#### SCOTT MCDONALD & ASSOCIATES, INC

## COMMUNITY OVERVIEW REPORT

General Dental Practice



Report Prepared for: Sample Report

> Concerning: Sample City

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#### **About This Report**

The Community Overview Report has been created solely for the customers of Scott McDonald & Associates, Inc. and Doctor Demographics, LLC. We have provided a great deal of background demographic information at the beginning of the Report. Some people prefer jumping right to the Analysis and Recommendations at the back. The Table of Contents on the previous page will tell you where this starts.

What follows has been created for the client alone and should not be reproduced for any other dentist, practice or business entity. Data has been purchased from EASI Demographic Systems and EBIS-ESRI Data, Delorme Inc. and DeLorme Mapping on behalf of the Client and analyzed by Scott McDonald & Associates. Publication of this data for parties other than for the private use of the client is a violation of copyright laws of the United States of America. The analysis and recommendations in this report are the product of Scott McDonald & Associates, Inc. but we can not be held responsible for the actions taken by a client based upon this information. Analysis of a business property is valid only for the purposes for which this report was created, which is to provide insights into the value and potential of a particular site and to provide the client with information relating to practice marketing.

Locations that are misreported or misidentified at the time of ordering can be corrected at an additional cost to the client.

Labels of doctors and practices should not be considered a database. There may be errors in these specific labels due to the fact that no data base can take into account changes that occur on a daily basis within practice communities. Some information may be out-of-date, incompete or misplaced. We attempt to obtain the most recent and accurate information possible but make no representation that our data bases are "perfect". We only warrant that it is within a professional standard (which often means within 24 months and 50 yards).

It might be asked "How recent is the data?" The answer is "As recent as we can get it." The U.S. Census Bureau, Counties, Cities, and other State and Federal agencies as well as data vendors such as ESRI publish data at odd times. We purchase this data as soon as it is available. Please be aware that conflicts in data are inevitable. For example, a city will define its own area differently from the Chamber of Commerce and the U.S. Post Office. For that reason, the number of people living in a Post Office Zip Code that has a corresponding community name may be different from the community name. Hence, Van Nuys, CA may appear to have a different population when its Zip Codes are considered as opposed to figures from the Van Nuys Chamber of Commerce or the Van NuysCity Hall. What is important to note is that the figures in this report are consistent throughout.

# **Practice Area Information: Why 14 Contiguous Zip Codes?**

This report takes into account a radius around the practice site that includes 14 Zip Code areas. If not specifically requested by the client at the time of ordering, we believe this to be the most appropriate radius to take in the likely traffic for the area. The typical practice will draw from three or four Zip Codes for slightly more than half of its active patients. We consider 14 Zip Codes will represent 90%+ of the average practice's patient base. It is likely that we will cover an area far larger than most dentists should consider. We believe that there is much to be gained by considering the area in aggregate form as well as in parts. In the latter part of the report, we will discuss this aggregate area in the form of drive-time radii.

We have found that for professional practices, the most reasonable geopraphic area to consider is the Zip Code. Most dental office computers can generate patient lists and summaries based upon Zip Codes. Additionally, all mailing lists are ordered by Zip Code. Please note that some of the Zip Codes found in the front of Yellow Page Directories do not contain residences. For the most part these are universities, large corporations, or government sites and do not have a direct statistical bearing upon the recommendations we will make at the end of the Report. Naturally, they are considered in the Employment section. The numbers we have used in the radius study are based upon the Updated 2016 Census. As an aside, we understand the specific value of Census Tracts, Tiger Units, Carrier Routes and even more granular measurements but we don't believe these units to be as helpful to our clients.

Zip Code	City	County	State
95366	Ripon city, C	San Joaquin, CA	California
95368	Salida CDP, C	Stanislaus, CA	California
95337	Manteca city	San Joaquin, CA	California
95336	Manteca city	San Joaquin, CA	California
95356	Modesto city	Stanislaus, CA	California
95320	Escalon city,	San Joaquin, CA	California
95350	Modesto city	Stanislaus, CA	California
95330	Lathrop city,	San Joaquin, CA	California
95367	Riverbank cit	Stanislaus, CA	California
95358	Modesto city	Stanislaus, CA	California
95355	Modesto city	Stanislaus, CA	California
95351	Modesto city	Stanislaus, CA	California
95354	Modesto city	Stanislaus, CA	California
95357	Modesto city	Stanislaus, CA	California

#### 14 Zip Codes: Map



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### **Competition Information**

We have highlighted in bold type the home Zip Code of the site under consideration. We have drawn upon two databases to depict the number of people living in each Zip Code and divided them by the number of professionals in each Zip to come up with the Dentist-To-Population Ratio. There are limits to these numbers. For example, we do not know if these are full-time, seasonal, or part-time professionals. This data is as up-to-date as possible. Please refer to the following map to show the location of other practices. We assume the client will often have a more up-to-date knowledge of where these practices are located relative to this site. The map is useful in determining where the centers of competition are situated relative to the practice site. That is all. Note: the map is not a representation of every doctor.

Proper emphasis must be placed upon the Dentist-to-Population Ratio, especially when considering a specific Zip Code. There are many factors that tend to skew the competition numbers. For exmple, it is typical for larger population centers to have more practices and doctors by percentage when there is significant shopping. "Life Traffic" retail outlets are most conducive to attracting patients. "Life Traffic" consists of grocery shopping, pharmacies, fast food, and drycleaners because people use these services almost every day. Because of this drawing power, serveral practices may be located close to these centers without suffering from significant over-competition. It is also not unusual for the Dentist-To-Population figures to be smaller when people travel from outside the area to either work or shop. For this reason, we do not consider Competition Ratios to be absolutes in determining the value of a practice location. Clustering is bound to occur. The data is best considered in the "aggregate" (considering several Zip Codes together rather than looking at them separetely).

