LINK21

CONNECT NORTHERN CALIFORNIA

# MARKET ANALYSIS REPORT

## APPENDIX E: MOSAIC MARKET SEGMENTATION

March 2022

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## ISSUE AND REVISION RECORD

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## SHAREPOINT PATH

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# MOSAIC MARKET SEGMENTATION

The market segmentation exercise aims to classify the broad, diverse Northern California travel market into relatively homogenous groups. Mosaic USA® customer segmentation data from Experian[1] were used to inform the development of a customized market segmentation scheme for the Link21 Program (Link21).

Mosaic USA® characterizes the United States population into 19 overarching groups and 71 unique types, summarized in **Figure 1** and **Figure 2**, respectively. These groups and types are created using cluster analyses based on a large number of demographic, lifestyle, economic, and financial variables.

**Figure 1. Overarching Groups**

| Group/Type | Group/Type Name | One-Line Description |
|---|---|---|
| A | Power Elite | The wealthiest households in the US, living in the most exclusive neighborhoods, and enjoying all that life has to offer |
| B | Flourishing Families | Affluent, middle-aged families and couples earning prosperous incomes and living very comfortable, active lifestyles |
| C | Booming with Confidence | Prosperous, established couples in their peak earning years living in suburban homes |
| D | Suburban Style | Middle-aged, ethnically-mixed suburban families and couples earning upscale incomes |
| E | Thriving Boomers | Upper-middle-class baby boomer-age couples living comfortable lifestyles settled in suburban homes |
| F | Promising Families | Young couples with children in starter homes, living child-centered lifestyles |
| G | Young City Solos | Younger and middle-aged singles living active and energetic lifestyles in metropolitan areas |
| H | Bourgeois Melting Pot | Middle-aged, established couples living in suburban homes |
| I | Family Union | Middle income, middle-aged families living in homes supported by solid blue-collar occupations |
| J | Autumn Years | Established and mature couples living gratified lifestyles in older homes |
| K | Significant Singles | Diversely aged singles earning mid-scale incomes supporting active city styles of living |
| L | Blue Sky Boomers | Middle-class baby boomer-aged households living in small towns |
| M | Families in Motion | Working-class families with young children, earning moderate incomes in smaller residential communities |
| N | Pastoral Pride | Eclectic mix of lower middle-class consumers who have settled in country and small town areas |
| O | Singles and Starters | Young singles starting out and some starter families living a city lifestyle |
| P | Cultural Connections | Diverse, mid- and low-income families in urban apartments and residences |
| Q | Golden Year Guardians | Retirees living in old homes, settled residences and communities |
| R | Aspirational Fusion | Lower-income singles and single parents living in urban locations and striving to make a better life |
| S | Thrifty Habits | Cost-conscious adults living alone in urban areas |

*Source: Experian*



[1] More information about the Mosaic USA data product by Experian can be found here: https://www.experian.com/content/dam/marketing/na/assets/ems/marketing-services/documents/brochures/mosaic-brochure.pdf.

**Figure 2. Unique Types**

| | |
|---|---|
| A01 | American Royalty |
| A02 | Platinum Prosperity |
| A03 | Kids and Cabernet |
| A04 | Picture Perfect Families |
| A05 | Couples with Clout |
| A06 | Jet Set Urbanites |
| B07 | Across the Ages |
| B08 | Babies and Bliss |
| B09 | Family Fun-tastic |
| B10 | Cosmopolitan Achievers |
| C11 | Sophisticated City Dwellers |
| C12 | Golf Carts and Gourmets |
| C13 | Philanthropic Sophisticates |
| C14 | Boomers and Boomerangs |
| D15 | Sport Utility Families |
| D16 | Settled in Suburbia |
| D17 | Cul de Sac Diversity |
| D18 | Suburban Nightlife |
| E19 | Consummate Consumers |
| E20 | No Place Like Home |
| E21 | Unspoiled Splendor |
| F22 | Fast Track Couples |
| F23 | Families Matter Most |
| G24 | Ambitious Singles |
| G25 | Urban Edge |
| H26 | Progressive Assortment |
| H27 | Life of Leisure |
| H28 | Everyday Moderates |
| H29 | Destination Recreation |
| I30 | Potlucks and the Great Outdo |
| I31 | Hard Working Values |
| I32 | Steadfast Conventionalists |
| I33 | Balance and Harmony |
| J34 | Suburban Sophisticates |
| J35 | Rural Escape |
| J36 | Settled and Sensible |
| K37 | Wired for Success |
| K38 | Modern Blend |
| K39 | Metro Fusion |
| K40 | Bohemian Groove |
| L41 | Booming and Consuming |
| L42 | Rooted Flower Power |
| L43 | Homemade Happiness |
| M44 | Creative Comfort |
| M45 | Growing and Expanding |
| N46 | True Grit Americans |
| N47 | Countrified Pragmatics |
| N48 | Rural Southern Bliss |
| N49 | Touch of Tradition |
| O50 | Full Steam Ahead |
| O51 | Digitally Savvy |
| O52 | Urban Ambition |
| O53 | Colleges and Cafes |
| O54 | Influenced by Influencers |
| O55 | Family Troopers |
| P56 | Mid-Scale Medley |
| P57 | Modest Metro Means |
| P58 | Heritage Heights |
| P59 | Expanding Horizons |
| P60 | Striving Forward |
| P61 | Simple Beginnings |
| Q62 | Enjoying Retirement |
| Q63 | Footloose and Family Free |
| Q64 | Established in Society |
| Q65 | Mature and Wise |
| R66 | Ambitious Dreamers |
| R67 | Passionate Parents |
| S68 | Small Town Sophisticates |
| S69 | Urban Legacies |
| S70 | Thrifty Singles |
| S71 | Modest Retirees |

*Source: Experian*

As Mosaic is primarily used for consumer marketing purposes, its groups and types are oriented around purchase potential with key variables being age, discretionary income, interests, activities, and media consumption. While these key variables are related to travel and transportation, the groups and types are not optimized for differentiating between different travel behaviors. As such, a customized segmentation based on key variables, such as public transit and car usage for commuting, is needed for the Link21 market analysis.

That said, there are certain limitations to using Mosaic data for segmentation - primarily, structural issues regarding access to and quality of transit may be the true underlying cause propensity to use transit, rather than demographic characteristics. However, we associate demographics with propensity to use transit because these structural issues and under-investments tend to occur along demographic lines.

The remainder of this appendix describes the methodology used to develop 12 custom market segments and to estimate changes in the segments as the Northern California population continues to grow and change through 2040. It then presents pen portraits, or brief descriptions, for each of the 12 market segments.

## Development of Market Segments

The following principles informed the development of market segments for Link21:

- The size of the segments should neither be too small nor too large relative to each other; ideally all segments should be similarly sized.
- The demographic profiles of the segments should be relatively homogeneous to aid in their visualization and in the creation of pen portraits.
- The segments should be created consistent with the principles of the Link21 equity framework.

The process of developing the market segments followed five steps:

1. Define the key variables that will define the segmentation, including an order of priority.
2. Combine the Mosaic USA® types based on the primary variable (transit use).
3. Subdivide the resulting groups based on each additional key variable in turn.
4. Review the resulting segment solution and repeat steps 2 and 3 as necessary.
5. Select the preferred segment solution and develop segment profiles and pen portraits.

The data source used to create the segmentation is Experian's Grand Index, which includes more than 700 variables spread across the topics identified previously. Transportation variables are limited to work/commute travel, and no breakdown of public transit modes is available.

**Table 1** summarizes the 13 key variables used to define the market segmentation. In selecting these key variables, priority was placed on data associated with current and potential future travel behavior, including income, occupation, ethnicity, urbanicity, and family composition.

**Table 1. Key Variables Summary**

| VARIABLE | RATIONALE FOR INCLUSION |
|---|---|
| **Travel to work: Public transportation** | This is the primary variable of interest. |
| **Travel to work: Car alone** | Relevant in terms of the potential for mode shift and the potential use of park-and-ride facilities. |
| **Travel to work: Bicycle** | Relevant in terms of the need to provide for cyclists either at stations or on board. |
| **Vehicle classification – no vehicle in household** | An alternative indicator to Travel to work: Car alone that also takes into account the availability of a car for leisure travel. |
| **Household occupation** | People from different types of occupation (e.g., white vs. blue collar) are more or less likely to travel by rail. |
| **Income** | An alternative indicator to occupation that is more directly related to equity. |
| **Household size** | The number of people in the household can affect the availability and attractiveness of auto, which tends to be more attractive when people are traveling in groups, such as a family group (or couple). |
| **Children in the household** | Presence of children in the household is an alternative to household size, which also takes into account the point that it can be easier to travel by auto with young children. |
| **Age** | There is a relationship between age and transportation use with public transportation use generally higher among younger age groups. However, age is also closely related to other factors, such as the presence of young children in the household, working status, and income. |
| **Retired** | The proportion of the population in a segment that is retired will have a major impact on transportation. |
| **Urbanicity** | There is a strong relationship between urbanicity and use of public transportation, though to a substantial degree this is connected to the availability of transport options. In metropolitan city areas, transit is relatively attractive and auto unattractive while in rural areas the opposite is the case. |
| **Travel – domestic travel for vacation** | This is potentially an indicator of use of long-distance rail, though the reliability of its use in this way is uncertain. |
| **How green we are** | Attitudes towards the environment may have an impact on the propensity to use transit rather than auto, though the evidence for this tends to be quite weak. |

As steps 2 through 4 (from page 3) can result in multiple segmentation solutions, Steer developed a customized segmentation evaluation tool, customized for Link21, to help select the optimal combination of the various groups and types. The tool assesses how homogenous the Mosaic USA® types are within each of the proposed market segments, accounting for the relative population size of each type and the relative importance of each variable. The output is a series of market segments, which are then used to profile the Northern California travel market in terms of propensity to use rail, as described in the following section.

