



# Indianola

*Retail Analysis*



**Buxton**



## Selecting Indianola's Retail Site

To begin the retail recruitment process, the City of Indianola selected three sites to be analyzed for possible retail development or revitalization. The locations of the three sites are shown on the following page.

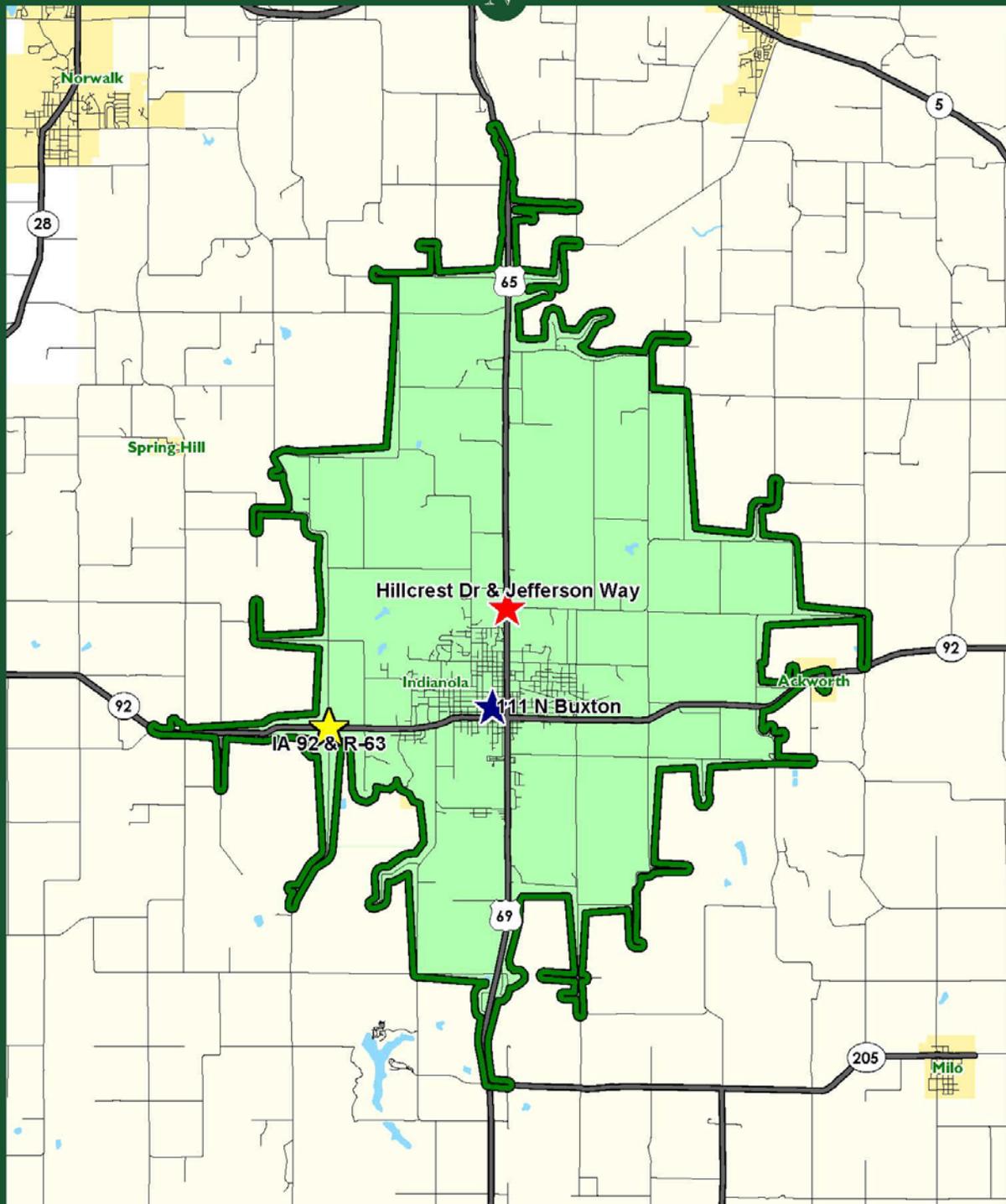
Buxton has examined the retail potential of the three sites based on the following analyses:

