# 2020 LABOR SHED ANALYSIS

New Braunfels, TX

NEW BRAUNFELS CHAMBER

ESTABLISHED 1919

Buxton

# EXECUTIVE SUMMARY

## In-Commuter and Out-Commuter Profiles

GPS data was used to capture workplace visits for New Braunfels, San Marcos, and Seguin. Buxton identified 633,764 home locations and 371,964 work locations of unique devices found within these city limits.

New Braunfels Out-Commuter and In-Commuter Profiles:

- Top Segments (3% or more) for both profiles include suburban families, established couples, and young singles and couples.

New Braunfels Compared to San Marcos and Seguin

- San Marcos has very similar In-Commuter profiles to New Braunfels. Their Out-Commuter profile has additional college-aged and young adult segments considered top segments.

- Seguin's In-Commuter profile has less suburban dwelling segments than the New Braunfels In-Commuter. Their Out-Commuter profile has a higher percentage of rural segments than the New Braunfels Out-Commuter profile.

Index scores centered around 100 show how each segment of New Braunfels Out-Commuter and In-Commuters compares to that of San Marcos and Seguin.

# EXECUTIVE SUMMARY CONT.

## Labor Shed Analysis

Labor shed is the average drive time of in-commuters and out-commuters. New Braunfels labor shed drive times capture 75%+ of in-commuter and out-commuter observations.

| City | Out-Commuter Trade Area (mins) | In-Commuter Trade Area (mins) | Percent of New Braunfels Out-Commuters | Percent of New Braunfels In-Commuters |
|---|---|---|---|---|
| New Braunfels | 50 | 40 | - | - |
| San Marcos | 52 | 42 | 14% | 8% |
| Seguin | 44 | 35 | 10% | 11% |
| Other | - | - | 76% | 81% |

In-Commuters visits to non-work locations are primarily restaurants, financial institutions, schools, and other places in-commuters would frequent as part of their daily lives (grocers, gasoline, etc.).

## Summertime Labor Shed

Commute times from Memorial Day weekend to Labor Day weekend were evaluated to determine if there are shifts in labor shed during the summertime.

- In-commuter and out-commuter drive times are **10-20 minutes less** during the summer months than the general, year-round drive times.

# GPS METHODOLOGY

- Buxton created custom geofencing polygons around New Braunfels, San Marcos, and Seguin city limits.
- All unique device IDs that were observed within the polygons were captured.
- Geospatial algorithms were then applied to identify high likelihood home and work locations of those within the boundaries.
- Visitors and residents were appended with the Mosaic segmentation information to create profiles.
- Drive times between identified work and home locations were used to determine labor shed.
- Micro-cluster visits within New Braunfels were leveraged to determine New Braunfels In-Commuter visitation to locations other than workplace.

# PROFILES

# GET BEYOND DEMOGRAPHICS

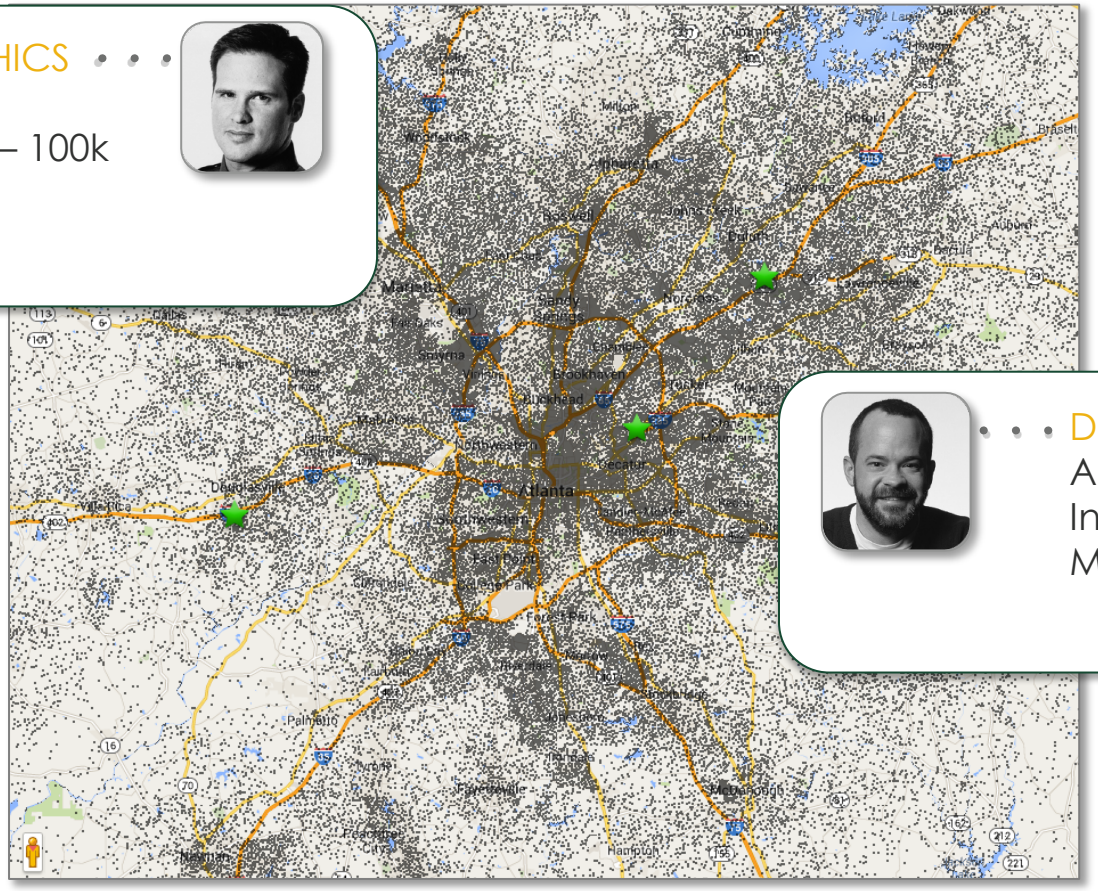
## DEMOGRAPHICS ONLY TELL A PIECE OF THE STORY

- NOT ACTIONABLE
- LIMITED APPLICATION

DEMOGRAPHICS



Age: 35-50
Income: $75 – 100k
Married






DEMOGRAPHICS
Age: 35-50
Income: $75 – 100k
Married



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# UNDERSTAND WHO THE COMMUTERS ARE

## GET BEYOND DEMOGRAPHICS

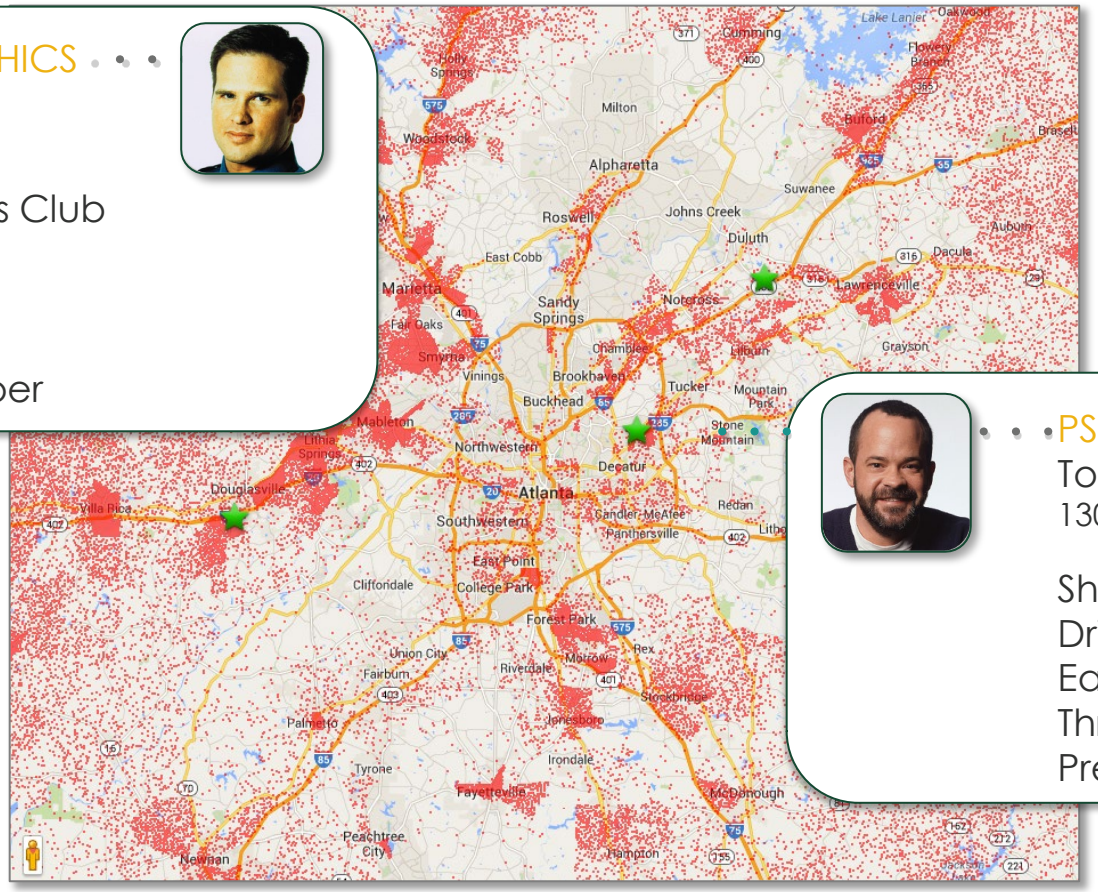
- TALK ABOUT VISITORS
- UNDERSTAND VISITOR BEHAVIOR
- HOUSEHOLD LEVEL

PSYCHOGRAPHICS



Ben Shaw
1010 Imperial Way

Shops at Sam's Club
Drives GMC
Eats at Chili's
One Child
Netflix Subscriber






PSYCHOGRAPHICS
Tom King
1308 Center St

Shops at Costco
Drives Volvo
Eats at P.F. Chang's
Three Children
Prefers Movie Theaters