## Application of Market Segments

The resulting optimal market segmentation from the segmentation tool contains 12 segments that are broken down by share of the Northern California Megaregion's (Megaregion) population in **Table 2**.

**Table 2. Identified Market Segments and Megaregion Population Share**

| NAME | SHARE OF MEGAREGION POPULATION | RAIL/TRANSIT PROPENSITY INDEX (100 = NATIONAL AVERAGE) |
|---|---|---|
| **Multimodal Urbanites** | 10% | 469 |
| **Lower Income Transit Riders** | 6% | 386 |
| **Middle Income Metro Families** | 12% | 211 |
| **Young Starters** | 7% | 162 |
| **Higher Income Empty Nesters** | 6% | 132 |
| **Middle Aged and Middle Income** | 7% | 111 |
| **Comfortable Retirement** | 10% | 119 |
| **Nonurban Midlife Singletons** | 8% | 87 |
| **Blue Collar Suburban Families** | 7% | 61 |
| **Young Suburban Families** | 8% | 42 |
| **Lower Income Suburban Families** | 16% | 36 |
| **Lower Income Rural Retirees** | 4% | 26 |

The primary application of this segmentation is to profile the Northern California travel market in terms of propensity to use rail. This informs the rail ridership potential by cluster and along various corridors.

Each of the 12 segments has a different propensity to travel by rail/transit, as measured by a normalized index (see Table 2 for the index by market segment). The relative rail

potential originating from each hexcell is calculated by weighting a given hexcell's population by the rail/transit propensity index. This index is determined according to the market segment(s) of the hexcell in question.

**Table 3** shows the rail/transit propensity index by cluster, which was obtained by calculating a population-weighted average of all hexcells belonging to a given cluster.

**Table 3. Rail/Transit Propensities by Cluster**

| CLUSTER NAME | AVERAGE POPULATION-WEIGHTED RAIL/TRANSIT PROPENSITY |
|---|---|
| Gilroy | 1.34 |
| San Martin | 0.83 |
| Morgan Hill | 0.92 |
| Blossom Hill | 1.67 |
| Capitol | 1.86 |
| Tamien | 1.59 |
| San Jose Diridon | 1.70 |
| Merced | 0.69 |
| College Park | 1.76 |
| Santa Clara | 1.80 |
| Berryessa | 2.10 |
| Lawrence | 2.10 |
| Sunnyvale | 2.31 |
| Mountain View | 2.96 |
| San Antonio (Caltrain) | 2.30 |
| Santa Clara-Great America | 2.47 |
| Milpitas | 2.07 |
| California Avenue | 1.61 |
| Stanford Stadium | 1.73 |
| Palo Alto | 2.36 |
| Menlo Park | 2.12 |
| Atherton | 1.76 |

| CLUSTER NAME | AVERAGE POPULATION-WEIGHTED RAIL/TRANSIT PROPENSITY |
|---|---|
| Redwood City | 1.71 |
| San Carlos | 1.49 |
| Warm Springs-South Fremont | 1.73 |
| Belmont | 1.91 |
| Hillsdale | 1.82 |
| Turlock-Denair | 0.64 |
| Hayward Park | 1.63 |
| Fremont-Centerville | 1.96 |
| Fremont | 2.03 |
| San Mateo | 2.61 |
| Burlingame | 2.96 |
| Broadway | 1.94 |
| Union City | 1.94 |
| Millbrae | 1.89 |
| SFO International Airport | 2.75 |
| San Bruno (Caltrain) | 1.56 |
| South Hayward | 1.84 |
| San Bruno (BART) | 2.18 |
| South San Francisco (Caltrain) | 2.28 |
| Pleasanton | 1.22 |
| South San Francisco (BART) | 2.02 |
| Hayward (Amtrak) | 1.83 |
| Hayward (BART) | 2.05 |
| Colma | 2.10 |
| Modesto (Existing) | 0.62 |
| Castro Valley | 1.65 |
| Livermore | 1.08 |

| CLUSTER NAME | AVERAGE POPULATION-WEIGHTED RAIL/TRANSIT PROPENSITY |
|---|---|
| Bay Fair | 1.79 |
| Daly City | 2.03 |
| West Dublin Pleasanton | 1.15 |
| Vasco Road | 0.85 |
| Bayshore | 2.26 |
| Dublin-Pleasanton | 1.24 |
| Tracy (ACE) | 0.90 |
| Balboa Park | 2.00 |
| San Leandro | 2.03 |
| Glen Park | 2.55 |
| West Portal | 2.29 |
| Forest Hill | 3.50 |
| 24th Street & Mission | 4.39 |
| Oakland Coliseum | 2.34 |
| Castro | 4.63 |
| 22nd St | 3.72 |
| Church | 4.64 |
| 16th Street & Mission | 4.69 |
| Van Ness | 4.69 |
| Civic Center-UN Plaza | 4.69 |
| San Francisco (Caltrain) | 4.69 |
| Fruitvale | 2.66 |
| Powell Street | 4.69 |
| Montgomery Street | 4.53 |
| Embarcadero | 4.69 |
| Oakland Jack London | 3.20 |
| Lake Merritt | 3.23 |

| CLUSTER NAME | AVERAGE POPULATION-WEIGHTED RAIL/TRANSIT PROPENSITY |
|---|---|
| West Oakland | 3.00 |
| 12th Street-Oakland City Center | 3.73 |
| 19th Street-Oakland | 3.32 |
| Lathrop-Manteca | 0.59 |
| MacArthur | 4.07 |
| Emeryville | 4.37 |
| Rockridge | 2.84 |
| Ashby | 3.28 |
| West Berkeley | 3.46 |
| North Berkeley | 3.64 |
| Downtown Berkeley | 3.13 |
| Orinda | 1.07 |
| Lafayette | 1.17 |
| El Cerrito Plaza | 2.03 |
| Walnut Creek | 1.21 |
| El Cerrito Del Norte | 1.82 |
| Pleasant Hill-Contra Costa | 1.46 |
| Richmond | 2.25 |
| Larkspur | 1.69 |
| Stockton (Amtrak) | 0.82 |
| Stockton (ACE) | 0.94 |
| Downtown San Rafael | 2.18 |
| Concord | 1.24 |
| Marin Civic Center | 1.36 |
| North Concord-Martinez | 0.77 |
| Martinez | 0.98 |
| Pittsburg-Bay Point | 1.31 |

| CLUSTER NAME | AVERAGE POPULATION-WEIGHTED RAIL/TRANSIT PROPENSITY |
|---|---|
| Antioch | 0.88 |
| Novato Hamilton | 0.78 |
| Novato Downtown | 1.10 |
| Novato San Marin | 0.88 |
| Lodi (Existing) | 0.82 |
| Downtown Petaluma | 1.02 |
| Suisun-Fairfield | 1.18 |
| Fairfield-Vacaville | 0.58 |
| Cotati | 0.70 |
| Rohnert Park | 0.70 |
| Santa Rosa Downtown | 1.25 |
| Santa Rosa North | 0.98 |
| Sonoma County Airport | 0.72 |
| Davis | 1.08 |
| Sacramento | 0.45 |
| Roseville | 0.61 |
| Rocklin | 0.62 |
| Auburn | 0.45 |



## Future Year Growth

Growth is applied to the various market segments to reflect future year conditions that are driven by various trends. This exercise aims to ensure that changes to population profiles, specifically those that can affect rail and transit use, are taken into account. For example, nationally, the proportion of the population aged 65+ is forecast to increase from 15% to 22% with this potentially having a knock-on effect for rail use.

The Link21 population profile approach allocated population increases to the market segments that were expected to grow whereas segments that were not expected to grow remained at their current size. Given that significant population growth is forecast, this process will result in a change in the mix of segments. Additionally, given the aging national and megaregional population, this means that older Link21 groups will represent a higher proportion of the total in the future.

The steps taken to estimate future growth are as follows:

1. Identify links between variables in Metropolitan Planning Organization (MPO) forecasts and Link21 market segmentation.
2. Calculate county-level changes by market segment.
3. Distribute changes to each hexcell by market segment.

Note that the process does not involve more fundamental changes, such as some neighborhoods (or hexcells) changing Mosaic USA® group or type or the appearance of new segments. Rather, it reflects an underlying process of people aging and mostly being replaced by people like themselves through a mixture of natural population growth and net inward migration.

It is also worth noting that the profiles of each segment are expected to change over time and that these changes will vary between segments. This process is captured within the Uncertainty Analysis, described further in Chapter 10 and Appendix J.

**Table 4** details the changing megaregional population share of each market segment.

**Table 4. Changing Megaregional Population Share for Select Market Segments**

| NAME | SHARE OF MEGAREGION POPULATION (2040) | CHANGE IN SHARE FROM 2015 |
|---|---|---|
| **Multimodal Urbanites** | 10% | --- |
| **Lower Income Transit Riders** | 12% | +6% |
| **Middle Income Metro Families** | 6% | -6% |
| **Young Starters** | 7% | --- |
| **Higher Income Empty Nesters** | 7% | +1% |
| **Middle Aged and Middle Income** | 6% | -1% |
| **Comfortable Retirement** | 8% | -2% |
| **Nonurban Midlife Singletons** | 10% | +2% |
| **Blue Collar Suburban Families** | 7% | --- |
| **Young Suburban Families** | 8% | --- |
| **Lower Income Suburban Families** | 16% | --- |
| **Lower Income Rural Retirees** | 4% | --- |

## Pen Portraits

The following pages present pen portraits for each of the 12 market segments, covering several key characteristics described in **Table 5**.

