Hard-to-Survey (HTS) Populations and the US Decennial Census

26th Annual Morris Hansen Lecture
Washington DC

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U.S. Census Bureau
- Who are hard to survey?
- Social Marketing campaigns in the US Census
  - Hard to Survey Segments
  - Evidence of campaign on HTS segments
- New HTS metric
- Digital media and HTS populations
Hard-to-Survey: Frameworks

Hard to survey according to *survey process* (Tourangeau, 2014)

- Hard to sample,
- locate,
- contact,
- persuade, and/or
- interview
HTS groups

Undercounted in 2010 Census (Mulry, 2014)
- Ethnic minorities (Blacks, Hispanics, AIAN)
- Males age 18-29
- Non-nuclear family members

High level of effort/proxy (Walker et al., 2012)
- Hispanic-headed households
- Black-headed households
- Renter households
HTS groups

Undercounted young children (0-4)

- Mothers (Konicki and Griffin, 2016; Dolson 2013)
  - Young (15-24)
  - Unmarried
  - Not living in own household
- Black and Hispanic; limited English proficiency; < HS education; unemployment (O’Hare, 2014)
Methods to count HTS

- Census special operations/forms
  - Shelter & Service-based enumeration
  - Update/enumerate
  - Group quarters
  - Campsites/RV parks
  - “Be counted” forms
Methods to include HTS

- Targeted mailouts:
  - Bi-lingual forms (Bentley, 2012)
  - Replacement forms (Hill, 2012)
  - Internet push vs Choice (Nichols, Horwitz, and Tancreto, 2013; Chesnut, 2015)
Methods to count HTS

Innovations for 2020 Census (Blumerman, Bishop and Dinwiddie, 2016)

- Multiple modes of self response
- Response without unique ID code
- Online forms in multiple languages
Methods to include HTS: social marketing campaigns

“The adaptation and adoption of commercial marketing activities, institutions, and processes as a means to induce behavioral change in a targeted audience on a temporary or permanent basis to achieve a social goal”

- S. Dann, 2010
Methods to include HTS: social marketing campaigns

- Locate (trusted voices)
- Contact (direct mail, texts, SMS)
- Persuade (targeted messaging)
- Interview (click to complete)
Methods to include HTS: social marketing campaigns

- Ad Council – Beginning with 1950 Census
- 1980 Census – PSAs
- 1990 Decennial Census - Partnered with Ogilvy and Mather
- Concentration on racial/ethnic minorities

Source: Census Bureau, Chapter 5 1990 Census History
Census '90 Button

EVERYONE COUNTS!

CENSUS '90

Answer the Census
1990 Census: a turning point?

- Budgeted for 70% self response
- By start of NRFU mail response was only 65%
- Spurred nonresponse research
- The agency decided to engage a paid campaign for 2000 Census

Source: Fay, Bates and Moore, 1991
2000 and 2010 Campaigns
Census 2000 was first census to use paid advertising

- Engaged advertising contractors (2000 Young & Rubicam; 2010 DraftFCB)
  - Paid advertising (28 languages)
    - TV, radio, print, out-of-home, digital
    - 110 Million in 2000 and 167 Million in 2010
- Earned media
- National and local partnership program
  - Census in Schools
  - Faith-based outreach
  - Complete Count Committees

Principle of social marketing?

Segment the target audience
(Adreason, 2002; French 2010)
2010 Census segmentation

- Census Planning Database
- Hard-to-Count (HTC) Score (Bruce, Robinson and Sanders, 2001)
- Census self-response data
- Augment with 2006 ACS data
Hard to Count Score Variables

Housing Factors:
- Percent vacant
- Percent Not Single Unit Structure
- Percent Renter Occupied
- Percent Crowded Occupancy

Social and Demographic:
- Percent Not Husband/Wife Households
- Percent Household with no phone service
- Percent Not High School Graduate
- Percent with Public Assistance Income
- Percent Unemployed
- Percent below poverty level
- Percent Linguistically Isolate Households
- Percent Moved into Unit (1999-2000)