- A primary drive-time trade area was delineated for each site
- The customers in each trade area were segmented according to buying habits and lifestyles
- A profile of Indianola's customers within each of the three trade areas was developed
- The surplus and leakage for 11 major store types and 49 minor store types were determined for the trade area

The purpose of these analyses is to develop Indianola's Customer Profile. The Customer Profile is a snapshot of the customers that reside in Indianola's trade area. Even though these consumers are complex and diverse, Buxton is able to capture and catalogue the extent to which potential demand for a retailer's goods and services are being met within the trade area.

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

With this analysis and Buxton's recommendations, Indianola can make a more informed decision about investments in infrastructure and can focus resources on areas of higher retail development potential.



## Indianola, Iowa: Overall Trade Area



### Shopping Centers

GLA in thousands



Overall Trade Area

Site 1

Site 2

Site 3





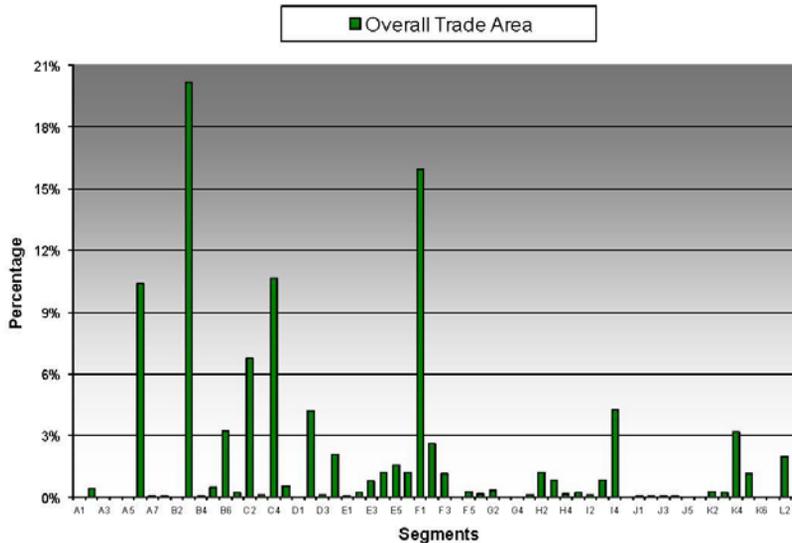
## Overall Trade Area

### Drive-Time Trade Area

The map on the previous page depicts the overall trade area. The overall trade area consists of a custom polygon derived from the Site 1 and Site 2 drive time polygons, determined by Buxton's proprietary drive-time technology.

### Psychographics

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



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### Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. By determining dominant segments and reviewing their segment descriptions, lifestyle habits and preferences can be identified. Please refer to Appendix C for additional segment description information.

Dominant Segments	Description	Households	% of All Households
A06	Small-town Success	594	10.36
B03	Urban Commuter Families	1,157	20.18
B06	Successful Suburbia	186	3.24
C02	Prime Middle America	388	6.77
C04	Family Convenience	609	10.62
D02	Working Rural Communities	242	4.22
F01	Steadfast Conservatives	913	15.92
I04	Small-town Connections	246	4.29
K04	Urban Diversity	183	3.19