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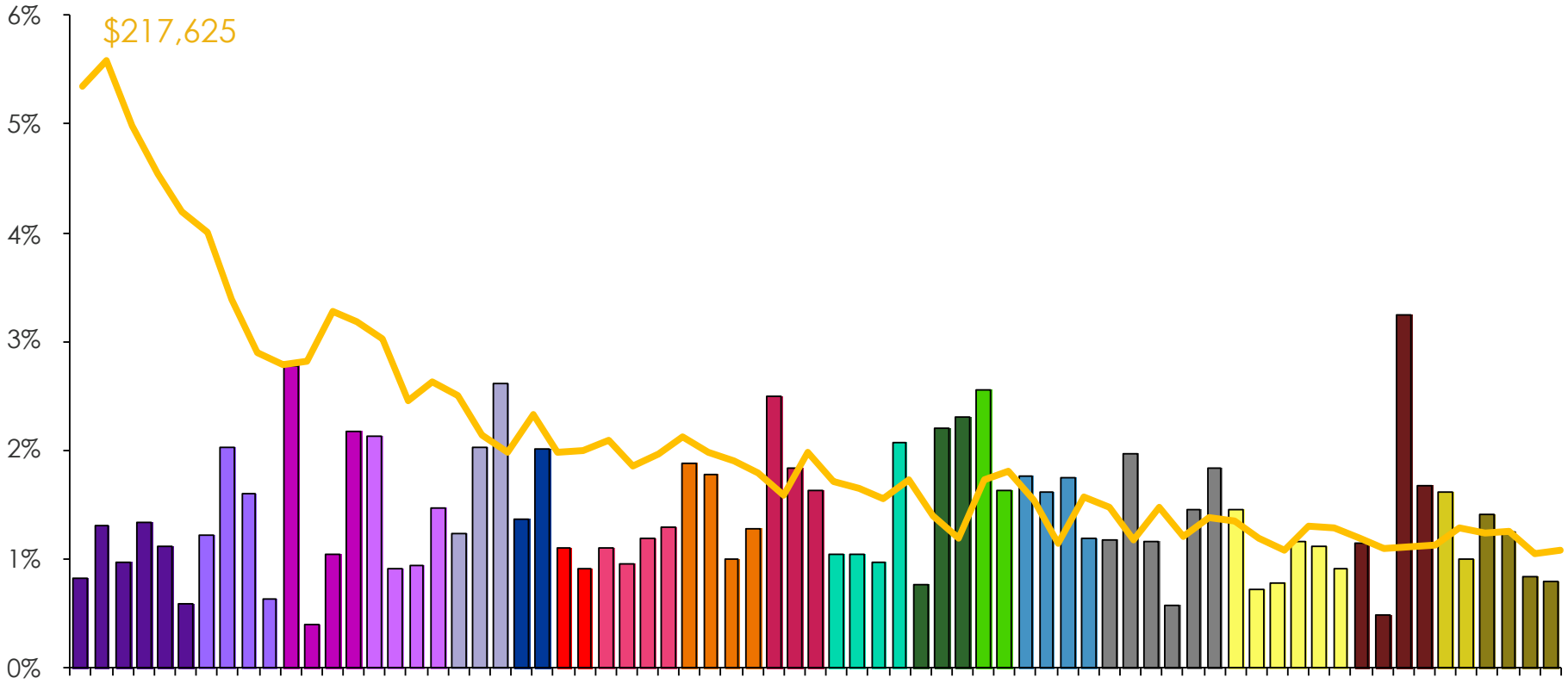
# SEGMENTATION

All U.S. households are grouped into types based on demographics and **psychographics**



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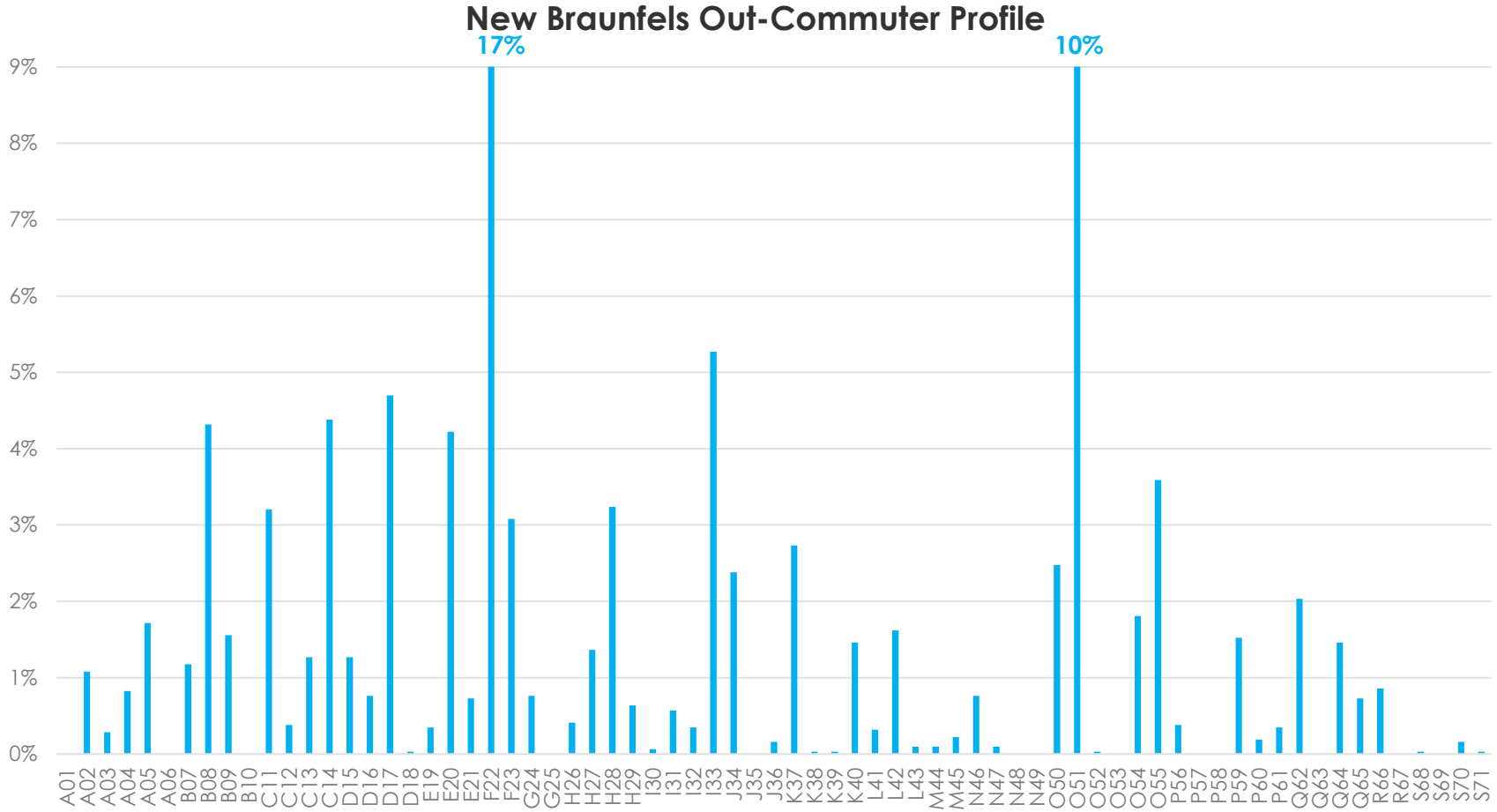
# NEW BRAUNFELS OUT-COMMUTER PROFILE

The Out-Commuter profile counts each captured resident inside of New Braunfels whose place of work is outside the New Braunfels city boundary. Top Segments (3% or more) include suburban families (D17, E20, F22,) established couples (C11, C14, H28), and young singles and couples (O51, O55).



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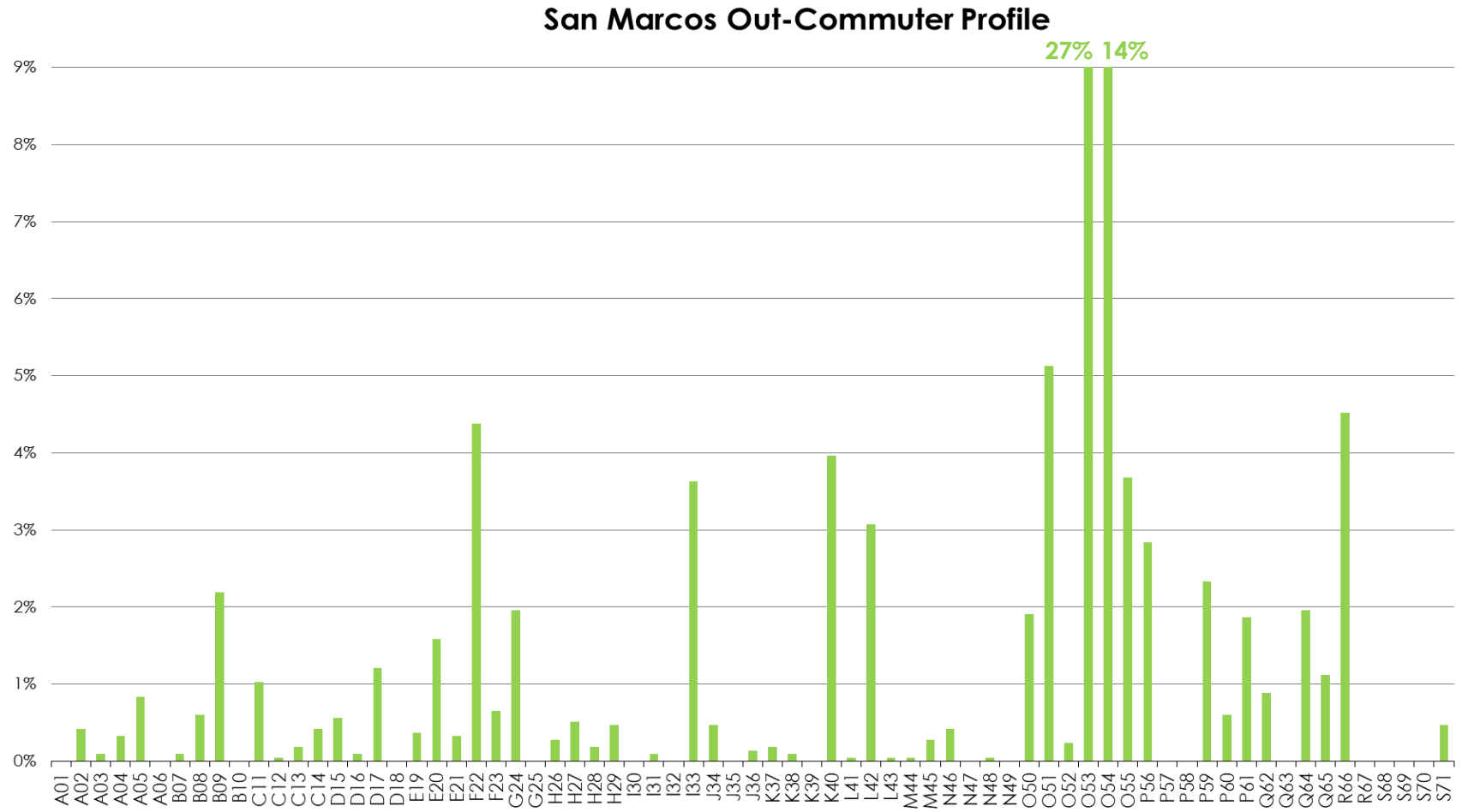
# SAN MARCOS OUT-COMMUTER PROFILE

The San Marcos Out-Commuter Top Segments (3% or more) include more young singles and couples than the New Braunfels profile (O53, O54).