Source: Bruce, Robinson, and Sanders (2001)
Segmentation Method

- Mutually exclusive groupings of Census tracts
- k-means cluster analysis using Planning Database
- Input the 12 hard-to-count (HTC) score variables
- Yielded 8 clusters
  - Several iterations
  - Looking for constructs identified previously
Geographic segmentation for 2010 Census social marketing campaign

- Advantaged Homeowners
- All Around Average I
- All Around Average II
- Single Unattached Mobiles
- Ethnic Enclave I
- Economically Disadvantaged I
- Ethnic Enclave II
- Economically Disadvantaged II

Source: Bates and Mulry, 2012
Five segments considered HTS

**Young/mobile/singles**
- renters; high educ; few children; urban; $40K; racially diverse

**Economically Disadvantaged (owner skewed)**
- urban & rural; single mothers; $26K; 49% Black; 1/3 live alone

**Economically Disadvantaged (renter skewed)**
- urban; female-headed; $22K; 59% Black; 23% Hispanic

**Ethnic enclave (owner skewed)**
- 43% foreign born; spousal; 50% w/children; $35K; 61% Hispanic

**Ethnic enclave (renter skewed)**
- 62% foreign born; low educ; younger; urban; $32K; 59% Hispanic; 11% Asian; 34% limited English proficiency

Source: Jacobsen, 2009; 2006 ACS
Apparently our HTS segments also apply to our neighbors to the North …
Audience profiles

Self-response rates on June 2, 2011 (first line)
Final response rates on September 30, 2011 (second line)

<table>
<thead>
<tr>
<th>Audience Profile</th>
<th>Self-response</th>
<th>Final response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advantaged Homeowners</td>
<td>69.45%</td>
<td>84.83%</td>
</tr>
<tr>
<td>All Around Average I</td>
<td>69.48%</td>
<td>80.35%</td>
</tr>
<tr>
<td>All Around Average II</td>
<td>71.58%</td>
<td>79.56%</td>
</tr>
<tr>
<td>Rural Urbanite</td>
<td>73.46%</td>
<td></td>
</tr>
<tr>
<td>Ethnic Enclave I</td>
<td>72.83%</td>
<td></td>
</tr>
<tr>
<td>Low-income Tenant</td>
<td>71.58%</td>
<td></td>
</tr>
<tr>
<td>Single Unattached Mobiles</td>
<td>69.48%</td>
<td></td>
</tr>
<tr>
<td>Ethnic Enclave II</td>
<td>69.45%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Statistics Canada, 2016
What about messaging to HTS?
Census Barriers Attitudes and Motivator Survey (CBAMS)

- Phone and in-person survey N=4000
- Oversampled HTS populations (e.g. limited English proficiency; high minority tracts)

Measured:
- Census familiarity and knowledge
- Self-reported propensity to respond
- Ranking of messages
- Barriers and motivators to participation

Source: Census Bureau, CBAMS, 2008
Attitudinal segmentation for 2010 Census campaign

Mindsets for Messaging

- Leading Edge: 26%
- Head Nodders: 41%
- Insulated: 6%
- Unacquainted: 7%
- Cynical Fifth: 19%

3 low-affinity mindsets (HTS)

Source: Census Bureau, CBAMS, 2008
Insulated 6% *Indifferent*

- Attached to their communications — higher on 10+ years in neighborhood
- Admittedly “don’t know” about Census — low familiarity
- Question impact of Census because they feel they haven’t seen results in their neighborhood
- Therefore, some softness of favorability, responsibility, trust and voice
- More interested in individual benefits of Census versus broader community benefits — probably due to their disadvantaged circumstance