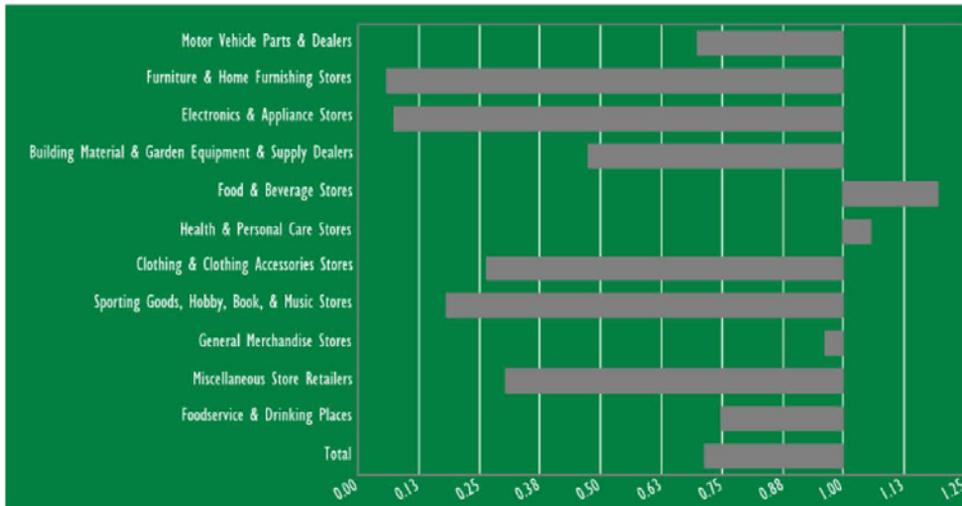
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## Overall Trade Area (continued)

### Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.