There are some trends we look for given different situations. For start-up locations in middle class areas, depending on the type of practice, we may look for a ratio of one doctor per 1,200 to 1,500 residents (or potential patients). The way we calculate if "there is room for one more" depends upon several variables. Each profession has a different threshold. When we see an area that the population is more affluent or educated, the ratio number can go down and still show a reasonable demand for services. This is due to the fact that older, affluent, and educated people tend to seek care more regularly AND spend more money on their healthcare in general. When there are many poor or un-motivated people in a site, the threshold ratio may need to be as high as 1:4,000. In almost every case, older adults are going to demand more medical related services including dentistry.

While we use the most accurate databases possible, there are inaccuracies due to many factors. Some databases list all doctors, some only practices. It is impossible to be completely up-to-date when doctors are moving in- and out- of an area every day. This map is, however, an excellent measure of where the centers of activity are located relative to a specific practice site. The map may show a practice that is no longer there OR not depict a new practice. The point is that the representation of the data is statistically useful in sighting practice locations. In order to determine whether or not there are sufficient patients to base a new practice, we also look at statistics in the Demographic and Psychographic data.

Zip Code	Population	Dentists	Ratio
95366	18,045	4	4,511
95368	14,402	5	2,880
95337	34,385	17	2,023
95336	46,581	13	3,583
95356	33,118	23	1,440
95320	13,590	3	4,530
95350	50,762	53	958
95330	19,794	1	19,794
95367	24,126	4	6,032
95358	33,179	2	16,590
95355	64,435	53	1,216
95351	49,883	10	4,988
95354	27,410	7	3,916
95357	11,896	0	None
TOTAL	441,606	195	2,265

#### Competition: Map



### **Population Information**

The chart on the following page shows the history, present situation, and projected growth of the population in each of the areas under consideration. The amount of difference between the given bars shows the rate of growth in population of the area. The larger the difference, the greater the growth.

Please keep in mind that the projection of a population (or any projection) is an educated guess. It comes from the U.S. Census Bureau and is not the result of special knowledge of new projects that have been proposed. Rather, it is the result of an algorithm or statistical projection based upon history. To be honest, just like every projection of the economy it is likely going to be wrong to some degree or another. That doesn't mean that the projection has no worth. It is an educated guess. But it is an INFORMED educated guess. What we are looking for in this type of chart is the rate of change being observed from Census to Census. In many areas, the change is gradual, negative, or significant. The rate of change is useful for someone considering placing a practice in a given location. With a greater rate of change, the greater the opportunities for practices to expand their patient base. But, we also want to consider the absolute numbers involved. In locations that have a large population and are "built out," the likelihood of dramatic change is small. But even a 1% growth rate in a large population can signify big increase in the potential new residents. On the other hand, a population that is small may have a 5% change but it won't signify much in reality. After all, if an area has a population of 20 people, a 5% increase only means one more person.

Lastly, we want to make sure that the Client is aware that these numbers are showing an increase or decrease in numbers. It does not indicate "churning". In locations with many transient renters, the numbers in population may appear steady but the reality is that many people are moving in –and out-of the area. That is why we also include the length of time that people are in their residence later in this report. The shorter their length of time in a residence, the greater the rate of churning. The ultimate manifestation of high churning is a college town.

It is not always important to be located in the Zip Code with the largest population. In fact, it is not unusual to find the largest populaiton is also the most "densely populated" location. As a general rule, this also has the effect of being the lowest socioeconomic area in the region. What is important is ACCESS to the large population.

#### Population: Area Graph





Historical Growth and Projected Growth are not based upon the same number of years. The Historical growth covers 5 years. The Projected Growth covers 3 years. That is why Projected Growth will almost always be greater than Historical Growth. In almost every case, a growing population is desirable for establishing a new practice. The Historical Growth figure is derived from taking the 2016 Adjusted Census populationfigure and dividing it by the 2010 Census population figure. Historical Growth is a fairly reliable statistic. Projections of growth will always be speculative. Nevertheless, both can be very useful when considering an area for a practice. Unfortunately, there is a habit people have of wanting to depend upon the speculative figures more than the historical ones.

Projected Growth is a statistical manipulation showing what the projected growth or reduction will be in an area and is based upon algorithms of "trends." Please keep in mind that some areas grow so quickly that they make other parts of the area-of-study look like they are not growing at all. Don't let this problem of "scale" deter you from considering other parts of an area simply because one location is growing so much faster. In some parts of the country, we will occasionally see negative growth. This may be due to a failing economy (trends that usually rise and fall within 5 years), "flight" to warmer climates (a 20 year trend), or displacement by undocumented residents (often seen in the Southwest). This is not an indication that there is no hope. Typically, when we see this, the age of practicing doctors is higher than the the National and State Means. In fact, this may indicate an opportunity for a new practice to add a bit of "energy" to the healthcare community.



### **Commute Times Information**

It can be extrememly useful to consider how long local residents take to get to work. This chart reflects a one-way commute time for local residents (not people working within this area).

This chart is actually fairly complex. As the Client will note, the taller the column, the more commuters there are in that Zip Code. The colors correspond to the length of their commute. It is generally true that commute times will not vary greatly from Zip Code-to-Zip Code. Nevertheless, there is going to be some differences.