- Ethnic (Hispanic, Black, American Indian, other)
- Many don’t speak English at home (mostly Spanish)
- More female than any other segment
- Large pocket of older (65+) and widows — but all ages are reflected
- Less likely to have children
- Downscale: low income ($25K or less, low education (more than half HS or less)
- Homeowners
Cynical Fifth 19% Resistant

- Highest claimed unfamiliarity with Census, but in reality, have relatively high knowledge
- Predisposition towards the Census is neutral to negative — alarmingly high belief they will never see results of Census in their neighborhood
- High belief information will be misused (or maybe not used) since no evidence to feel otherwise; also high belief that Census is an invasion of privacy
- Therefore low trust, high skepticism, but still some underlying sense of responsibility and belief that all should be counted
- Ideological
- Will have to convince them at another level, perhaps more emotional, gut
- Diverse (mirrors the population)
- Medium to high income
- Educated
- Male skew
Feel part of their community 81%

Unaware of Census 100%

Non-White 48%

Non-US born 42%

Never heard of the Census, even after aiding — know nothing about it at all

Low community stakedness and civic participation — focusing on self for the moment — individual impact may have most leverage

Least likely to indicate participation in the Census, but potential since no negative baggage

Far less likely to vote — probably can’t (non-citizens)

Ethnic, majority minority (Hispanic, Asian, AI, Black)

Almost half non-U.S. born

Most speaking in language at home

Male skew

Younger or older

Highest never married

Largest household size (4+ people), most likely to have children in household

Most downscale of all segments — least educated, lowest income

Much more likely renters versus homeowners
Armed with audience segments and messaging mindsets, ad agency produced multitude of advertising pieces across various platforms...
WHAT CAN

QUESTIONS DO?
HELP BUILD BETTER COMMUNITIES

Better healthcare. Better schools. Better roads. All that is within your reach when you fill out the census form and mail it back when it comes in March. 10 simple questions. 10 minutes that will help decide how more than $435 billion in federal funds get dispersed to your community.

For more information, go to www.2010census.gov.

We move forward when you send it back.
CENSUS 2010 - Miss Maybelle
Online Conform :30 NFA
Jan 5, 2010

www.bondedit.com
Targeted ads

- 35% of African Americans recalled seeing Ms. Maybelle compared to 15% for Diverse Mass ad (Frank)
- 31% said targeted ad grabbed attention compared to 11% for DM ad
- 31% said gave reason to mail back compared to 11%

Conclusion: targeted ads resonated among target audiences
Breadth of 2010 Campaign

 Between January and July 2010, Census ranked among top 5 advertisers behind McDonalds, Walmart and GEICO
 Average number of ad exposures = 42
 In fact, ran out of minority media inventory to purchase in some markets!
Do paid campaigns work?
Mail self-response rates

No paid advertising

1990: 65%

2000: 67%

2010: 67%

Paid advertising in 2000 and 2010

Source: Fay, Bates and Moore, 1991; Letourneau, 2012
ACS March mail-response by segment: Decennial vs non-decennial year
ACS March mail-response by segment: difference between decennial and non-decennial
1990-2010 Census net over/undercounts: by race and ethnicity

Source: US Census CCM, 2012

- **White**
  - 1990: -0.68
  - 2000: 1.13
  - 2010: 0.84

- **Black**
  - 1990: 0
  - 2000: -1.84
  - 2010: -2.07

- **Hispanic**
  - 1990: 0
  - 2000: -0.71
  - 2010: -1.54

No paid advertising

Paid advertising campaigns in 2000 and 2010
“How much have you seen or heard recently – within the last week or so – about the 2010 Census?”

Rolling Week %

Source: Miller, Bates and Walejko, 2010
"How much have you seen or heard recently-within the last week or so—about the 2010 Census?"

Response: Heard great deal/some/a little

Rolling Week %
"How much have you seen or heard recently—within the last week or so—about the 2010 Census?"