**Table 5. Key Characteristics used in Pen Portraits**

| VARIABLE | DESCRIPTION |
|---|---|
| **Demographics and Travel Behavior** | |
| **Transit use** | The propensity to commute by public transportation and the propensity for households in the segment to have no vehicle based on an index where 100 is the national average (and therefore an index of 200 would be twice the average and 50 would be half the national average). |
| **Race/ethnicity** | The racial/ethnic mix of the segment based on the race/ethnicity of the head of the household. |
| **Method of travel to work** | Mode share for travel to work for the segment and the national average. The data are from the U.S. Census Bureau. |
| **Percent of population where household income <$35,000** | The percentage of the segment living in households where the income is less than $35,000, which is the Metropolitan Transportation Commission (MTC) definition of a low-income household. Also, it shows the average for comparative purposes, which is based on the mean of all segments in the Megaregion weighted by their relative population. |
| **Group income distribution** | The proportion of the segment population falling into different income bands. Also, it shows the average distribution for the Megaregion. |
| **Lifestyle Indicators** | |
| **Travel** | Relative frequency of traveling abroad for vacations: jet setter, occasional travel, and vacation at home. |
| **Technology** | Relative capability to use new technologies: technophile, competent with technology, and technophobe. |
| **Environmentalism** | Experian categorization of how aware people are about green issues: Behavioral Greens, Think Greens, Potential Greens, and True Browns. |
| **Social media** | Relative use of social media, such as Facebook, Twitter, YouTube, and LinkedIn: regular multiplatform user, below average user, and avoids social media. |
| **Sports and interests** | Describes participation in sports or other recreational activities. |

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CONNECT NORTHERN CALIFORNIA

# Megaregion Population
# Pen Portraits

# Megaregion Population
# Pen Portraits

| Population Segment | | % Megaregion Population |
|---|---|---|
| 1 | Multimodal Urbanites | 9.5% |
| 2 | Lower-Income Transit Riders | 5.6% |
| 3 | Middle-Income Metro Families | 11.6% |
| 4 | Young Starters | 6.9% |
| 5 | Higher-Income Empty Nesters | 5.8% |
| 6 | Middle-Aged and Middle-Income | 7.3% |
| 7 | Comfortable Retirement | 9.9% |
| 8 | Nonurban Midlife Singletons | 7.9% |
| 9 | Blue-Collar Suburban Families | 7.3% |
| 10 | Young Suburban Families | 7.7% |
| 11 | Lower-Income Suburban Families | 16.1% |
| 12 | Lower-Income Rural Retirees | 4.4% |

## Overview

The Link21 Market Segments were developed to support the analysis of rail potential across the Northern California Megaregion. To help visualize the typical characteristics of each segment, Pen Portraits were created and are provided in this document.

## Development of the Segments

The 12 Link21 Market Segments were developed from the Mosaic consumer classification, which defines 71 different types of households across the U.S. Underlying this classification is the ConsumerView national database, which brings together more than 300 data factors covering a wide range of demographic, lifestyle, attitudinal, and behavioral variables.

The 12 Market Segments were created by combining the 71 different household types using common transportation behaviors along with key demographics such as income, age, and ethnicity. In selecting the variables for creating the Link21 Market Segments, priority was placed on data associated with current and potential future travel behavior, including income, occupation, ethnicity, urbanicity, and family composition.

## Using the Pen Portraits

Behind each of the 12 Link21 Market Segments is a wealth of data describing typical characteristics and behaviors, and to help make sense of this the Pen Portraits were developed. These focus on what are deemed to be the most relevant characteristics of each segment, with a description of the indicators used provided on pages 3 and 4. On the following pages, each segment is then described using these indicators. The Pen Portraits are designed to provide a snapshot of each segment to help the reader create a mental picture of their typical traits.

# Pen Portraits

## Demographics and Transport Behavior

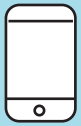
| Mosaic types | Transit use | Ethnicity | Method of travel to work | % of population where household income <$35k | Group income distribution |
|---|---|---|---|---|---|
| Which of the 71 Mosaic types fall into this segment. | The propensity to commute by public transportation and the propensity for households in the segment to have no vehicle based on an index where 100 is the national average (and therefore an index of 200 would be twice the average and 50 would be half the national average). | The ethnic mix of the segment based on the ethnicity of the head of the household. | Mode share for travel to work for the segment and the national average. The data are from the U.S. Census Bureau[1]. | The percentage of the segment living in households where the income is less than $35k; which is the state, Metropolitan Transportation Commission (MTC), and Bay Area Metropolitan Planning Organization (MPO) definition of a low-income household. Also showing the average for comparative purposes. The average is based on the mean of all segments in the Megaregion weighted by their relative population. | The proportion of the segment population falling into different income bands. Also showing the average distribution for the Megaregion. |

1 Experian ConsumerView database, 2019.

Megaregion Population

# Pen Portraits

## Lifestyle Indicators

|  **Travel** |  **Technology** |  **Environmentalism** |  **Social Media** |  **Sports and Interests** |
|---|---|---|---|---|
| Relative frequency of traveling abroad for vacations:<br><br>- Jet Setters<br>- Occasional Travel<br>- Vacation at Home | Relative capability to use new technologies:<br><br>- Technophile<br>- Competent with Technology<br>- Technophobe | Experian categorization of how aware people are about green issues:<br><br>- Behavioral Greens<br>- Think Greens<br>- Potential Greens<br>- True Browns | Relative use of social media, such as Facebook, Twitter, YouTube, and LinkedIn:<br><br>- Regular multiplatform user<br>- Below average user<br>- Avoids social media | Describes participation in sports or other recreational activities. |

Source: Experian ConsumerView database, 2019

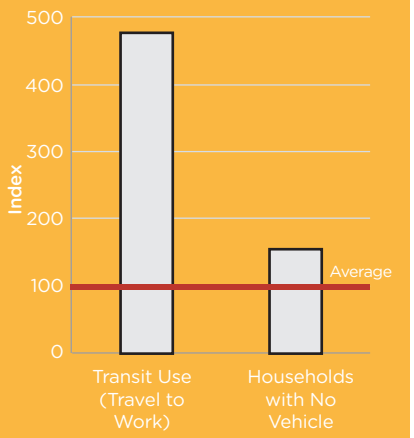
# 1

# Multimodal Urbanites



**Mosaic Type:**
A06 / E19 / G25

## Transit use





**Travel**
Jet Setters

**Technology**
Technophile

**Environmentalism**
Behavioral Greens

**Social Media**
Avoids social media other than LinkedIn

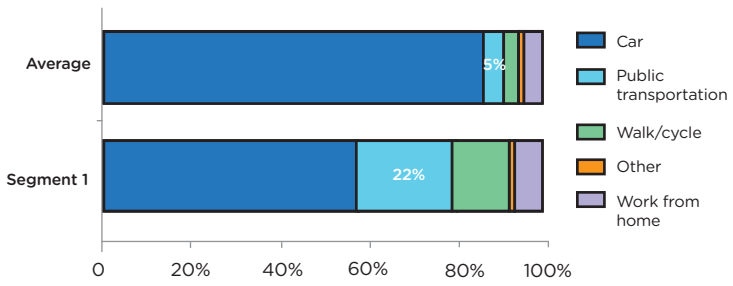
**Sports and Interests**
Regularly attends cultural events, has many hobbies, and loves sports and exercise

Most of this segment are metropolitan singles without children. They are well-educated with the majority having received a degree. Generally working in professional, managerial, or technical jobs, they have advanced quickly in their careers earning a good income and have high discretionary spending. This segment is one of the least likely to own a car and, therefore, has a high propensity to use public transportation to travel to work or even walk and cycle. Not owning a car is likely due to living in urban centers and, therefore, having the option of public transportation or active travel.

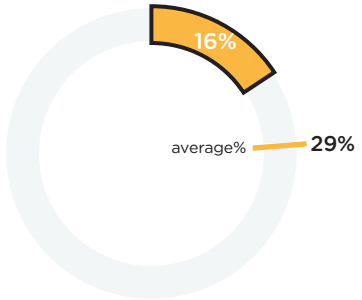
## Ethnicity

| | |
|---|---|
| Caucasian | 68.5% |
| Asian | 11.3% |
| African American | 11.0% |
| Hispanic | 9.1% |
| Native American | 0.1% |

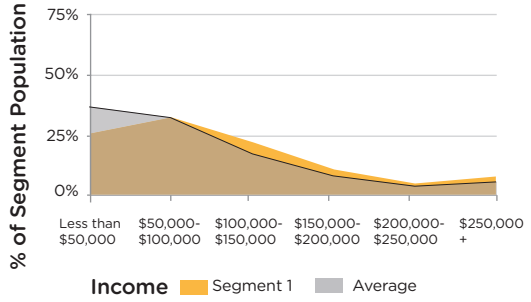
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution

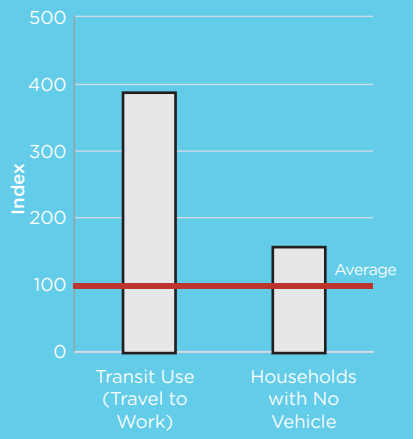


# 2

# Lower-Income Transit Riders

**Mosaic Type:**
K38 / K39 / O52 / P57 / P58 / P60 / P61 / R67 / S69 / S71

## Transit use




## Ethnicity

| | |
|---|---|
| Hispanic | 46.1% |
| African American | 29.0% |
| Caucasian | 16.9% |
| Asian | 7.9% |
| Native American | 0.1% |