#### Commute Times: Graph



The number of Households in an area is important, especially when considering how to market a practice. Marketing is almost always based upon Households rather than Population. The Average Household Size in America is about 2.4. While larger families may not have as much money as smaller ones, it costs less per patient to send a message to a household with many potential patients than it does to a household with a single person in it.

The stability of a population is important to a practice. For this reason we track the date that the population actually moves into a new residence. We referred to this in the sections Population and Growth. If the population has a short length of time in their homes, it is an indication of "Churning" or turn-over. Because this is a MEDIAN, it means that as many people moved in BEFORE this date as AFTER typically there will be little variation between the Median Year Moved-In. However, there is usually extreme differences in the Median Year Built. This is because different locations TEND to be developed at close to the same time. We have found great use in looking at the relative age of housing. When the Median Year Built is new, it is an indication that the age of the practices in that area will tend to be new. That is because practices tent to be founded around the same time by professionals who are somewhat close to the same age. It is not unusual for several practices in the same geographic region to be placed on the market at the same time because of this.

### Housing: Households & Avg. HH Size Charts

Zip Code	Households	Av. HH Size
95366	6,105	3
95368	4,144	3.8
95337	10,602	3.4
95336	15,202	3.1
95356	11,909	2.9
95320	4,609	3
95350	19,107	2.7
95330	5,232	4.1
95367	7,068	3.7
95358	8,912	3.9
95355	22,993	2.9
95351	13,266	4
95354	9,427	2.8
95357	3,722	3.4

Zip Code	Year Built	Year Moved In
95366	1991	2003
95368	1993	2003
95337	1992	2004
95336	1982	2004
95356	1985	2004
95320	1980	2004
95350	1968	2005
95330	1997	2003
95367	1993	2003
95358	1981	2004
95355	1984	2004
95351	1975	2005
95354	1969	2006
95357	1986	2003

Not all patients are going to come to a practice from their homes. In fact, many will come from their place of work. For this reason, we want to consider the number of people actually employed in the various parts of the area of a practice when considering a threshold of how many potential patients there might be surrounding it. Employment Potential is the number of adults over 25. When we see a particular zip code with a large number of employees, we have to consider that as a strong mitigating factor in favor of having a practice in this location.

Another factor to consider is that Blue Collar Employees tend to have better health insurance than White Collar Employees (although they make more money).

#### **Employment: Employment Potential Chart**

Zip Code	Employ. Pot.
95366	13,720
95368	10,488
95337	25,402
95336	35,452
95356	25,990
95320	10,530
95350	40,495
95330	14,352
95367	17,842
95358	24,353
95355	50,270
95351	35,535
95354	21,100
95357	9,115

Zip Code	White Colla	Blue Collar
95366	4,676	1,434
95368	2,812	1,973
95337	7,367	3,868
95336	9,453	5,670
95356	8,150	2,715
95320	2,965	1,340
95350	10,162	4,186
95330	3,432	2,412
95367	4,326	2,677
95358	4,740	3,755
95355	15,415	5,086
95351	4,895	5,692
95354	4,384	2,373
95357	2,217	1,014

### **Race & Ethnicity Information**

There are many ways to define Race. The U.S. Census Bureau has added new definitions. They are White, Black, Asian/Pacific Islander, American Indian, Other (One Race Alone), and Two or More Races. Not only are we looking for the distribution of race, we are also comparing the integration/segregation of the races. There are several things this chart can tell us. For one, it will usually show where different racial groups are concentrated. When we see racial minorities that are distributed evenly throughout a region, it suggests that there is integration of the races. On the other hand, when one or two zip codes show a large representation of a particular race that is different from those around it, there is likely to be more segregation. Race has many implications. We merely want the client to know that when it exists, it may make it more difficult for a doctor who is NOT of that segregated population to attract patients from that area. This is true of ALL races and should not be considered a truism of one particular group or another. It is also true of ethnic and religious groups within races, that they will be more likely to seek out a professional who is similar to themselves demographically.

Zip Code	White	Black	Asian	Am. Indian	Other	2 or More
95366	13,559	312	880	140	2,036	1,118
95368	8,284	435	871	113	3,772	927
95337	18,656	1,657	3,799	314	6,794	3,165
95336	28,087	1,635	2,871	550	9,467	3,971
95356	20,912	1,350	4,127	271	3,998	2,460
95320	10,465	84	249	131	2,076	585
95350	33,539	1,866	3,168	647	7,847	3,695
95330	7,314	1,356	4,762	221	4,496	1,645
95367	14,971	486	994	280	5,987	1,408
95358	17,848	824	1,538	305	10,962	1,702
95355	42,842	2,512	6,009	681	7,877	4,514
95351	21,856	1,772	3,976	630	18,650	2,999
95354	16,661	1,089	1,351	409	5,792	2,108
95357	7,223	337	826	139	2,571	800

#### Race & Ethnicity: Area Graph





### Language & Citizenship Information

Language spoken may be the most obvious factor that is related to racial and ethnic background. The chart does not take into account the number who speak a particular language in a given zip code. It describes the percentage of people who speak that language thus indicating the dominance of a Culture in a defined geographic area.

When Citizenship is really a function of Culture, not Race, it is a far more important factor in predicting behavior and attitudes of a population. The "Foreign Born Residents Who Are Not Citizens" represents the least likely population to seek non-emergency care. Foreign Born Naturalized Citizens represent the highest fertility rates (number of children per female over 16) in the United States.