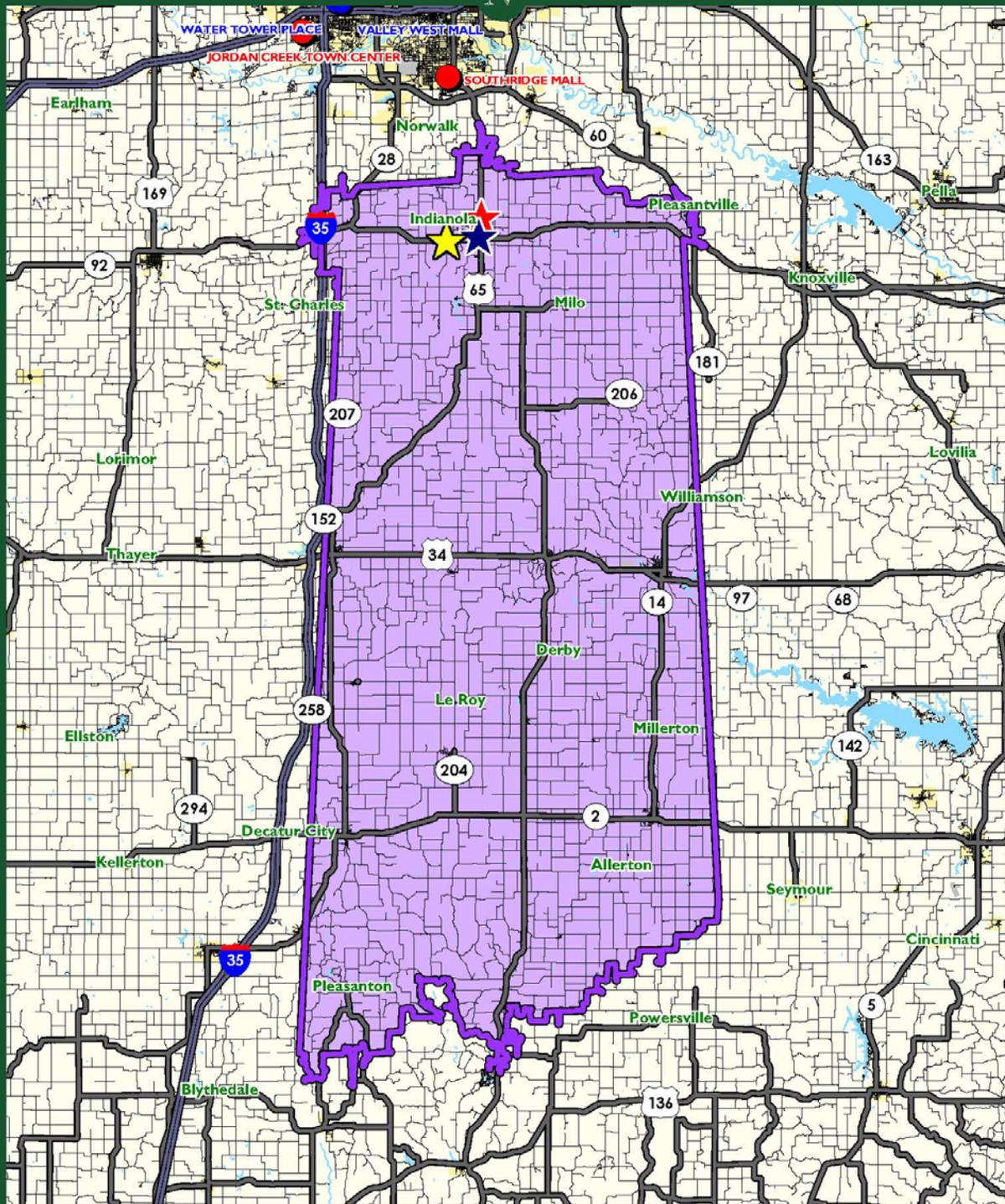


Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000; Census Estimates and Projections 2008 Data

The following table presents the trade potential variables for the overall trade area:

Trade Potential Variables	Overall
Estimated Household Count	5,734
Number of Households in Dominant Segments	4,518
Traffic Count	18,300
Total Demand	\$207,799,911
Total Supply	\$148,476,385
Leakage	(\$59,323,526)

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## Indianola, Iowa: Secondary Trade Area



### Shopping Centers

GLA in thousands



Secondary Trade Area

Site 2

Site 1

Site 3

Miles





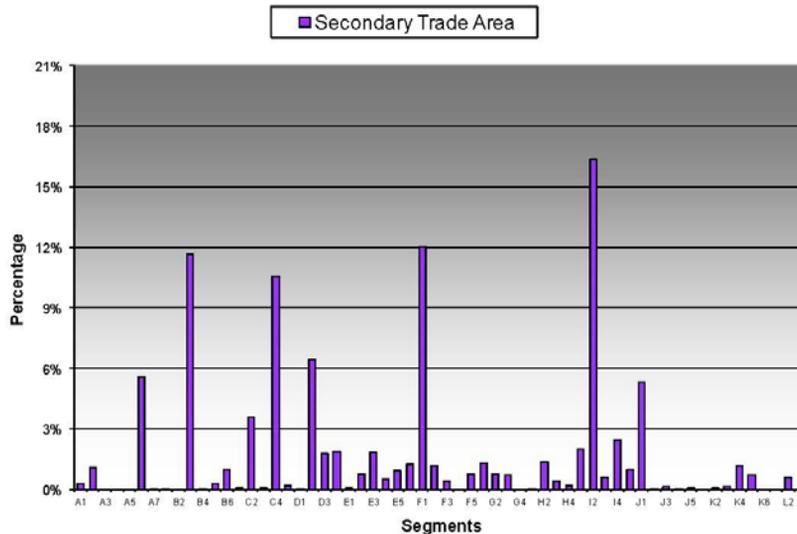
## Secondary Trade Area

### Drive-Time Trade Area

The map on the previous page depicts the secondary trade area. The secondary trade area consists of a custom polygon, determined by Buxton and Indianola, IA.

### Psychographics

The psychographic profile of the households within custom secondary trade area is presented below.



Mosaic® USA is a registered trademark of Experian; CAPE Estimates and Projections 2010 Data. Data Source: Experian

### Dominant Segments

A segment that represents at least three percent of a trade area is a dominant segment. By determining dominant segments and reviewing their segment descriptions, lifestyle habits and preferences can be identified. Please refer to Appendix C for additional segment description information.