Response: Heard great deal/some/a little

Rolling Week %
"How likely are you to participate in the 2010 Census? By participate we mean fill out and mail in a Census form"

Response: Definitely Will/Already Mailed Back

Rolling Week %

![Graph showing response rates by age groups over time.](image-url)

- **Age 18-24**
- **Age 25-44**
- **Age 45-64**
- **Age 65+**

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Linear (Age 18-24)  Linear (Age 25-44)  Linear (Age 45-64)  Linear (Age 65+)
2010 Census ICP Shift in Mindsets (Panel Cases)

<table>
<thead>
<tr>
<th>Wave 1</th>
<th>Unacquainted</th>
<th>Head Nodders</th>
<th>Cynical 5th</th>
<th>Insulated</th>
<th>Leading Edge</th>
</tr>
</thead>
<tbody>
<tr>
<td>8%</td>
<td>35%</td>
<td>22%</td>
<td>23%</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Wave 2</th>
<th>Unacquainted</th>
<th>Head Nodders</th>
<th>Cynical 5th</th>
<th>Insulated</th>
<th>Leading Edge</th>
</tr>
</thead>
<tbody>
<tr>
<td>2%</td>
<td>35%</td>
<td>31%</td>
<td>14%</td>
<td>18%</td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Wave 3</th>
<th>Unacquainted</th>
<th>Head Nodders</th>
<th>Cynical 5th</th>
<th>Insulated</th>
<th>Leading Edge</th>
</tr>
</thead>
<tbody>
<tr>
<td>0%</td>
<td>36%</td>
<td>39%</td>
<td>12%</td>
<td>13%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Bates and Mulry, 2012
What did we do right?

- Segmentation
- Targeted ads
- Real time monitoring
- Rapid response program
Where can we improve?

- Oversaturation
- More precise targeting
- Better alignment of geo segments and mindsets
- Better communication mix for HTS (more “trusted voices” less TV; engage single people)
- Further segmentation of Cynical 5th
2020 social marketing campaign

- Social media and *digital advertising* increasing exponentially
- 34% use phone as their primary Internet device*
  - More likely young adults, non-whites, and low income/education
- Smartphone ownership gap has closed*
  - Whites, 66%; Black 68% and Hispanics: 64%
- *Mobile devices* as new contact and response method
  - Text/SMS
  - Digital advertisement

*Source: Pew Research Center, 2015*
2015 Digital Ad Test

- Savannah designated market area (DMA)
- Selection of households received mailing materials
- DMA-wide communications campaign to simulate census environment:
  - Earned Media
  - Partnership outreach
  - Television and radio advertising
  - Print and out-of-home advertising
  - Digital advertising and social media

First test allowing response without a mailed material and direct digital response
Digital ads split into 3 categories...

1. Paid Search Ads

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Paid Search Ads example:

Google search results for "2015 Census"

- **2015 Census**
  - www.census.gov/2015
  - Participate in the census test. Stand up and be counted!
  - 2015 Census has 207 followers on Google+
Digital ads were split into four categories:

- Social media in-feed
3 Display ads
2015 Digital Ad Test: response mode by HTS segments: **Mailout** households

<table>
<thead>
<tr>
<th>Segment</th>
<th>Mail</th>
<th>Internet</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall</strong></td>
<td>19%</td>
<td>69%</td>
<td>12%</td>
</tr>
<tr>
<td>(Overall response: 49%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Low internet connectivity</strong></td>
<td>29%</td>
<td>54%</td>
<td>17%</td>
</tr>
<tr>
<td>(Overall response: 33%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Female-headed low income</strong></td>
<td>28%</td>
<td>55%</td>
<td>17%</td>
</tr>
<tr>
<td>(Overall response: 37%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Young/mobile/renters</strong></td>
<td>19%</td>
<td>74%</td>
<td>7%</td>
</tr>
<tr>
<td>(Overall response: 37%)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Virgile and Bates, 2016
Source of online response among HTS segments: Mailout households