**Travel**
Occasional Travel

**Technology**
Technophile

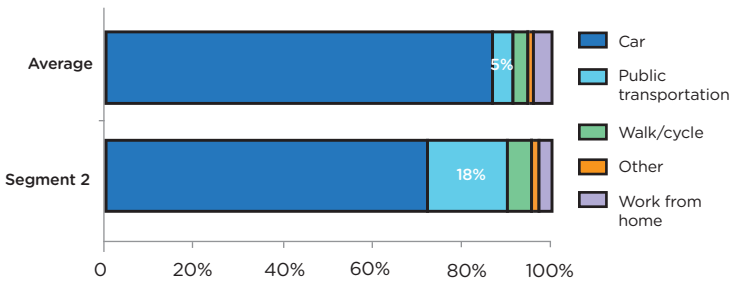
**Environmentalism**
Potential Greens

**Social Media**
Avoids social media

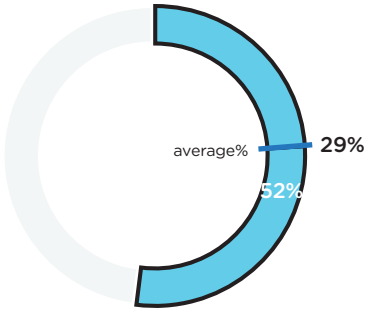
**Sports and Interests**
Likes video games and occasionally participates in sports and exercise

Many of this segment are from Hispanic or African American backgrounds with more than half of the population living in households with an income of less than $35k. Single parents make up the largest family composition. Almost 40% of this segment hasn't finished high school, and they are the least likely to have received a degree. Most are employed in blue-collar jobs. Out of everyone living in suburban areas, this segment has the highest rates of no car ownership. As a result, public transit use is relatively high.

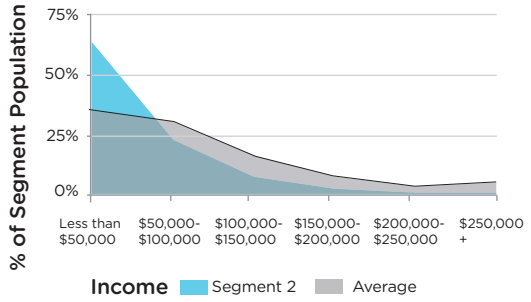
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution

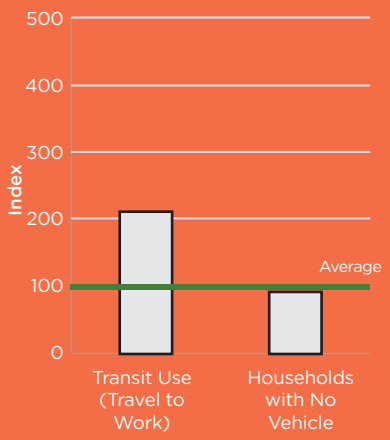


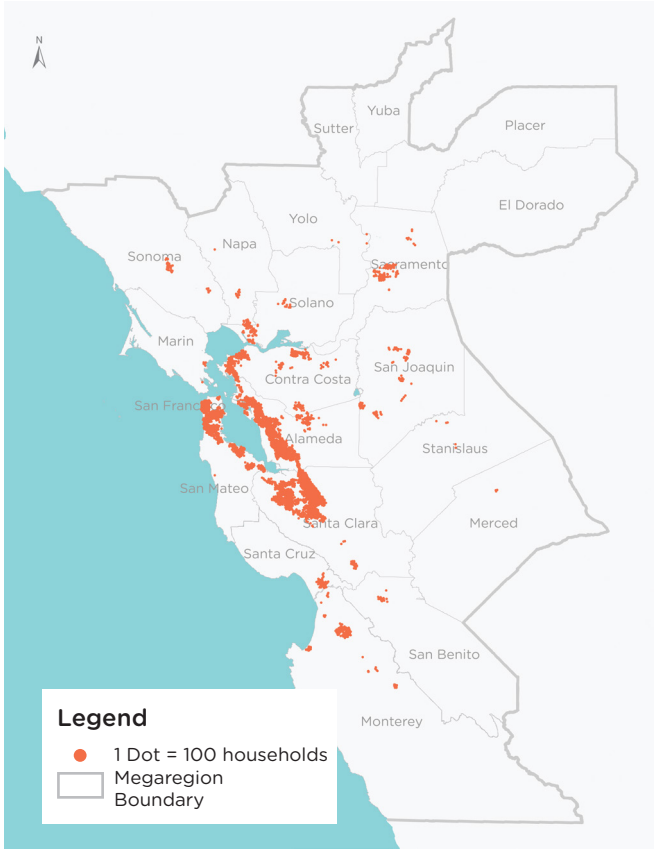
# 3

# Middle-Income Metro Families

**Mosaic Type:**
B10 / D18 / I32

## Transit use




**Travel**
Jet Setters

**Technology**
Technophile

**Environmentalism**
Behavioral Greens

**Social Media**
Regular multiplatform user

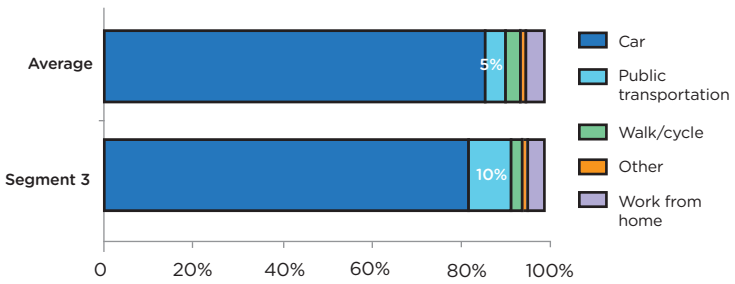
**Sports and Interests**
Interested in culture, in particular museums.
Likes soccer and has many hobbies

This segment is predominantly made up of families with Hispanic and Asian backgrounds with younger children. The parents have middle-income jobs across a range of professions reflecting a level of education where nearly all adults have graduated high school and many have gone on to a degree-level study. This segment is slightly more likely to own a car than a typical household but has levels of transit use almost twice the national average.

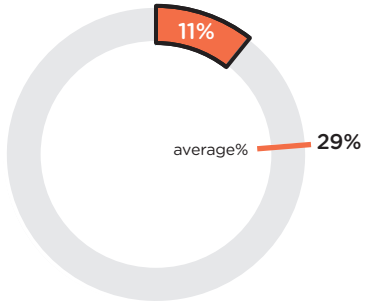
## Ethnicity

| | |
|---|---|
| Asian | 39.3% |
| Hispanic | 33.5% |
| Caucasian | 18.9% |
| African American | 8.2% |
| Native American | 0% |

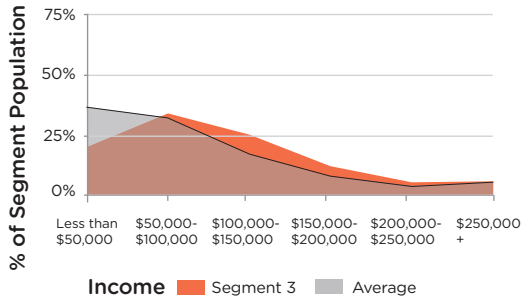
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution

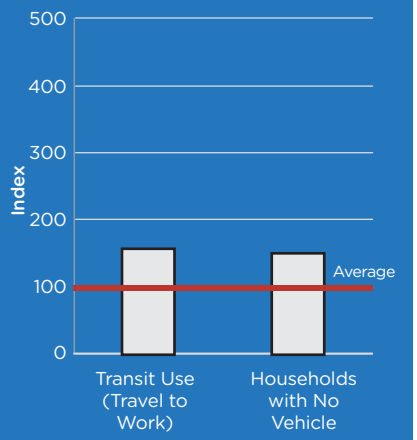


# 4

# Young Starters

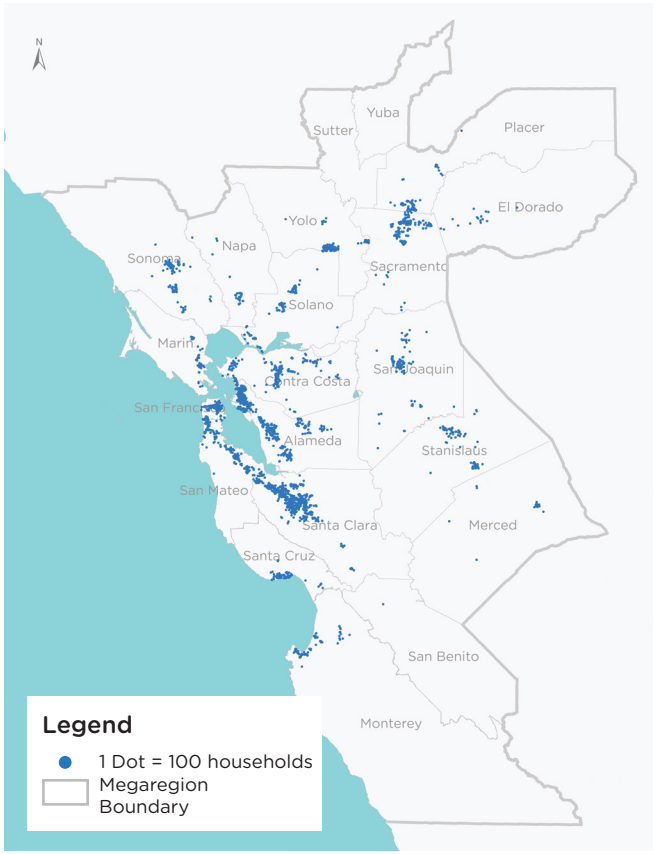
**Mosaic Type:**
O53 / O54 / Q65

## Transit use




## Ethnicity

| | |
|---|---|
| Caucasian | 57.8% |
| African American | 18.6% |
| Hispanic | 15.1% |
| Asian | 8.4% |
| Native American | 0.2% |