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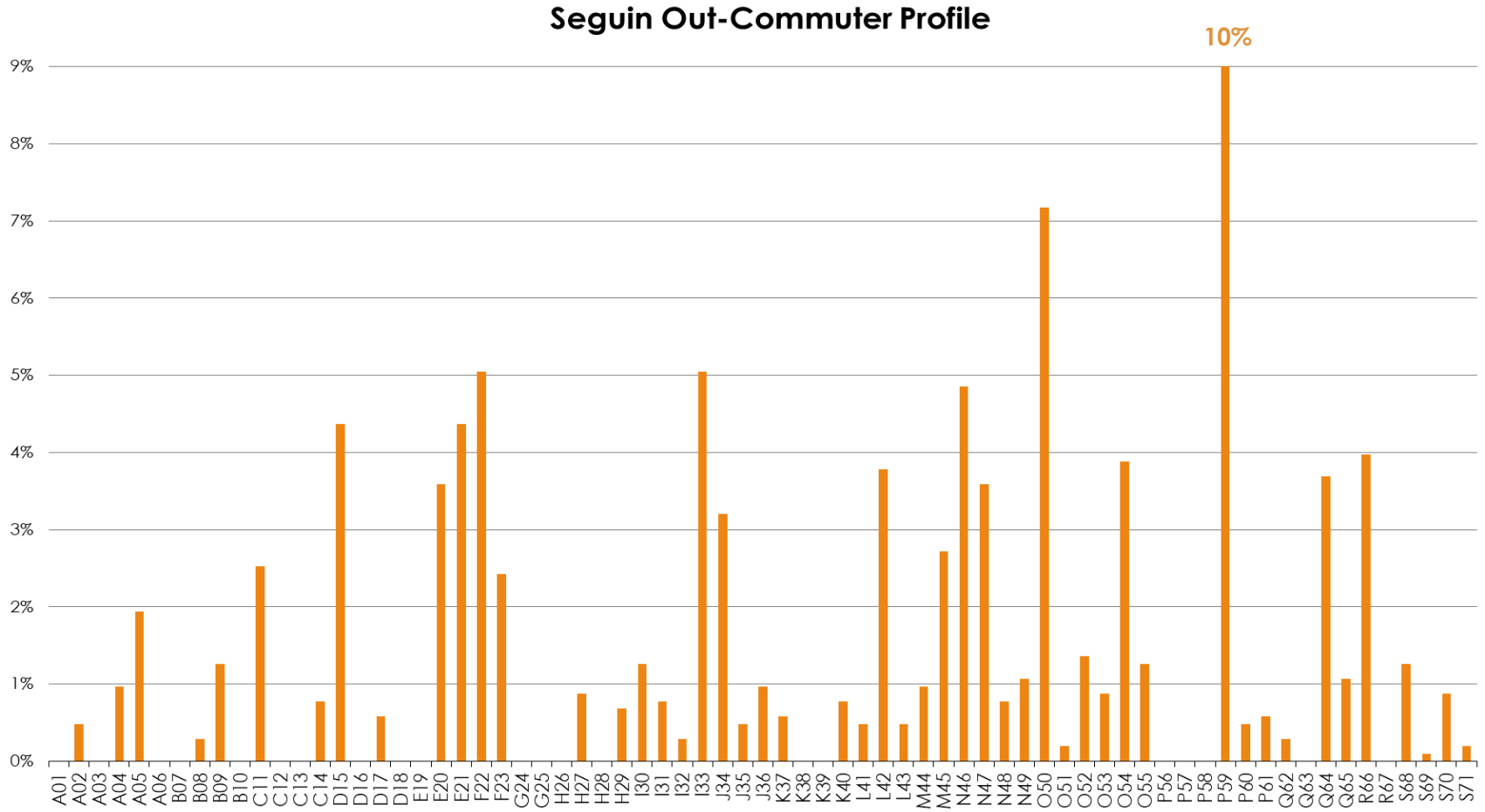
# SEGUIN OUT-COMMUTER PROFILE

The Seguin Out-Commuter Top Segments (3% or more) look very different than the New Braunfels Out-Commuter profile. Seguin include more rural couple segments than New Braunfels (older couples (J34, L42, N46). Top segments are the family segments (D15, E21, F22) and young singles (O51, O55, P59).



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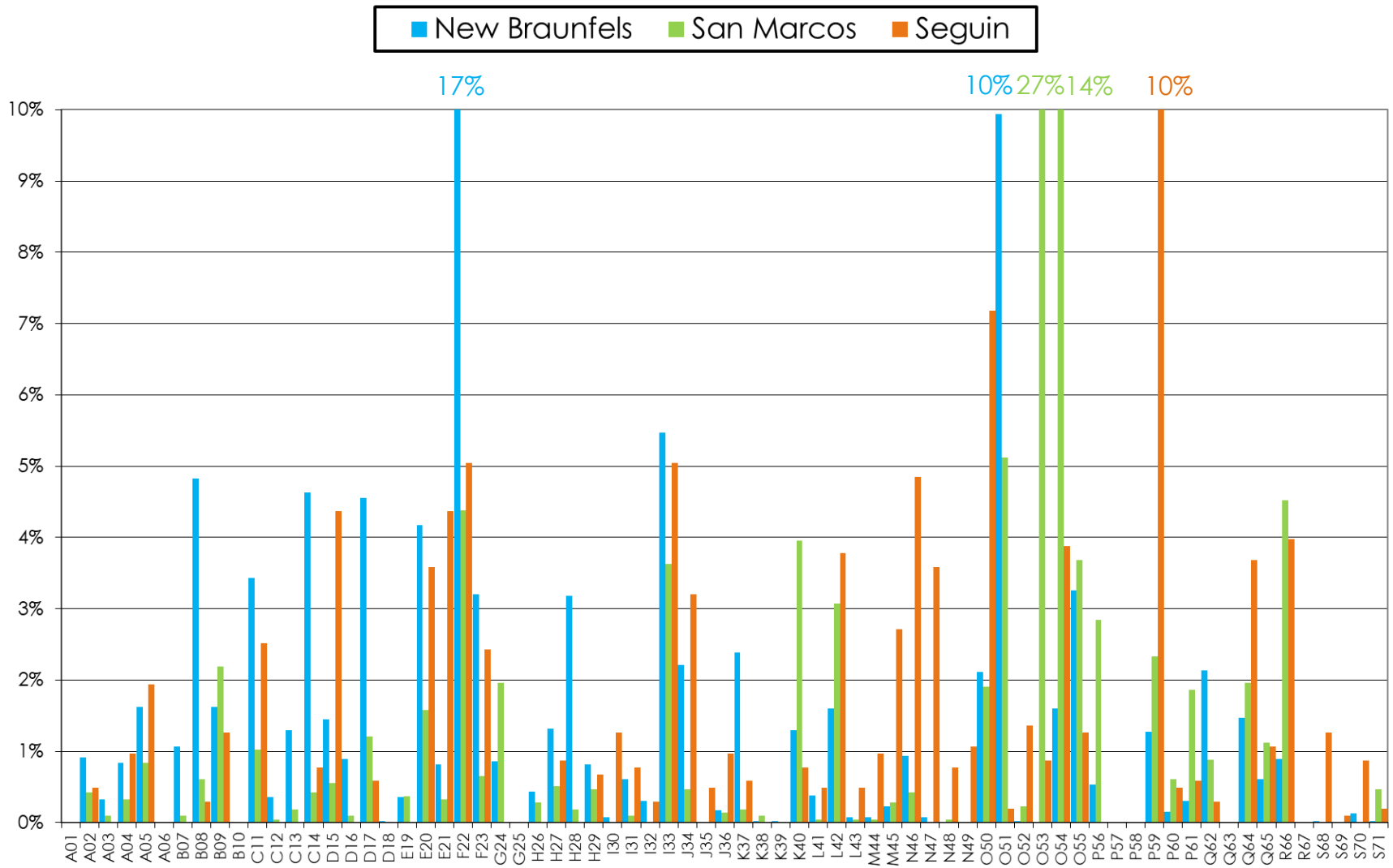
# OUT-COMMUTER PROFILE COMPARISON



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# OUT-COMMUTER INDEX

The Index-Scores compare the Out-Commuter percentages to that of the base workforce and create an index. Segments more likely to be a specific cities Out-Commuter when compared to their base workforce are shown below.

**Index scores for New Braunfels of 80 or more are shown.**

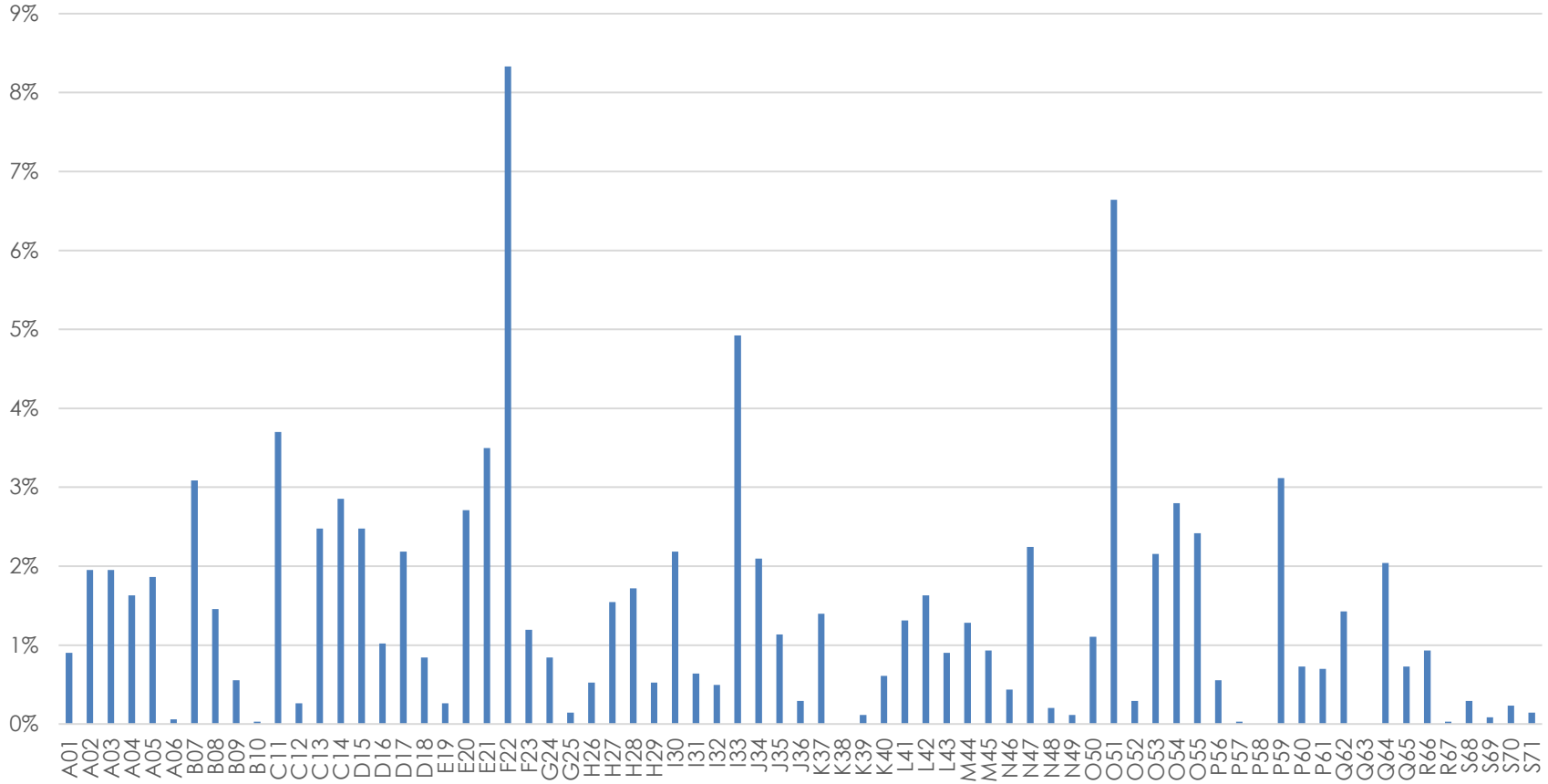
Segments that are highly likely to be an Out-Commuter for New Braunfels may or may not be true for that of San Marcos or Seguin. This shows how New Braunfels workforce differs from that of San Marcos or Seguin.

