



Retail Site Assessment

December 2006

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Oro Valley's Retail Site

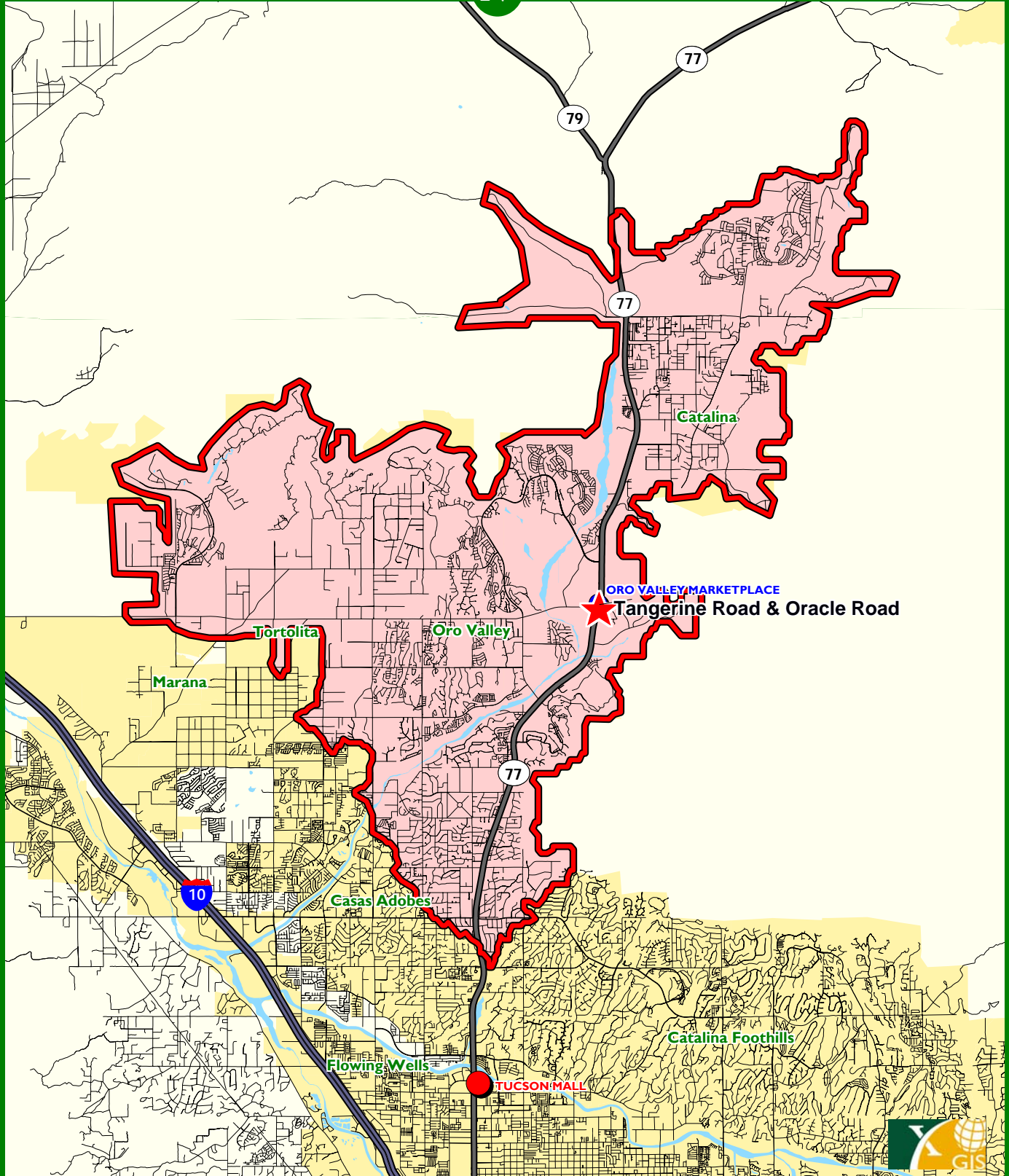
To begin the CommunityID process, Oro Valley selected the intersection of Tangerine Road and Oracle Road for possible retail development or revitalization.

To more fully understand the retail potential of the selected site, Buxton conducted the following analyses:

- A primary residential trade area was delineated for the site
- The customers within the trade area were segmented according to buying habits and lifestyles
- A profile of Oro Valley's customers within the trade area was developed
- The retail demand for more than 400 products and services were determined for the potential trade area

The purpose of these analyses is to develop Oro Valley's customer profiles. The customer profiles are snapshots of the customers that are found within Oro Valley's trade area. Even though these consumers are complex and diverse, by using a variety of databases Buxton is able to capture and catalogue the extent to which potential demand for retailer's goods and services are concentrated in the trade area.

By overlaying Oro Valley's customer profiles with over 4,500 retail matching profiles in Buxton's proprietary database, we are able to identify major categories of retail that are candidates for location in Oro Valley. This matching provides the basis for determining Oro Valley's viability to attract retailers and restaurants and forms the basis for Buxton's assessment.



Oro Valley, Arizona: Trade Area

Shopping Centers

GLA in thousands

- 1000+
- 500 to 1000

★ Retail Site

Primary Trade Area

Miles



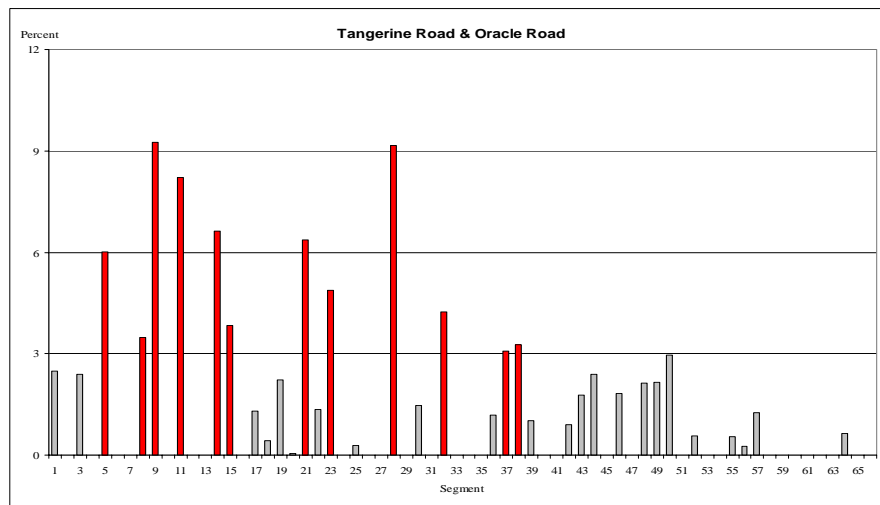
Retail Site Analysis

Drive-Time Trade Area

The map on the opposite page depicts the primary trade area for the selected site at the intersection of Tangerine Road and Oracle Road. The primary trade area was determined by Buxton's proprietary drive-time technology.