**Travel**
Occasional Travel

**Technology**
Technophile

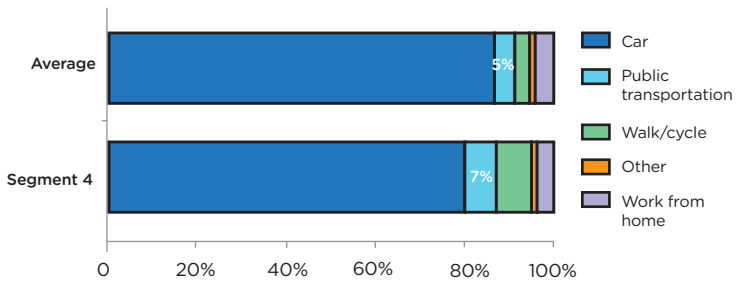
**Environmentalism**
Potential Greens

**Social Media**
Below average user

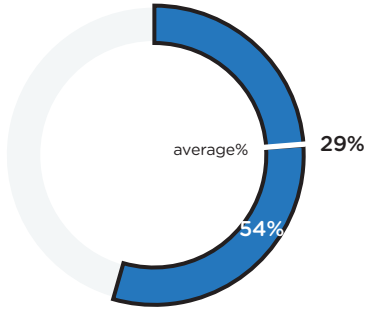
**Sports and Interests**
Interested in culture, arts, video games, and pursues "extreme" sports

This segment is predominately made up of younger Caucasian singletons without children. The large majority have received a high school education and are currently attending college. Generally, this segment has lower incomes in part because many of them are students but many also work in blue-collar jobs. This segment is less likely to own a car than the average household and, as a result, has higher than average transit use.

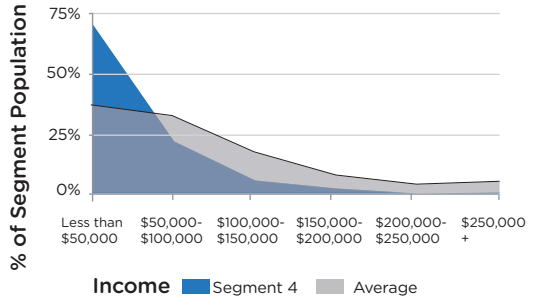
### Method of travel to work




### % of segment population where household income <$35k




### Segment Income Distribution



# 5

# Higher-Income Empty Nesters

**Travel**
Jet Setters

**Technology**
Competent with technology

**Environmentalism**
Think Greens/True Browns

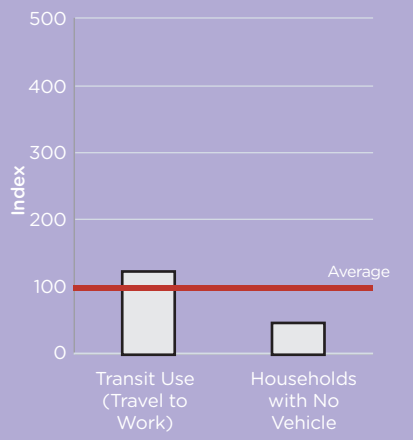
**Social Media**
Regular multiplatform user

**Sports and Interests**
Regularly attends cultural events, has many hobbies, and loves fitness


This is the most affluent segment in the Megaregion. They are generally Caucasian married couples with adult children. They are of an age where they are approaching retirement. With every household having at least one person who has gained a degree, they work in senior positions in professional, managerial, or technical jobs. Car ownership is highly prevalent, but public transportation use is still close to the average for the Megaregion.

**Mosaic Type:**
A01 / A09

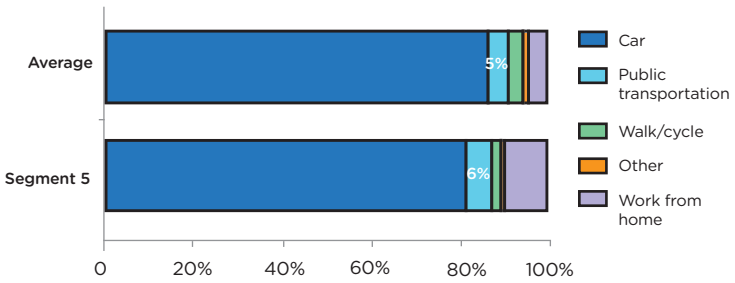
## Transit use



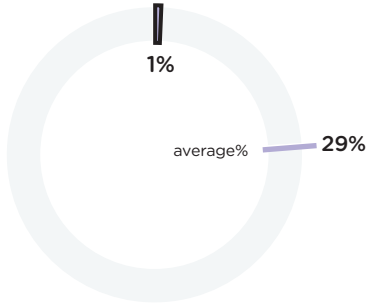

## Ethnicity

| | |
|---|---|
| Caucasian | 77.4% |
| Asian | 12.2% |
| Hispanic | 5.2% |
| African American | 5.2% |
| Native American | 0.1% |

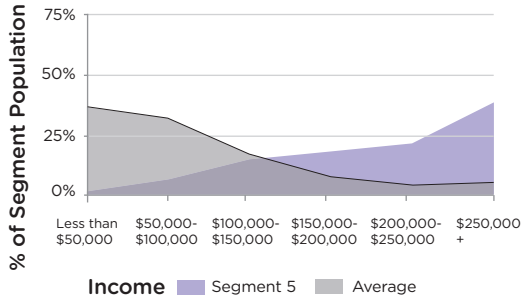
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution

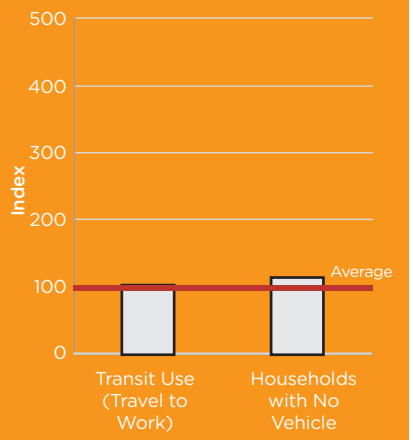


# 6

# Middle-Aged and Middle Income

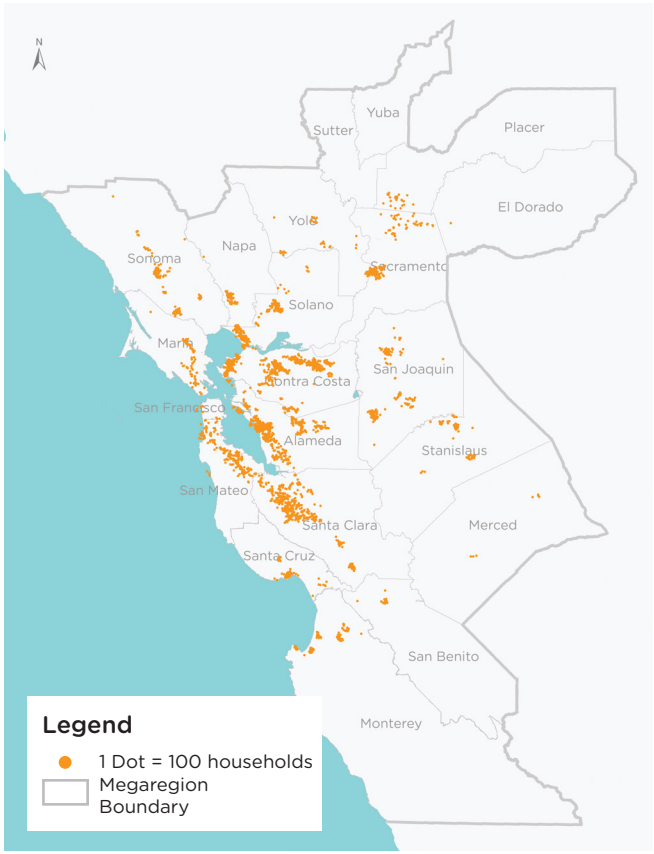
**Mosaic Type:**
H26 / K37

## Transit use




## Ethnicity

| | |
|---|---|
| Caucasian | 56.2% |
| Hispanic | 26.7% |
| Asian | 9.4% |
| African American | 7.5% |
| Native American | 0.2% |




**Travel**
Occasional Travel

**Technology**
Competent with technology

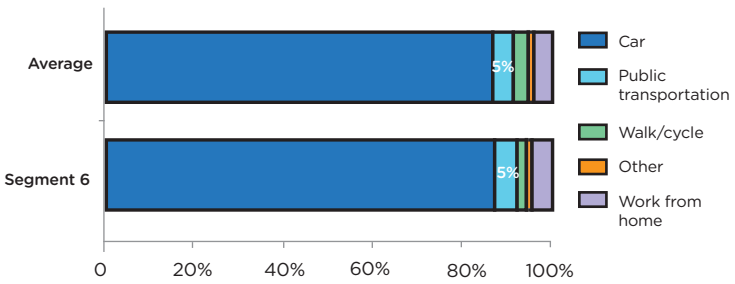
**Environmentalism**
Think Greens

**Social Media**
Avoids social media

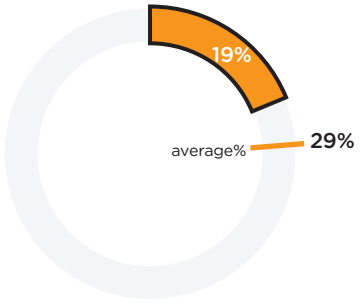
**Sports and Interests**
Interested in culture, many hobbies, pursues outdoor sports, such as climbing and snowboarding

This segment comprises middle-aged, married couples on middle incomes working across a range of professions. They live in the suburbs, and few have children still at home. They have average rates of car ownership and similarly average rates of public transportation use.

