; some have discovered Websites like myspace.com and myyearbook.com.





**RAC St. Louis 45-Minute Drive Area**  
 '15 Blockgroups (1:1007)

**Legend:**  
 ■ O: Singles and Starters [245]

The map displays the St. Louis metropolitan area with various cities and highways labeled. A legend indicates that the red shaded areas represent 'O: Singles and Starters' with a count of 245. A scale bar shows distances from 0 to 6 miles, and a north arrow is present.





## O. Singles and Starters

Singles and Starters Neighborhoods in the Region - Market Reach 13.1%							
Audience Development Strategy - Broaden, Diversify							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	56.4%	61.4%	79.4%	% No high school diploma	12.8%	8.5%	8.2%
% Black	32.7%	26.5%	13.7%	% High school diploma	17.9%	24.1%	28.3%
% American Indian/AK Native	0.3%	0.3%	0.3%	% Some college	26.1%	31.9%	35.3%
% Asian/Pacific Islander	6.0%	6.3%	2.0%	% College degree	24.4%	22.0%	18.7%
% Multi-racial/other	4.6%	5.6%	4.6%	% Graduate/professional degree	18.9%	13.5%	9.5%
				<b>Market Potential Index (Average: 111)</b>			
% Hispanic/Latino origin	4.9%	5.6%	4.9%	Average "audience arts"	<b>107</b>		
				Average "participatory arts"	<b>117</b>		
Median age	34.4	33.5	36.3	Visits art galleries	<b>116</b>		
Median household income	\$43,420	\$46,260	\$53,507	Visits museums	<b>102</b>		
Average household income	\$59,311	\$58,401	\$66,339	Attends dance performances	<b>101</b>		
				Attends classical music/opera performances	<b>119</b>		
% Households w/persons < age 18	17.5%	25.4%	28.5%	Attends other music performances	<b>105</b>		
				Attends live theater	<b>100</b>		
% Unemployed	2.8%	3.7%	5.1%	Plays musical instrument	<b>115</b>		
				Paints or draws	<b>127</b>		
% Housing units owner occupied	28.8%	36.9%	50.9%	Goes out dancing	<b>115</b>		
% Housing units renter occupied	54.8%	58.8%	43.0%	Cooks for fun	<b>110</b>		






## O. Singles and Starters

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


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

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



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

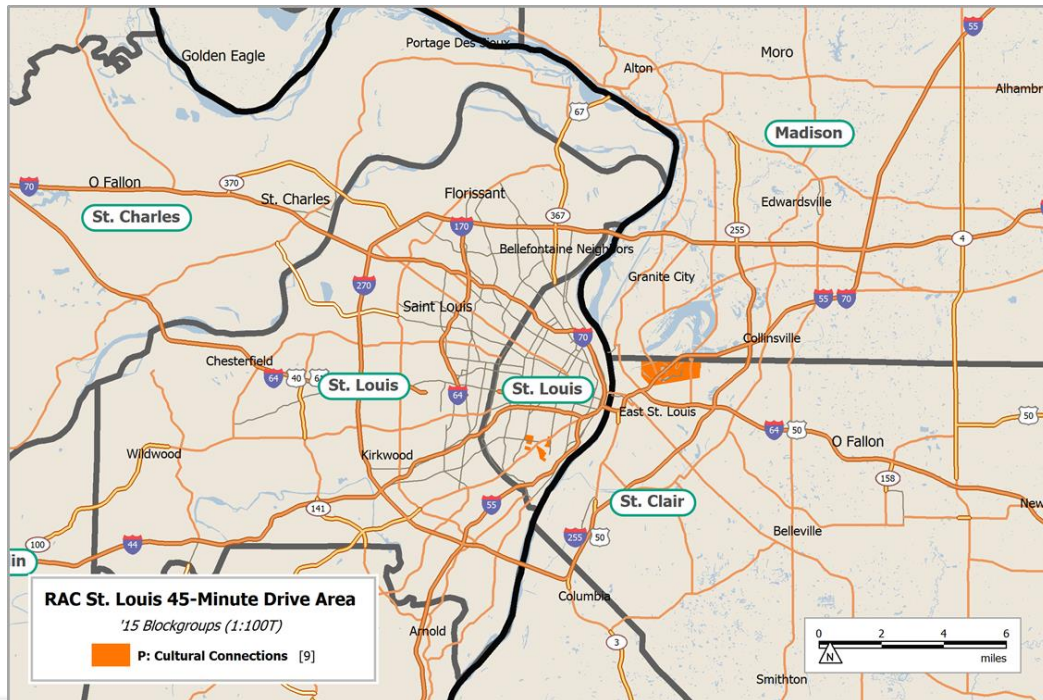
Singles and Starters are active and aspirational consumers. They like to wear the latest styles and search for designer labels they can afford at mid-market retailers and discount chains like Burlington Coat Factory, Express and Banana Republic. Their interest in the latest styles extends to home design;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