Psychographics

The psychographic profile of the households within the trade area of the selected site is presented below.



Source: Claritas, Inc. PRIZM® NE, © 2006

Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. Following is a description of the dominant segments for the potential retail site.

Tangerine Road & Oracle Road			
Dominant Segments	Description	Households	% of All Households
5	Country Squires	1775	6.01
8	Executive Suites	1028	3.48
9	Big Fish, Small Pond	2734	9.25
11	God's Country	2425	8.21
14	New Empty Nests	1958	6.63
15	Pools & Patios	1133	3.83
21	Gray Power	1883	6.37
23	Greenbelt Sports	1442	4.88
28	Traditional Times	2703	9.15
32	New Homesteaders	1250	4.23
37	Mayberry-ville	910	3.08
38	Simple Pleasures	967	3.27

Source: Claritas, Inc. PRIZM® NE, © 2006

Retail Site Analysis (continued)

Product Category Potential

The following table outlines the estimated dollar potential available in major retail categories by consumers located within the primary trade area for the potential retail site:

<i>Consumer Variable – Major Categories</i>	<i>Total Estimated Dollars – Primary Residential Trade Area</i>
Food at Home	\$105,571,600
Food Away from Home	\$94,854,340
Alcoholic Beverages	\$24,243,430
Smoking Products & Supplies	\$8,988,990
Personal Care Products & Services	\$18,154,690
Day Care	\$6,022,330
Household Furnishings & Services	\$131,142,880
Housing Expenses	\$20,455,980
Apparel	\$81,140,670
Sports & Recreation	\$26,627,790
Miscellaneous	\$64,225,730
Education	\$26,385,320
Automotive	\$160,412,440
Health Care	\$70,302,270
TOTAL	\$838,528,460

The following table presents the trade potential variables for the Site:

Trade Potential Variables	Primary Trade Area
Estimated Household Count	29,549
Number of Households in Dominant Segments	20,208
Traffic Count	31,500
Estimated Product Category Potential	\$838,528,460

Brief Segment Descriptions

- 1 **UPPER CRUST** – The nation’s most exclusive address, Upper Crust is the wealthiest lifestyle in America—a haven for empty-nesting couples over 55 years old. No segment has a higher concentration of residents earning over \$200,000 a year or possessing a postgraduate degree, and none has a more opulent standard of living.
- 2 **BLUE BLOOD ESTATES** – Blue Blood Estates is a family portrait of suburban wealth, a place of million-dollar homes and manicured lawns, high-end cars and exclusive private clubs. The nation’s second-wealthiest lifestyle, it is characterized by married couples with children, college degrees, a significant percentage of Asian Americans and six-figure incomes earned by business executives, managers and professionals.
- 3 **MOVERS & SHAKERS** – Movers & Shakers is home to America’s up-and-coming business class: a wealthy suburban world of dual-income couples who are highly educated, typically between the ages of 35 and 54, often with children. Given its high percentage of executives and white-collar professionals, there is a decided business bent to this segment: Movers & Shakers rank number one for owning a small business and having a home office.
- 4 **YOUNG DIGERATI** – Young Digerati are the nation’s tech-savvy singles and couples living in fashionable neighborhoods on the urban fringe. Affluent, highly educated and ethnically mixed, Young Digerati communities are typically filled with trendy apartments and condos, fitness clubs and clothing boutiques, casual restaurants and all types of bars—from juice to coffee to microbrew.
- 5 **COUNTRY SQUIRES** – The wealthiest residents in exurban America live in Country Squires, an oasis for affluent Baby Boomers who have fled the city for the charms of small-town living. In their bucolic communities noted for their recently built homes on sprawling properties, the families of executives live in six-figure comfort. Country Squires enjoy country club sports like golf, tennis and swimming as well as skiing, boating and biking.
- 6 **WINNER’S CIRCLE** – Among the wealthy suburban lifestyles, Winner’s Circle is the youngest, a collection of mostly 25- to 34-year-old couples with large families in new-money subdivisions. Surrounding their homes are the signs of upscale living: recreational parks, golf courses and upscale malls. With a median income of nearly \$90,000, Winner’s Circle residents are big spenders who like to travel, ski, go out to eat, shop at clothing boutiques and take in a show.
- 7 **MONEY & BRAINS** – The residents of Money & Brains seem to have it all: high incomes, advanced degrees and sophisticated tastes to match their credentials. Many of these city dwellers—predominantly white with a high concentration of Asian Americans—are married couples with few children who live in fashionable homes on small, manicured lots.

Brief Segment Descriptions

- 8 EXECUTIVE SUITES – Executive Suites consists of upper-middle-class singles and couples typically living just beyond the nation’s beltways. Filled with significant numbers of Asian Americans and college graduates—both groups are represented at more than twice the national average—this segment is a haven for white-collar professionals drawn to comfortable homes and apartments within a manageable commute to downtown jobs, restaurants and entertainment.
- 9 BIG FISH, SMALL POND – Older, upper-class, college-educated professionals, the members of Big Fish, Small Pond are often among the leading citizens of their small-town communities. These upscale, empty-nesting couples enjoy the trappings of success, belonging to country clubs, maintaining large investment portfolios and spending freely on computer technology.
- 10 SECOND CITY ELITE – There’s money to be found in the nation’s smaller cities, and you’re most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous executives who decorate their \$200,000 homes with multiple computers, large-screen TV sets and an impressive collection of wines. With more than half holding college degrees, Second City Elite residents enjoy cultural activities—from reading books to attending theater and dance productions.
- 11 GOD’S COUNTRY – When city dwellers and suburbanites began moving to the country in the 1970’s, God’s Country emerged as the most affluent of the nation’s exurban lifestyles. Today, wealthier communities exist in the hinterlands, but God’s Country remains a haven for upper-income couples in spacious homes. Typically college-educated Baby Boomers, these Americans try to maintain a balanced lifestyle between high-power jobs and laid-back leisure.
- 12 BRITE LITES, LI’L CITY – Not all of the America’s chic sophisticates live in major metros. Brite Lights, Li’l City is a group of well-off, middle-aged couples settled in the nation’s satellite cities. Residents of these typical double income, no kids households have college educations, well-paying business and professional careers and swank homes filled with the latest technology.
- 13 UPWARD BOUND – More than any other segment, Upward Bound appears to be the home of those legendary Soccer Moms and Dads. In these small satellite cities, upper-class families boast dual incomes, college degrees and new split-levels and colonials. Residents of Upward Bound tend to be kid-obsessed, with heavy purchases of computers, action figures, dolls, board games, bicycles and camping equipment.
- 14 NEW EMPTY NESTS – With their grown-up children recently out of the house, New Empty Nests is composed of upscale older Americans who pursue active—and activist—lifestyles. Nearly three-quarters of residents are over 65 years old, but they show no interest in a rest-home retirement. This is the top-ranked segment for all-inclusive travel packages; the favorite destination is Italy.