Dominant Segments	Description	Households	% of All Households
A06	Small-town Success	1,073	5.60
B03	Urban Commuter Families	2,232	11.65
C02	Prime Middle America	689	3.60
C04	Family Convenience	2,023	10.56
D02	Working Rural Communities	1,235	6.44
F01	Steadfast Conservatives	2,307	12.04
I02	America's Farmlands	3,133	16.35
J01	Rugged Rural Style	1,022	5.33

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## Secondary Trade Area (continued)

### Leakage Analysis

The following table represents an overview by store type of the leakage or surplus within the studied trade area. This is represented by an index with 1.0 being the baseline. A leakage is reflected by an index less than 1.0 and a surplus is reflected by an index greater than 1.0. Please see Appendix A for detailed demand and actual sales by category.



Mosaic® USA is a registered trademark of Experian; Census Data. Data Source: Applied Geographic Solutions, 2000; Census Estimates and Projections 2008 Data

The following table presents the trade potential variables for the secondary trade area:

Trade Potential Variables	Secondary
Estimated Household Count	19,163
Number of Households in Dominant Segments	13,714
Traffic Count	18,300
Total Demand	\$645,717,672
Total Supply	\$319,897,152
Leakage	(\$325,820,520)

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# Appendix A: Leakage Analysis



## **Retail Leakage and Surplus Analysis**

The Retail Leakage and Surplus Analysis examines the quantitative aspect of the community's retail opportunities. It is a guide to understanding retail opportunities but it is not an analysis that indicates unconditional opportunities. The analysis is sometimes called "a gap analysis" or "a supply and demand analysis" and can aid in the following:

- Indicating how well the retail needs of local residents are being met
- Uncovering unmet demand and possible opportunities
- Understanding the strengths and weaknesses of the local retail sector
- Measuring the difference between actual and potential retail sales

### Understanding Retail Leakage

Retail leakage means that residents are spending more for products than local businesses capture. Retail sales leakage suggests that there is unmet demand in the trade area and that the community can support additional store space for that type of business.

However, retail leakage does not necessarily translate into opportunity. For example, there could be a strong competitor in a neighboring community that dominates the market for that type of product or store.

### Understanding Retail Surplus

A retail surplus means that the community's trade area is capturing the local market plus attracting non-local shoppers. A retail surplus does not necessarily mean that the community cannot support additional business. Many communities have developed strong clusters of stores that have broad geographic appeal. Examples of these types of retailers include: sporting goods stores, home furnishing stores, restaurants, and other specialty operations that become destination retailers and draw customers from outside the trade area.

Examining the quantitative aspects (Leakage/Surplus) is only part of the evaluation of community's retail opportunities. Before any conclusions can be drawn about potential business expansion or recruitment opportunities, qualitative considerations such as trade area psychographics and buying habits must be analyzed in context of other market factors.

Leakage/Surplus Index by Major Store Type

The quantitative comparison of retail leakage and surplus in the twelve major store types shown in the chart and table below provides an initial measure of market opportunities. Combining this analysis with the knowledge of the local retail situation will take the process of identifying retail possibilities one step further.

Figure 1 provides the leakage/surplus indices and following is the sales potential and actual sales for major store types.

Figure 1. Leakage/Surplus Index and Actual and Potential Sales by Major Store Types



