



## **Uptown Dallas**

Prepared for Uptown Dallas, Inc.

Market Study

**December 2019**

**Metrostudy-Dallas/Ft. Worth**

1255 West 15<sup>th</sup> Street, Suite 240  
Plano, TX 75075

Phone: 214.869.4916

Email: [pshipp@metrostudy.com](mailto:pshipp@metrostudy.com)

Web: [www.metrostudy.com](http://www.metrostudy.com)



<b>Profile</b>	<b>3 – 8</b>
<b>Economic/Demographic</b>	<b>7 – 11</b>
<b>Employment</b>	<b>12 – 14</b>
<b>Real Estate</b>	<b>15 – 21</b>
<b>Transportation</b>	<b>22 – 24</b>
<b>Uptown Data</b>	<b>25 – 28</b>
<b>Uptown Residents</b>	<b>29 – 37</b>





1993

Development in Uptown began in the 1980s with residential and commercial growth. As the neighborhood began to take shape, developers and residents alike saw an opportunity to enhance the area. Through consensus with the City of Dallas, Uptown Dallas, Inc. was formed in 1993 to scale, maintain and further improve the neighborhood. Uptown Dallas, Inc. celebrated 25 years in 2018.



591.8 Acres

Stretching just under one square mile, or 591.8 acres, Uptown is a diverse and dense neighborhood. The community includes numerous residential options, reputable companies, schools and a variety of retail and dining options.



58.1 Acres

Uptown has 19 square feet of greenspace per person totaling 58.1 acres. Open space includes Griggs Park which is 8 acres and Greenwood Cemetery, Calvary, Temple Emanuel, Anita Phelps Park and Freedman's Memorial comprise 44 acres. Katy Trail, a 3.5-mile, privately funded trail system built on an old railroad line defines Uptown's western border. Additionally, there are 53.5 acres of greenspace bordering Uptown including the award-winning Klyde Warren Park.



4.6 Miles

Founded in 1983 with the intent of returning heritage streetcars to the streets of Uptown, the McKinney Avenue Transit Authority successfully accomplished that goal in July of 1989. The M-Line's restored 7 vintage trolleys operates on 4.6 miles of track 365 days a year, providing safe, clean, reliable, and convenient public transportation free of charge.



\$6.47B

In 2019, the Uptown Public Improvement District valuation increased 6.6% to \$6.47B over 2018's valuation of \$6.1B.



99%

With only 10 acres of vacant, developable land, Uptown is 99% developed. New, exciting projects continue to be announced with new redevelopment and resulting density.

Source: UDI, DART



## Uptown Dallas Inc. vs. Dallas Downtown Improvement District



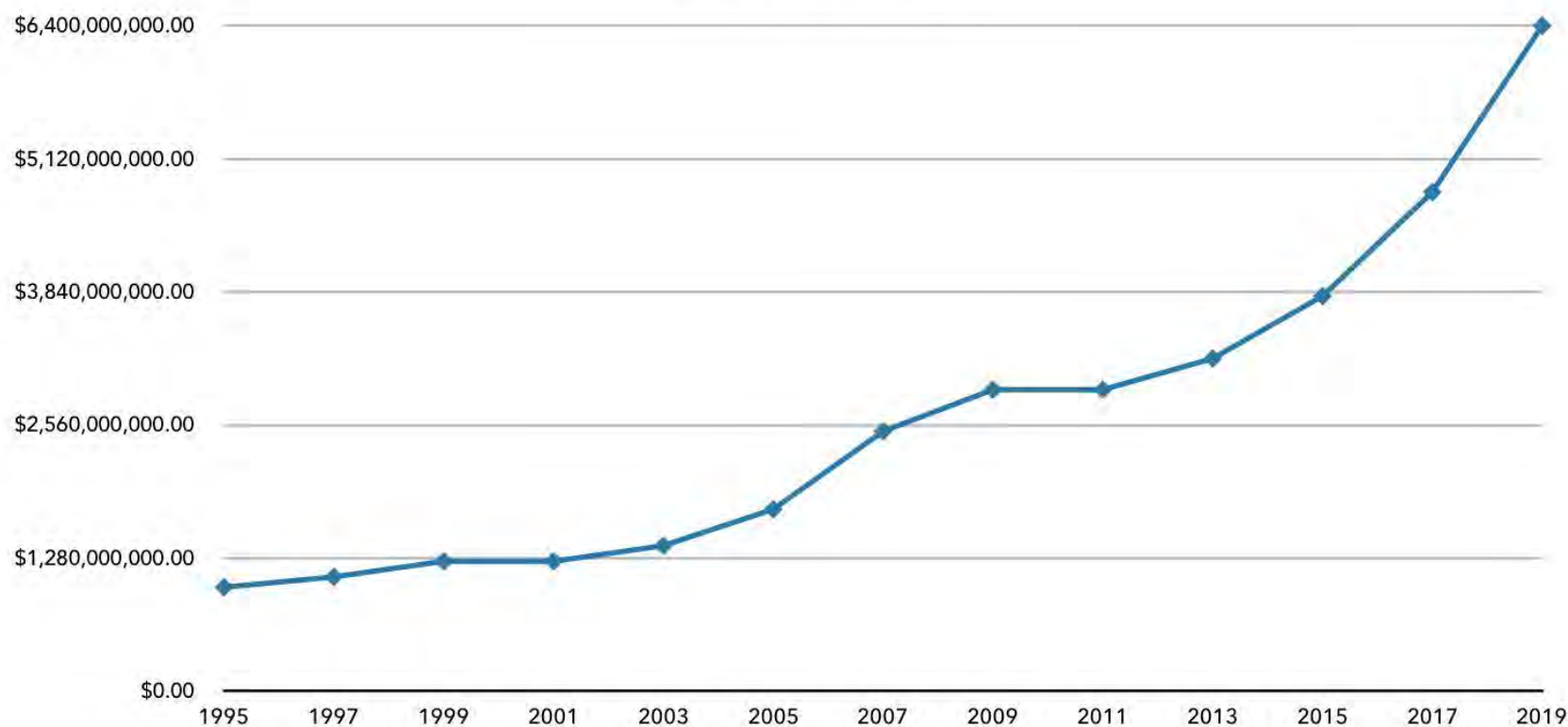
2017	2018	2019
<b>UDI</b> <ul style="list-style-type: none"> <li>• \$5.5B total value (8% growth)</li> <li>• 591.8 acres (0.92 square miles)</li> <li>• \$9.3M per acre</li> <li>• \$1.4M PID Assessment</li> </ul> <b>DDI</b> <ul style="list-style-type: none"> <li>• \$5.8B total value</li> <li>• 1,024 acres</li> <li>• \$5.7M per acre</li> <li>• \$6.6M PID assessment</li> </ul>	<b>UDI</b> <ul style="list-style-type: none"> <li>• \$6.1B total value (10% growth)</li> <li>• 591.8 acres (0.92 square miles)</li> <li>• \$10.3M per acre</li> <li>• \$1.4M PID Assessment</li> </ul> <b>DDI</b> <ul style="list-style-type: none"> <li>• \$6.5B total value</li> <li>• 1,024 acres</li> <li>• \$6.3M per acre</li> <li>• \$8.3M PID assessment</li> </ul>	<b>UDI</b> <ul style="list-style-type: none"> <li>• \$6.5B total value (7% growth)</li> <li>• 591.8 acres (0.92 square miles)</li> <li>• \$10.9M per acre</li> <li>• \$1.5M PID Assessment</li> </ul> <b>DDI</b> <ul style="list-style-type: none"> <li>• \$6.9B total value</li> <li>• 1,024 acres</li> <li>• \$6.7M per acre</li> <li>• \$8.9M PID assessment</li> </ul>