Brief Segment Descriptions

- 15 **POOLS & PATIOS** – Formed during the postwar Baby Boom, Pools & Patios has evolved from a segment of young suburban families to one for mature, empty-nesting couples. In these stable neighborhoods graced with backyard pools and patios—the highest proportion of homes were built in the 1960’s—residents work as white-collar managers and professionals, and are now at the top of their careers.
- 16 **BOHEMIAN MIX** – A collection of young, mobile urbanites, Bohemian Mix represents the nation’s most liberal lifestyles. Its residents are a progressive mix of young singles and couples, students and professionals, Hispanics, Asians, African-Americans and whites. In their funky row houses and apartments, Bohemian Mixers are the early adopters who are quick to check out the latest movie, nightclub, laptop and microbrew.
- 17 **BELTWAY BOOMERS** – The members of the postwar Baby Boom are all grown up. Today, these Americans are in their forties and fifties, and one segment of this huge cohort—college-educated, upper-middle-class and home-owning—is found in Beltway Boomers. Like many of their peers who married late, these Boomers are still raising children in comfortable suburban subdivisions, and they’re pursuing kid-centered lifestyles.
- 18 **KIDS & CUL-DE-SACS** – Upscale, suburban, married couples with children is the description of Kids & Cul-de-Sacs, an enviable lifestyle of large families in recently built subdivisions. With a high rate of Hispanic and Asian Americans, this segment is a refuge for college-educated, white-collar professionals with administrative jobs and upper-middle-class incomes. Their nexus of education, affluence and children translates into large outlays for child-centered products and services.
- 19 **HOME SWEET HOME** – Widely scattered across the nation’s suburbs, the residents of Home Sweet Home tend to be upper-middle-class married couples living in mid-sized homes with few children. The adults in the segment, mostly between the ages of 25 and 54, have gone to college and hold professional and white-collar jobs. With their upscale incomes and small families, these folks have fashioned comfortable lifestyles, filling their homes with toys, TV sets and pets.
- 20 **FAST-TRACK FAMILIES** – With their upper-middle-class incomes, numerous children and spacious homes, Fast-Track Families are in their prime acquisition years. These middle-aged parents have the disposable income and educated sensibility to want the best for their children. They buy the latest technology with impunity: new computers, DVD players, home theater systems and video games. They take advantage of their rustic locales by camping, boating and fishing.

Brief Segment Descriptions

- 21 **GRAY POWER** – The steady rise of older, healthier Americans over the past decade has produced one important by-product: middle-class, home-owning suburbanites who are aging in place rather than moving to retirement communities. A segment of older, mid-scale singles and couples who live in quiet comfort, Gray Power reflects this trend.
- 22 **YOUNG INFLUENTIALS** – Once known as the home of the nation’s yuppies, Young Influentials reflects the fading glow of acquisitive yuppiedom. Today, the segment is a common address for young, middle-class singles and couples who are more preoccupied with balancing work and leisure pursuits. Having recently left college dorms, they now live in apartment complexes surrounded by ball fields, health clubs and casual-dining restaurants.
- 23 **GREENBELT SPORTS** – A segment of middle-class exurban couples, Greenbelt Sports is known for its active lifestyle. Most of these middle-aged residents are married, college-educated and own new homes; about a third have children. And few segments have higher rates for pursuing outdoor activities such as skiing, canoeing, backpacking, boating and mountain biking.
- 24 **UP-AND-COMERS** – Up-and-Comers is a stopover for young, mid-scale singles before they marry, have families and establish more deskbound lifestyles. Found in second-tier cities, these mobile twenty-somethings include a disproportionate number of recent college graduates who are into athletic activities, the latest technology and nightlife entertainment.
- 25 **COUNTRY CASUALS** – There’s a laid-back atmosphere in Country Casuals, a collection of middle-aged, upper-middle-class households that have started to empty-nest. Workers here—and most households boast two earners—have well-paying blue- or white-collar jobs, or own small businesses. Today these Baby-Boom couples have the disposable income to enjoy traveling, owning timeshares and going out to eat.
- 26 **THE COSMOPOLITANS** – Educated, mid-scale and multi-ethnic, The Cosmopolitans are urbane couples in America’s fast-growing cities. Concentrated in a handful of metros—such as Las Vegas, Miami and Albuquerque—these households feature older home-owners, empty-nesters and college graduates. A vibrant social scene surrounds their older homes and apartments, and residents love the nightlife and enjoy leisure-intensive lifestyles.
- 27 **MIDDLEBURG MANAGERS** – Middleburg Managers arose when empty-nesters settled in satellite communities which offered a lower cost of living and more relaxed pace. Today segment residents tend to be middle-class and over 55 years old with solid managerial jobs and comfortable retirements. In their older homes, they enjoy reading, playing musical instruments, indoor gardening and refinishing furniture.