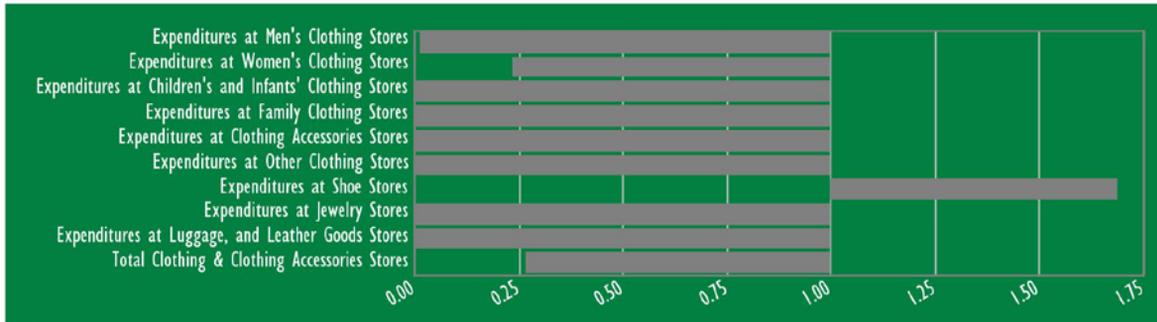
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	\$51,546,978	\$36,092,874	0.7
Furniture & Home Furnishing Stores	\$6,153,120	\$374,560	0.1
Electronics & Appliance Stores	\$6,057,370	\$449,254	0.1
Building Material & Garden Equipment & Supply Dealers	\$27,514,729	\$13,066,136	0.5
Food & Beverage Stores	\$28,211,888	\$33,635,640	1.2
Health & Personal Care Stores	\$12,807,926	\$13,536,106	1.1
Clothing & Clothing Accessories Stores	\$11,700,038	\$3,126,232	0.3
Sporting Goods, Hobby, Book, & Music Stores	\$5,528,337	\$1,009,775	0.2
General Merchandise Stores	\$30,324,402	\$29,220,906	1.0
Miscellaneous Store Retailers	\$6,646,721	\$2,023,388	0.3
Foodservice & Drinking Places	\$21,308,403	\$15,941,514	0.7
<b>Total</b>	<b>\$207,799,911</b>	<b>\$148,476,385</b>	<b>0.7</b>

Sub-Categories of Building Material & Garden Equipment & Supply Dealers



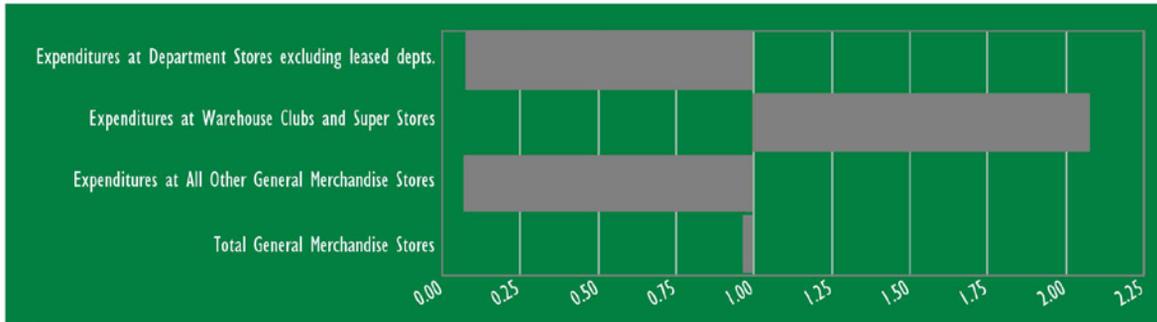
Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	\$10,091,835	\$2,636,113	0.3
Expenditures at Paint and Wallpaper Stores	\$550,990	\$0	0.0
Expenditures at Hardware Stores	\$2,098,770	\$546,940	0.3
Expenditures at Other Building Materials Dealers	\$12,549,198	\$5,819,508	0.5
Expenditures at Outdoor Power Equipment Stores	\$331,056	\$0	0.0
Expenditures at Nursery and Garden Centers	\$1,892,880	\$4,063,575	2.1
<b>Total Building Material &amp; Garden Equipment &amp; Supply Dealers</b>	<b>\$27,514,729</b>	<b>\$13,066,136</b>	<b>0.5</b>