<table>
<thead>
<tr>
<th>Segment</th>
<th>Mail URL/prereg</th>
<th>Traditional ad URL</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>84%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Low internet connectivity</td>
<td>84%</td>
<td>11%</td>
<td>4%</td>
</tr>
<tr>
<td>Female-headed low income</td>
<td>69%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Young/mobile/renters</td>
<td>87%</td>
<td>9%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: Virgile and Bates, 2016
Tagline and awareness campaign to increase self-response in continuing surveys

- Content: overall Census Bureau branding and messaging to increase awareness
- Surveys not mentioned by name and no immediate call to action (i.e., click here to complete your survey)
- Deliver ads to households in sample
Video pre-roll example

https://www.youtube.com/playlist?list=PLhLB6X1ybzTSei5-DCgvsPsonAb7MCUu5
New HTS tools for 2020?
THE LOW RESPONSE SCORE (LRS)
A METRIC TO LOCATE, PREDICT, AND MANAGE HARD-TO-SURVEY POPULATIONS

CHANDRA ERDMAN
NANCY BATES

Abstract In 2012, the US Census Bureau posed a challenge under the America COMPETES Act, an act designed to improve the competitiveness of the United States by investing in innovation through research and development. The Census Bureau contracted Kaggle.com to host and manage a worldwide competition to develop the best statistical model to predict 2010 Census mail return rates. The Census Bureau provided competitors with a block group-level database consisting of housing, demographic, and socioeconomic variables derived from the 2010 Census, five-year American Community Survey estimates, and 2010 Census operational data. The Census Bureau then challenged teams to use these data (and other publicly available data) to construct the models. One goal of the challenge was to leverage winning models as inputs to a new model-based hard-to-count (HTC) score, a metric to stratify and target geographic areas according to propensity to self-respond in sample surveys and censuses. All contest winners employed data-mining and machine-learning techniques to predict mail-return rates. This made the models relatively hard to interpret (when compared with the Census Bureau’s original HTC score) and impossible to directly translate to a new HTC score. Nonetheless, the winning models contained insights toward building a new model-based score using variables from the database. This paper describes the original algorithm-based HTC score, insights gained from the Census Return Rate Challenge, and the model underlying a new HTC score.
New metric to locate HTS: 
Low Response Score (LRS) model

<table>
<thead>
<tr>
<th>Predictor</th>
<th>Coef</th>
<th>Sig</th>
<th>Predictor</th>
<th>Coef</th>
<th>Sig</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Intercept)</td>
<td>10.29</td>
<td>***</td>
<td>Renter occupied units</td>
<td>1.08</td>
<td>***</td>
</tr>
<tr>
<td>Ages 18-24</td>
<td>0.64</td>
<td>***</td>
<td>Female head, no husband</td>
<td>0.58</td>
<td>***</td>
</tr>
<tr>
<td>Non-Hispanic White</td>
<td>-0.77</td>
<td>***</td>
<td>Ages 65+</td>
<td>-1.21</td>
<td>***</td>
</tr>
<tr>
<td>Related child &lt;6</td>
<td>0.46</td>
<td>***</td>
<td>Males</td>
<td>0.09</td>
<td>***</td>
</tr>
<tr>
<td>Married family households</td>
<td>-0.12</td>
<td>***</td>
<td>Ages 25-44</td>
<td>-0.06</td>
<td></td>
</tr>
<tr>
<td>Vacant units</td>
<td>1.08</td>
<td>***</td>
<td>College graduates</td>
<td>-0.32</td>
<td>***</td>
</tr>
<tr>
<td>Median household income</td>
<td>0.24</td>
<td>***</td>
<td>Ages 45-64</td>
<td>-0.08</td>
<td>*</td>
</tr>
<tr>
<td>Persons per household</td>
<td>3.44</td>
<td>***</td>
<td>Moved in 2005-2009</td>
<td>0.09</td>
<td>***</td>
</tr>
<tr>
<td>Hispanic</td>
<td>0.41</td>
<td>***</td>
<td>Single unit structures</td>
<td>-0.52</td>
<td>***</td>
</tr>
<tr>
<td>Population Density</td>
<td>-0.40</td>
<td>***</td>
<td>Below poverty</td>
<td>0.11</td>
<td>***</td>
</tr>
<tr>
<td>Different HU 1 year ago</td>
<td>-0.12</td>
<td>***</td>
<td>Ages 5-17</td>
<td>0.17</td>
<td>***</td>
</tr>
<tr>
<td>Black</td>
<td>-0.04</td>
<td>**</td>
<td>Single person households</td>
<td>-0.24</td>
<td>***</td>
</tr>
<tr>
<td>Not high school grad</td>
<td>-0.06</td>
<td>***</td>
<td>Median house value</td>
<td>0.71</td>
<td>***</td>
</tr>
</tbody>
</table>