Brief Segment Descriptions

- 28 **TRADITIONAL TIMES** – Traditional Times is the kind of lifestyle where small-town couples nearing retirement are beginning to enjoy their first empty-nest years. Typically in their fifties and sixties, these middle-class Americans pursue a kind of granola-and-grits lifestyle. On their coffee tables are magazines with titles ranging from *Country Living* and *Country Home* to *Gourmet* and *Forbes*. But they're big travelers, especially in recreational vehicles and campers.
- 29 **AMERICAN DREAMS** – American Dreams is a living example of how ethnically diverse the nation has become: more than half the residents are Hispanic, Asian or African-American. In these multilingual neighborhoods—one in ten residents speaks a language other than English—middle-aged immigrants and their children live in middle-class comfort.
- 30 **SUBURBAN SPRAWL** – Suburban Sprawl is an unusual American lifestyle: a collection of mid-scale, middle-aged singles and couples living in the heart of suburbia. Typically members of the Baby Boom generation, they hold decent jobs, own older homes and condos, and pursue conservative versions of the American Dream. Among their favorite activities are jogging on treadmills, playing trivia games and renting videos.
- 31 **URBAN ACHIEVERS** – Concentrated in the nation's port cities, Urban Achievers is often the first stop for up-and-coming immigrants from Asia, South America and Europe. These young singles and couples are typically college-educated and ethnically diverse: about a third are foreign-born, and even more speak a language other than English.
- 32 **NEW HOMESTEADERS** – Young, middle-class families seeking to escape suburban sprawl find refuge in New Homesteaders, a collection of small rustic townships filled with new ranches and Cape Cods. With decent-paying jobs in white-collar and service industries, these dual-income couples have fashioned comfortable, child-centered lifestyles, their driveways filled with campers and powerboats, their family rooms with PlayStations and Game Boys.
- 33 **BIG SKY FAMILIES** – Scattered in placid towns across the American heartland, Big Sky Families is a segment of young rural families who have turned high school educations and blue-collar jobs into busy, middle-class lifestyles. Residents like to play baseball, basketball and volleyball in addition to going fishing, hunting and horseback riding. To entertain their sprawling families, they buy virtually every piece of sporting equipment on the market.
- 34 **WHITE PICKET FENCES** – Midpoint on the socioeconomic ladder, residents in White Picket Fences look a lot like the stereotypical American household of a generation ago: young, middle-class, married with children. But the current version is characterized by modest homes and ethnic diversity—including a disproportionate number of Hispanics and African-Americans.

Brief Segment Descriptions

- 35 **BOOMTOWN SINGLES** – Affordable housing, abundant entry-level jobs and a thriving singles scene— all have given rise to the Boomtown Singles segment in fast-growing satellite cities. Young, single and working-class, these residents pursue active lifestyles amid sprawling apartment complexes, bars, convenience stores and laundromats.
- 36 **BLUE-CHIP BLUES** – Blue-Chip Blues is known as a comfortable lifestyle for young, sprawling families with well-paying blue-collar jobs. Ethnically diverse—with a significant presence of Hispanics and African-Americans—the segment’s aging neighborhoods feature compact, modestly priced homes surrounded by commercial centers that cater to child-filled households.
- 37 **MAYBERRY-VILLE** – Like the old Andy Griffith Show set in a quaint picturesque berg, Mayberry-ville harks back to an old-fashioned way of life. In these small towns, middle-class couples and families like to fish and hunt during the day, and stay home and watch TV at night. With lucrative blue-collar jobs and moderately priced housing, residents use their discretionary cash to purchase boats, campers, motorcycles and pickup trucks.
- 38 **SIMPLE PLEASURES** – With more than two-thirds of its residents over 65 years old, Simple Pleasures is mostly a retirement lifestyle: a neighborhood of lower-middle-class singles and couples living in modestly priced homes. Many are high school-educated seniors who held blue-collar jobs before their retirement, and a disproportionate number served in the military; no segment has more members of veterans clubs.
- 39 **DOMESTIC DUOS** – Domestic Duos represents a middle-class mix of mainly over-55 singles and married couples living in older suburban homes. With their high-school educations and fixed incomes, segment residents maintain an easy-going lifestyle. Residents like to socialize by going bowling, seeing a play, meeting at the local fraternal order or going out to eat.
- 40 **CLOSE-IN COUPLES** – Close-In Couples is a group of predominantly African-American couples living in older homes in the urban neighborhoods of mid-sized metros. High school educated and empty nesting, these 55-year-old-plus residents typically live in older city neighborhoods, enjoying secure and comfortable retirements.
- 41 **SUNSET CITY BLUES** – Scattered throughout the older neighborhoods of small cities, Sunset City Blues is a segment of lower-middle-class singles and couples who have retired or are getting close to retirement. These empty-nesters tend to own their homes but have modest educations and incomes. They maintain a low-key lifestyle filled with newspapers and television by day, and family-style restaurants at night.

Brief Segment Descriptions

- 42 **RED, WHITE & BLUES** – The residents of Red, White & Blues typically live in exurban towns rapidly morphing into bedroom suburbs. Their streets feature new fast-food restaurants, and locals have recently celebrated the arrival of chains like Wal-Mart, Radio Shack and Payless Shoes. Middle-aged, high school educated and lower-middle class, these folks tend to have solid, blue-collar jobs in manufacturing, milling and construction.
- 43 **HEARTLANDERS** – America was once a land of small middle-class towns, which can still be found today among Heartlanders. This widespread segment consists of middle-aged couples with working-class jobs living in sturdy, unpretentious homes. In these communities of small families and empty-nesting couples, Heartlanders pursue a rustic lifestyle where hunting and fishing remain prime leisure activities along with cooking, sewing, camping and boating.
- 44 **NEW BEGINNINGS** – Filled with young, single adults, New Beginnings is a magnet for adults in transition. Many of its residents are twenty-something singles and couples just starting out on their career paths—or starting over after recent divorces or company transfers. Ethnically diverse—with nearly half its residents Hispanic, Asian or African-American—New Beginnings households tend to have the modest living standards typical of transient apartment dwellers.
- 45 **BLUE HIGHWAYS** – On maps, blue highways are often two-lane roads that wind through remote stretches of the American landscape. Among lifestyles, Blue Highways is the standout for lower-middle-class couples and families who live in isolated towns and farmsteads. Here, Boomer men like to hunt and fish; the women enjoy sewing and crafts, and everyone looks forward to going out to a country music concert.
- 46 **OLD GLORIES** – Old Glories are the nation’s downscale suburban retirees, Americans aging in place in older apartment complexes. These racially mixed households often contain widows and widowers living on fixed incomes, and they tend to lead home-centered lifestyles. They’re among the nation’s most ardent television fans, watching game shows, soaps, talk shows and newsmagazines at high rates.
- 47 **CITY STARTUPS** – In City Startups, young, multi-ethnic singles have settled in neighborhoods filled with cheap apartments and a commercial base of cafés, bars, laundromats and clubs that cater to twenty-somethings. One of the youngest segments in America—with ten times as many college students as the national average—these neighborhoods feature low incomes and high concentrations of Hispanics and African-Americans.