| SEGMENT | NEW BRAUNFELS OUT-COMMUTER SCORE | SAN MARCOS OUT-COMMUTER SCORE | SEGUIN OUT-COMMUTER SCORE |
|---|---|---|---|
| A05: COUPLES WITH CLOUT | 91 | 80 | 245 |
| B08: BABIES AND BLISS | 216 | 53 | 32 |
| C12: GOLF CARTS AND GOURMETS | 104 | 20 | 0 |
| C13: SILVER SOPHISTICATES | 80 | 27 | 0 |
| C14: BOOMERS AND BOOMERANGS | 122 | 19 | 30 |
| D16: SETTLED IN SUBURBIA | 164 | 25 | 0 |
| D17: CUL DE SAC DIVERSITY | 237 | 81 | 81 |
| E19: FULL POCKETS, EMPTY NESTS | 146 | 54 | 0 |
| F22: FAST TRACK COUPLES | 231 | 108 | 147 |
| F23: FAMILIES MATTER MOST | 158 | 64 | 185 |
| G24: STATUS SEEKING SINGLES | 223 | 229 | 0 |
| H27: BIRKENSTOCKS AND BEEMERS | 127 | 61 | 148 |
| H28: EVERYDAY MODERATES | 141 | 14 | 0 |
| H29: DESTINATION RECREATION | 135 | 99 | 103 |
| I32: STEADFAST CONVENTIONALISTS | 88 | 0 | 112 |
| I33: BALANCE AND HARMONY | 111 | 66 | 123 |
| J34: AGING IN PLACE | 83 | 43 | 138 |
| K37: WIRED FOR SUCCESS | 183 | 29 | 134 |
| K38: GOTHAM BLEND | 117 | 194 | 0 |
| K40: BOHEMIAN GROOVE | 137 | 316 | 104 |
| N46: TRUE GRIT AMERICANS | 118 | 77 | 212 |
| O50: FULL STEAM AHEAD | 175 | 227 | 169 |
| O51: DIGITAL DEPENDENTS | 173 | 138 | 128 |
| O54: STRIVING SINGLE SCENE | 90 | 247 | 84 |
| O55: FAMILY TROOPERS | 150 | 159 | 215 |
| P56: MID-SCALE MEDLEY | 103 | 308 | 209 |
| Q62: REAPING REWARDS | 184 | 104 | 40 |
| Q64: TOWN ELDERS | 101 | 183 | 117 |
| R66: DARE TO DREAM | 169 | 446 | 291 |

# NEW BRAUNFELS IN-COMMUTER PROFILE

The In-Commuter profile counts each captured resident outside of New Braunfels whose place of work is within the New Braunfels city boundary. Top Segments (3% or more) include suburban families (B07, E21, F22), established couples (C11, I33), and young singles and couples (O51, P59).

**New Braunfels In-Commuter Profile**



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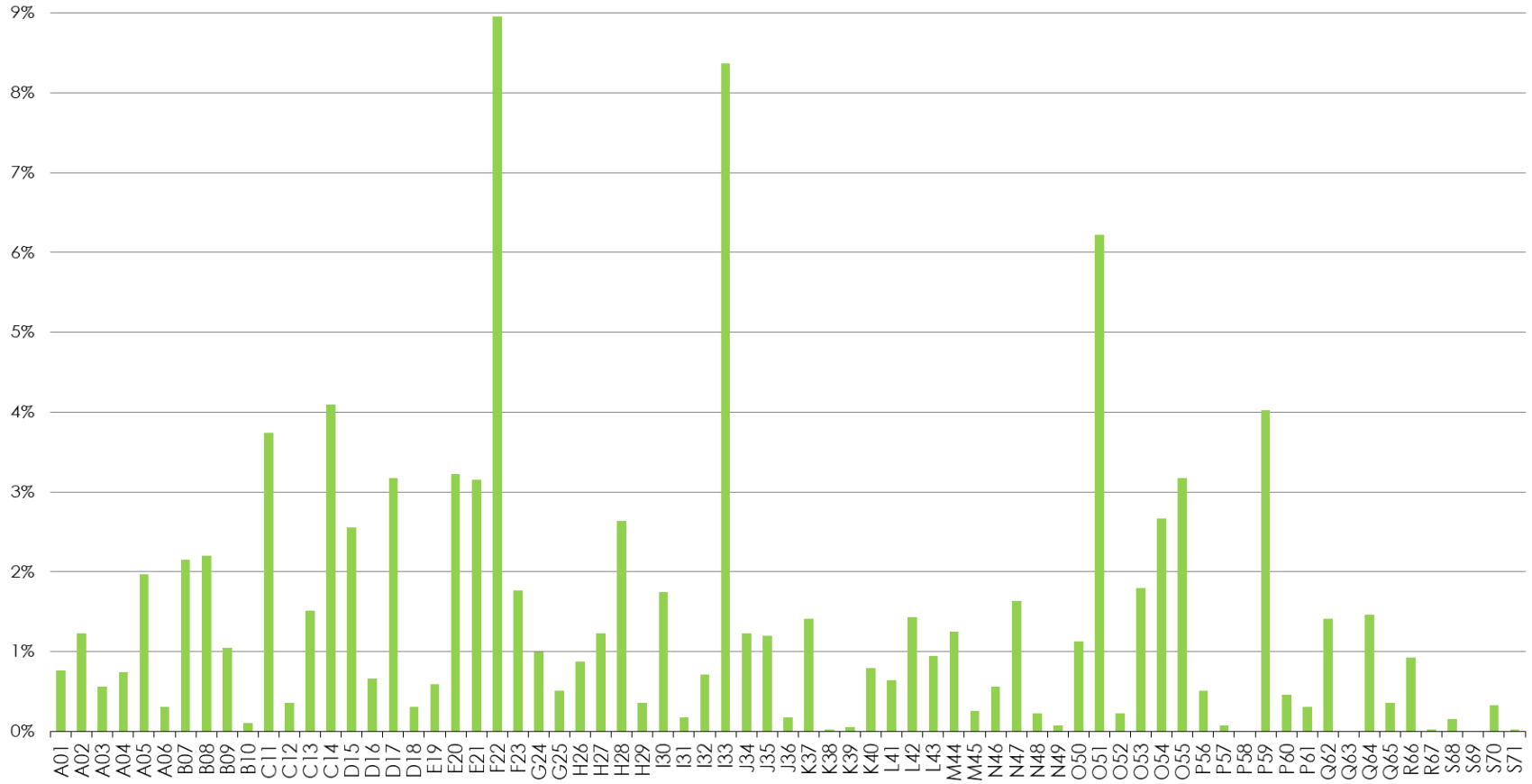
# SAN MARCOS IN-COMMUTER PROFILE

The San Marcos In-Commuter Top Segments are (3% or more) include suburban families (D17, F22) and established couples (C11, C14). They do have a higher percentage of rural dwelling segments driving into to work (I33) but is consistent overall with the type of segments in the New Braunfels In-Commuter profile.

**San Marcos In-Commuter Profile**



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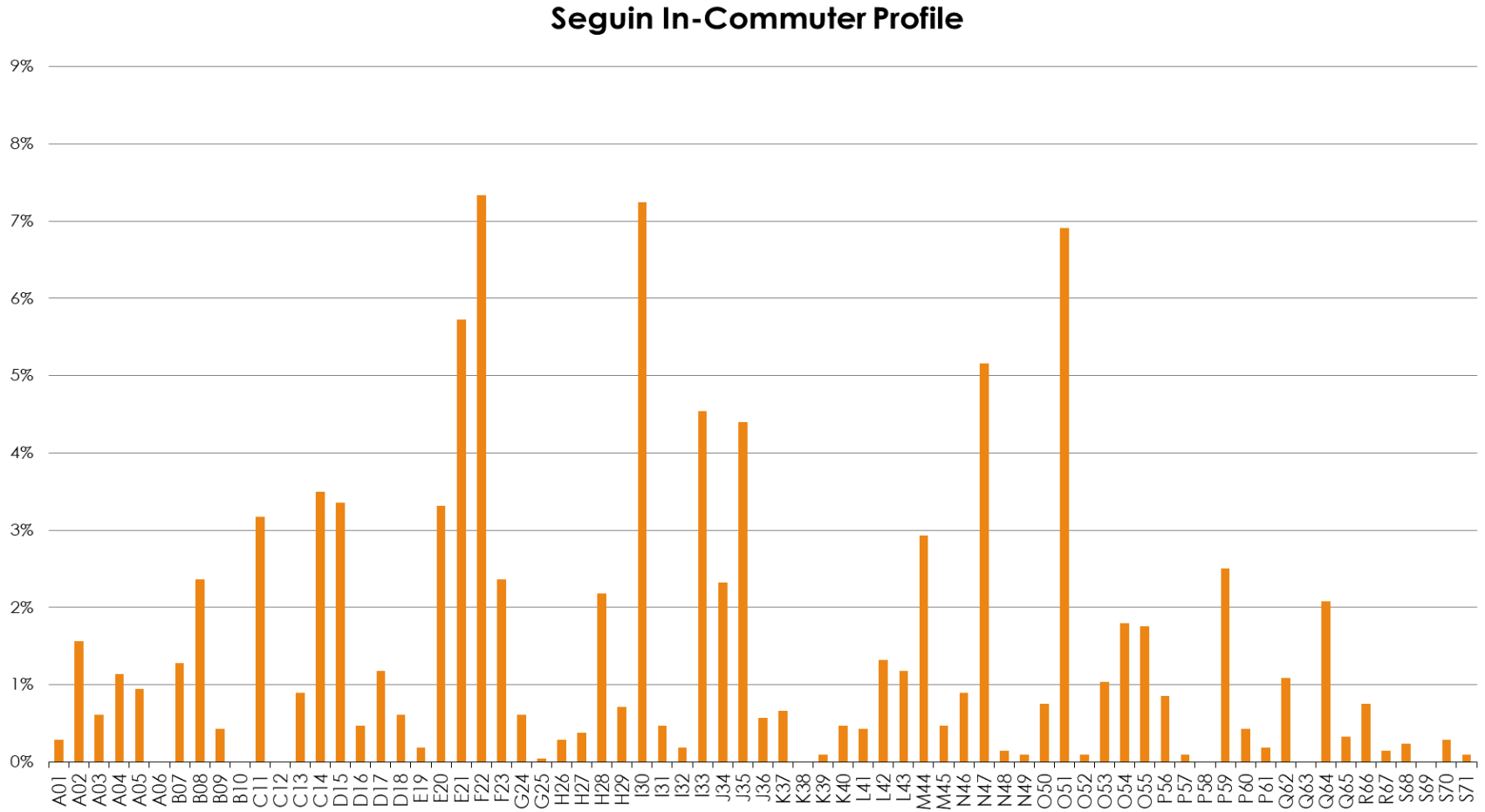
# SEGUIN IN-COMMUTER PROFILE

The Seguin In-Commuter Top Segments are (3% or more) include suburban family and older couples. But the Seguin profile has a much higher percentage of rural-dwelling segments (I30, J35) than the New Braunfels profile. Other top segments are suburban family segments (D15, E20, F22) and older couples (C11, J34).