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

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

## P. Cultural Connections



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

## P. Cultural Connections

Cultural Connections Neighborhoods in the Region - Market Reach 9.9%							
Audience Development Strategy - Diversify							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	47.4%	n/a	51.7%	% No high school diploma	26.3%	n/a	41.8%
% Black	29.5%	n/a	0.0%	% High school diploma	28.2%	n/a	32.6%
% American Indian/AK Native	0.4%	n/a	1.4%	% Some college	26.2%	n/a	20.0%
% Asian/Pacific Islander	13.8%	n/a	0.3%	% College degree	10.8%	n/a	4.3%
% Multi-racial/other	8.8%	n/a	46.5%	% Graduate/professional degree	8.6%	n/a	1.3%
				<b>Market Potential Index (Average: 82)</b>			
% Hispanic/Latino origin	11.4%	n/a	77.4%	Average "audience arts"	80		
				Average "participatory arts"	84		
Median age	34.2	n/a	30.9	Visits art galleries	79		
Median household income	\$32,367	n/a	\$35,199	Visits museums	69		
Average household income	\$41,165	n/a	\$41,800	Attends dance performances	104		
				Attends classical music/opera performances	80		
% Households w/persons < age 18	30.7%	n/a	46.4%	Attends other music performances	81		
				Attends live theater	67		
% Unemployed	5.1%	n/a	1.5%	Plays musical instrument	78		
				Paints or draws	96		
% Housing units owner occupied	36.5%	n/a	66.7%	Goes out dancing	82		
% Housing units renter occupied	47.7%	n/a	25.1%	Cooks for fun	79		





## P. Cultural Connections

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


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

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



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

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



Cultural Connections make a mixed audience for most media. Most like to keep up with Latin news, music and sports and they say that radio is their chief form of entertainment, especially stations that feature Mexican, Tejano, Latin ballads and salsa music. They rely on magazines to stay informed and they read English-language publications like Parents, Allure, Glamour and Maxim. Though they have little interest in watching most U.S. TV stations, they do like watching programs with their kids on MTV, Nickelodeon and VH1. Perhaps because they receive fewer ad messages than more upscale groups, they're receptive to a variety of ad channels: billboards, movie theaters, buses, trains and taxis. These consumers say that they're loyal to companies that advertise in Spanish.

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



[illegible]

## Q. Golden Year Guardians

### Golden Year Guardians Neighborhoods in the Region - Market Reach 16.1%

#### Audience Development Strategy - Broaden, Deepen


Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	71.3%	78.8%	89.0%	% No high school diploma	23.8%	6.2%	9.2%
% Black	19.9%	13.0%	7.3%	% High school diploma	30.5%	22.9%	32.9%
% American Indian/AK Native	0.4%	0.1%	0.2%	% Some college	20.8%	26.8%	35.8%
% Asian/Pacific Islander	2.6%	5.7%	0.9%	% College degree	16.0%	26.9%	14.7%
% Multi-racial/other	5.7%	2.3%	2.6%	% Graduate/professional degree	9.0%	17.2%	7.4%
				<b>Market Potential Index (Average: 94)</b>			
% Hispanic/Latino origin	7.2%	2.3%	2.5%	Average "audience arts"	<b>102</b>		
Median age	42.4	53.6	47.3	Average "participatory arts"	<b>82</b>		
Median household income	\$22,688	\$60,723	\$52,138	Visits art galleries	<b>103</b>		
Average household income	\$33,192	\$82,224	\$64,362	Visits museums	<b>95</b>		
% Households w/persons < age 18	19.6%	19.2%	24.2%	Attends dance performances	<b>90</b>		
% Unemployed	2.4%	2.2%	4.3%	Attends classical music/opera performances	<b>114</b>		
% Housing units owner occupied	25.4%	53.7%	65.4%	Attends other music performances	<b>103</b>		
% Housing units renter occupied	60.5%	41.9%	29.4%	Attends live theater	<b>104</b>		
				Plays musical instrument	<b>84</b>		
				Paints or draws	<b>77</b>		
				Goes out dancing	<b>79</b>		
				Cooks for fun	<b>88</b>		