Source: UDI, DDI





**1995: \$525 BILLION**  
**2019: \$6.4 BILLION**

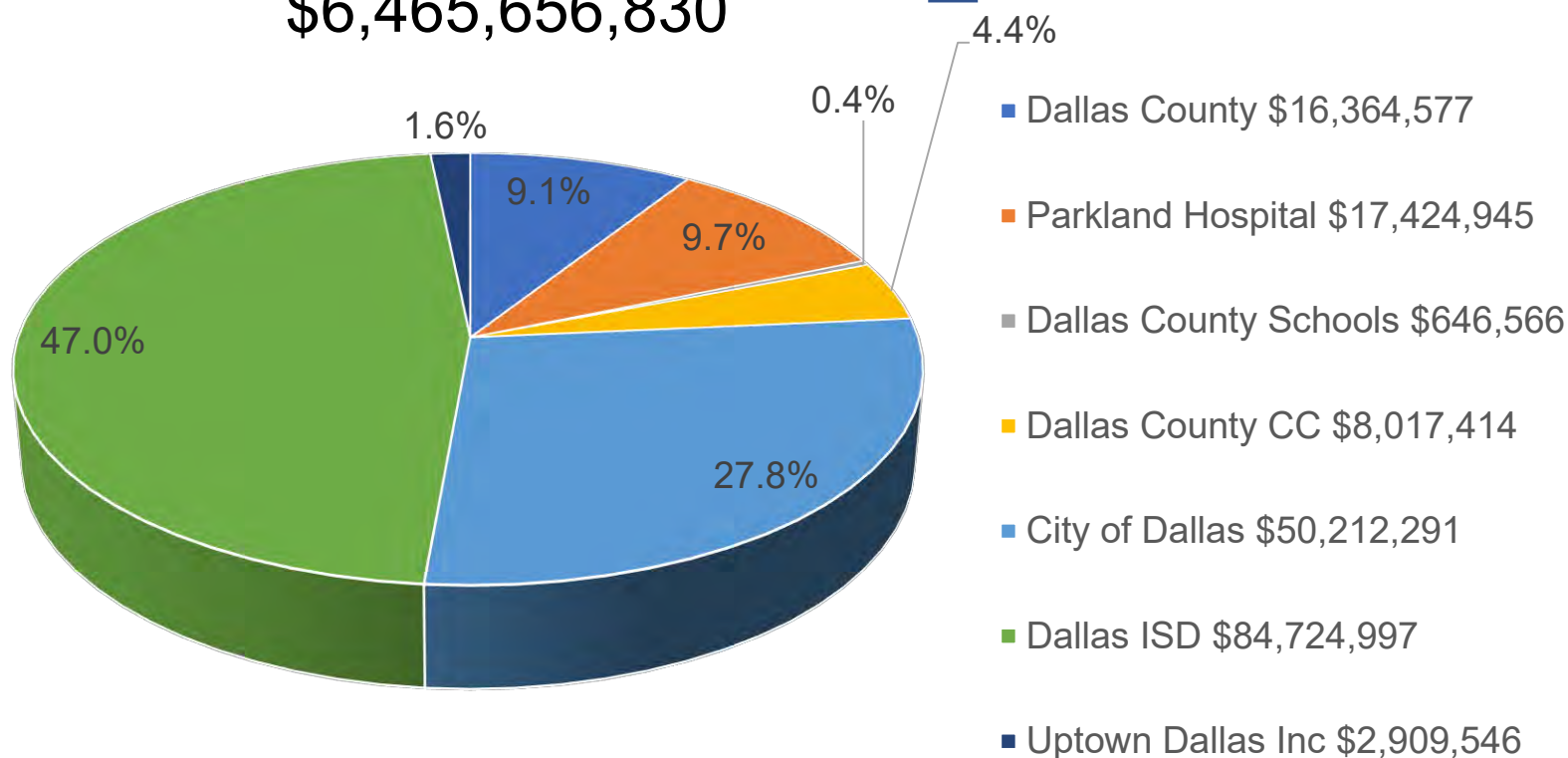


Source: Uptown Dallas, Inc.