#### Languages & Citizenship: Languages Spoken Area Graph



#### Languages & Citizenship: Citizenship Area Graph



#### Languages & Citizenship: Practice Site Zip Code Languages Chart



### **Age Information**

We have found that Age is a statistic that often predicts need. Children under 10 have very different needs from adults over 40. Obviously, people over 80 years of age are less prone to want or need the services of those who are 60. For this reason, we want to understand the distribution of people by Age. The Age Distribution Graph shows what percentage of the population in any zip code falls within a given age group. It is unusual for children under 18 to be higher than 20%. Typically when we see 18-to-24 year olds over 10% we presume there is a college, unversity or military base nearby. When we see those 65-years-plus making up more than 15% we expect to see a retirement community or village. With a little imagination, one can easily see which parts of the area are going to be best for a practice of a particular slant. The Median Age chart shows a point in which there are as many people of that age ABOVE that figure as BELOW. When we see significant variation in other aspects of the community as well.

### Age: Median Age Chart

Zip Code	Med. Age
95366	37.7
95368	31.4
95337	32.5
95336	35.0
95356	37.4
95320	37.3
95350	37.6
95330	31.1
95367	32.1
95358	30.5
95355	37.0
95351	29.0
95354	33.5
95357	35.5

### Age: Area Graph



#### Age: Children & Youth Area Graph


## Age: Practice Site Zip Code Chart



## **Income Information**

Obviously, the ability to pay is going to affect the choices one makes in his/her healthcare. There are several ways we track this information. We have provided different ways of looking at how much money a household or a region will make. The Per Capita Income data depicts a figure derived from taking the total income earned by residents of a household and dividing by the number of individuals over 16. In this way, a household with non-working teenagers can have a lower Per Capita Income even if Mom and Dad are working. Typically, it skews just a little bit in favor of older, non-retired workers. Most often, these are the ideal patients for elective procedures. Unfortunately, there is no set national standard that shows how much is "good" for Per Capita Income. That is because the Cost of Living varies greatly from one part of the country to another. What is "survival" income in New York City may be relative affluence in Mississippi. For this reason, we prefer to recommend that one zip code be measured against another rather than against some larger standard.

We have also included the Median and Average Household Income chart. It is worth noting that when the Median Income is higher than the Average, the households have a significant number of poor people relative to affluent people. When the Average Income is higher, there are usually pockets of significant affluence in a larger population of lower income housing. Normally, we don't expect to see great gaps between the two figures. The Median Household Income is derived by finding a point where there are as many people earning OVER that figure as UNDER. We don't like Income Averages as much because they show an untrue representation of an area's real potential. If you happen to be in Bill Gates' neighborhood, the Average Household Income will show that almost everyone in the neighborhood is a millionaire. The Median Household Income is more dependable. For the purpose of comparison, we have provided both for consideration. Household Earnings shows how the affluence, poverty, and everything in between break out in each zip code. When we look at a chart like this one to follow, we are looking for the "extremes" first of all. How much poverty is there relative to wealth? How large is the middle-income population in one Zip Code compared to the same income range in another?

### **Income:** Area Chart

Zip Code	Me	d. HH Inc.	Av.	HH Inc.	Per	Cap Inc.
95366	\$	89,345	\$	121,633	\$	41,344
95368	\$	77,031	\$	101,736	\$	29,420
95337	\$	77,564	\$	97,259	\$	30,163
95336	\$	69,600	\$	88,851	\$	29,682
95356	\$	71,419	\$	101,512	\$	36,658
95320	\$	73,778	\$	93,256	\$	31,717
95350	\$	55,049	\$	76,316	\$	29,269
95330	\$	77,048	\$	87,884	\$	23,276
95367	\$	67,649	\$	86,293	\$	25,816
95358	\$	56,193	\$	77,771	\$	21,188
95355	\$	71,761	\$	93,436	\$	33,701
95351	\$	36,770	\$	54,900	\$	14,958
95354	\$	40,218	\$	62,707	\$	21,905
95357	\$	63,434	\$	81,902	\$	25,777

This is a new statistic we are tracking in our reports. We have found that so many procedures of a non-emergency nature are influenced by the educational attainment level of the potential patients that we decided to include it. This is especially important for those doctors who offer services that are of a cosmetic or non-essential nature. The greater the educational attainment, the more likely a person will seek care and follow through with treatment.



## **Education: Practice Site Zip Code Chart**



## Neighborhood & Site Information: Why use a 5-, 10-, 15-Minute Drive-Time Radius?

Previously in this report we provided data on the zip code level. When we consider the potential of a site, it makes sense to look at the contiguous zip codes to determine how the population on the North side of the practice might differ from that on the South side, for example. This gives us an idea of what opportunities or liabilities can be found in the entire practice area. But if we want to consider the immediate area of a practice, it is best to do so using a radius with the practice site in the center. This can tell us the potential demographic and psychographic character of the clients in the closest area surrounding the site.

Rather than use an artificial data construct like a circle, we have found that the public tends to follow Drive-Times. For example, when we see a practice located on a coast line, near a mountain, or by a river, the circle would include data from areas that are obviously not going to apply to the practice. After all, people have to travel through tunnels, over bridges, and along highways. The Drive-Time radius takes these physical phenomena into consideration. Granted, they are oddly shaped and may resemble ameobas. But in an era when no one measures distance in terms of miles "as the crow flies," people want to know how long it takes to get somewhere. And it is the interpretation of this Drive-Time that provides us a more nuanced way of considering how far is "too far" and how near is "reasonably distant."