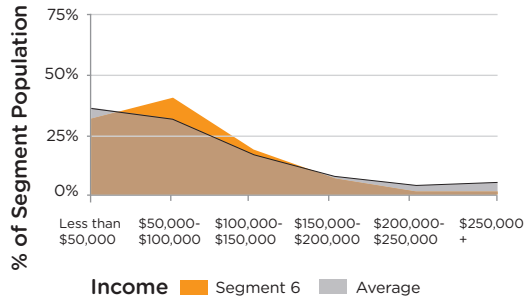
### Method of travel to work




### % of segment population where household income <$35k




### Segment Income Distribution

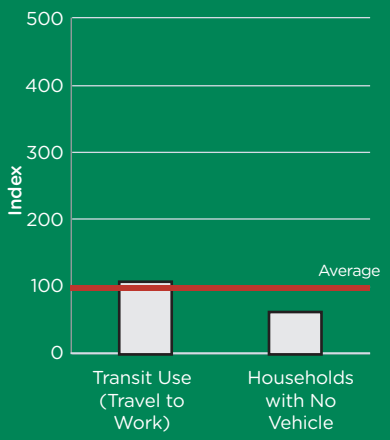


# 7

# Comfortable Retirement

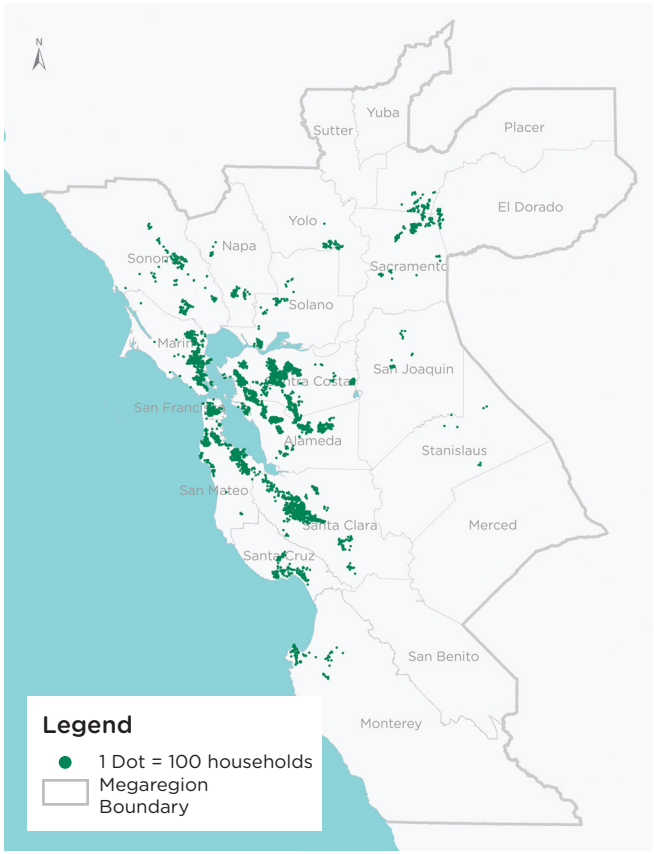
**MosaicType:**
C13 / D16

## Transit use




## Ethnicity

| | |
|---|---|
| Caucasian | 81.4% |
| Asian | 6.7% |
| African American | 6.1% |
| Hispanic | 5.7% |
| Native American | 0.1% |




**Travel**
Jet Setters

**Technology**
Competent with technology

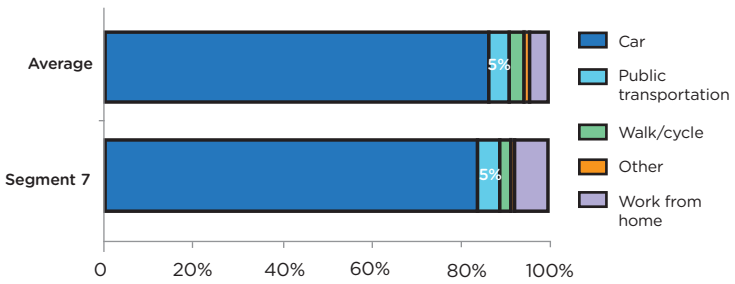
**Environmentalism**
Behavioral Greens

**Social Media**
Regular multiplatform user

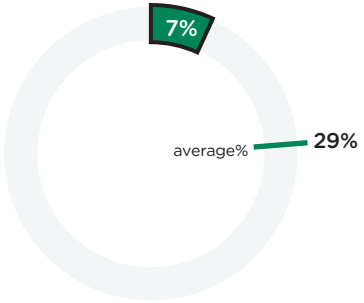
**Sports and Interests**
Regularly attends cultural events, has many hobbies, and loves outdoor pursuits, such as walking and camping

This segment consists of mostly Caucasian retired couples who have received a high level of education, worked in professional managerial jobs, and are now retired in city suburbs on a good pension. They have high rates of car ownership and slightly lower than average public transportation use. Those that are still working are likely to work from home.

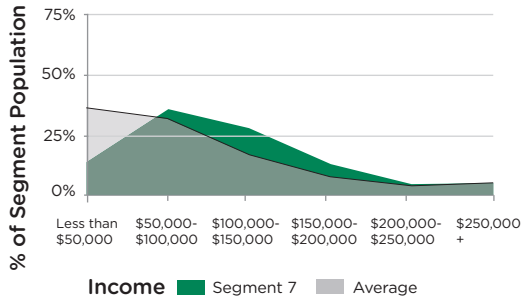
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution



# 8

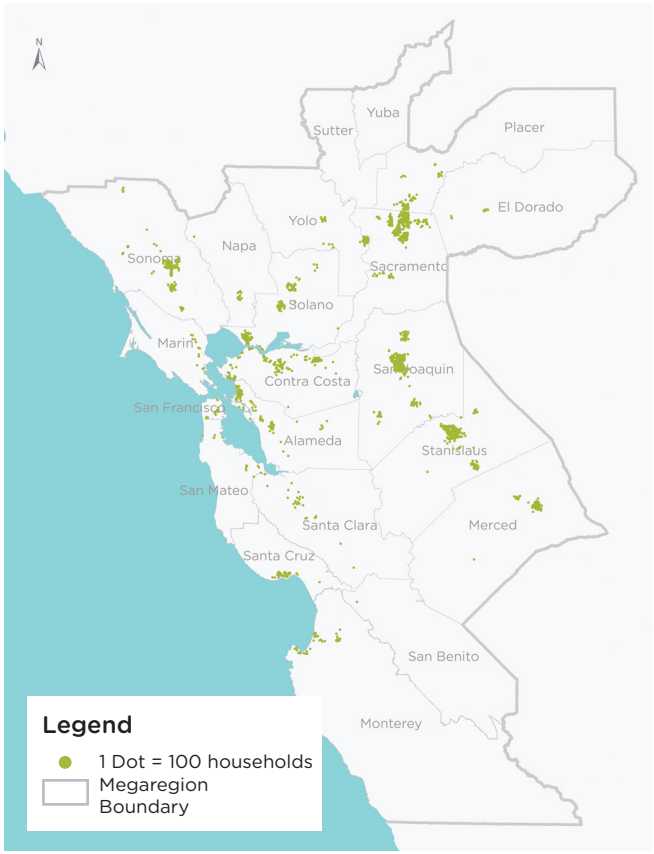
# Nonurban Midlife Singletons

**Mosaic Type:**
G24 / K40 / L42 / O50 / P56 / R66

## Transit use


## Ethnicity

| | |
|---|---|
| Caucasian | 72.0% |
| Hispanic | 15.1% |
| African American | 7.5% |
| Asian | 4.8% |
| Native American | 0.6% |




**Travel**
Vacation at Home

**Technology**
Competent with technology

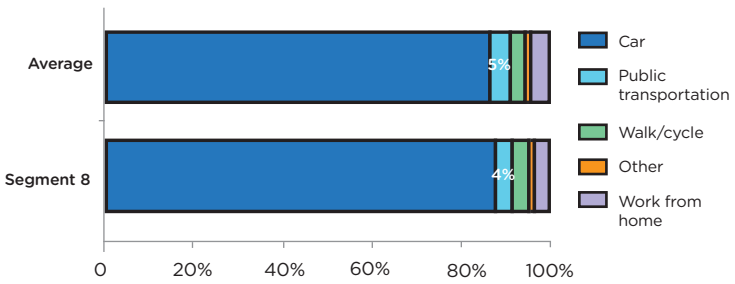
**Environmentalism**
Potential Greens

**Social Media**
Avoids social media

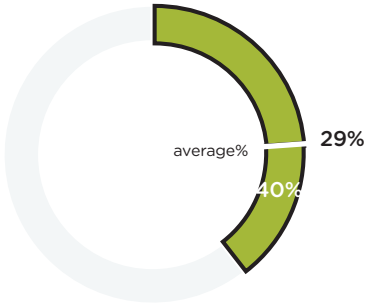
**Sports and Interests**
Interested in culture but has few hobbies and is uninterested in sports or exercise

This segment of middle-aged singletons without children works in a range of sectors but has lower than average incomes for the Megaregion. Although car ownership is lower than average for the Megaregion, public transportation use is low due to this segment living in the suburbs.