2019 Total Property Value  
\$6,465,656,830

↑ 6.6% Growth from 2018

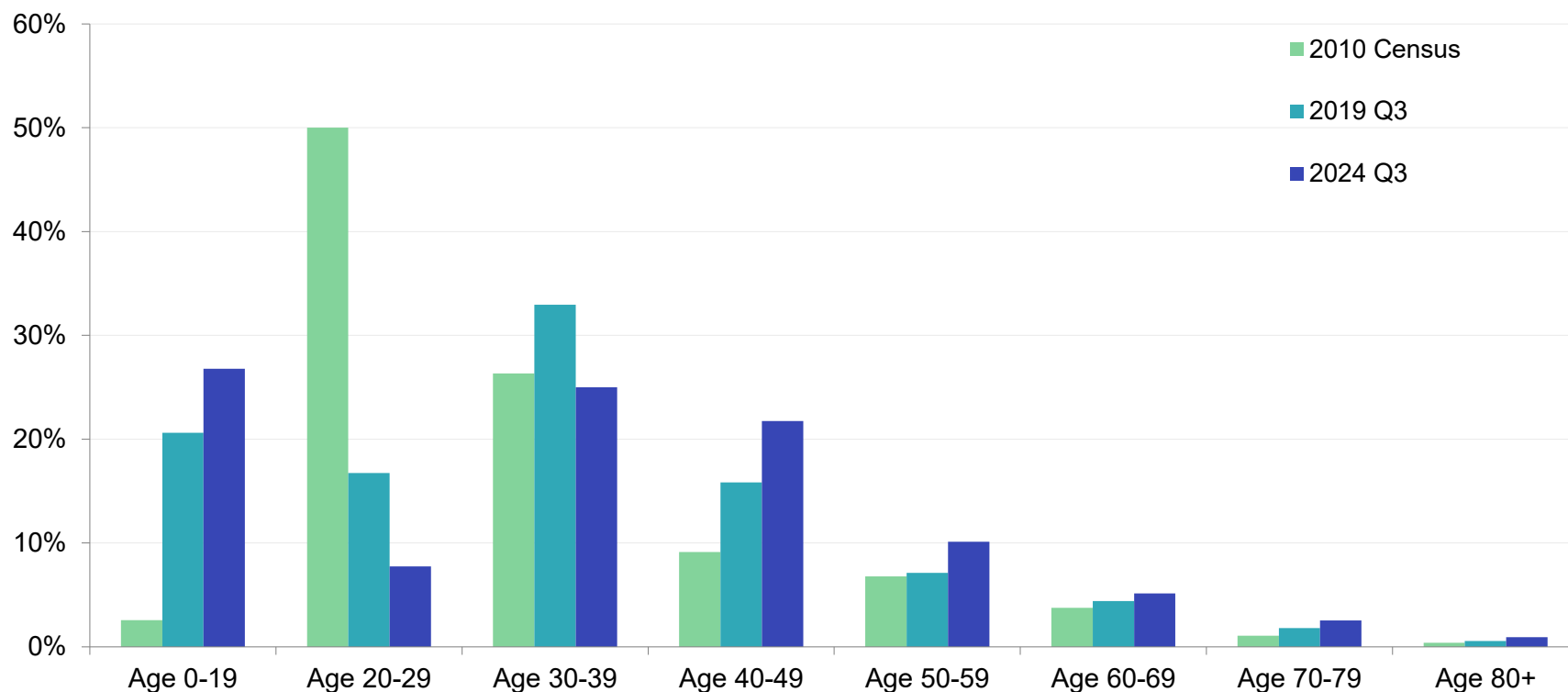


Total Taxes Paid \$180,300,337

Source: DCAD

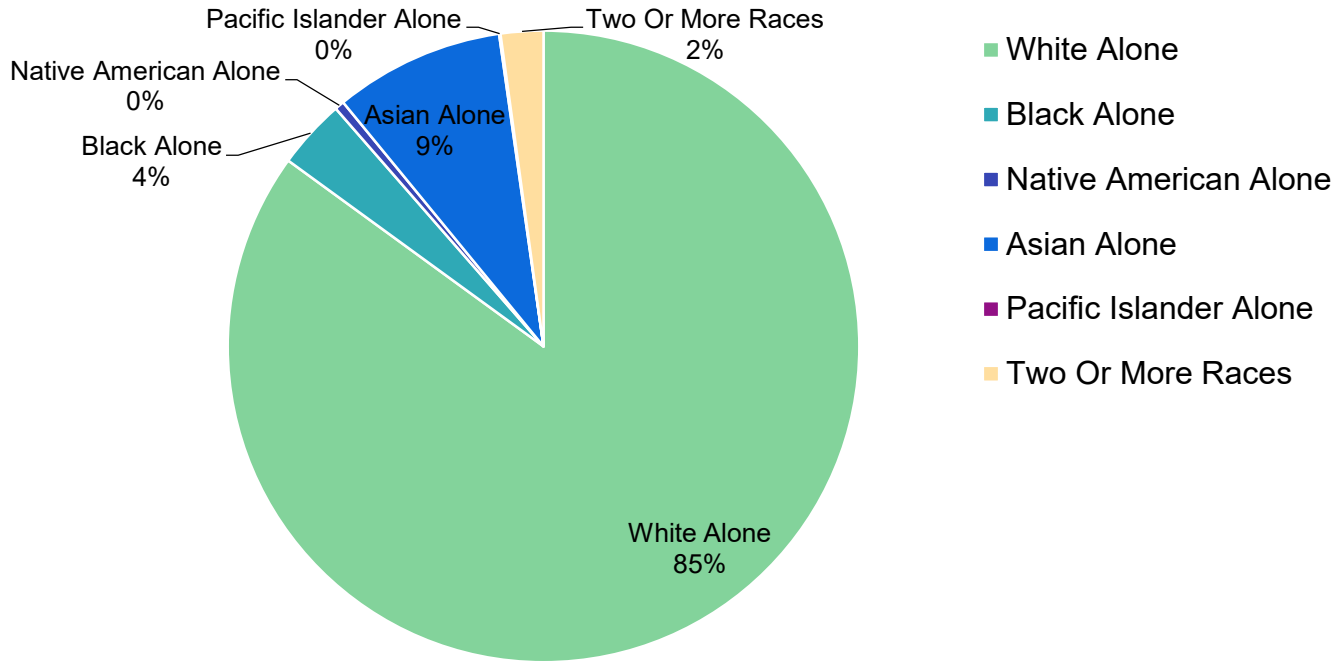


Population Summary	2010 Census	2019 Q3	2024 Q3
Population	11,746	17,064	18,389
Annual Pop Growth 2019 Q3 To 2024 Q3	7.8%		
Annual Pop Growth 2010 Census To 2019 Q3	45.3%		



Source: Neustar, 2019.



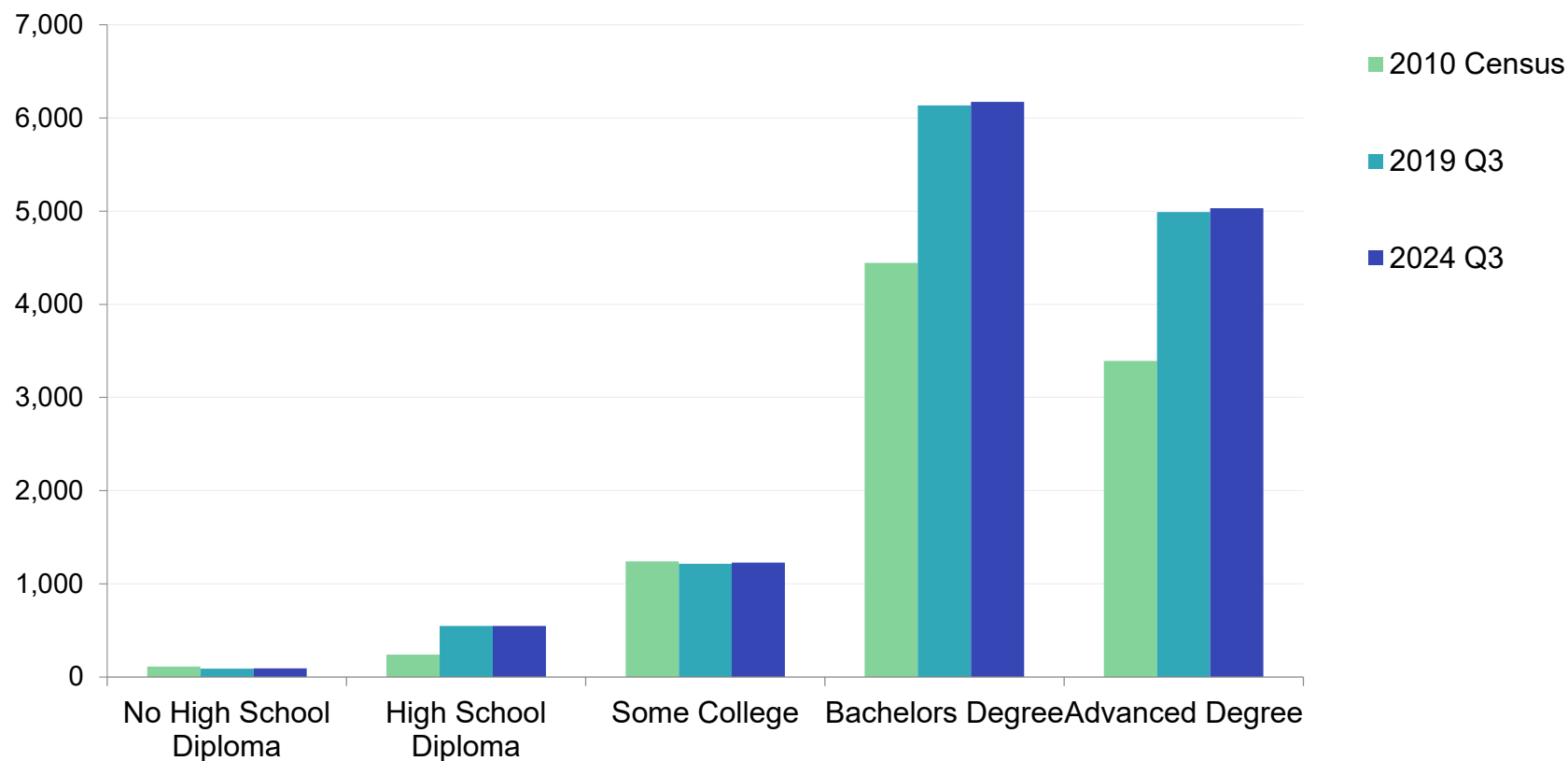


Race	2010 Census		2019 Q3		2024 Q3	
White Alone	10,493	89.3%	14,507	85.0%	15,319	83.3%
Black Alone	339	2.9%	607	3.6%	703	3.8%
Native American Alone	62	0.5%	83	0.5%	90	0.5%
Asian Alone	663	5.6%	1,483	8.7%	1,816	9.9%
Pacific Islander Alone	7	0.1%	12	0.1%	15	0.1%
Two Or More Races	183	1.6%	372	2.2%	446	2.4%

Source: Neustar, 2019.