### Neighborhood & Site: Close View Map



### Neighborhood & Site: Drive-Time Map



## Neighborhood & Site: Demographics

See the ESRI Market Profile Report summary pages to follow:



## Neighborhood & Site: Population & Growth Data

	Population			
	5 minutes	10 minutes	15 minutes	
2000	5,773	36,248	114,933	
2010	8,370	49,012	139,603	
2017	9,023	53,828	152,615	
2022	9,522	57,353	161,408	



Growth						
5 minutes	10 minutes	15 minutes				
1.08%	1.28%	1.13%				

	5 minutes	10 minutes	15 minutes
Owner Occupied	71.3%	64.3%	58.2%
Renter Occupied	25.0%	31.6%	36.6%
Vacant	3.7%	4.2%	5.2%



	Med. Household Income		
	5 minutes 10 minutes 15 min		15 minutes
2017	\$91,317	\$70,802	\$62,431
2022	\$104,487	\$79,954	\$69,263



#### Households by Income

	5-Min.	10-Min.	15-Min
<\$15,000	5.2%	6.5%	8.2%
\$15,000 - \$24,999	6.7%	7.4%	8.6%
\$25,000 - \$34,999	6.3%	7.5%	8.9%
\$35,000 - \$49,999	9.3%	12.3%	13.2%
\$50,000 - \$74,999	14.1%	18.5%	18.7%
\$75,000 - \$99,999	11.8%	13.8%	13.7%
\$100,000 - \$149,999	21.0%	17.8%	15.8%
\$150,000 - \$199,999	11.1%	8.6%	7.2%
\$200,000+	14.4%	7.6%	5.7%

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Mate Dicakout	Race	Breakout
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	5-Min.	10-Min.	15-Min
White Alone	77.6%	63.9%	62.0%
Black Alone	1.5%	3.5%	3.7%
American Indian Alone	0.8%	1.0%	1.1%
Asian Alone	5.0%	6.5%	7.2%
Pacific Islander Alone	0.3%	0.5%	0.8%
Some Other Race Alone	9.4%	17.9%	18.3%
Two or More Races	5.4%	6.7%	7.1%
Hispanic Origin	24.6%	38.3%	39.7%





## Neighborhood & Site: Education Data

	Educational Attainment		
	5-Min.	10-Min	15-Min
Less than 9th Grade	4.4%	7.1%	7.7%
9th - 12th Grade, No Diploma	4.2%	8.2%	8.8%
High School Graduate	21.5%	25.5%	26.7%
GED/Alternative Credential	1.9%	4.6%	4.2%
Some College, No Degree	27.1%	25.8%	25.2%
Associate Degree	10.8%	9.5%	9.2%
Bachelor's Degree	20.1%	13.3%	12.4%
Graduate/Professional Degree	10.0%	6.0%	5.8%



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### Neighborhood & Site: Psychographic-Lifestyle Information

The Community Tapestry segmentation system classifies U.S. Neighborhoods by 65 market segments using proven methodology introduced more than 30 years Ago by the ACORN segmentation system. Neighborhoods with the most similar characteristics are grouped together, and neighborhoods showing divergent characteristics are separated.

### Analyzing Attributes

U.S. consumer markets are different and diverse. Capturing the essence of each market to characterize those differences requires sorting the most accurate and powerful data available using a wide array of attributes. Each neighborhood is analyzed and sorted by more than 60 attributes including income, souce of income, employment, home value, housing type, occupation, education, household composition, age and other key determinants of comsumer behavior. To capture the subtlety and vibrancy of the U.S. marketplace, data sources include Census 2010, proprietary ESRI BIS 2017 demographic updates, the Acxiom InfoBase comsumer database, the Mediamark Research Inc. national comsumer survey, and other sources.

### **Combining Techniques**

Tapestry combines traditional statistical segment analysis methodology with the latest ESRI BIS data mining techniques. These techniques complement and strengthen the traditional methodology used in working with large amounts of geodemographic data to produce a vigorous and compelling segmentation of the U.S. neighborhoods.Geodemographic data includes vast numbers of neighbohoods, many with very large or small attribute values. Employing robust methods that are less susceptible to extreme values is crucial in dealing with geodmeographic data. The traditional methodology of sement analysis has a long track record in developing segmentation systems. To develop Tapestry, EsRI BIS used complementary data mining tecniques develped in recent years to enhance the effectiveness oftraditional staticial methodology.

### **Building LifeMode and Urbanization Group**

Segment analysis is also used to develop summary groups. The 65 segments are combined into 12 LifeMode groups that share similar demogrphic characteristics and consumer behavior patterns. The 11 Urbanization groups present an alternate way of combining the 65 segments based on geographic and physical features of the segments along with income. These groups provide broad overviews of the segments and are ideal for projects that require a less granular approach than reviewing all 65 market segments. Copyright c: ESRIBIS 2006

In order to better understand these populations and the likelihood of success for a practice, we have used the Tapestry statistics to find the dominant lifestyles within the 5-, 10-, and 15-minute drive time radius of the site. We have also provided our own interpretation of the data with our proprietary algorithms to determine their application to dentistry on the following pages. As you will note, these statistics make it far easier to comprehend the differences between various parts of the area of study. The following pages contain an interpretation of these groups. They are listed in their code order (1 is first and so forth).

### Within a 5 Minute Radius of the Practice:

- 1. Soccer Moms
- 2. Green Acres
- 3. Midlife Constants

### Within a 10 Minute Radius of the Practice:

- 1. Soccer Moms
- 2. Home Improvement
- 3. Up and Coming Families

### Within a 15 Minute Radius of the Practice:

- 1. Soccer Moms
- 2. Home Improvement
- 3. Front Porches

## Soccer Moms

### Quick Facts

Average Household Size: 2.96 Median Age: 36.6 Median Household Income: \$84,000

### Description

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

- *Soccer* Moms residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 36% built in the 1990s (Index 253), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 74 (Index 163), and low rate vacancy at 5.
- Median home value is \$226,000.
- Most households are married couples with children; average household size is 2.96.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 133).
- Education: 37.7 college graduates; more than 70 with some college education.