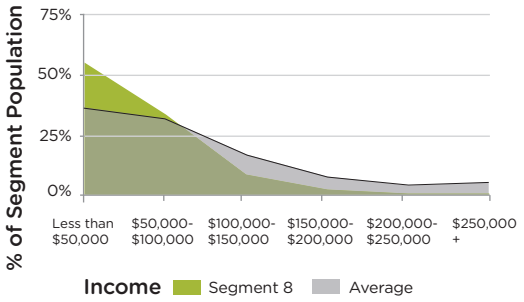
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution

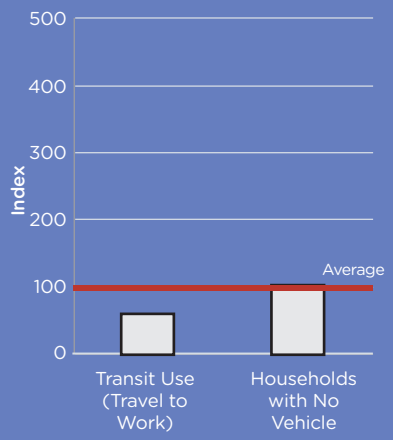


# 9

# Blue-Collar Suburban Families

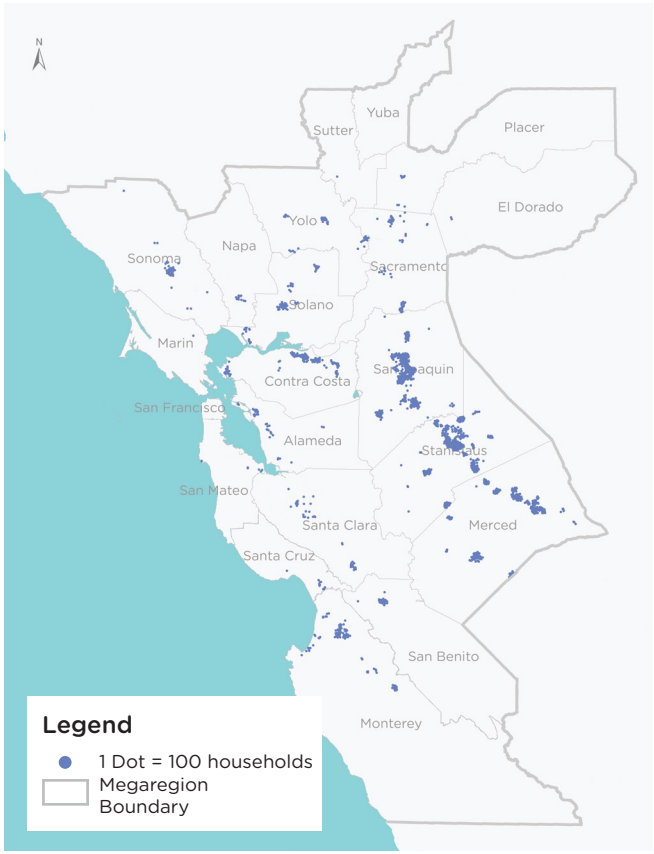
**Mosaic Type:**
I33 / O55 / P59

## Transit use




## Ethnicity

| | |
|---|---|
| Hispanic | 77.9% |
| Caucasian | 15.7% |
| African American | 3.7% |
| Asian | 2.3% |
| Native American | 0.4% |




**Travel**
Vacation at Home

**Technology**
Technophile

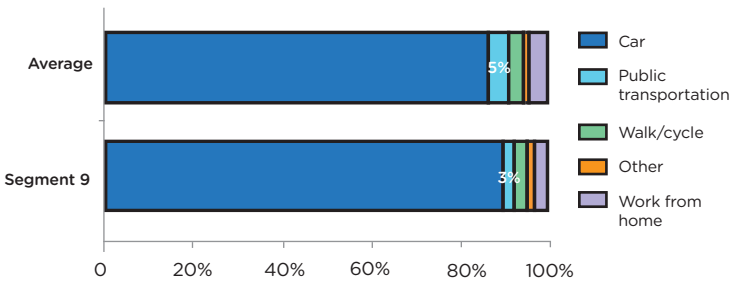
**Environmentalism**
Potential Greens

**Social Media**
Regular Instagram and Snapchat user

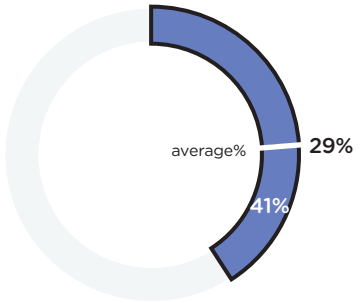
**Sports and Interests**
Loves video games, R&B and Hip Hop, but has few other hobbies or sporting interests

This segment is nearly all Hispanic families with younger children. Having generally received less education, the majority are employed in blue-collar jobs and, as a result, have low household incomes. Although car ownership is average, this segment is still one of the most likely to travel to work by car, in part due to living in suburban areas of the Megaregion.

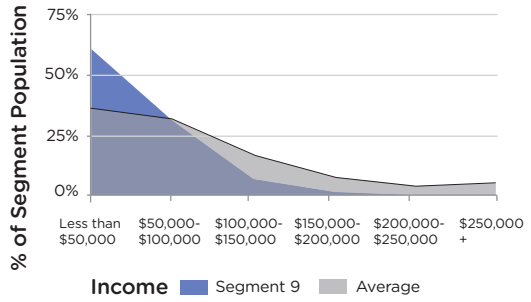
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution

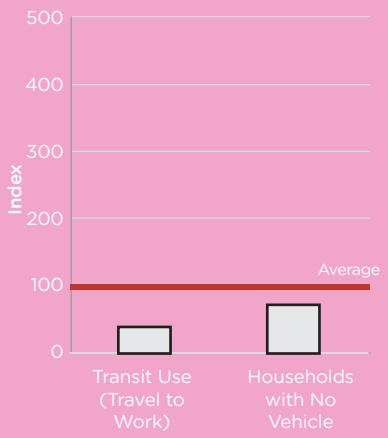


# 10

# Young Suburban Families

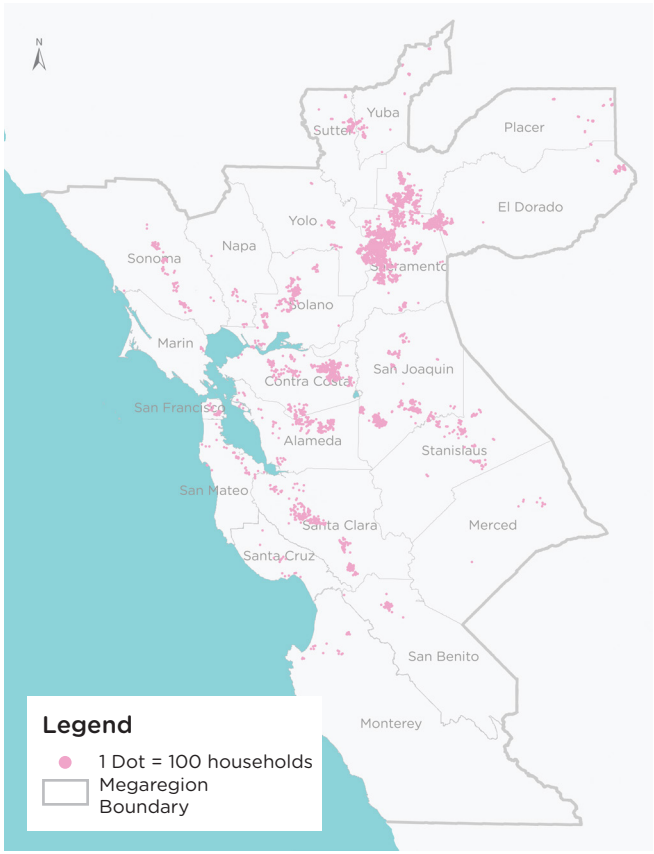
**Mosaic Type:**
A03 / A04 / A05 / B07 / B08 / C14 / D15 / D17 / F22 / F23 / H28 / I30 / I31 / M45

## Transit use




## Ethnicity

| | |
|---|---|
| Caucasian | 73.3% |
| Hispanic | 11.9% |
| African American | 7.8% |
| Asian | 6.9% |
| Native American | 0.2% |




**Travel**
Jet Setters

**Technology**
Competent with technology

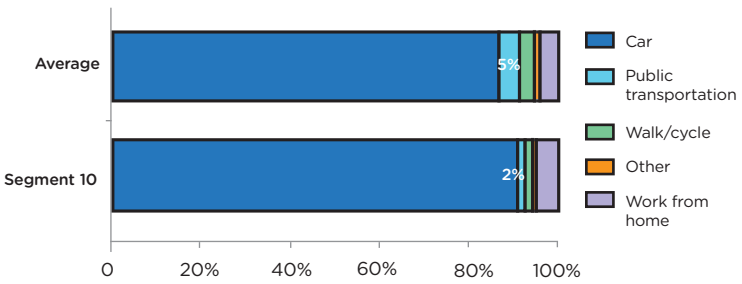
**Environmentalism**
Behavioral Greens/ True Browns

**Social Media**
Regular multiplatform user

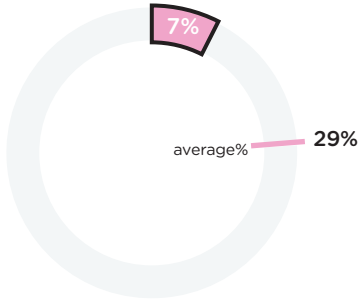
**Sports and Interests**
Regularly attends cultural events, has many hobbies particularly video games, uninterested in sports or exercise

This segment is typified by well-off young suburban families with younger children. With a range of educational achievement, they work across a range of sectors. Their high rates of car ownership correlate with their very low rates of public transportation use.