Brief Segment Descriptions

- 48 **YOUNG & RUSTIC** – Like the soap opera that inspired its nickname, Young & Rustic is composed of young, restless singles. Unlike the glitzy soap denizens, however, these folks tend to be lower income, high school-educated and live in tiny apartments in the nation’s exurban towns. With their service industry jobs and modest incomes, these folks still try to fashion fast-paced lifestyles centered on sports, cars and dating.
- 49 **AMERICAN CLASSICS** – They may be older, lower-middle class and retired, but the residents of American Classics are still living the American Dream of home ownership. Few segments rank higher in their percentage of home owners, and that fact alone reflects a more comfortable lifestyle for these predominantly white singles and couples with deep ties to their neighborhoods.
- 50 **KID COUNTRY, USA** – Widely scattered throughout the nation’s heartland, Kid Country, USA is a segment dominated by large families living in small towns. Predominantly white with an above-average concentration of Hispanics, these young working-class households include homeowners, renters and military personnel living in base housing; about 20 percent of residents own mobile homes.
- 51 **SHOTGUNS & PICKUPS** – The segment known as Shotguns & Pickups came by its moniker honestly: it scores near the top of all lifestyles for owning hunting rifles and pickup trucks. These Americans tend to be young, working-class couples with large families—more than half have two or more kids—living in small homes and manufactured housing. Nearly a third of residents live in mobile homes, more than any other segment.
- 52 **SUBURBAN PIONEERS** – Suburban Pioneers represents one of the nation’s eclectic lifestyles, a mix of young singles, recently divorced and single parents who have moved into older, inner-ring suburbs. They live in aging homes and garden-style apartment buildings where the jobs are blue-collar and the money is tight. What unites these residents—a diverse mix of whites, Hispanics and African-Americans—is a working-class sensibility and an appreciation for their off-the-beaten-track neighborhoods.
- 53 **MOBILITY BLUES** – Young singles and single parents make their way to Mobility Blues, a segment of working-class neighborhoods in America’s satellite cities. Racially mixed and under 25 years old, these transient Americans tend to have modest lifestyles due to their lower-income blue-collar jobs. Surveys show they excel in going to movies, playing basketball and shooting pool.
- 54 **MULTI-CULTI MOSAIC** – An immigrant gateway community, Multi-Culti Mosaic is the urban home for a mixed populace of younger Hispanic, Asian and African-American singles and families. With nearly a quarter of the residents foreign born, this segment is a Mecca for first-generation Americans who are striving to improve their lower-middle-class status.

Brief Segment Descriptions

- 55 **GOLDEN PONDS** – Golden Ponds is mostly a retirement lifestyle, dominated by downscale singles and couples over 65 years old. Found in small bucolic towns around the country, these high school-educated seniors live in small apartments on less than \$25,000 a year; one in five resides in a nursing home. For these elderly residents, daily life is often a succession of sedentary activities such as reading, watching TV, playing bingo and doing craft projects.
- 56 **CROSSROADS VILLAGERS** – With a population of middle-aged, blue-collar couples and families, Crossroads Villagers is a classic rural lifestyle. Residents are high school-educated with lower-middle incomes and modest housing; one-quarter live in mobile homes. There's an air of self-reliance in these households as Crossroads Villagers help put food on the table through fishing, gardening and hunting.
- 57 **OLD MILLTOWNS** – America's once-thriving mining and manufacturing towns have aged—as have the residents in Old Milltowns communities. Today, the majority of residents are retired singles and couples living on downscale incomes in pre-1960 homes and apartments. For leisure they enjoy gardening, sewing, socializing at veterans clubs or eating out at casual restaurants.
- 58 **BACK COUNTRY FOLKS** – Strewn among remote farm communities across the nation, Back Country Folks are a long way away from economic paradise. The residents tend to be poor, over 55 years old and living in older, modest-sized homes and manufactured housing. Typically, life in this segment is a throwback to an earlier era when farming dominated the American landscape.
- 59 **URBAN ELDERS** – For Urban Elders—a segment located in the downtown neighborhoods of such metros as New York, Chicago, Las Vegas and Miami—life is often an economic struggle. These communities have high concentrations of Hispanics and African-Americans and tend to be downscale, with singles living in older apartment rentals.
- 60 **PARK BENCH SENIORS** – Park Bench Seniors are typically retired singles living in the racially mixed neighborhoods of the nation's satellite cities. With modest educations and incomes, these residents maintain low-key, sedentary lifestyles. Theirs is one of the top-ranked segments for TV viewing, especially daytime soaps and game shows.
- 61 **CITY ROOTS** – Found in urban neighborhoods, City Roots is a segment of lower-income retirees, typically living in older homes and duplexes they've owned for years. In these ethnically diverse neighborhoods—more than a third are African-American and Hispanic—residents are often widows and widowers living on fixed incomes and maintaining low-key lifestyles.

Brief Segment Descriptions

- 62 **HOMETOWN RETIRED** – With three-quarters of all residents over 65 years old, Hometown Retired is one of the oldest segments. These racially mixed seniors tend to live in aging homes—half were built before 1958—and typically get by on social security and modest pensions. Because most never made it beyond high school and spent their working lives at blue-collar jobs, their retirements are extremely modest.
- 63 **FAMILY THRIFTS** – The small-city cousins of inner-city districts, Family Thrifts contain young, ethnically diverse parents who have lots of children and work entry-level service jobs. In these apartment-filled neighborhoods, visitors find the streets jam-packed with babies and toddlers, tricycles and basketball hoops, Daewoos and Hyundais.
- 64 **BEDROCK AMERICA** – Bedrock America consists of young, economically challenged families in small, isolated towns located throughout the nation’s heartland. With modest educations, sprawling families and blue-collar jobs, many of these residents struggle to make ends meet. One quarter live in mobile homes. One in three has not finished high school. Rich in scenery, Bedrock America is a haven for fishing, hunting, hiking and camping.
- 65 **BIG CITY BLUES** – With a population that’s half Latino, Big City Blues has the highest concentration of Hispanic Americans in the nation, but it’s also the multi-ethnic address for downscale Asian and African-American households occupying older inner-city apartments. Concentrated in a handful of major metros, these young singles and single-parent families face enormous challenges: low incomes, uncertain jobs and modest educations. More than 40% haven’t finished high school.
- 66 **LOW-RISE LIVING** – The most economically challenged urban segment, Low-Rise Living is known as a transient world for young, ethnically diverse singles and single parents. Home values are low—about half the national average—and even then, less than a quarter of residents can afford to own real estate.

Buxton utilizes the Claritas® PRIZM®NE segmentation system in this analysis. PRIZM®NE and Claritas® are resgistered trademarks of Claritas Inc. The PRIZM segment nicknames (e.g., “Blue Blood Estates,” Big Sky Families,” “Country Squires”) are trademarks of Claritas Inc.