- Low unemployment at 5.9; high labor force participation rate at 72; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices from iPods to tablets-anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 159) and second mortgages (Index 154) and auto loans (Index 151).
- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 165), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery, like bicycling, jogging, golfing, boating, and target shooting.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like riding mowers and tillers.

### Median Household Income: \$84,000 (US Median \$51,000)

### Median Net Worth: \$252,000 (US Median \$71,000)

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**Implications**: This group is often targeted because they represent a strong market for all forms of healthcare, particularly when it comes to any kind of "family practice." They are good about making and keeping appointments. They do not mind spending for diagnosis and treatment that is outside the limits of an insurance

plan. One of the best things about them is their tendency to seek preventive treatments like inoculations and dental hygiene.

The "Moms" title is a little deceptive because the "Dads" in this group are extremely involved in the family healthcare decisions. Both parents are welleducated and likely to work. We have found that they favor locations that are in or near retail centers where they can run other errands. That is why "convenience" has so much appeal to these households. A practice that is located on their commute path or near schools/shopping will appeal to them. They are a good risk for Saturday appointments as well as "extended hours." Most of the time, these should be in the morning rather than the evening.

A good web site and SEO strategy are "musts" but we also want to encourage direct mail on specific treatments as a means to attract attention. Décor matters to them as well as strong signage.

## Green Acres

### Quick Facts

Average Household Size: 2.69 Median Age: 43.0 Median Household Income: \$72,000

### **Description**

The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 10 years.
- Single-family, owner-occupied housing, with a median value of \$197,000.
- An older market, primarily married couples, most with no children.
- Education: 60% are college educated.
- Unemployment is low at 6% (Index 70); labor force participation rate is high at 67.4% (Index 108).
- Income is derived not only from wages and salaries but also from self-employment (more than 15% of households), investments (30% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.

- Purchasing choices reflect Green Acres' resident's country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- Green Acres residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans' clubs.

Median Household Income: \$72,000 (US Median \$51,000)

Median Net Worth: \$226,000 (US Median \$71,000)

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# Midlife Constants

### Quick Facts

Average Household Size: 2.30 Median Age: 45.9 Median Household Income: \$48,000

### Description

Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

- Older homes (most built before 1980) found in the suburban periphery of smaller metropolitan markets.
- Primarily married couples, with a growing share of singles.
- Settled neighborhoods with slow rates of change and residents that have lived in the same house for years.
- Single-family homes, less than half still mortgaged, with a median home value of \$141,000 (Index 80).
- Education: 64% have a high school diploma or some college.
- Unemployment is lower in this market at 7.4% (Index 86), but so is the labor force participation rate (Index 89).
- Almost 42% of households are receiving Social Security (Index 150); 28% also receive retirement income (Index 160).
- Traditional, not trendy; opt for convenience and comfort, not cutting-edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.

- Radio and newspapers are the media of choice (after television).
- Prefer practical vehicles like SUVs and trucks (domestic, of course).
- Sociable, church-going residents belonging to fraternal orders, veterans' clubs and charitable organizations and do volunteer work and fund-raising.
- Contribute to arts/cultural, educational, political, and social services organizations.
- DIY homebodies that spend on home improvement and gardening.
- Media preferences: country or Christian channels.
- Leisure activities include scrapbooking, movies at home, reading, fishing, and golf.

### Median Household Income: \$48,000 (US Median \$51,000)

### Median Net Worth: \$104,000 (US Median \$71,000)

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**Implications:** We have found these people to be good and loyal patients. Their referral behavior is high. Unfortunately, they are just as anxious to report that your office is not nice as they are to praise it. They are prime candidates for all the procedures associated with their age. In short, their needs are just starting. Their judgment on the quality of a professional is more tied to their understanding of his or her personality than anything else. If they "like you," they will love you.

They tend to prefer practices that are close to their favorite shopping center (Wal-Mart, for example) and do not concern themselves too much with the office's décor. They just want to know that the doctor is a caring professional. They will probably pay their bills on time and are pleased to do so. But they don't want to spend on things that are not necessary in their minds. For this reason, a little extra time in a consultation can eliminate problems later.

We have found that they are easily accessible through the local newspapers (weeklies are better than dailies), yellow pages, and AM radio stations. We have also had some significant success with this group in advertising in Church Bulletins. Billboards are often a consideration given the type of area in which they find themselves.

# Home Improvement

### Quick Facts

Average Household Size: 2.86 Median Age: 37.0 Median Household Income: \$67,000

### Home Improvement

Married-couple families occupy well over half of these suburban households. Most Home Improvement residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects.

- These are low density suburban neighborhoods.
- Eight of every 10 homes are traditional single-family dwellings, owner occupied.
- Majority of the homes were built between 1970 and 2000.
- More than half of the households consist of married-couple families; another 12% include single-parent families.
- Higher participation in the labor force and lower unemployment than US levels; most households have 2+ workers.
- Cautious consumers that do their research before buying, they protect their investments.
- Typically spend 4–7 hours per week commuting, and, therefore, spend significant amounts on car maintenance (performed at a department store or auto repair chain store).
- They are paying off student loans and second mortgages on homes.
- They spend heavily on eating out, at both fast-food and family restaurants.
- They like to work from home, when possible.