Education	2010 Census		2019 Q3		2024 Q3	
No High School Diploma	111	0.9%	89	0.5%	91	0.5%
High School Diploma	241	2.1%	546	3.2%	547	3.0%
Some College	1,241	10.6%	1,214	7.1%	1,226	6.7%
Bachelors Degree	4,443	37.8%	6,135	36.0%	6,173	33.6%
Advanced Degree	3,391	28.9%	4,990	29.2%	5,030	27.4%

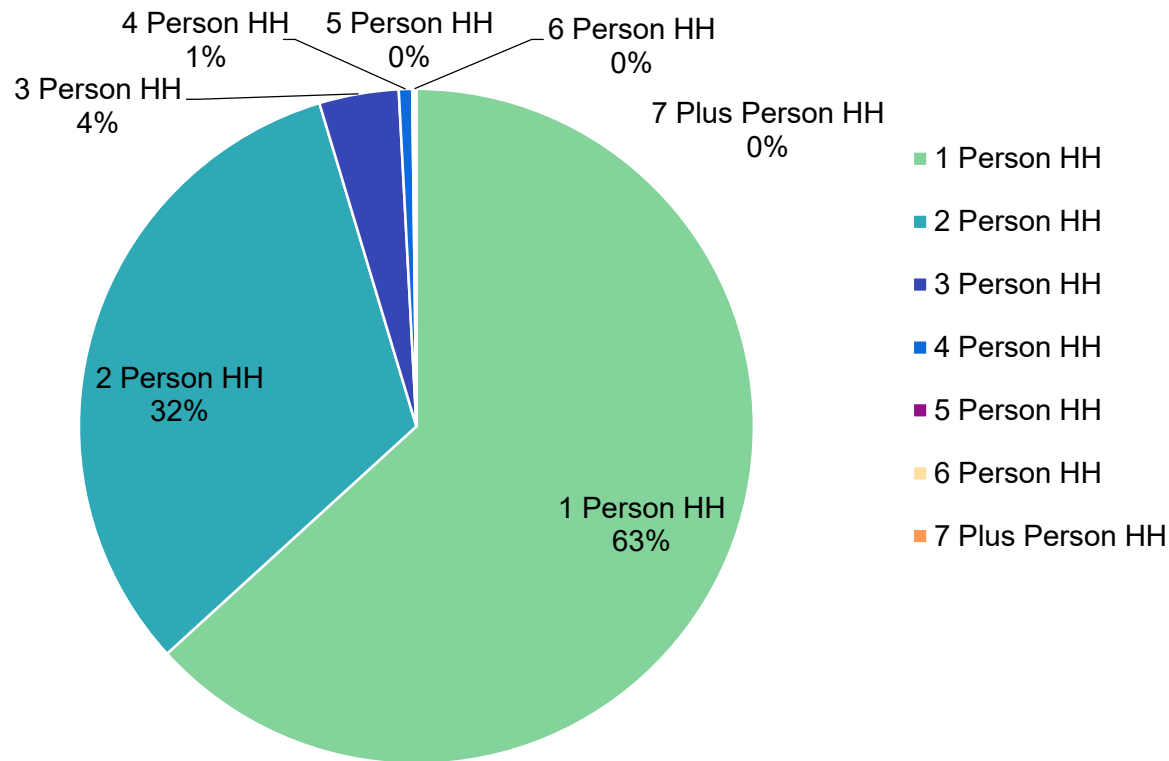
Source: Neustar, 2019.





Source: Neustar, 2019.



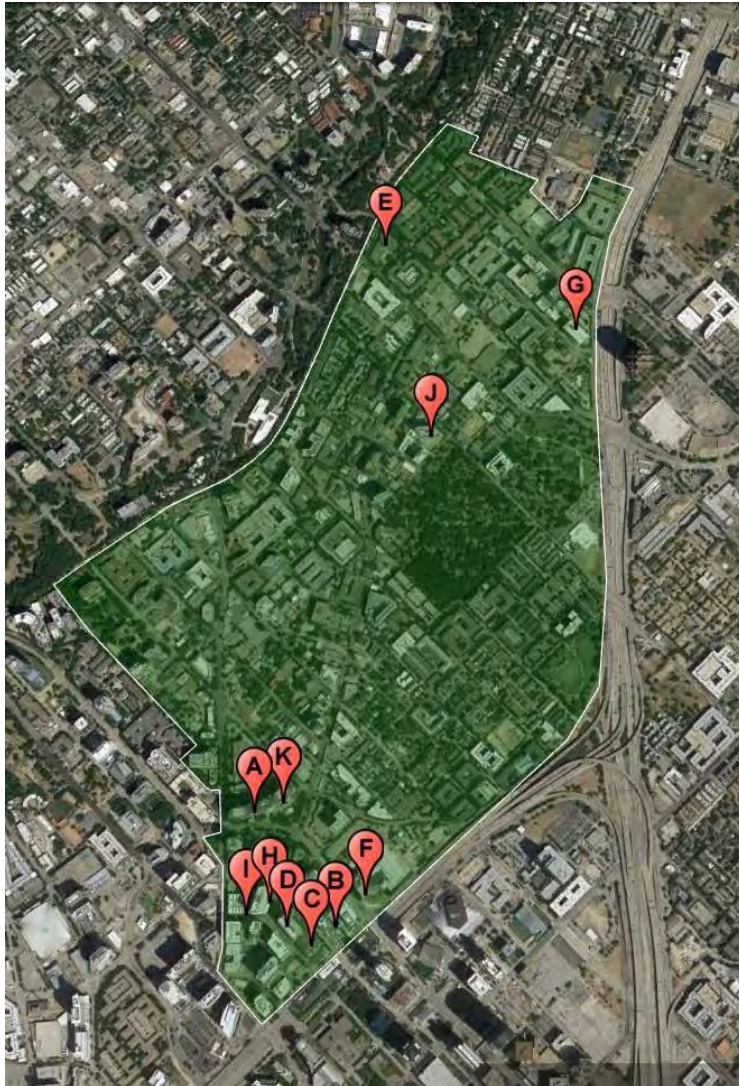


Housing Unit Occupancy	2010 Census		2019 Q3		2024 Q3	
Owner Occupied HUs	1,460	15.8%	1,845	15.0%	1,956	14.7%
Renter Occupied HUs	6,774	73.3%	9,747	79.4%	10,495	78.7%
Vacant HUs	1,007	10.9%	679	5.5%	879	6.6%
Seasonal Hus	195	2.1%	121	1.0%	159	1.2%
Other Usage HUs	811	8.8%	557	4.5%	720	5.4%

Source: Neustar, 2019.