## Q. Golden Year Guardians

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

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



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



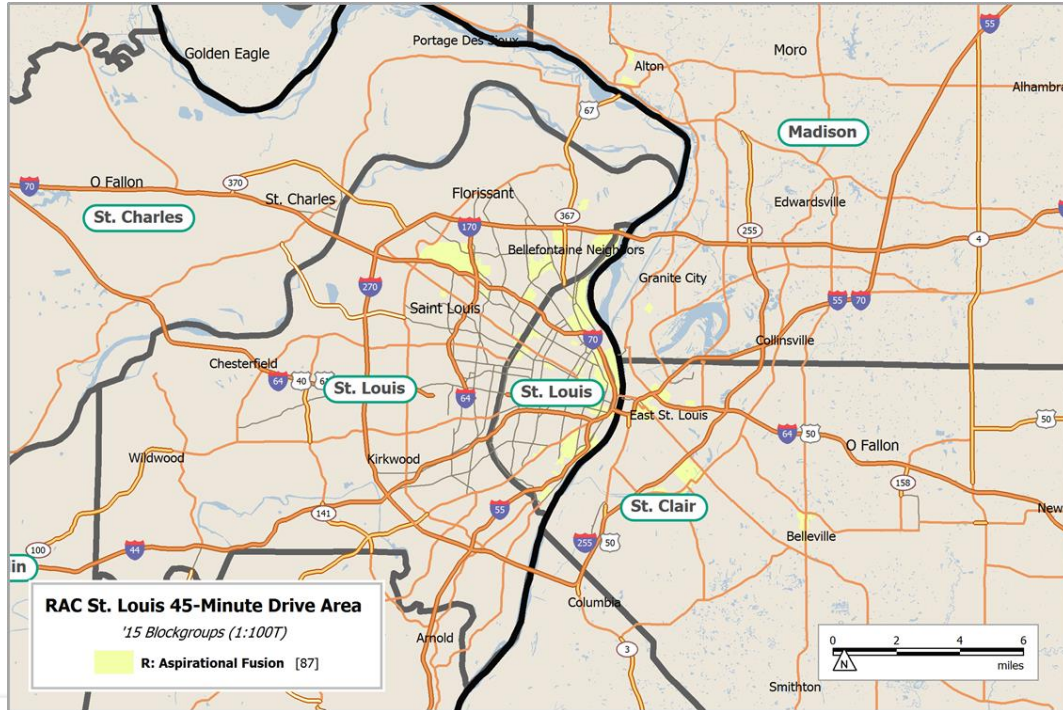
Golden Year Guardians tend to lead quiet lifestyles. Their social life revolves around various community groups, and they belong to churches and synagogues as well as veterans' clubs and arts groups. They spend a lot of their time in their residences reading books, gardening and doing needlework. For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

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

Golden Year Guardians are a strong market for traditional media. They subscribe to daily newspapers to stay informed and like listening to newscasts on the radio. They describe TV as their main source of entertainment; they watch news, movies, game shows and sitcoms. Many arrange their schedules around favorite TV programs, typically shows on cable networks like AMC, CNBC, the Golf Channel, Hallmark Channel and Movie Channel. These seniors are a prime market for women's and home magazines such as Martha Stewart Living, Family Circle, Country Living and Better Homes & Gardens. Most are still shy about the Internet, telling researchers that computers leave them baffled.