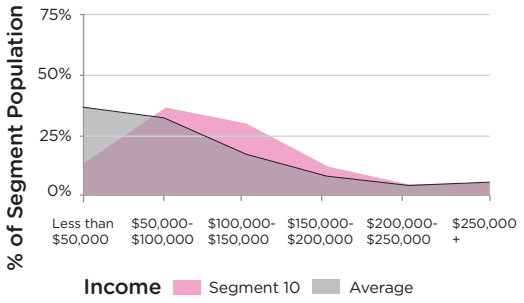
## Method of travel to work




## % of segment population where household income <$35k



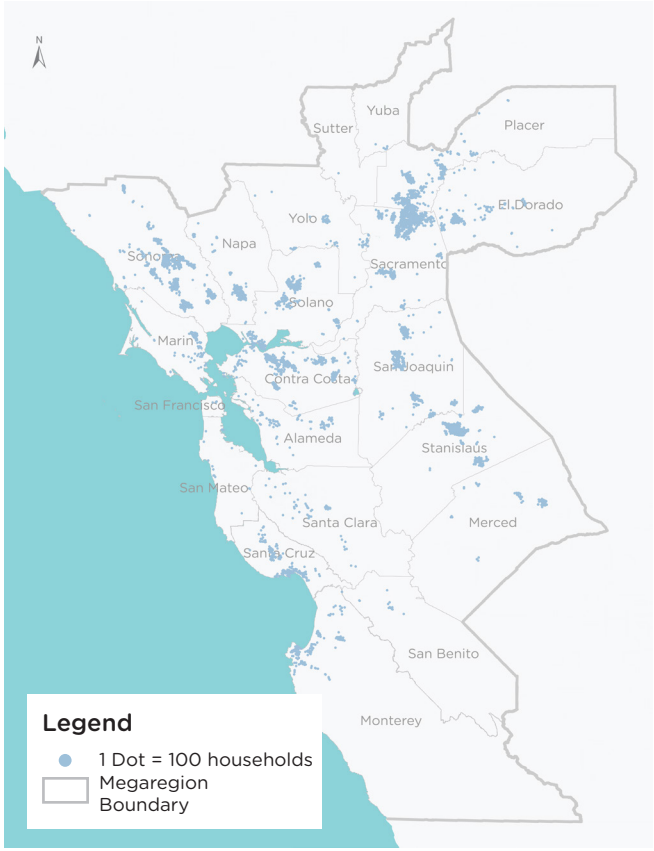

## Segment Income Distribution



# 11

# Lower-Income Suburban Retirees

**Mosaic Type:**
A02 / C11 / C12 / E20 / E21 / H27 / H29 / J34 / J36 / L41 / O51 / Q62 / Q63




**Travel**
Occasional Travel

**Technology**
Technophobe

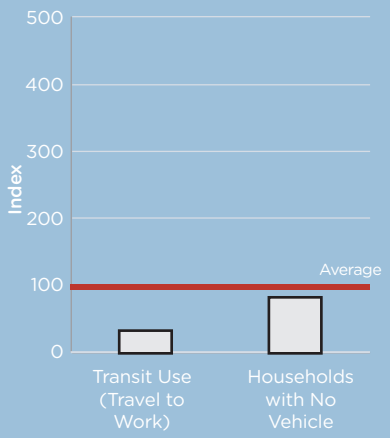
**Environmentalism**
Potential Greens

**Social Media**
Avoids social media

**Sports and Interests**
Attends cultural events, has a wide range of hobbies, and likes golf but uninterested in other sports or exercise

This segment is characterized by lower-income, mostly Caucasian retired couples. They live in suburban areas and, as a result, often have a car and use public transportation very little.

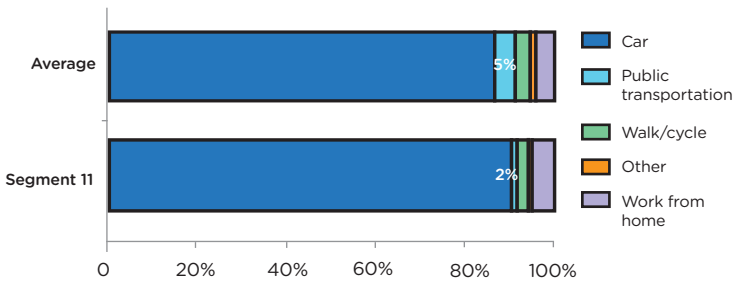
## Transit use



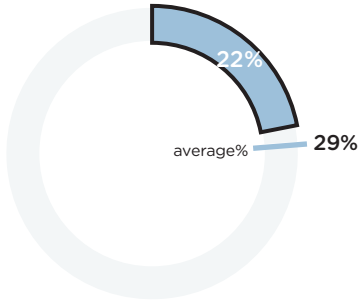

## Ethnicity

| | |
|---|---|
| Caucasian | 83.8% |
| Hispanic | 6.7% |
| African American | 6.4% |
| Asian | 2.8% |
| Native American | 0.3% |

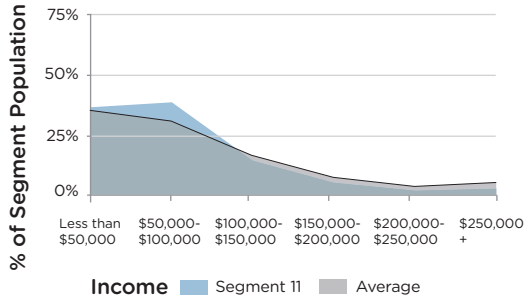
## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution

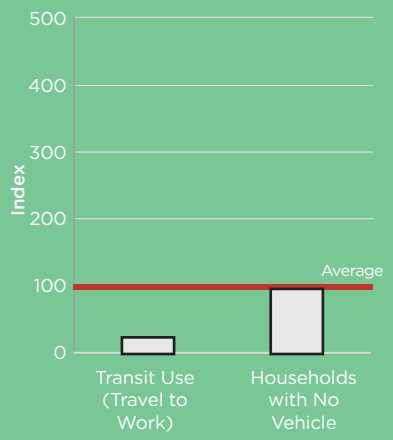


# 12

# Lower-Income Rural Retirees

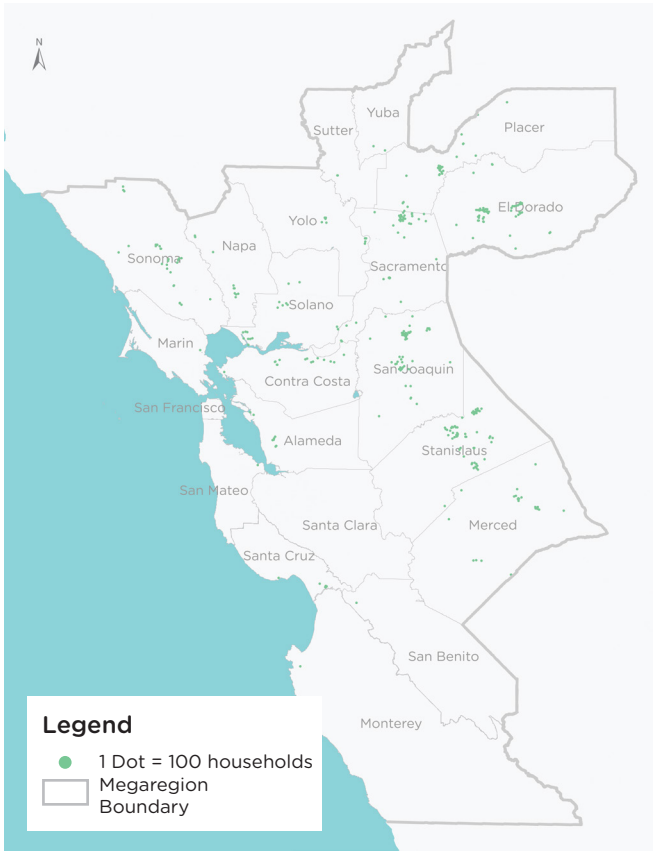
**Mosaic Type:**
J35 / L43 / M44 / N46 / N47 / N48 / N49 / Q64 / S68 / S70

## Transit use




## Ethnicity

| | |
|---|---|
| Caucasian | 81.7% |
| African American | 11.0% |
| Hispanic | 5.4% |
| Asian | 1.2% |
| Native American | 0.7% |




**Travel**
Vacation at Home

**Technology**
Technophobe

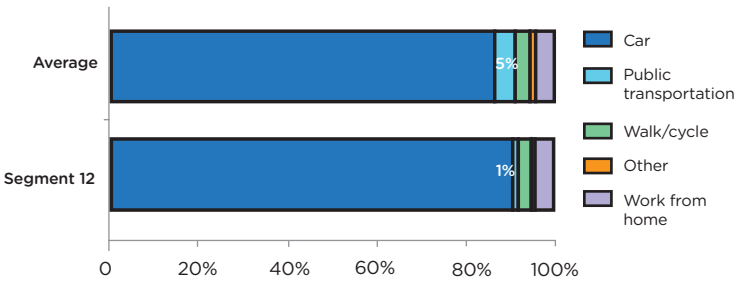
**Environmentalism**
Potential Greens

**Social Media**
Avoids social media

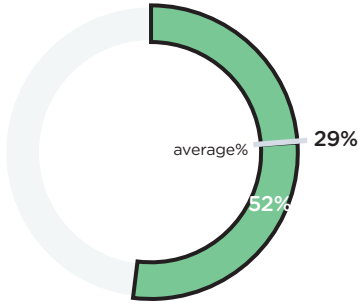
**Sports and Interests**
Likes gardening, country music, and fishing and has a few other hobbies or sporting interests

This segment is mostly retired couples living in rural areas. They come from a range of professions but without significant pensions and often have a small income. Living in rural areas, they have very low rates of public transportation use, but despite this they only have average rates of car ownership, potentially because of low incomes.

## Method of travel to work




## % of segment population where household income <$35k




## Segment Income Distribution