## Top Companies by Number of Employees



- A. Hilltop Holdings Inc (Investment Management)  
5,200 Employees
- B. PwC (Tax Consulting)  
2,300 Employees
- C. Lincoln Property Company (Multifamily Development)  
1,681 Employees
- D. Texas Capital Bancshares Inc (Banking)  
1,564 Employees
- E. Austin Industries (Construction)  
1,303 Employees
- F. Federal Reserve Bank of Dallas (Regional Reserve Bank)  
1,265 Employees
- G. The Richards Group (Marketing and Advertising)  
742 Employees
- H. Foley Gardere (Law Firm)  
489 Employees
- I. Cushman & Wakefield (Commercial Real Estate)  
350 employees
- J. ISN Software (Technology)  
233 Employees
- K. Westwood Holdings Group (Investment Management)  
182 Employees

Source: Dallas Morning News, Dallas Business Journal, Company Websites



Industry	Business		Employees	
	Count	Percent	Count	Percent
Professional, Scientific, and Technical Services	442	22.8%	6,063	25.0%
Finance and Insurance	290	15.0%	4,387	18.1%
Real Estate and Rental and Leasing	212	10.9%	2,242	9.3%
Accommodation and Food Services	187	9.7%	4,363	18.0%
Health Care and Social Assistance	171	8.8%	916	3.8%
Retail Trade	137	7.1%	1,208	5.0%
Other Services (except Public Administration)	108	5.6%	782	3.2%
Administrative and Support and Waste Management and Remediation Services	83	4.3%	478	2.0%
Construction	79	4.1%	1,279	5.3%
Arts, Entertainment, and Recreation	35	1.8%	236	1.0%
Information	33	1.7%	382	1.6%
Management of Companies and Enterprises	28	1.4%	400	1.7%
Mining, Quarrying, and Oil and Gas Extraction	28	1.4%	136	0.6%
Transportation and Warehousing	24	1.2%	249	1.0%
Manufacturing	23	1.2%	392	1.6%
Educational Services	23	1.2%	349	1.4%
Wholesale Trade	17	0.9%	135	0.6%
Agriculture, Forestry, Fishing and Hunting	9	0.5%	47	0.2%
Public Administration	5	0.3%	25	0.1%
Utilities	3	0.2%	137	0.6%
<b>Total</b>	<b>1,937</b>	<b>100%</b>	<b>24,206</b>	<b>100%</b>

Source: Neustar, 2019.



# Employment Employment by Industry and Occupation



Employment Industries	2010 Census		2019 Q3		2024 Q3	
Employed In Agriculture And Mining Industries	47	0.5%	117	1.0%	119	1.0%
Employed In Construction Industries	185	1.8%	244	2.0%	247	2.0%
Employed In Manufacturing Industries	551	5.4%	1,075	9.0%	1,100	9.0%
Employed In Wholesale Industries	459	4.5%	438	3.7%	446	3.7%
Employed In Retail Industries	695	6.9%	1,027	8.6%	1,045	8.6%
Employed In Transportation And Utilities Industries	464	4.6%	361	3.0%	365	3.0%
Employed In Information Industries	478	4.7%	332	2.8%	336	2.8%
Employed In Real-Estate Industries	1,706	16.9%	1,767	14.8%	1,783	14.7%
Employed In Professional Industries	2,710	26.8%	3,267	27.3%	3,318	27.3%
Employed In Health And Education Industries	1,353	13.4%	2,217	18.5%	2,269	18.7%
Employed In Art Industries	1,011	10.0%	614	5.1%	628	5.2%
Employed In Other Industries	243	2.4%	347	2.9%	353	2.9%
Employed In Public Administration Industries	213	2.1%	148	1.2%	150	1.2%
<b>Total</b>	<b>10,115</b>	<b>100%</b>	<b>11,954</b>	<b>100%</b>	<b>12,159</b>	<b>100%</b>

Employment Occupations	2010 Census		2019 Q3		2024 Q3	
Employed In Management Occupations	6,874	68.0%	8,533	71.4%	8,677	71.4%
Employed In Service Occupations	602	6.0%	585	4.9%	601	4.9%
Employed In Sales Occupations	2,315	22.9%	2,465	20.6%	2,505	20.6%
Employed In Farming Occupations	0	0.0%	13	0.1%	13	0.1%
Employed In Construction Occupations	89	0.9%	173	1.4%	174	1.4%
Employed In Production Occupations	235	2.3%	185	1.5%	189	1.6%
<b>Total</b>	<b>10,115</b>	<b>100%</b>	<b>11,954</b>	<b>100%</b>	<b>12,159</b>	<b>100%</b>

Source: Neustar, 2019.







### **Griggs Park**

A historic 8-acre park providing a safe, beautiful, and natural area for all ages including families and children. The park has newly renovated amenities for picnics, children's playgrounds, areas for pets, groves of trees for enjoying reading, painting or quiet conversation, scenic views, and a moving historical memorial to the Park's namesake, the Rev. A.R. Griggs.



### **Greenwood Cemetery**

Founded in 1875, Greenwood Cemetery was part of a Republic of Texas grant, called the John Grigsby League, given for service in the Battle of San Jacinto. Many people prominent in the histories of the city, state and nation rest here, in addition to casualties and veterans of every American military involvement since the War between the States.



### **Katy Trail**

Bordering Uptown's northwestern edge, the Katy trail is a 3.5-mile, privately funded trail system built on an old railroad line. The Friends of the Katy Trail organization is the principal fundraiser for the Trail. Through generous donations and private support from businesses and individuals, the Katy Trail remains in peak condition for residents and visitors alike.



### **Freedman's Cemetery**

Freedman's Cemetery was established as a burial ground for Dallas' early African-American population in 1861. This is one of the largest Freedman Cemeteries in the country. The site represents the remnants of the once-thriving North Dallas community which from the Civil War to the 1970s was the largest segregated African American enclave in Dallas and one of the largest in the country.



### **Klyde Warren Park**

Completed in 2012 and seeded with a grant from Uptown Dallas, Inc., Klyde Warren Park is a 5.2-acre deck park over a recessed eight-lane freeway. Bordering Uptown's southeastern edge, the park bridges the Uptown and Downtown neighborhoods. Some of its features include a children's park, reading room, great lawn, restaurant, urban dog park and botanical garden. The park has received numerous awards including Urban Land Institute's Open Space Award in 2014.

*Source: Park Websites*





Cedar Springs and Routh are primed for Uptown's new future development. The area is being planned for an 18-story office tower, a 22-story residential high-rise, a luxury hotel and retail space. The site is approximately 4 acres. Ryan Cos and GFF are working on the site and anticipate the first phase to open in late 2022 and early 2023. An acre of open space will be included within the site.



Endeavor Real Estate Group is planning a 19-story mixed-use tower for the half-block it purchased at Boll Street and McKinney Avenue. Plans show the project will include 290 residential units, almost 60,000 square feet of office space and 15,000 square feet of retail. Dallas-based architect HKS designed the new building with underground parking and a rooftop "amenity deck."



Marriott Uptown, a 14-story hotel at Wolf Street and Maple Avenue, is scheduled to open November 2020. Developer Alamo Manhattan Corp is building the 277,524-square-foot, 255-room hotel. The project also includes a full-service restaurant, lounge, swimming pool, fitness facility and 12,980 square feet of meeting space. WDG Architecture designed the brick and glass building.



Central Market will occupy the lower levels of a 19-story mixed-use project KDC plans for the high-profile Uptown block at McKinney and Lemmon. Dallas architect Omniplan and San Antonio design firm Lake|Flato are designing the development, which will have a 2-acre public plaza on the roof of the Central Market with access to the office tower and shops and restaurants facing the elevated public space.