Appendix: Product Category

Analysis Geography: Tangerine Road & Oracle Road
Oro Valley, AZ

Date: 11/28/2006

Category Totals

Custom Trade Area

Food at Home	\$105,571,600
Food Away from Home	\$94,854,340
Alcoholic Beverages	\$24,243,430
Smoking Products & Supplies	\$8,988,990
Personal Care Products & Services	\$18,154,690
Day Care	\$6,022,330
Household Furnishings & Services	\$131,142,880
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Analysis Geography: Tangerine Road & Oracle Road
Oro Valley, AZ

Date: 11/28/2006

Food at Home

Custom Trade Area

Cereals & Cereal Products	\$5,195,130
Cereals	\$2,894,480
Rice	\$597,850
Pasta, Cornmeal, and Other	\$1,013,440
Flour	\$689,360
Bakery Products	\$10,716,840
Cookies	\$1,377,270
Crackers	\$821,430
Bread Products	\$8,518,140
Fish & Seafood	\$2,614,440
Canned Fish	\$514,520
Frozen Fish	\$705,660
Fresh Fish	\$1,394,260
Meats & Poultry	\$18,994,260
Meats	\$12,911,800
Poultry	\$6,082,460
Juices	\$3,439,430
Frozen Juices	\$446,660
Other Juices	\$2,992,770
Fruits & Vegetables	\$13,460,010
Fresh Fruits & Vegetables	\$10,191,350
Frozen Fruits & Vegetables	\$1,207,150
Canned Fruits & Vegetables	\$1,533,690
Other Vegetables	\$527,820
Dairy Products	\$11,410,080
Eggs	\$1,338,500
Fresh Whole Milk All Types	\$2,439,240
Cream	\$366,880
Butter & Margarine	\$898,640
Cheese	\$3,211,320
Ice Cream Related Products	\$2,001,830
Other Dairy Products	\$1,153,670
Sugar & Other Sweets	\$7,252,590
Candy & Chewing Gum	\$4,773,480
Jams, Jellies, and Preserves	\$1,448,420
Sugar & Artificial Sweeteners	\$1,030,690
Fats & Oils	\$1,036,170
Fats & Oil Products	\$409,850
Non-Dairy Cream	\$289,440
Peanut Butter	\$336,880
Non-Alcoholic Beverages	\$11,145,330
Coffee	\$2,182,350
Non-Carbonated Beverages	\$3,544,300
Carbonated Beverages	\$4,779,060

Analysis Geography: Tangerine Road & Oracle Road
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Food at Home

Custom Trade Area

Tea	\$639,620
Prepared Foods	\$20,307,320
Canned / Packaged Soup	\$1,465,850
Frozen Meals	\$1,312,940
Frozen Prepared Food	\$2,775,100
Potato Chips & Other Snacks	\$2,797,670
Nuts	\$1,122,380
Salt & Other Seasonings	\$805,460
Sauces & Gravies	\$1,428,560
Prepared Salads	\$676,700
Baby Food	\$1,051,470
Condiments	\$2,635,140
Miscellaneous Prepared Food	\$4,236,050
Housekeeping Supplies	\$6,808,520
Soaps & Detergents	\$767,160
Other Laundry & Cleaning Products	\$591,820
Paper Towels & Napkins	\$2,189,450
Miscellaneous Housekeeping Products	\$3,260,090

Food Away From Home

Custom Trade Area

Lunch	\$26,013,960
Lunch Fast Food	\$14,517,410
Lunch Full Service	\$11,496,550
Dinner	\$28,555,010
Dinner Fast Food	\$7,812,330
Dinner Full Service	\$20,742,680
Breakfast & Brunch	\$7,248,710
Breakfast & Brunch Fast Food	\$3,083,390
Breakfast & Brunch Full Service	\$4,165,320
Other	\$33,036,660
Snacks & Non-Alcoholic Beverages	\$10,600,020
Catered Affairs	\$2,501,940
Food & Non-Alcoholic Beverages on Trips	\$19,934,700

Alcoholic Beverages

Custom Trade Area

Alcoholic Beverages at Home	\$16,306,660
Beer & Ale at Home	\$8,593,510
Whiskey at Home	\$1,122,890
Wine at Home	\$4,373,290
Other Alcoholic Beverages at Home	\$2,216,970
Alcoholic Beverages Away from Home	\$7,936,770
Beer & Ale Away from Home	\$1,064,950

Analysis Geography: Tangerine Road & Oracle Road
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Alcoholic Beverages

Custom Trade Area

Wine Away from Home	\$555,980
Other Alcoholic Beverages Away from Home	\$721,860
Alcohol at Restaurants & Etc.	\$5,593,980

Smoking Products & Supplies

Custom Trade Area

Cigarettes	\$7,929,220
Cigars, Pipes, and Other Tobacco Products	\$1,059,770

Personal Care Products & Services

Custom Trade Area

Services	\$9,014,580
Products	\$9,140,110
Hair Care Products	\$2,444,360
Non-Electric Articles for Hair	\$278,110
Oral Hygiene Products & Articles	\$1,245,210
Shaving Needs	\$780,250
Cosmetics, Perfume, and Bath	\$2,800,630
Deodorant & Feminine Hygiene Products	\$1,407,890
Electric Personal Care Appliances	\$170,040
Wigs & Hairpieces	\$13,620

Day Care

Custom Trade Area

Babysitting & Child Care	\$968,970
Day Care, Nursery, and Pre-School	\$3,983,360
Eldercare	\$1,070,000

Household Furnishings & Services

Custom Trade Area

Household Services	\$11,358,750
Domestic Service	\$4,081,570
Gardening & Lawn Service	\$4,087,860
Miscellaneous Home Services	\$530,790
Termite & Pest Control Services	\$392,200
Moving, Storage, and Freight	\$2,266,330
Domestic Textiles	\$4,897,130
Bathroom Linens	\$1,268,570
Bedroom Linens	\$3,628,560
Window & Furniture Covers	\$6,770,250
Kitchen & Dining Room Linens	\$272,090
Other Linens	\$191,960
Curtains & Drapes	\$1,611,180
Slipcovers & Decorative Pillows	\$212,940

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Household Furnishings & Services