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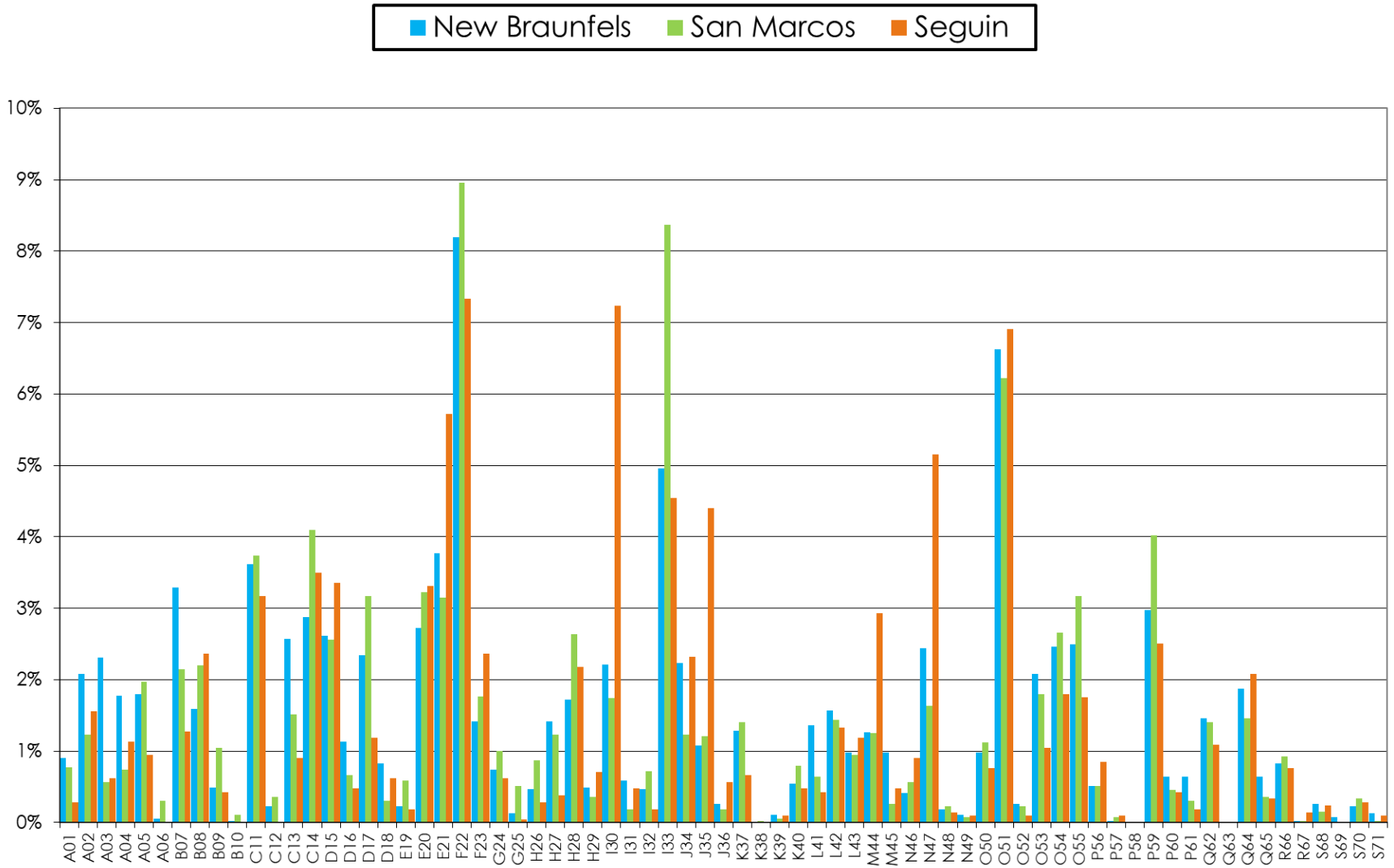
# IN-COMMUTER PROFILE COMPARISON



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# IN-COMMUTER INDEX

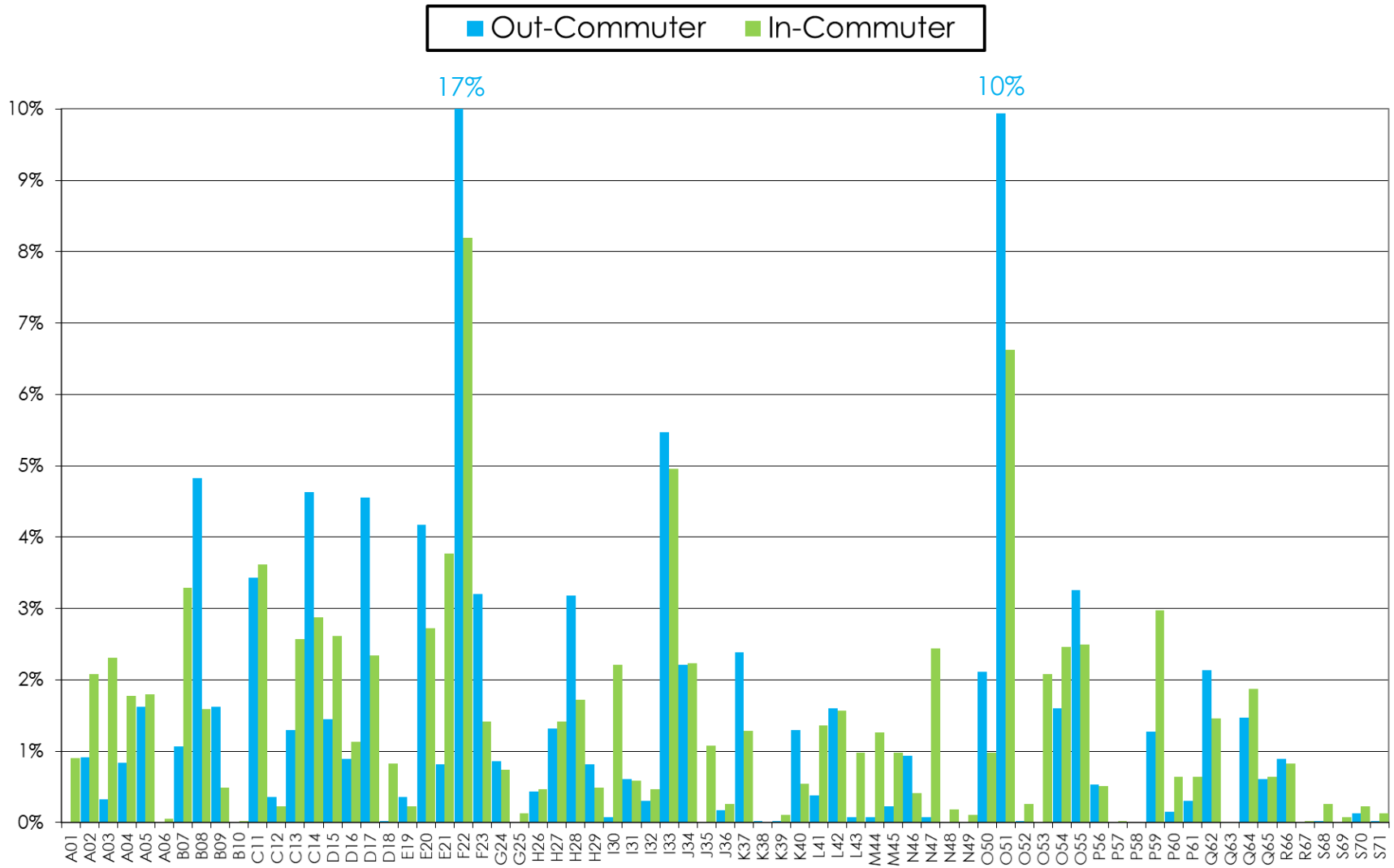
The Index-Scores compare the In-Commuter percentages to that of the base workforce and create an index. Segments more likely to be a specific cities In-Commuter when compared to their base workforce are shown below.

**Index scores for New Braunfels of 100 or more are shown.**

All Out-Commuter and In-Commuter Index Scores are in the embedded file.