*Source: UDI, Dallas Morning News*







*The Brady – 2728 Cedar Springs Road*



*The Monterrey by Windsor – 3950 McKinney Avenue*

Average Monthly Rent in Uptown is  
**\$2,067 vs. \$1,971 (2017)**

Average Monthly Rent per SF in Uptown is  
**\$2.05**

Total rental units in Uptown is  
**12,241**  
*(excludes construction and lease-up)*

Average Unit Size  
**981 SF**

Rental Occupancy Rate in Uptown is  
**91.5%**

*Source: Uptown Dallas, ALN, 2019.*



Retail is vibrant in Uptown Dallas with several major stores:

**Whole Foods**  
**Stanley Korshak**  
**Brooks Brothers**  
**J.Crew**  
**Banana Republic**  
**UNTUCKit**  
**Sephora**  
**Kendra Scott**  
**Starbucks**

Uptown boasts more retail anchors than Downtown Dallas. Uptown is the only live, work, play development that has larger walkable retail anchors with a walkscore of 91/100 and is considered a “walker’s paradise”

*Source: UDI, 2019, walkscore.com.*





Hotel	Rooms	2019 YTD *			2018		
		Total Revenue	RevPar	YoY Revenue Change	Total Revenue	RevPar	YoY Revenue Change
The Ritz-Carlton	218	\$23,374,602	345.88	5.0%	\$26,745,029	329.79	5.1%
Hotel Crescent Court	226	\$16,861,777	284.78	37.2%	\$17,265,675	243.00	44.2%
Le Meridien Dallas, The Stoneleigh	176	\$10,881,239	199.44	9.6%	\$11,839,703	180.84	-3.8%
Hotel ZaZa	169	\$9,353,980	206.67	1.5%	\$10,895,131	200.60	-4.0%
Hilton Canopy **	150	\$7,165,406	154.09	N/A	\$2,907,514	104.21	N/A
Hotel St. Germaine	7	\$96,463	44.45	42.2%	\$91,462	35.12	12.4%
<b>Coming Soon</b>							
Marriott Uptown	255						
Hilton - Motto & Spark	300+						

\* Through 10/31/2019

\*\* Hotel Canopy opened August 2018

Source: searchtexastax.com





Below is a summary of the most recent for sale, single-family new construction. Uptown is mostly built out which is why new construction is minimal in the area.

<u>Subdivision Name</u>	<u>Product Type</u>	<u>Min Price</u>	<u>Max Price</u>	<u>Total Units</u>
2127 Clark Street Townhomes	Townhouse	\$585,000	\$650,000	6
Boll Street, 1800-2799 (45F)	Single Family	\$1,500,000	\$2,000,000	2
Heritage at the Stoneleigh	HiRise	\$1,200,000	\$1,900,000	76
Place Prevot Townhomes	Townhouse	\$1,495,000	\$1,595,000	13
Residences at Ritz Carlton Townhomes	Townhouse	\$6,700,000	\$7,200,000	4
Thomas Avenue, 2600-3399 (45G)	Single Family	\$500,000	\$700,000	2
Worthington Street, 2200-2799 (45G)	Single Family	\$450,000	\$600,000	2

Source: Metrostudy, 2019.





# Future Development/Redevelopment In and Influenced by Uptown



- \* **1 VICTOR** 39-story, 344-unit apartment tower by Hines. Opens 2021.
- \* **2 VICTORY COMMONS** 15-story, 365,000-square-foot office building by Hillwood Urban and USAA Real Estate. Opens 2021.
- \* **3 THE LINK AT UPTOWN** 25-story, 300,000-square-foot office building by Kaizen Development Partners. Opens 2021.
- \* **4 T2 HOSPITALITY HOTEL** 19-story, 230-room luxury hotel. No start date announced.
- \* **5 HARWOOD HOTEL** 22-story luxury hotel by Harwood International. Under construction/no opening date announced.
- \* **6 HARWOOD NO. 10** 22-story, 220,548-square-foot office tower by developer Harwood International. Opens fall 2019.
- \* **7 HARWOOD NO. 12** 40-story, 1.05 million-square-foot office tower by developer Harwood International. No construction date announced.
- 8 MARRIOTT UPTOWN** 14-story, 255-room hotel by developer Alamo Manhattan Corp. Opens 2020.
- 9 CEDAR MAPLE PLAZA** 25-story, 600,000-square-foot office tower by Granite Properties. No start date announced.
- 10 KAIROI APARTMENTS** 12-story residential tower by developer Kairoi Residential. No start date announced.
- 11 2500 CEDAR SPRINGS** 18-story office tower, a 22-story residential high-rise, a luxury hotel and retail space by developer Ryan Cos. Starting 2020 and opening 2022 and 2023.
- 12 QUADRANGLE** 12-story, 335,000-square-foot office tower and retail buildings by Stream Realty Partners. Opens 2022.
- 13 MCKINNEY AND BOLL** 19-story, 290-unit residential tower by Endeavor Real Estate. No start date announced.
- 14 ALEXAN OAK GROVE** 13-story, 185-unit apartment tower by Trammell Crow Residential. Completion 2021.
- 15 MCKINNEY CENTRAL MARKET TOWER** 19-story, 450,000-square-foot office tower and Central Market grocery store by developer KDC.

\* Located outside of Uptown

Source: Dallas Morning News, August 2019.





The McKinney Avenue Trolley ridership has continued to grow rapidly from 400,000 in 2012 to 635,000 in 2016. Current ridership stands at 693,000. The boost from 2012 to 2016 was due to Klyde Warren Park. The first expansion occurred in 1995 with the second expansion being spearheaded in 2002. Future expansion is planned for the trolley to be connected to the formal Dallas streetcar line.

## BY THE NUMBERS



**635,000+**  
rides per year



**30 years**  
providing free transit in Uptown



**4.6 miles**  
of track and lines

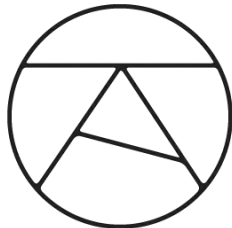


**7 cars**  
currently in operation



Source: MATA, UDI, 2019.





ALTO



Tens of thousands of pickups occur in the Uptown area per month. Ride shares have experience close to 100% growth in pickups over the past year.

### Top Dallas Rideshare Destinations:

1. American Airlines Center
2. Sheraton Dallas Hotel
3. Happiest Hour
4. The Statler Dallas, Curio Collection by Hilton
5. Bottled Blonde - Dallas
6. \*Katy Trail Ice House
7. Backyard - Dallas
8. Round-Up Saloon
9. The Henry
10. \*The Rustic
11. W Dallas - Victory
12. Fairmont Dallas
13. \*Moxie's Grill & Bar
14. Magnolia Dallas Downtown
15. \*The Ritz-Carlton, Dallas

\* Located in Uptown

Source: Lyft, 2019.





Vendor	Number of Trips	Number of Miles	Average Miles per Trip
Bird	85,419	39,683	0.46
Jump	38,660	30,370	0.79
Lime	142,497	133,473	0.9
Lyft	42,706	49,213	1.15
Ojo	3,610	7,251	2.0
Total	312,892	259,990	1.06

### Safety & Scooter Ridership Data

- 156 emergency department visits
- 30 hospital admissions
- 10 requiring Intensive Care Unit
- 1 death

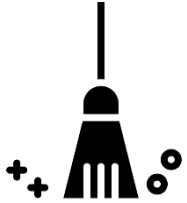
Of the injuries reported:

- 43% included facial injuries
- 58% included extremity injuries
- 35% included brain injuries



Source: City of Dallas, 2019.





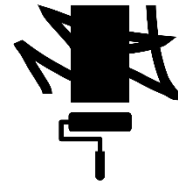
**140**  
Miles Swept



**47,710**  
Gallons of Trash Picked Up



**11,282**  
Street Benches Cleaned



**405**  
Graffiti Removed



**267**  
Scooter Pickups



**175**  
Business Contacts

*Source: Block by Block-Uptown Clean Streets  
\*Scooter tracking began September 24, 2019*





Campus	Level	2016/2017	2017/2018	2018/2019	Great Schools Rating*
Ben Milam Elementary	Pre-K to 5th	291	263	259	5
Travis Vanguard Academy*	4 <sup>th</sup> -8 <sup>th</sup>	493	514	562	N/A
Alex W. Spence Middle School	6 <sup>th</sup> -8 <sup>th</sup>	821	832	832	5
North Dallas High School	9 <sup>th</sup> -12 <sup>th</sup>	1,060	1,132	1,207	2



- \* Travis Vanguard Academy is a magnet school in which students must apply to received admittance. Travis is located in the Uptown District; the other schools are not.
- Great Schools ranks the performance of public institutions out of a scale of 10.
  - School aged children in Uptown account for roughly 21% of the total population.