Custom Trade Area

Sewing Materials	\$938,380
Window Coverings	\$600,050
Non-Permanent Floor Coverings	\$839,870
Other Household Decorative Items	\$2,103,780
Bedroom Furniture	\$4,163,950
Mattress Springs	\$1,904,510
Other Bedroom Furniture	\$2,259,440
Living & Dining Room Furniture	\$6,924,790
Living Room Chairs	\$1,602,400
Living Room Tables	\$600,270
Sofas	\$2,996,250
Kitchen & Dining Room Furniture	\$1,725,870
Other Furniture	\$4,468,870
Infants Furniture	\$178,160
Patio, Porch, and Outdoor Furniture	\$877,160
Other Living & Family Room Furniture	\$1,947,470
Office Furniture & Equipment Home	\$570,810
Rental Office Furniture & Equipment Home	\$132,720
Infants Equipment	\$145,590
Lamps & Lighting Fixtures	\$450,450
Closet & Storage Items	\$166,510
Major Household Appliances	\$6,625,900
Purchase & Install Window AC	\$263,540
Purchase & Install Refrigerator Freezer	\$1,716,200
Purchase & Install Clothes Washer	\$654,080
Purchase & Install Clothes Dryer	\$553,750
Purchase & Install Stoves & Ovens	\$1,085,670
Purchase & Install Microwave Ovens	\$292,430
Purchase & Install Dishwashers	\$646,060
Repair of Household Appliances	\$809,210
Sewing Machines	\$119,480
Electric Floor Cleaning Equipment	\$485,480
Small Appliances & Housewares	\$14,798,320
Small Electric Kitchen Appliances	\$885,740
Portable Heating & Cooling Equipment	\$262,400
Plastic Dinnerware	\$466,650
China & Other Dinnerware	\$2,457,600
Flatware	\$897,600
Glassware	\$1,009,500
Serving Pieces	\$476,840
Non-Electric Cookware	\$2,843,050
Clocks	\$123,810
Smoke Alarm	\$31,210
Miscellaneous Household Items	\$5,343,920
Miscellaneous Household Equipment	\$10,352,190

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Household Furnishings & Services

Custom Trade Area

Power Tools	\$1,683,330
Non-Power Hand Tools	\$663,160
Fresh Flowers & Potted Plants	\$3,928,830
Outdoor Equipment	\$167,010
Lawn & Garden Supplies	\$2,724,590
Rental & Repair of Lawn Mowing Equipment	\$170,380
Yard Machinery Power & Non-Power	\$1,014,890
Household Repairs	\$26,281,900
Wall to Wall Carpet	\$3,157,030
Heat, AC, Electric Labor & Materials	\$2,946,460
Plumbing & Water Heater Labor & Materials	\$1,504,160
Electrical Supplies & Heating & Cooling Equipment	\$101,350
Construction Materials	\$420,730
Hard Surface Floor Labor & Materials	\$521,800
Floor Repair & Replacement Materials	\$124,220
Patio, Masonry, and etc. Materials	\$31,460
Landscaping Materials	\$81,400
Remodeling & Maintenance Repair Materials	\$227,880
Paint & Wallpaper Supplies & Equipment	\$600,620
Paneling, Roofing, and Siding Materials	\$721,360
Plumbing Supplies & Equipment	\$225,410
Security System Management Fees	\$393,810
Miscellaneous Household Repairs	\$28,600
Miscellaneous Equipment & Hardware	\$4,130
Capital Improvements Material	\$3,138,820
Capital Improvements Labor	\$8,462,710
Roofing & Gutters Labor & Materials	\$2,605,540
Painting & Papering Labor & Materials	\$984,410
TV, Radio, and Sound Equipment	\$34,500,830
Comm Antenna or Cable TV	\$7,917,380
Color TVs All	\$2,904,520
VCRs & Video Disc Players	\$645,990
Radios	\$776,090
Sound Components & Component System	\$3,350,840
Record, Tape, CD, or Video Mail Order	\$3,275,060
Purchased CD or Tape not Club	\$508,140
Video Cassettes, Tapes, Discs	\$973,400
Computer Software Accessories Home Use	\$1,062,200
Computer Hardware Home Use	\$8,689,620
Repair Computer System Home Use	\$109,130
Calculator or Other Office Machine Home Use	\$76,810
Rental Video Cassette Tapes	\$2,337,330
Telephone Answering Devices	\$36,680
Telephone Accessories	\$504,700
Video Games Hardware & Software	\$525,520

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Household Furnishings & Services

Custom Trade Area

Repair of TV, Radio, or Sound Equipment	\$791,500
Rental of Home Electronic Equipment	\$15,920

Housing Expenses

Custom Trade Area

Fuels & Utilities	\$2,278,230
Fuel Oil	\$1,204,720
Gas Bottled or Tank	\$906,690
Other Home Heating Fuels	\$166,820
Telephone Services	\$18,177,750
Telephone Service Excluding Mobile Phone	\$7,387,470
Telephone Service For Mobile Phone	\$10,790,280

Apparel

Custom Trade Area

Women's Apparel	\$23,078,350
Women's Coats & Jackets	\$2,657,510
Women's Dresses	\$1,435,630
Women's Sport Coats & Tailored Jackets	\$402,090
Women's Vests & Sweaters	\$1,499,850
Women's Shirts, Tops, and Blouses	\$4,054,290
Women's Skirts	\$1,107,660
Women's Pants	\$4,551,060
Women's Shorts & Shorts Sets	\$950,600
Women's Active Sportswear	\$604,610
Women's Sleepwear	\$569,610
Women's Undergarments	\$1,430,430
Women's Hosiery	\$538,570
Women's Suits	\$1,392,490
Women's Accessories	\$831,500
Women's Uniforms & Costumes	\$1,052,450
Men's Apparel	\$15,292,130
Men's Suits	\$1,850,430
Men's Sport Coats & Tailor Jackets	\$663,140
Men's Coats & Jackets	\$1,195,320
Men's Underwear	\$597,580
Men's Hosiery	\$354,760
Men's Nightwear & Loungewear	\$137,470
Men's Accessories	\$548,330
Men's Sweaters & Vests	\$556,080
Men's Active Sportswear	\$578,910
Men's Shirts	\$3,292,950
Men's Pants	\$3,894,230
Men's Shorts & Shorts Sets	\$857,540