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

## R. Aspirational Fusion



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

## R. Aspirational Fusion

Aspirational Fusion Neighborhoods in the Region - Market Reach 3.9%							
Audience Development Strategy - Diversify							
Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Region
% White	24.9%	10.0%	26.2%	% No high school diploma	23.8%	19.1%	18.2%
% Black	67.7%	86.7%	70.1%	% High school diploma	31.7%	32.7%	36.9%
% American Indian/AK Native	0.3%	0.2%	0.1%	% Some college	30.6%	35.3%	34.5%
% Asian/Pacific Islander	1.9%	0.3%	0.5%	% College degree	8.6%	8.4%	6.2%
% Multi-racial/other	5.2%	2.9%	3.1%	% Graduate/professional degree	5.2%	4.5%	4.2%
				Market Potential Index (Average: 70)			
% Hispanic/Latino origin	5.3%	2.0%	2.1%	Average "audience arts"		61	
				Average "participatory arts"		85	
Median age	32.1	27.7	30.0	Visits art galleries		58	
Median household income	\$22,783	\$27,116	\$21,152	Visits museums		51	
Average household income	\$33,227	\$37,350	\$30,269	Attends dance performances		85	
				Attends classical music/opera performances		71	
% Households w/persons < age 18	37.8%	46.2%	39.2%	Attends other music performances		56	
				Attends live theater		43	
% Unemployed	6.5%	10.1%	9.6%	Plays musical instrument		70	
				Paints or draws		78	
% Housing units owner occupied	25.4%	30.7%	26.6%	Goes out dancing		108	
% Housing units renter occupied	55.5%	61.7%	61.1%	Cooks for fun		83	






## R. Aspirational Fusion

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

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



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





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

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

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



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

**RAC St. Louis 45-Minute Drive Area**  
*'15 Blockgroups (1:1007)*

**S: Struggling Societies [242]**

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

# S. Struggling Societies

## Struggling Societies Neighborhoods in the Region - Market Reach 4.0%

### Audience Development Strategy - Diversify


Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Block Groups	Block Group Area Characteristics	City of St. Louis	St. Louis County	Remaining Block Groups
% White	12.2%	13.1%	33.4%	% No high school diploma	22.5%	15.5%	19.0%
% Black	84.2%	83.2%	62.4%	% High school diploma	32.1%	35.2%	37.6%
% American Indian/AK Native	0.2%	0.2%	0.2%	% Some college	30.9%	35.3%	33.7%
% Asian/Pacific Islander	1.1%	0.7%	0.4%	% College degree	8.8%	9.5%	6.5%
% Multi-racial/other	2.3%	2.7%	3.6%	% Graduate/professional degree	5.8%	4.5%	3.2%
% Hispanic/Latino origin	1.5%	1.7%	3.1%	<b>Market Potential Index (Average: 72)</b>			
Median age	39.2	35.3	37.7	Average "audience arts"	64		
Median household income	\$23,748	\$32,461	\$27,773	Average "participatory arts"	84		
Average household income	\$32,486	\$40,976	\$37,350	Visits art galleries	57		
% Households w/persons < age 18	28.4%	36.3%	33.4%	Visits museums	46		
% Unemployed	7.6%	8.6%	11.2%	Attends dance performances	85		
% Housing units owner occupied	33.0%	52.0%	46.1%	Attends classical music/opera performances	75		
% Housing units renter occupied	47.2%	40.9%	39.5%	Attends other music performances	64		
				Attends live theater	59		
				Plays musical instrument	75		
				Paints or draws	64		
				Goes out dancing	106		
				Cooks for fun	92		



## S. Struggling Societies

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

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



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

Their small-city locations afford members of Struggling Societies some low-cost entertainment options. They go to local establishments, nightclubs, billiards halls and the occasional play or concert. However, most activities are home-based, whether it's listening to music, watching TV, doing needlework or reading gaming magazines.



These older adults pursue few athletic activities other than rooting for home-town teams playing professional basketball, football or baseball. For excitement, they regularly try their luck gambling, playing bingo or buying lottery tickets.

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

Struggling Societies have selective media tastes. Self-described TV addicts, many keep their TV sets on most of the day to watch sitcoms, movies, reality programs and game shows. They enjoy a variety of cable networks, including Soapnet, Lifetime, Oxygen, AMC, BET and Cinemax. This is a group filled with music fans, and they tune their radios to stations that play soul, gospel, rhythm and blues and salsa. While many of these households pick up a newspaper, they typically only read the classifieds, food and news sections. Group members say that most magazines are worth the money, and they like to read Harper's Bazaar, Popular Science, Prevention and Ebony. A high number concede that they like advertisements, especially those they see on TV, at movie theaters and on buses and subways. They're particularly fond of entertaining ads and, unlike more jaded consumers, they say that they remember ads when shopping and find them helpful.

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