Source: TEA, Great Schools, 2019.





	March 2018 Primary	May 2018 Primary Runoff	November 2018 General Election	May 2019 Joint Election	June 2019 Joint Election Runoff
Registered Voters	16,543	16,765	18,311	13,002	12,997
Change in Voter Registration	N/A	1.3%	9.2%	N/A	0.0%
Voted	1,738	546	9,882	927	1,006
Voter Turnout	10.5%	3.3%	54.0%	7.1%	7.7%

Source: Dallas County Votes Historical Election Results



Photo Source: Joseph Haubert





Consumer Group	# of Households	% Comp
Feature and Location	4,131	35.6%
Elite	3,078	26.6%
Renters Near Term Buyers	2,446	21.1%
Renters	962	8.3%
Entry Level Urban	443	3.8%
Active Adult Feature and Location	350	3.0%
Simple Life Affluent No Children	158	1.4%
Active Adult Entry Level	24	0.2%
Entry Level Suburban	0	0.0%
Simple Life Moderate Income With Children	0	0.0%
Simple Life Moderate Income No children	0	0.0%
Family Life School Age Children	0	0.0%
Family Life Young Children	0	0.0%
Active Adult Elite	0	0.0%
<b>Total</b>	<b>11,592</b>	<b>100%</b>

Source: Metrostudy, 2019.







## ENTRY LEVEL— SUBURBAN



Average Annual HH Income	\$38K
Average Age (Head of HH)	50
With Children in HH	36%
Dominant Education	High School Diploma
Married	38%
Homeownership	73%

- Average credit: small savings account; need education on how to budget their money and save to buy a home
- Employed in part-time job(s)
- Not concerned with personally saving the environment
- Use the internet for shopping, work, and entertainment
- High percentage of single parent families

## ENTRY LEVEL— URBAN



Average Annual HH Income	\$69K
Average Age (Head of HH)	47
With Children in HH	69%
Dominant Education	College Graduate
Married	49%
Homeownership	66%

- Good credit: have some savings including 401k and savings account
- Feel they work hard for their money and are workaholics; often self-employed
- Strong belief in sustainability; will pay more for energy efficiency and sustainability
- Read numerous magazines for news and entertainment
- Very family oriented: spend time and make decisions together; multi-generational households common

## SIMPLE LIFE— AFFLUENT, NO CHILDREN



Average Annual HH Income	\$125K
Average Age (Head of HH)	50
With Children in HH	14%
Dominant Education	College Graduate
Married	68%
Homeownership	79%

- Financially stable with mortgage, checking, and savings accounts
- Work for the government, either as active military or civilian; or are entrepreneurial, own and run a small business
- Not concerned with personally saving the environment
- Use the internet for shopping, work, and entertainment
- Two-person household; grown children recently left home to work or attend college

## SIMPLE LIFE— MODERATE INCOME, WITH CHILDREN



Average Annual HH Income	\$64K
Average Age (Head of HH)	39
With Children in HH	84%
Dominant Education	Some College
Married	62%
Homeownership	84%

- Some savings, but may be forced to borrow money for emergencies
- Employed by others in management, administrative work, or real estate
- Not concerned with personally saving the environment
- Heavy tablet use by all family members
- One spouse works, the other stays home with the children

## SIMPLE LIFE— MODERATE INCOME, NO CHILDREN



Average Annual HH Income	\$41K
Average Age (Head of HH)	52
With Children in HH	17%
Dominant Education	High School Diploma
Married	45%
Homeownership	88%

- Equity in current home is the majority of savings; spend money as quickly as it is earned
- Non-managerial employment including truck driver, retailer, or nurse
- Only concerned about energy efficiency and sustainability if it benefits them directly
- Enjoy gadgets, but not heavily dependent on the latest technology; average smartphone and internet usage
- Male works while the female stays home

## FEATURE & LOCATION



Average Annual HH Income	\$127K
Average Age (Head of HH)	40
With Children in HH	19%
Dominant Education	College Graduate
Married	52%
Homeownership	52%

- Significant savings in banks and invest in stock and money market accounts
- Own and run medium sized business; will change jobs for higher pay or better company
- Sustainability is important, but not a priority
- Conduct business and shopping on smartphone; shop primarily on the internet
- Multigenerational households common

## FAMILY LIFE— YOUNG CHILDREN



Average Annual HH Income	\$109K
Average Age (Head of HH)	32
With Children in HH	95%
Dominant Education	College Graduate
Married	86%
Homeownership	95%

- Some savings; will borrow money to purchase a home
- Employed as a manager in finance, insurance, and other professional sectors
- Indifferent about sustainability; will recycle if it's easy, but won't go out of the way
- High smartphone usage; research products and shop primarily on the internet
- Both spouses work; two to three kids under age of 12

## FAMILY LIFE— SCHOOL AGE CHILDREN



Average Annual HH Income	\$114K
Average Age (Head of HH)	46
With Children in HH	100%
Dominant Education	College Graduate
Married	82%
Homeownership	100%

- Financially stable and want to leave monetary legacy for kids; safe and stable investors
- Employed in education, engineering, and government
- Sustainability important because they believe it's best for their children
- Entertainment for all family members is primarily technology based
- Family focused: life revolves around children and parents put kids needs ahead of their own; two to three kids ages 12 to 18



## ACTIVE ADULT— ENTRY LEVEL



Average Annual HH Income	\$24K
Average Age (Head of HH)	74
With Children in HH	3%
Dominant Education	High School Diploma
Married	28%
Homeownership	99%

- Live on a fixed income; very budget conscious
- Retired
- Feel indifferent about sustainability; will recycle if financially beneficial
- Little to no internet usage; read magazines and newspapers
- High percentage of widows; often live alone

## ACTIVE ADULT— FEATURE & LOCATION



Average Annual HH Income	\$61K
Average Age (Head of HH)	68
With Children in HH	4%
Dominant Education	College Graduate
Married	45%
Homeownership	73%

- Savings are in "safe" accounts, e.g. money market, annuities
- Retired; served in the armed forces
- Sustainability is important, but not a priority
- Read newspaper daily
- Not tech savvy; do not use internet on mobile devices
- Married; have grandchildren

## ACTIVE ADULT— ELITE



Average Annual HH Income	\$91K
Average Age (Head of HH)	64
With Children in HH	2%
Dominant Education	College Graduate
Married	70%
Homeownership	99%

- Excellent credit; strictly manages money; investments include IRA, CDs, and life insurance
- Retired; highly educated
- Strong belief in sustainability; will pay more for energy efficiency and sustainability
- Read newspaper daily; don't use mobile to shop
- Married; have grandchildren

## ELITE



Average Annual HH Income	\$175K
Average Age (Head of HH)	51
With Children in HH	35%
Dominant Education	College Graduate
Married	80%
Homeownership	90%

- Financially savvy and secure; high net-worth, have investments and 401k
- Employed as managerial architect, engineer, or doctor, and often self-employed
- Sustainability is important and part of their lifestyle
- Research, purchase, and conduct business primarily on the internet
- One or both adults work from home; older children of high school and college age