Sig: *** $p < .001$; ** $0.001 \leq p < .01$; * $0.01 \leq p < .05$
R-squared: 56.10%, $n = 217,417$

Source: Erdman and Bates, in press
Distribution of the LRS

Number of Block Groups

Low Response Score
**LRS/PDB Example: Three HTS DC Blocks**

**Columbia Heights:** 43% Hispanic; 36% Other Language; 92% 10+ multi-units; 64% non-family hhds; 85% renters; 60% moved 5 years; LRS=32

**Trinidad:** 37% Ages 18-24; 59% Moved 5 years; 33% Below poverty; 28% Vacant; 55% Black; 31% white; 87% renters; LRS=37

**Anacostia:** 98% Black; 46% below poverty; 89% single unit homes; 15% non-family hhds; 21% moved 5 years; 93% renters; LRS=38
LRS and PDB publicly available

- Google “Census Planning Database”
- LRS on both block-group and tract level files
- Available in CSV and API format
App for mapping HTS areas
App for mapping HTS areas

Low Response Score (LRS) by 2010 Census Tract

The LRS is simply the Predicted Mail Non-Response Rate (%) as calculated in the Planning Database. More information on the U.S. Census Bureau's Planning Database and a full discussion of the LRS methodology can be found by clicking the "Source" note to the right.

Source: U.S. Census Bureau 2015 Planning Database

LEGEND

Predicted Mail Non-Response Rate (%)

LRS
- 29.0 - 46.2
- 25.0 - 28.9
- 22.0 - 24.9
- 18.0 - 21.9
- 0.0 - 17.9
- Not Calculated* (-1)

- 9.5% poverty
- 93.3 % Black
- 3.7% Hispanic
- 60.3% Renters
- 1.6% Limit English
- 11.0% < HS
- 32.5% Female head
LRS limitations

- Only considers mail self-response
- Some tracts have small Ns in mailback universe
- January 2013 ACS began collecting internet access Q; also offered internet as a mode
- First order of business is to update LRS
Plans for 2020 campaign

- 2020 Communications Contract awarded to Young and Rubicam (Y&R)
  - Multicultural advertising partner subcontractors:
    - BRAVO, Carol H Williams, Culture ONE World, g+g advertising, TDW & Co; Kalaimoku Group
- Plan to conduct household level models:
  - Propensity to self-respond
  - Preferred mode of response
  - Preferred mode of contact (media vehicle)
Parting thoughts…

- Post-2010 Census attitudes
- Insulated & Cynical Fifth still aligned
- Trust in government/attitudes became important
- Emerging “suspicious” mindset
  - Census will personally harm
  - Misinformed about Census uses
  - Low intent to participate

Source: Census, CBAMSII, 2011
Thanks to the Hansen Nomination Committee, NASS, WSS and Westat

nancy.a.bates@census.gov
<table>
<thead>
<tr>
<th>Tapestry® segment</th>
<th>Female headed low income/education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modest Income Homes</td>
<td>35%</td>
</tr>
<tr>
<td>Rural Bypass</td>
<td>20%</td>
</tr>
</tbody>
</table>
WHO ARE WE?
Families in this urban segment may be nontraditional; however, their religious faith and family values guide their modest lifestyles. Many residents are primary caregivers to their elderly family members. Jobs are not always easy to come by, but wages and salary income are still the main sources of income for most households. Reliance on Social Security and public assistance income is necessary to support single-parent and multigenerational families. High poverty rates in this market make it difficult to make ends meet. Nonetheless, rents are relatively low (Index 73), public transportation is available, and Medicaid can assist families in need.