| SEGMENT | NEW BRAUNFELS IN-COMMUTER SCORE | SAN MARCOS IN-COMMUTER SCORE | SEGUIN IN-COMMUTER SCORE |
|---|---|---|---|
| A01: AMERICAN ROYALTY | 198 | 174 | 186 |
| A03: KIDS AND CABERNET | 179 | 104 | 189 |
| A05: COUPLES WITH CLOUT | 100 | 188 | 119 |
| A06: JET SET URBANITES | 182 | 313 | 0 |
| B07: GENERATIONAL SOUP | 183 | 312 | 163 |
| B10: COSMOPOLITAN ACHIEVERS | 1181 | 189 | 0 |
| C13: SILVER SOPHISTICATES | 159 | 218 | 346 |
| D15: SPORTS UTILITY FAMILIES | 116 | 174 | 110 |
| D16: SETTLED IN SUBURBIA | 209 | 180 | 182 |
| D17: CUL DE SAC DIVERSITY | 122 | 213 | 164 |
| D18: SUBURBAN ATTAINMENT | 334 | 189 | 317 |
| E21: UNSPOILED SPLENDOR | 109 | 103 | 75 |
| F22: FAST TRACK COUPLES | 115 | 220 | 213 |
| G24: STATUS SEEKING SINGLES | 192 | 117 | 481 |
| G25: URBAN EDGE | 281 | 206 | 286 |
| H27: BIRKENSTOCKS AND BEEMERS | 135 | 145 | 64 |
| I30: STOCKCARS AND STATE PARKS | 147 | 121 | 126 |
| I32: STEADFAST CONVENTIONALISTS | 133 | 166 | 73 |
| I33: BALANCE AND HARMONY | 100 | 152 | 111 |
| J35: RURAL ESCAPE | 146 | 134 | 123 |
| K39: METRO FUSION | 121 | 30 | 208 |
| L41: BOOMING AND CONSUMING | 138 | 172 | 77 |
| L43: HOMEMADE HAPPINESS | 134 | 136 | 55 |
| M44: RED, WHITE, AND BLUEGRASS | 131 | 131 | 109 |
| M45: DIAPERS AND DEBIT CARDS | 195 | 59 | 33 |
| N47: COUNTRIFIED PRAGMATICS | 283 | 201 | 178 |
| N48: RURAL SOUTHERN BLISS | 197 | 175 | 37 |
| N49: TOUCH OF TRADITION | 135 | 115 | 38 |
| O51: DIGITAL DEPENDENTS | 115 | 167 | 124 |
| O52: URBAN AMBITION | 454 | 158 | 208 |
| O53: COLLEGES AND CAFES | 139 | 8 | 77 |
| O54: STRIVING SINGLE SCENE | 139 | 47 | 173 |
| O55: FAMILY TROOPERS | 115 | 137 | 97 |
| P57: MODEST METRO MEANS | 591 | 921 | 1146 |
| P60: STRIVING FORWARD | 194 | 97 | 62 |
| P61: HUMBLE BEGINNINGS | 114 | 28 | 36 |
| Q62: REAPING REWARDS | 126 | 165 | 149 |
| Q64: TOWN ELDERS | 128 | 136 | 66 |
| R66: DARE TO DREAM | 156 | 91 | 55 |
| R67: HOPE FOR TOMORROW | 169 | 205 | 164 |
| S68: SMALL TOWN SHALLOW POCKETS | 133 | 136 | 25 |
| S69: URBAN SURVIVORS | 394 | 0 | 0 |

# NEW BRAUNFELS PROFILE COMPARISON



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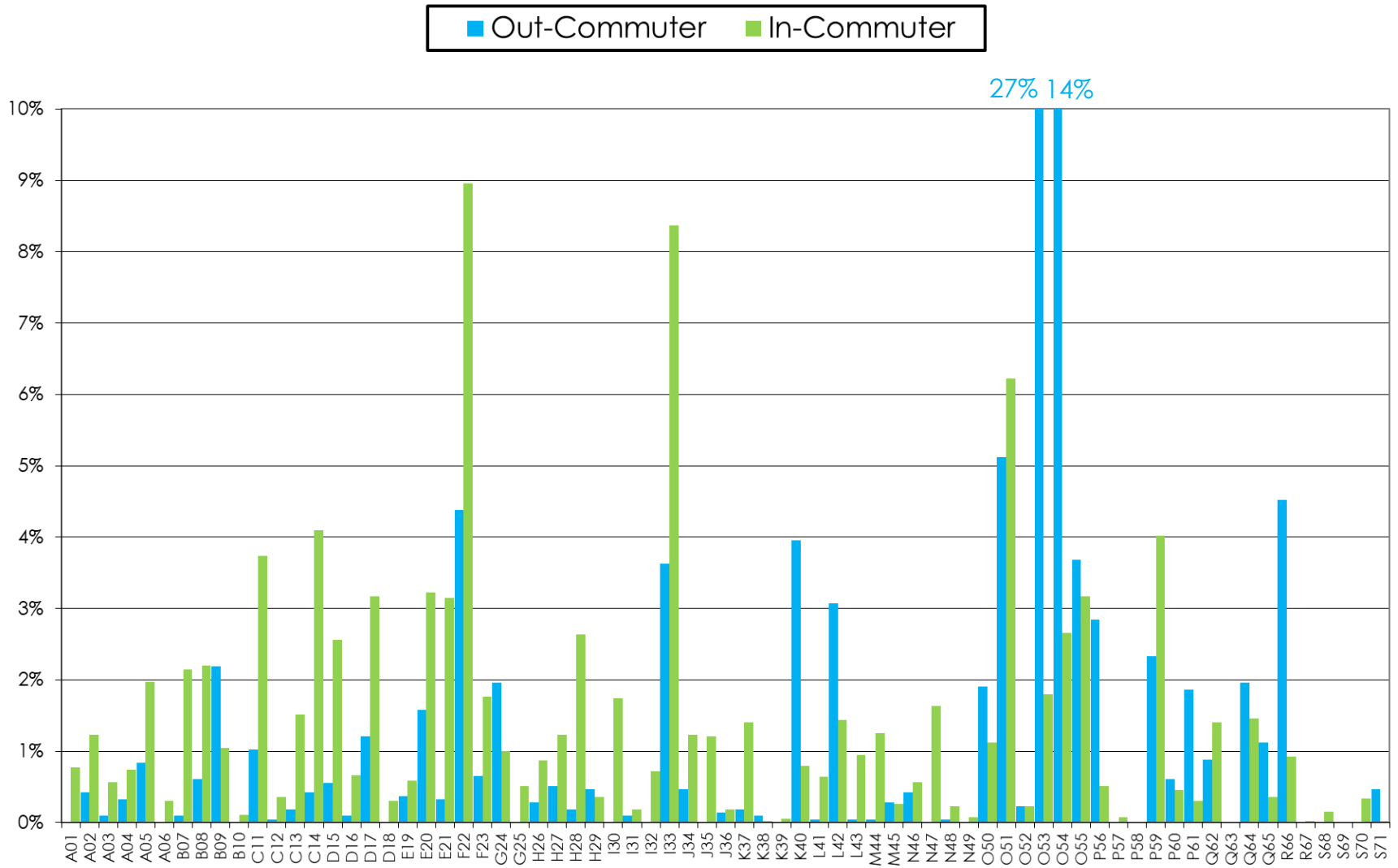
# SAN MARCOS PROFILE COMPARISON



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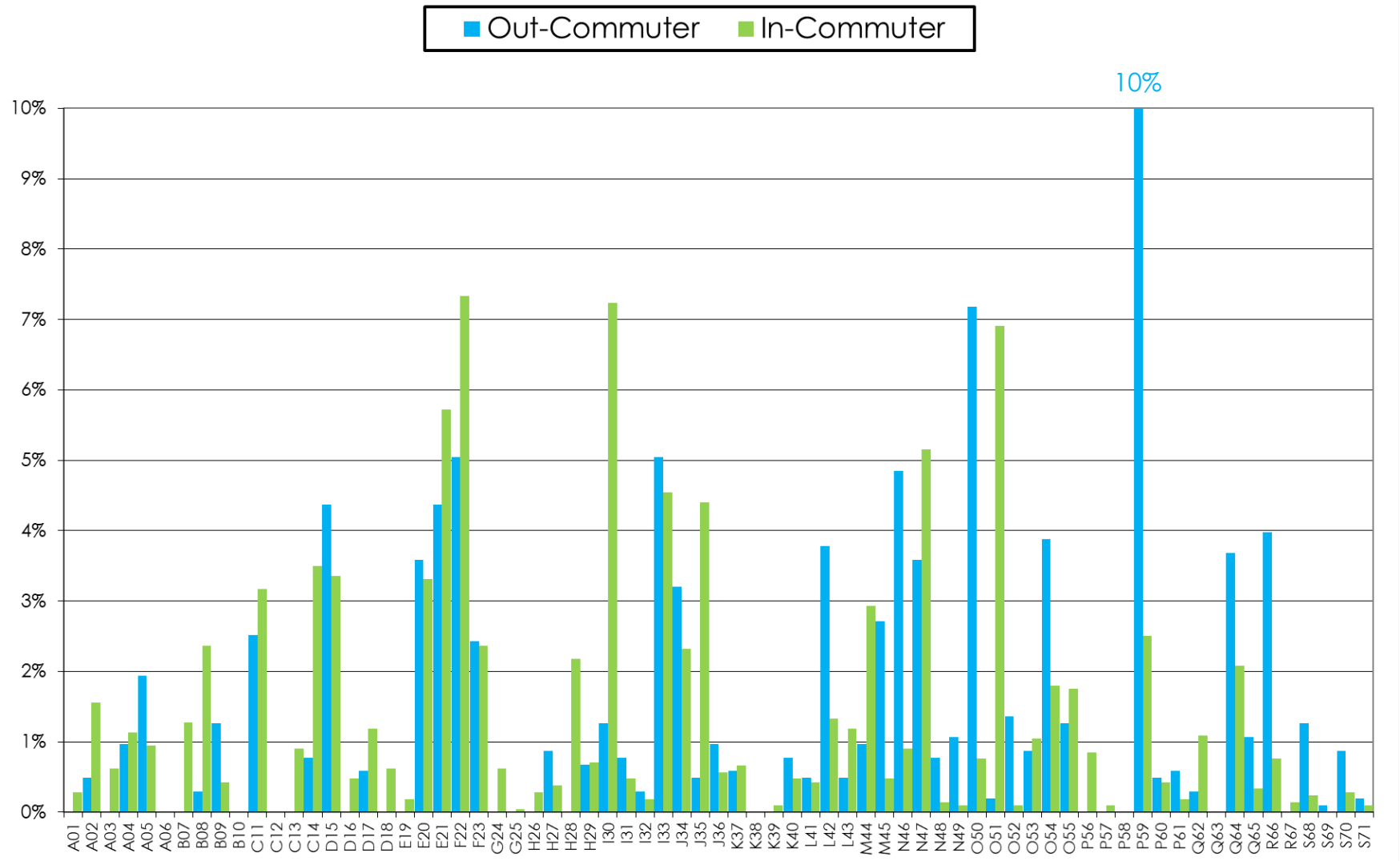
# SEGUIN PROFILE COMPARISON



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# LABOR SHED INSIGHTS

# GENERAL LABOR SHED COMPARISON

Labor shed is the average drive time of in-commuters and out-commuters. New Braunfels labor shed drive times capture 75%+ of in-commuter and out-commuter observations.

- Out-Commuters drive 50 minutes
- In-Commuters drive 40 minutes

The labor shed of San Marcos and Seguin were calculated for comparison.

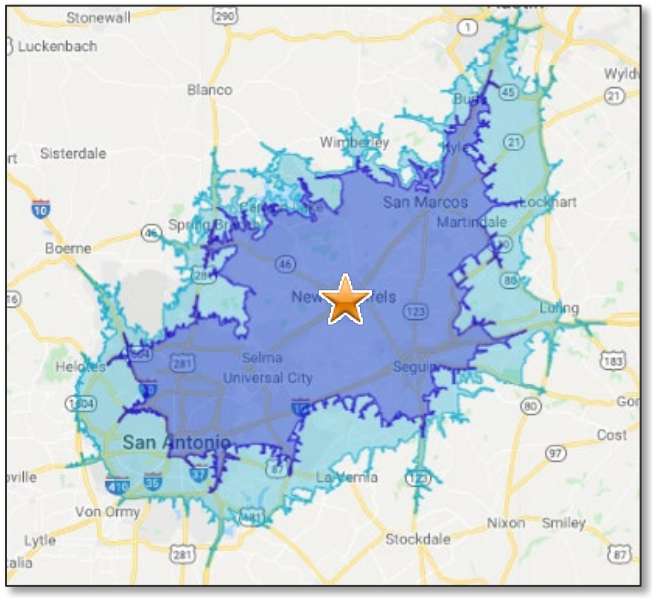
Out-Commuters

- San Marcos is 52 minutes
- Seguin is 44 minutes

In-Commuters

- San Marcos is 42 minutes
- Seguin is 35 minutes

Compared to San Marcos, people commuting inside for work and or outside of New Braunfels have a similar commute. However, Seguin has lower drive times for both Out-Commuters and In-Commuters.