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Apparel

Custom Trade Area

Men's Uniforms & Costumes	\$765,390
Girl's Apparel	\$4,614,800
Girl's Coats & Jackets	\$198,520
Girl's Dresses & Suits	\$396,160
Girl's Shirts, Blouses, and Sweaters	\$1,173,880
Girl's Skirts & Pants	\$1,262,300
Girl's Shorts & Shorts Sets	\$481,360
Girl's Active Sportswear	\$143,060
Girl's Underwear & Sleepwear	\$343,860
Girl's Hosiery	\$110,380
Girl's Accessories	\$78,710
Girl's Uniforms & Costumes	\$426,570
Boy's Apparel	\$3,737,370
Boy's Coats & Jackets	\$177,120
Boy's Sweaters	\$121,320
Boy's Shirts	\$862,830
Boy's Underwear	\$201,800
Boy's Nightwear	\$51,320
Boy's Hosiery	\$123,260
Boy's Accessories	\$62,300
Boy's Suits, Sport Coats, and Vests	\$102,380
Boy's Pants	\$1,152,320
Boy's Shorts & Shorts Sets	\$509,740
Boy's Active Sportswear	\$165,470
Boy's Uniforms & Costumes	\$207,510
Infants' Apparel	\$1,535,100
Infants' Coats, Jackets, and Snowsuit	\$32,600
Infants' Rompers, Dresses, and Outerwear	\$528,940
Infants' Undergarments	\$701,290
Infants' Sleeping Garments	\$96,210
Infants' Accessories	\$176,060
Footwear (Excl Infants')	\$8,480,680
Men's Footwear	\$2,774,510
Boy's Footwear	\$758,510
Girl's Footwear	\$842,430
Women's Footwear	\$4,105,230
Other Apparel Products & Services	\$24,402,240
Clothing Material & Pattern	\$817,660
Clothing Rental & Storage	\$2,208,670
Clothing Repair & Alteration	\$5,998,020
Shoe Repair & Other Shoe Service	\$85,020
Coin Operated Laundry Service	\$749,790
Laundry & Dry Cleaning not Coin Operated	\$2,052,210
Watches	\$1,408,000
Jewelry	\$10,624,540

Analysis Geography: Tangerine Road & Oracle Road
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Apparel

Custom Trade Area

Watch & Jewelry Repair	\$458,330
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Sports & Recreation

Custom Trade Area

Recreation \$11,822,610

Social or Recreational Civic Club Membership	\$2,771,610
Fees for Participant Sports	\$2,070,670
Admission to Sporting Events	\$2,174,700
Fees for Recreational Lessons	\$2,817,040
Music Instruments & Accessories	\$712,200
Rental & Repair Musical Instruments	\$35,260
Admission Fees for Entertainment	\$1,241,130

Sports Equipment \$14,805,180

General Sports & Exercise Equipment	\$2,963,140
Bicycles	\$717,230
Camping Equipment	\$334,740
Hunting Fishing Equipment	\$332,960
Winter Sport Equipment	\$476,830
Water Sport Equipment	\$582,900
Playground Equipment	\$367,420
Other Sports Equipment	\$1,101,820
Toys, Games, Hobbies, and Tricycles	\$7,928,140

Miscellaneous

Custom Trade Area

Photographic Equipment & Supplies \$2,333,200

Film	\$692,980
Film Processing	\$856,550
Photographic Equipment	\$783,670

Pet Expenses \$9,111,860

Pet Food	\$4,454,900
Pet Supplies & Medicine	\$666,600
Pet Services	\$195,130
Veterinarian Services	\$3,795,230

Reading Materials \$12,374,330

Books not Through Book Club	\$3,666,750
Books Through Book Club	\$4,648,360
Newspapers Single Copy & Subscriptions	\$3,715,310
Magazines Single Copy & Subscriptions	\$343,910

Travel \$33,597,820

Airline Fares on Trips	\$10,975,030
Intercity Bus Fares on Trips	\$465,690
Local Transportation on Trips	\$2,191,900
Intercity Train Fares on Trips	\$209,790

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Miscellaneous

Custom Trade Area

Ship Fares on Trips	\$829,230
Travel Items & Luggage	\$931,510
Entertainment Expense on Trips	\$8,498,600
Lodging While on Trips	\$9,496,070

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Education

Custom Trade Area

Room & Board	\$1,696,340
Board	\$1,573,150
Housing While Attending School	\$123,190
Tuition & School Supplies	\$24,688,980
College Tuition	\$14,977,110
Elementary & High School Tuition	\$4,251,910
Other School Tuition	\$1,060,540
School Books, Supplies, and Equipment for College	\$2,806,290
School Books, Supplies, and Equipment non College	\$1,593,130

Automotive

Custom Trade Area

Transportation	\$29,338,640
Towing Charges	\$80,640
Gasoline	\$28,998,470
Diesel Fuel	\$259,530
New Automobiles, Trucks, and Vans	\$59,983,330
New Cars	\$15,981,710
New Car Lease	\$15,819,530
New Trucks & Vans	\$26,696,590
New Motorcycles	\$1,485,500
Used Vehicles	\$31,086,680
Used Cars	\$16,562,850
Used Trucks & Vans	\$13,000,020
Used Motorcycles	\$1,523,810
Boats	\$3,976,670
Rented Vehicles	\$4,858,880
Auto Rental	\$4,337,150
Vehicle Rentals non Auto	\$521,730
Automotive Maintenance, Repair and Other	\$31,168,240
Motor Oil	\$558,980
Vehicle Audio Equipment	\$275,800
Miscellaneous Auto Repair Svcs	\$1,782,730
Tire Repair & Other Repair Work	\$1,768,550
Minor Automobile Parts & Accessories	\$2,842,540
Automobile Service Clubs	\$371,260
Add Coolant, Brake, and Transmission Fluid	\$142,940
Tires Purchased, Replaced, and Installed	\$4,084,800
Body Work, Painting, and Upholstry	\$1,387,580
Repair to Steering or Front End	\$748,630
Front End Alignment, Wheel Balance, Rotate	\$604,880
Repair to Engine Cooling System	\$915,320
Motor Tune Up	\$2,335,050
Lube, Oil & Filter Change	\$3,198,740

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Automotive

Custom Trade Area

Shock Absorber Replacement	\$223,160
Exhaust System Repair	\$474,500
Electrical System Repair	\$1,187,590
Motor Repair & Replacement	\$3,712,200
Brake Work	\$2,092,410
Clutch & Transmission Repair	\$2,226,090
Drive Shaft & Rear End Repair	\$234,490

Health Care

Custom Trade Area

Medical Services	\$32,086,020
Eye Care Services	\$2,203,690
Dental Services	\$11,839,170
Specialists Services	\$2,744,050
Physicians Services	\$8,341,270
Lab Tests & X Rays	\$1,783,260
Hospital Room	\$1,096,040
Hospital Service Other than Room	\$3,282,600
Care in Nursing Home	\$476,110
Other Medical Care Services	\$319,830
Drugs	\$35,497,750
Non-Prescription Drugs	\$2,755,940
Vitamins & Vitamin Supplements	\$1,826,760
Prescription Drugs	\$30,915,050
Medical Supplies	\$2,718,500
Eyeglasses & Contact Lenses	\$1,789,610
Hearing Aids	\$287,430
Topicals & Dressings	\$445,330
Purchase or Rent Medical & Surgical Equip.	\$196,130