OUR NEIGHBORHOOD
• Households are single person or single parent (usually female householders). Multigenerational families are also present.
• Homes are predominantly single family; values reflect the age of the housing, built more than 60 years ago.
• Over half of the homes are renter occupied; average rent is lower than the US average.
• Most households have no vehicle or one car, with a high dependence on public transportation.

SOCIOECONOMIC TRAITS
• Almost a quarter of adults aged 25 or more have no high school diploma.
• Labor force participation is only 50%, with unemployment at more than double the US rate.
• Income is less than half of the US median income; one in three households are in poverty, dependent on Social Security, public assistance, and Supplemental Security Income.
• Consumers in this market consider traditional gender roles and religious faith very important.
• This market lives for today, choosing to save only for a specific purpose.
• They favor TV as their media of choice and will purchase a product with a celebrity endorsement.
LifeMode Group: Hometown
Modest Income Homes

AGE BY SEX (Est data)
Median Age: 36.1  US: 37.6
* Indicates US

RACE AND ETHNICITY (Est data)
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 33.3  US: 62.1

INCOME AND NET WORTH
Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income
$22,000
US Median $51,000

Median Net Worth
$13,000
US Median $71,000
MARKET PROFILE  (Consumer preferences are estimated from data by GfK MMR)

- To make ends meet, consumers shop at warehouse clubs and low-cost retailers.
- Unlikely to own a credit card, they pay their bills in person.
- This market supports multigenerational families; they are often primary caregivers for elderly family members. On average, Modest Income Homes residents have a higher reliance on Medicaid.
- For entertainment, they listen to gospel and R&B music and prefer to watch BET.
- The recreational activity of choice for residents is basketball.

HOUSING

Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau’s American Community Survey.

- **Home Ownership**
  - US Percentage: 63.6%
  - 46.3% Own
  - 53.7% Rent

- **Typical Housing:**
  - Single Family

- **Average Rent:**
  - $720
  - US Average: $990
# Self Response by Mode – Percent of Total Submissions

<table>
<thead>
<tr>
<th>Self Response Mode</th>
<th>All Submissions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Count</td>
<td>% of Submissions</td>
</tr>
<tr>
<td>Total Submissions</td>
<td>70,208</td>
<td>100.0%</td>
</tr>
<tr>
<td>Mode: Internet</td>
<td>56,145</td>
<td>80.0%</td>
</tr>
<tr>
<td>Blank (largely mailout URL)</td>
<td>27,171</td>
<td>38.7%</td>
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<tr>
<td>Census Vanity URL</td>
<td>19,948</td>
<td>28.4%</td>
</tr>
<tr>
<td>Digital Ad Initiated</td>
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<tr>
<td>Partners/Events</td>
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<tr>
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<tr>
<td>Out-of-Home SMS</td>
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<tr>
<td>Organic Social Media</td>
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<td>0.0%</td>
</tr>
<tr>
<td>Unidentified</td>
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<td>0.0%</td>
</tr>
<tr>
<td>Mode: Paper, mail-back</td>
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<td>12.1%</td>
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<tr>
<td>Mode: Telephone, in-bound</td>
<td>5,602</td>
<td>8.0%</td>
</tr>
</tbody>
</table>

*40.1% directly attributable to advertising and communications campaign*

Source: US Census Bureau, 2015 Savannah Test Census