## RENTERS—NEAR TERM BUYERS



Average Annual HH Income	\$41K
Average Age (Head of HH)	34
With Children in HH	71%
Dominant Education	High School Diploma
Married	39%
Homeownership	6%

- Little to no savings; credit challenged with limited credit history
- Employed in information systems, technical studies, managerial support, or sales
- Not concerned with personally saving the environment
- Affinity for latest technology; communicate on social media
- Engaged or living with partner; four or more children living at home

## RENTERS



Average Annual HH Income	\$33K
Average Age (Head of HH)	49
With Children in HH	29%
Dominant Education	High School Diploma
Married	27%
Homeownership	6%

- Credit challenged; not financially secure
- Temporarily unemployed or collecting disability
- Not concerned with personally saving the environment
- High smartphone usage; heavily influenced by media and advertisements
- Live alone or with partner







### Demographics

	Group	US Avg.
Average Age (Head of HH)	40	52
Average Income	<b>\$127k</b>	\$72k
Current Home Owner	52%	65%
Cost of Living	<b>41%</b>	73%
% of US HHs	7.2%	
HoH Age: 25-34	<b>38%</b>	19%
HoH Income: \$150K+	22%	10%
Marital Status: Single (never married)	34%	22%

- Ride bikes every chance they get
- Travel extensively for business and pleasure
- Prefer Whole Foods and Trader Joe's to traditional grocery stores
- Attend professional basketball games
- Visit coffee shops regularly
- Use public transportation
- Enjoy drinking at local bars
- Drive practical, compact cars
- Enjoy going to movies and the theater
- Read newspapers, local and national, online
- Play fantasy sports
- Depend on business reviews from Yelp, Google, etc.



**Feature & Location:** Affluent professionals that love everything living in a city has to offer. They're the first to have new tech, join the latest fitness trend, and try new restaurants. They love having friends over for a dinner party or to watch a game. They are environmentally cautious and do their best to live green.



**Top TV Channels:** HBO, Adult Swim, Bravo, NFL Network, Comedy Central, FX, Travel Channel

**Top TV Shows:** Real Housewives, Chopped, Game of Thrones, American Horror Story, The Walking Dead, E! News



**Magazines:** Economist, Elle Décor, Men's Health, InStyle, ESPN the Magazine, Bride's, Discover, Rolling Stone



**Types of sites:** Reviews & Recommendations, Entertainment

**Specific Sites:** Yelp, TripAdvisor, NY Times, IMDB, Expedia, Fandango, Apple, YouTube



**Where They Shop:** Banana Republic, J. Crew, H&M, Nordstrom, Express, Macy's, Nike



**Outdoor Advertising:** Subway Train/Platform, Bus Shelter/Bench, Taxis, Buses



**Streaming/Social Media (Rank):** Hulu (1), Twitter (1), Instagram (1), LinkedIn (2), Spotify (2), Netflix (3), Pandora (3), Facebook (3)







## Demographics

### Average Age (Head of HH)

Average Income

Current Home Owner

Cost of Living

% of US HHs

EDU: Graduate Degree

HoH Income: \$150K+

HH has a Dog

## Group

## US Avg.

51

52

**\$175k**

\$72k

90%

65%

69%

73%

8.8%

**27%**

12%

**69%**

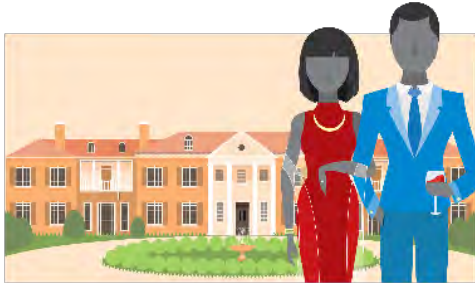
10%

49%

42%

- Travel extensively for business and pleasure – both foreign and domestic
- Currently paying for one or more of their children's education
- Own premium cars and prefer to buy them new
- Have 2 or more American Express cards
- Likes to play golf and ski
- Enjoy attending live sporting events
- Member of an art association (museum, symphony, etc.)
- Wear a fitness tracker
- Sizeable investments & retirement funds
- Pay others for home improvement & repairs
- Own a vacation home





**Elite:** Working in high paying fields such as law & architecture, these consumers have excelled in their professional life and enjoy showing off their success. They want the best of the best and are willing to pay for it. They're tech savvy and want everything connected.



**Top TV Channels:** HGTV, Golf, ESPN, HBO, NFL Network, DIY, CNN, MLB Network, Food Network

**Top TV Shows:** Madam Secretary, Modern Family, Black-Ish, Saturday Night Live, MLB Games, PGA Tournaments, Beachfront Bargain Hunt



**Magazines:** Hemispheres, Conde Nast Traveler, Travel + Leisure, The Economist, American Way, Fortune



**Types of sites:** Travel, News, Entertainment

**Specific Sites:** TripAdvisor, Fandango, CNN, Expedia, Orbitz, Fox News, Yelp, Fox Sports, NY Times, Realtor.com



**Where They Shop:** Brooks Brothers, Ann Taylor, Nordstrom, Dick's Sporting Goods, Saks Fifth Avenue, Ulta



**Outdoor Advertising:** Airport Displays, Sports Stadiums, Elevators, Plane/Blimp Banner



**Streaming/Social Media (Rank):** LinkedIn (1), Spotify (1), Twitter (2), Instagram (3), Pandora (4), Netflix (4), Facebook (5), Hulu (8)



### Demographics

	Group	US Avg.
Average Age (Head of HH)	34	52
Average Income	\$41k	\$72k
Current Home Owner	<b>6%</b>	65%
Cost of Living	77%	73%
% of US HHs	9.5%	
EDU: High School Grad	34%	29%
HoH Age: 25-34	45%	19%

- Expect to get married in the next 12 months
- Expect to buy first home in the next 12 months
- Live with partner in domestic relationship
- Striving to forward their career
- Enjoy playing video games
- Play basketball
- Download/stream movies from the internet
- Not registered to vote
- Buy the latest fashions
- Often eat fast food
- Not financially stable
- Do not own a car/vehicle



**Renters, Near Term Buyers:** Younger, singles, single parents & families looking to improve their current position in life. They have little to no savings and are not financially sound in their decision making. They want to feel like their advancing – they see what everyone else has and are making strides to improve their current lifestyle.



**Top TV Channels:** Nickelodeon, Teennick, BET, Adult Swim, Cartoon Network, Adult Swim

**Top TV Shows:** Simpsons, That '70s Show, Family Guy, Friends, Bob's Burgers, The Vampire Diaries, Gotham, Scandal, Empire



**Magazines:** American Baby, Parents, Weight Watchers, Family Fun, National Geographic Traveler, Cosmopolitan

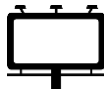


**Types of sites:** Streaming, Job Boards, Media

**Specific Sites:** Hulu, NBA, CareerBuilder, WebMD, IMDB, T-Mobile, Pandora, Craigslist



**Where They Shop:** Kids Foot Locker, Limited Too, GameStop, Hot Topic, Lane Bryant, Foot Locker, Ross Dress For Less, Party City



**Outdoor Advertising:** Taxis, Bus Shelters/Benches, Buses



**Streaming/Social Media (Rank):** Spotify (3), Hulu (3), Twitter (4), Facebook (5), Instagram (5), Pandora (6), Netflix (8), LinkedIn (9)





## CONTACT INFORMATION

**Paige Shipp**

Regional Director – Dallas / Fort Worth

Dallas Office:

1255 West 15<sup>th</sup> Street, Suite 240

Plano, Texas 75075

[pshipp@metrostudy.com](mailto:pshipp@metrostudy.com)

[www.metrostudy.com](http://www.metrostudy.com)