New Braunfels

50-Minute Out-Commuter Drive Time

40-Minute In-Commuter Drive Time



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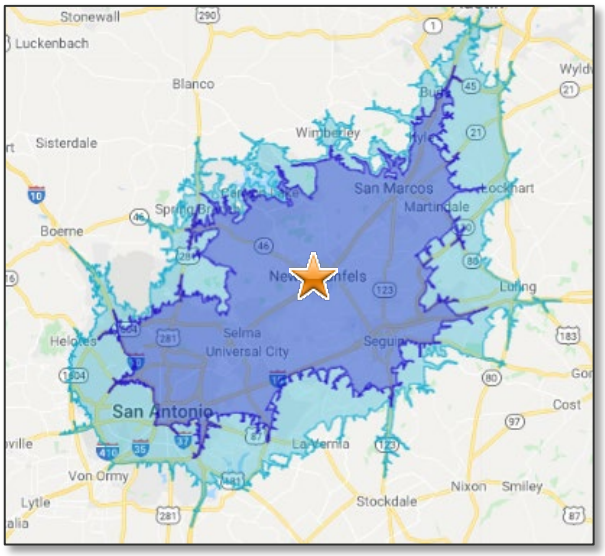
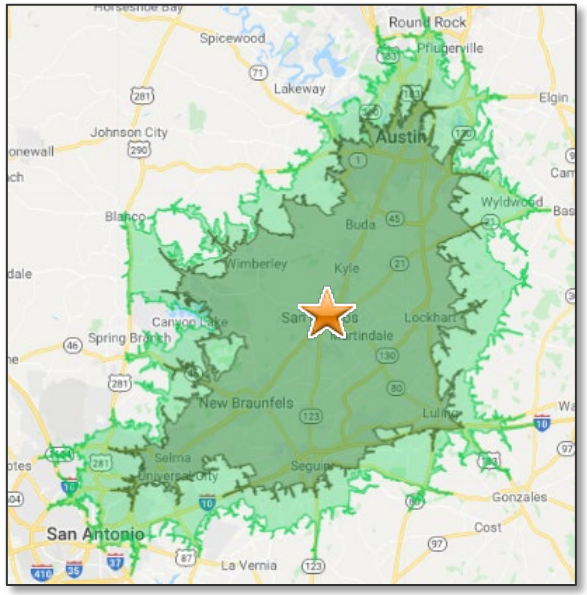
# GENERAL LABOR SHED COMPARISON

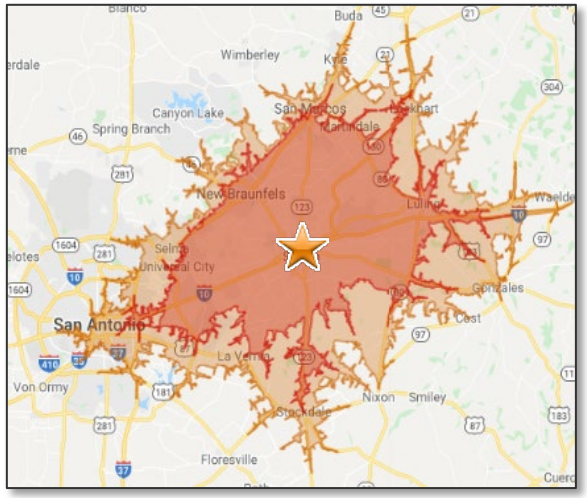



New Braunfels

50-Minute Out-Commuter Drive Time

40-Minute In-Commuter Drive Time




San Marcos

52-Minute Out-Commuter Drive Time

42-Minute In-Commuter Drive Time

Seguin

44-Minute Out-Commuter Drive Time

35-Minute In-Commuter Drive Time



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# SUMMERTIME LABOR SHED INSIGHTS

Does the New Braunfels labor shed shift during the summer? Commute times from Memorial Day weekend to Labor Day weekend were evaluated to determine if there is shifts in labor shed.

General All-Year Drive-Times

- Out-Commuters drive 50 minutes
- In-Commuters drive 40 minutes

Summertime Drive-Times

- Out-Commuters drive 30 minutes
- In-Commuters drive 27 minutes

However, summertime average drive-times only capture 65-70% of in-commuter and out-commuter observations.

Summertime 75% Observation Drive-Times

- Out-Commuters drive 38 minutes
- In-Commuters drive 30 minutes

**When 75% of observations are evaluated, the drive times are ~10 minutes lower than the general commutes. This decrease could be caused by college-aged in-commuters returning home for the summer and families taking summer vacation. Both segment groups are top segments for the New Braunfels In-Commuter profile.**

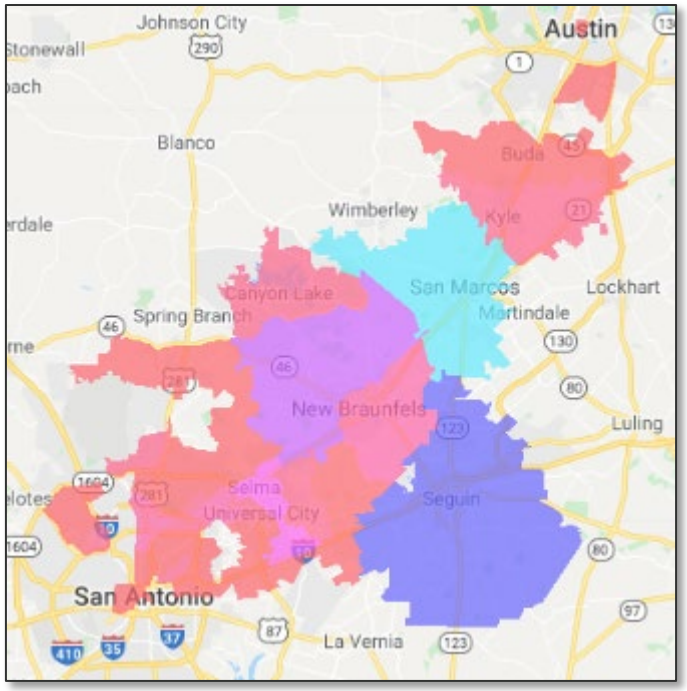
# OUT-COMMUTERS INSIGHTS

What percentage of New Braunfels out-commuters going to Seguin or San Marcos?

- 14% of Out-Commuters work in San Marcos
- 10% of Out-Commuters work in Seguin

The ZIP Out-Commuter Thematic shows San Marcos and Seguin ZIP codes capture high percentages of out-commuters.

Other cities include Austin and Shertz, with each capturing 5% or more of New Braunfels out-commuters. However, San Antonio ZIP codes capture ~30% of New Braunfels Out-Commuters when added together.



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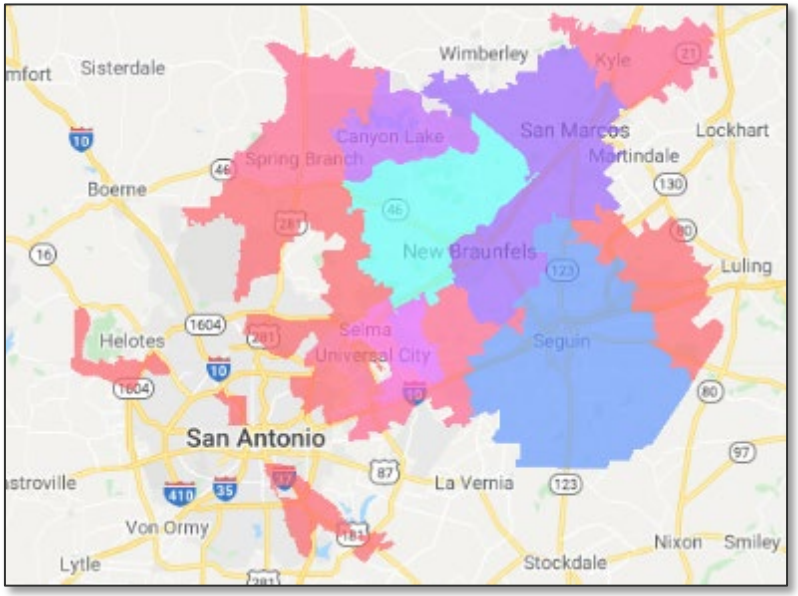
# IN-COMMUTERS INSIGHTS

New Braunfels draws commuters from the cities of San Marcos, Seguin, Canyon Lakes, Cibola, and ZIP codes surrounding New Braunfels.

The ZIP In-Commuter Thematic shows New Braunfels has the in-commuters primarily coming from those surrounding the city and ZIP codes in Seguin.



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# IN-COMMUTERS INSIGHTS

Besides their work locations, In-Commuters visit these type of places within the New Braunfels city boundaries. The top categories reflect places in-commuters would frequent as part of their daily lives. Other frequented places include retailers, medical services, and entertainment centered places. Average dwell times reflect the average visit length to a location within the category. A dwell time of 1+ hour is rounded to the full and half hours. Minutes are not rounded. The index (average is 100) is a measure of how likely an in-commuter will visit a specific category when compared to all categories visited.

| TOP CATEGORY | PERCENT | INDEX | AVERAGE DWELL TIME (HRS. ARE ROUNDED TO THE HALF) |
|---|---|---|---|
| RESTAURANTS AND OTHER EATING PLACES | 11.72% | 1,090 | 1.5 hr. |
| DEPOSITORY CREDIT INTERMEDIATION | 9.22% | 858 | 2 hrs. |
| ELEMENTARY AND SECONDARY SCHOOLS | 5.67% | 528 | 2.5 hrs. |
| GASOLINE STATIONS | 5.62% | 523 | 32 min. |
| GROCERY STORES | 5.40% | 503 | 1 hr. |
| HEALTH AND PERSONAL CARE STORES | 5.00% | 465 | 1 hr. |
| PERSONAL CARE SERVICES | 4.22% | 393 | 1 hr. |
| OFFICES OF PHYSICIANS | 4.17% | 388 | 3.5 hrs. |
| HOME HEALTH CARE SERVICES | 3.97% | 369 | 3.5 hrs. |
| ACCOUNTING, TAX PREPARATION, BOOKKEEPING, AND PAYROLL SERVICES | 2.95% | 274 | 2 hrs. |
| GENERAL MERCHANDISE STORES, INCLUDING WAREHOUSE CLUBS AND SUPERCENTERS | 2.78% | 259 | 1 hr. |
| OTHER AMUSEMENT AND RECREATION INDUSTRIES | 2.77% | 257 | 54 min. |
| OFFICES OF OTHER HEALTH PRACTITIONERS | 2.64% | 245 | 3.5 hrs. |
| AUTOMOBILE DEALERS | 2.61% | 243 | 3 hrs. |
| GENERAL MEDICAL AND SURGICAL HOSPITALS | 2.23% | 207 | 4 hrs. |
| BUILDING MATERIAL AND SUPPLIES DEALERS | 2.08% | 194 | 1 hr. |
| AGENCIES, BROKERAGES, AND OTHER INSURANCE RELATED ACTIVITIES | 1.99% | 185 | 2 hrs. |
| DEPARTMENT STORES | 1.91% | 177 | 1.5 hr. |
| OFFICES OF DENTISTS | 1.81% | 169 | 2 hrs. |
| AUTOMOTIVE REPAIR AND MAINTENANCE | 1.79% | 166 | 2 hrs. |

# IN-COMMUTERS INSIGHTS

**Top Non-Work Visit Categories**

New Braunfels' In-Commuters drive from Canyon Lakes, Cibola, and other surrounding ZIP codes. Since it is a larger city, New Braunfels offers a larger variety of restaurants, retailers, and businesses than many In-Commuters origin city.