- Enjoy working on home improvement projects and watching DIY networks.
- Make frequent trips to warehouse/club and home improvement stores in their minivan or SUV.
- Own a giant screen TV with fiber-optic connection and premium cable; rent DVDs from Redbox or Netflix.
- Very comfortable with new technology; embrace the convenience of completing tasks on a mobile device.
- Enjoy dining at Chili's, Chick-fil-A, and Panera Bread.
- Frequently buy children's clothes and toys.

Median Household Income: \$67,000 (US Median \$51,000)

Median Net Worth: \$162,000 (US Median \$71,000)

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**Implications:** This group is extremely stable and unlikely to move. But they have a larger-than-average amount of debt and this affects the decision on healthcare they make. They always feel strapped for cash. Nevertheless, they know they have to go to the dentist and the physician, especially for their kids. They are highly prone to select a practice and the range of services according to the insurance they receive through work. They are very happy to find an office that will waive their co-payment and don't worry too much about the implications of it. When they do not have insurance, they will seek a "corporate provider" in a clinic format. As their healthcare needs tend to focus on their children, this group is a challenge to get in for a recall appointment.

They are the perfect population for discount marketing. Coupons, especially those that offer very low-cost or free services, are a major attraction for them. The challenge is getting them to stay in the practice beyond the services offered in the advertisements. That is why the somewhat expensive practice of blanketing an area with discount coupons will deliver these households but it is a toss-up whether the marketing will really result in a long-term benefit to the practice.

They are also strong word-of-mouth patients and are likely to bring with them other members of the same lifestyle group. That is because they tend to associate almost exclusively with other households of this type.

As with all lifestyles, people tend to graduate from one lifestyle to another. At least for now, however, these folks have had a very tough time of it during the recent economic downturn.

# Up and Coming Families

### Quick Facts

Average Household Size: 3.10 Median Age: 30.7 Median Household Income: \$64,000

### Description

Up and Coming Families is a market in transition—residents are younger and more mobile and ethnically diverse than the previous generation. They are ambitious, working hard to get ahead, and willing to take some risks to achieve their goals. The recession has impacted their financial well-being, but they are optimistic. Their homes are new; their families are young. And this is one of the fastest-growing markets in the country.

- New suburban periphery: new families in new housing subdivisions.
- Building began in the housing boom of the 2000s and continues in this fast-growing market.
- Single-family homes with a median value of \$174,000 and a lower vacancy rate.
- The price of affordable housing: longer commute times (Index 116).
- Education: 66% have some college education or degree(s).
- Hard-working labor force with a participation rate of 71% (Index 114) and low unemployment at 7% (Index 81).
- Most households (63%) have 2 or more workers.
- Careful shoppers, aware of prices, willing to shop around for the best deals and open to influence by others' opinions.
- Seek the latest and best in technology.
- Young families still feathering the nest and establishing their style.
- Rely on the Internet for entertainment, information, shopping, and banking.

- Prefer imported SUVs or compact cars, late models.
- Carry debt from credit card balances to student loans and mortgages, but also maintain retirement plans and make charitable contributions.
- Busy with work and family; use home and landscaping services to save time.
- Find leisure in family activities, movies at home, trips to theme parks or the zoo, and sports, from backpacking and baseball to weight lifting and yoga.

Median Household Income: \$64,000 (US Median \$51,000)

### Median Net Worth: \$96,000 (US Median \$71,000)

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**Implications:** These young families are a good base for a practice because of their potential rather than their situation at the present time. Their children are just beginning to start regular doctor visits. The parents are starting to use their insurance regularly. It is likely that they will remain in their homes for between five and ten years. For this reason, they are "long-term" patients. They tend to reject optional treatments. Most will start off accepting only the amount of care their insurance provides but can be persuaded to accept more treatment if they receive adequate information.

They like their practices to be located on their way to work or their way home (along the commute path). They have little patience trying to find an office. We have noted that they are particularly prone to like cross-street references and maps in advertisements and brochures (both word maps and traditional street maps). Keep in mind that both partners in these households are employed and they feel stressed for time.

This is a very good group to target with direct mail. Because they are homeowners and stable, they are probably going to be on a mailing list but due to their relative youth and modest (but growing) net worth, they are not on as many mailing lists as they will be. We have found that refrigerator magnets and telephone stickers are especially appreciated and used. They do tend to use their yellow pages to find

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practices. They are also prone to seek their doctors on the Internet. We strongly recommend both a web site as well as e-mail recall systems. We also note that they are prone to seek care for their children before themselves and to like an office tour if available before committing to a practice. Don't forget signage to attract those running errands close to home!

## Front Porches

### Quick Facts

Average Household Size: 2.55 Median Age: 34.2 Median Household Income: \$39,000

### Description

Front Porches blends household types, with more young families with children or single households than average. This group is also more diverse than the US. Half of house-holders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to Front Porches residents and help to influence household buying decisions. Residents enjoy their automobiles and like cars that are fun to drive. Income and net worth are well below the US average, and many families have taken out loans to make ends meet.

- Nearly one in five homes is a duplex, triplex, or quad; half are older single-family dwellings.
- Just over half the homes are occupied by renters.
- Older, established neighborhoods; three quarters of all homes were built before 1980.
- Single-parent families or singles living alone make up almost half of the households.
- Composed of a blue-collar work force with a strong labor force participation rate, but unemployment is high at 11%.
- Price is more important than brand names or style to these consumers.
- With limited incomes, these are not adventurous shoppers.
- They would rather cook a meal at home than dine out.
- They seek adventure and strive to have fun.
- Go online for gaming, online dating, and chat rooms.