- Restaurants and other Eating Places category has the largest percent of non-workplace visits for in-commuters.
  - Chain and local coffee places (Starbucks, On the Grind Coffee)
  - Quick-service restaurants (McDonalds, Whataburger, Chick-fil-A)
  - Fast-casual restaurants (BJ's Restaurants, Olive Garden).

- Depository Credit Intermediation category has the second largest percent of non-working visits for in-commuters.
  - Top banks include BBVA Compass, Wells Fargo, and Chase

The top categories for In-Commuter visits show that New Braunfels is a hub for daily life for their In-Commuter workforce. The In-Commuters not only work in New Braunfels but frequent places that would be considered common for a resident.

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# APPENDIX

## MOSAIC 71 SEGMENTATION

# VISITOR SEGMENTS: GROUP A

**Segment A01: American Royalty** – Affluent, influential and successful couples and families living in prestigious suburbs

**Segment A02: Platinum Prosperity** – Wealthy and established empty-nesting couples residing in suburban and in-town homes

**Segment A03: Kids and Cabernet** – Prosperous, middle-aged married couples with children living child-focused lives in affluent suburbs

**Segment A04: Picture Perfect Families** – Established families of child-rearing households living in wealthy suburbs

**Segment A05: Couples with Clout** – Middle-aged, childless couples living in affluent metro areas

**Segment A06: Jet Set Urbanites** – Upscale singles and couples living high-rise fashionable lives; city-style

**Power Elite**

# VISITOR SEGMENTS: GROUP B

**Segment B07: Across the Ages** – Flourishing couples and multi-generational families living a wide range of lifestyles in suburbia

**Segment B08: Babies and Bliss** – Middle-aged couples with large families and active lives in affluent suburbia

**Segment B09: Family Fun-tastic** – Upscale, middle-aged families with older children pursuing busy kid-centered lives in satellite cities

**Segment B10: Cosmopolitan Achievers** – Affluent middle-aged and established couples and families enjoying dynamic lifestyles in metro areas

**Flourishing Families**

# VISITOR SEGMENTS: GROUP C

**Segment C11: Sophisticated City Dwellers** – Wealthy boomer-aged couples living in cities and closed-in suburbs

**Segment C12: Golf Carts and Gourmets** – Thriving retirees and empty-nesters in comfortable communities

**Segment C13: Philanthropic Sophisticates** – Mature, upscale couples and singles in suburban homes

**Segment C14: Boomers and Boomerangs** – Baby boomer adults and their teenage/young adult children sharing suburban homes

**Booming with Confidence**

# VISITOR SEGMENTS: GROUP D

**Segment D15: Sports Utility Families** – Upscale, middle-aged couples with school-aged children living active family lifestyles in outlying suburbs

**Segment D16: Settled in Suburbia** – Upper middle-class diverse family unites and empty nesters living in established suburbs

**Segment D17: Cul De Sac Diversity** – Cultured families settled in new suburban neighborhoods

**Segment D18: Suburban Nightlife** – Upper established couples and families living mainly in the expanding suburbs

**Suburban Style**

# VISITOR SEGMENTS: GROUP E

**Segment E19: Consummate Consumers** – Households with adult children in an upper-middle class lifestyle with discretionary income living sophisticated lifestyles

**Segment E20: No Place Like Home** – Upper middle-class multi-generational households in exurban areas

**Segment E21: Unspoiled Splendor** – Comfortably established baby boomer couples in town and country communities

**Thriving Boomers**

# VISITOR SEGMENTS: GROUP F

**Segment F22: Fast Track Couples** – Active, young, upper middle-class suburban couples and families living upwardly-mobile lifestyles

**Segment F23: Families Matter Most** – Young, middle-class families in scenic suburbs leading active, family-focused lives

**Promising Families**

# VISITOR SEGMENTS: GROUP G

**Segment G24: Ambitious Singles** – Youthful, cutting-edge singles living in mid-scale metro areas balancing work and leisure lifestyles

**Segment G25: Urban Edge** – Lively, up-and-coming singles living big city lifestyles located within top MSA markets

**Young, City Solos**

# VISITOR SEGMENTS: GROUP H

**Segment H26: Progressive Assortment** – Mature couples with comfortable and active lives in established suburbs

**Segment H27: Life of Leisure** – Upper established couples living leisure lifestyles in small towns and cities

**Segment H28: Everyday Moderates** – Mid-scale, multi-cultural couples and families living in mid-tier metro suburban settings

**Segment H29: Destination Recreation** – Middle-aged, midscale couples in rural towns and fringe suburbs working to enjoy their active lifestyles

**Bourgeois Melting Pot**

# VISITOR SEGMENTS: GROUP I

**Segment I30: Potlucks and the Great Outdoors** – Comfortably established, middle-income couples with children living in suburbia

**Segment I31: Hard Working Values** – Established families in smaller cities and towns with solid blue-collar jobs

**Segment I32: Steadfast Conventionalists** – Conventional Generation X families located in selected coastal city homes

**Segment I33: Balance and Harmony** – Middle-class families living lively lifestyles in city-centric neighborhoods

**Family Union**

# VISITOR SEGMENTS: GROUP J

**Segment J34: Suburban Sophisticates** – Established sophisticates living comfortable suburban lifestyles

**Segment J35: Rural Escape** – Sophisticated, established couples and singles living comfortable lives in rural towns

**Segment J36: Settled and Sensible** – Mature, established couples with adult children and singles in suburban and rural neighborhoods

**Autumn Years**

# VISITOR SEGMENTS: GROUP K

**Segment K37: Wired for Success** – Young, mid-scale singles and couples living socially-active city lives

**Segment K38: Modern Blend** – Comfortably established singles and couples living suburban lifestyles

**Segment K39: Metro Fusion** – Ethnically-diverse, middle-aged singles living urban active lifestyles

**Segment K40: Bohemian Groove** – Mature, unattached individuals enjoying settled urban lives

**Significant Singles**

# VISITOR SEGMENTS: GROUP L

**Segment L41: Booming and Consuming** – Older empty-nesting couples and singles enjoying relaxed lives in small towns

**Segment L42: Rooted Flower Power** – Mid-scale baby boomer singles and couples rooted in established suburban communities and approaching retirement

**Segment L43: Homemade Happiness** – Lower middle-class baby boomer households living in remote town and country homes

**Blue Sky Boomers**

# VISITOR SEGMENTS: GROUP M

**Segment M44: Creative Comfort** – Rural families with modest incomes and diverse household dynamics

**Segment M45: Growing and Expanding** – Young, working-class families and single parent households living in small established, city residences

**Families in Motion**

# VISITOR SEGMENTS: GROUP N

**Segment N46: True Grit Americans** – Older, middle-class households in town and country communities located in the nation's midsection

**Segment N47: Countrified Pragmatics** – Lower middle-income couples and singles living rural, casual lives

**Segment N48: Rural Southern Bliss** – Lower middle-income multi-generational families living in small towns

**Segment N49: Touch of Tradition** – Working-class, middle-aged couples and singles living in rural homes

**Pastoral Pride**

# VISITOR SEGMENTS: GROUP O

**Segment O50: Full Steam Ahead** – Younger and middle-aged singles gravitating to second-tier cities

**Segment O51: Digitally Savvy** – Young singles who live digital-driven smaller city lifestyles

**Segment O52: Urban Ambition** – Mainly Generation Y African-American singles and single families established in mid-market cities

**Segment O53: Colleges and Cafes** – Young singles and recent college graduates living in college communities

**Segment O54: Influenced by Influencers** – Young singles living in Midwest and Southern city centers

**Segment O55: Family Troopers** – Families and single-parent households living near military bases

**Singles and Starters**

# VISITOR SEGMENTS: GROUP P

**Segment P56: Mid-scale Medley** – Middle-aged, mid-scale unattached adults living in secondary cities

**Segment P57: Modest Metro Means** – Mid-scale singles established in inner-city communities

**Segment P58: Heritage Heights** – Singles and families with mid and low incomes living settled lives in urban apartments

**Segment P59: Expanding Horizons** – Middle-aged, mid-scale income families living mainly within US border cities

**Segment P60: Striving Forward** – Cultured families and single parents earning modest incomes in gateway communities

**Segment P61: Simple Beginnings** – Singles and single parent households with modest incomes in city apartments

**Cultural Connections**

# VISITOR SEGMENTS: GROUP Q

**Segment Q62: Enjoying Retirement** – Relaxed, retired couples and widowed individuals in suburban homes living quiet lives

**Segment Q63: Footloose and Family Free** – Elderly couples and widowed individuals living active and comfortable lifestyles

**Segment Q64: Established in Society** – Stable, sophisticated seniors living in older homes and leading sedentary lifestyles

**Segment Q65: Mature and Wise** – Retirees settled in metro apartment communities living cost-effective, sensible lives

**Golden Year Guardians**

# VISITOR SEGMENTS: GROUP R

**Segment R66: Ambitious Dreamers** – Lively singles and single-parents with cost-conscious mindsets starting out in city apartments

**Segment R67: Passionate Parents** – Young, single parents with cost-conscious mindsets in second-city apartments

**Aspirational Fusion**

# VISITOR SEGMENTS: GROUP S

**Segment S68: Small Town Sophisticates**– Sophisticated, down-scale singles and couples with adult children living in modest, exurban small towns

**Segment S69: Urban Legacies** – Cultured singles and single parents established in modest urban settings

**Segment S70: Thrifty Singles** – Middle-aged singles with limited income in transitional small town and exurban apartments

**Segment S71: Modest Retirees** – Mature singles with limited income typically concentrated in inner-city apartments

**Thrifty Habits**

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