- Use their cell phones to redeem mobile coupons and listen to hip hop and R&B music.
- Drink energy and sports drinks.
- Participate in leisure activities including sports, indoor water parks, bingo, and video games.
- Watch Comedy Central, Nickelodeon, and PBS Kids Sprout.

Median Household Income: \$39,000 (US Median \$51,000)

Median Net Worth: \$21,000 (US Median \$71,000)

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**Implications:** This group is pretty young (think about the adults as being in their late 20s or early 30s) and don't have a great deal of money. In fact, one of the striking similarities with this group is their crunch with credit. They don't have much and have little savings. Typically, they are holders of HMO or low-end PPO insurance. Their primary motivation for seeking care is pain or discomfort caused by a condition. Those with children are almost always covered by some kind of public assistance program (many receive food stamps).

The challenge for providers when it comes to this group is that they don't usually have many clinical needs given their age. Their lifestyles (tobacco, drug, and alcohol use) mean that in time, they are going to have a healthcare problem but it hasn't hit them yet. At least for now, there are not many reasons to seek these people out. Unless they reside in large numbers (25%+) in a nearby radius around the practice, they should likely not be a target market.

The purpose of the report was to answer the following question:

### How viable would a General Dental Practice be in this area and at this site?

Based upon the information we have we believe a General Dental Practice is viable in this area and site due to the current competition ratio, ideal demographic, and the strong growth that is happening in this area

### **Demographic Information**

There is a good Growth Rate in this area for a General Dental Practice (1.08%, 1.28% and 1.13% in the 5, 10 and 15 Minute Drive Time Radii respectively). We look for a Growth Rate of 1% or higher as a positive indicator that new patients will move into an area and seek out a new practice location for their care. We also see a adequate population in the immediate area (9,023 people in the 5 Minute Drive Time Radius). We like to see at least 5,000 people in the 5 Minute Drive Time Radius to support a General Dental Practice.

In the Zip Code as a whole we see a Competition Rate or Dentist-To-Population Ratio of 1:4,511 people. We like to see a Doctor-To-Patient Ratio of 1:1,400 – 1:2,000. Competition for a general practice at this site is acceptable.

Housing in the area shows a population that is stable. We see an Owner Occupied housing number of 71.3%, 64.3%, and 58.2% in the 5, 10, and 15 Minute Drive Time Radii respectively. Renter housing numbers show 25.0%, 31.6%, and 36.6% in the 5, 10 and 15 Minute Drive Time Radii respectively. We show a housing vacancy rate that is average for a Suburban/Rural Population. A population which moves often requires more constant advertising.

Median Household Income levels in the area are average (\$91,317, \$70,802, and \$62,431 in the 5, 10 and 15 Minute Drive Time Radii respectively). We like to see an income level of \$55,000 or higher as a more positive indicator of sufficient disposable income to support active use of dental services. There is also the issue of education. We like to see the number of people in the area with a Bachelor's Degree or higher at 30%. In this area we see 30.1% of the people with a Bachelor's Degree or higher. This indicator, along with disposable income, show a group's willingness to seek out and use dental care regularly.
Blue Collar workers make up about 20% of the workers in the area and the people are likely to have dental insurance through work.

The residents are not significantly dependent upon Public Assistance so they are likely to not have dental work paid for by government programs.

The Zip Code area surrounding this site has a Median Age of 38.7. This is a positive indicator for a General Dentist. We like to see a Median Age of 35 or higher.

## **Psychographic-Lifestyle Information**

The following three Psychographic-Lifestyle groupings can be found surrounding the practice site:

First, we see that most people in the area fit into the "Soccer Moms" grouping. Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

Also, we see people in the "Green Acres" lifestyle grouping. The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.

Finally, we find people in the "Midlife Constants" grouping. Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous, but not spendthrifts.

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For more detailed information about these Psychographic-Lifestyle groupings and marketing recommendations see the "Neighborhood & Site: Psychographic-Lifestyle Descriptions and Implications" section of this report or a Marketing Report is available for this specific practice site from Scott McDonald & Associates, Inc. at our website DoctorDemographics.org.

## **Technical Notes**

## About Zip Codes and Census Geography

In developing this software, our data vendors have used the results from the 2016 census update and it is important for the data user to understand the limitations of this product, since different applications require different levels of boundary and data accuracy. Census geography and United States Postal Service (USPS) geography cannot be linked easily. In practice, Zone Improvement Plan (ZIP) Codes are more accurately represented as an open network of lines interspersed with points. Any attempt to create Zip Codes areas requires interpretation and adjustment.

Tabulating Zip Code statistics to geographic areas replaces the 1980 census methodology of tabulating Zip Code statistics based on the mailing address associated with each census questionnaire. The Zip Code delineations in Summary Tape File (STF) 3B Zip Code/Block Equivalency (Equivalency) file are the product of Geographic Data Technology of Lyme, New Hampshire and represent this commercial vendors interpretation of the relationship of Zip Codes to 1990 Census block numbers. The particular model and methodology used to create this file are one of many possible approaches. There are no "Post Office Box Only" Zip Codes included in this file.

These Zip Code areas are for statistical purposes only. Zip Code boundaries typically follow property lines rather than the center lines of streets. For this reason, they do not coincide with census block boundaries. Data users should be aware of this inherent limitation in the Zip Code tabulations caused by including whole census blocks in a Zip Code when only some of the housing units are served by that Zip Code. Therefore, some housing units will not be allocated to their true USPS Zip Code. Unlike census geographic areas, which change only once in every ten years, the USPS can (and does) change Zip Codes at any time.