Sub-Categories of Clothing & Clothing Accessories Stores



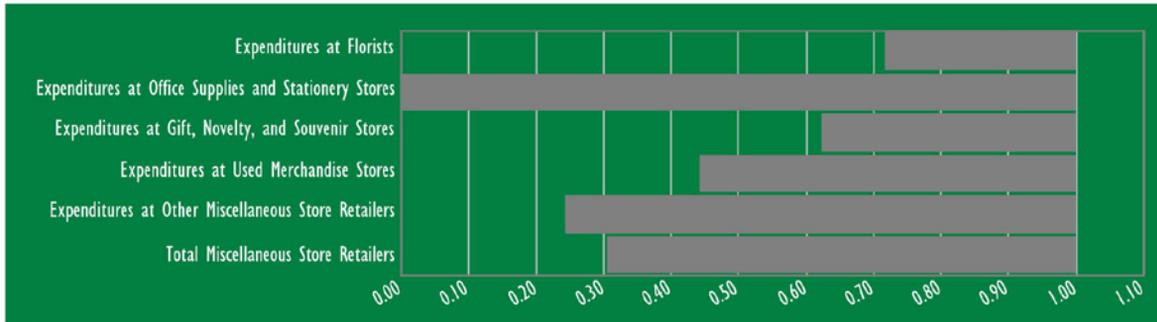
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	\$551,398	\$6,729	0.0
Expenditures at Women's Clothing Stores	\$2,215,578	\$525,311	0.2
Expenditures at Children's and Infants' Clothing Stores	\$438,308	\$0	0.0
Expenditures at Family Clothing Stores	\$4,595,181	\$0	0.0
Expenditures at Clothing Accessories Stores	\$190,605	\$0	0.0
Expenditures at Other Clothing Stores	\$558,667	\$0	0.0
Expenditures at Shoe Stores	\$1,537,258	\$2,594,193	1.7
Expenditures at Jewelry Stores	\$1,482,035	\$0	0.0
Expenditures at Luggage, and Leather Goods Stores	\$131,008	\$0	0.0
<b>Total Clothing &amp; Clothing Accessories Stores</b>	<b>\$11,700,038</b>	<b>\$3,126,232</b>	<b>0.3</b>

Sub-Categories of General Merchandise Stores



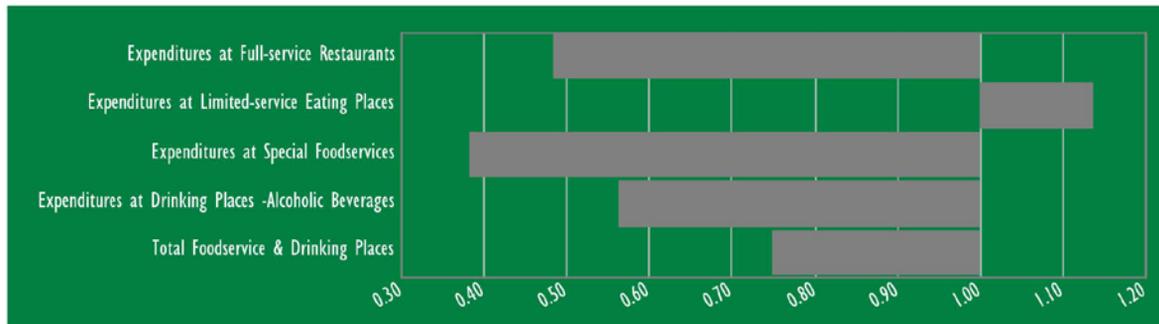
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	\$14,607,182	\$1,093,881	0.1
Expenditures at Warehouse Clubs and Super Stores	\$13,441,451	\$27,966,162	2.1
Expenditures at All Other General Merchandise Stores	\$2,275,769	\$160,863	0.1
Total General Merchandise Stores	\$30,324,402	\$29,220,906	1.0

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	\$461,227	\$331,515	0.7
Expenditures at Office Supplies and Stationery Stores	\$1,532,305	\$0	0.0
Expenditures at Gift, Novelty, and Souvenir Stores	\$1,164,983	\$726,111	0.6
Expenditures at Used Merchandise Stores	\$574,767	\$254,210	0.4
Expenditures at Other Miscellaneous Store Retailers	\$2,913,439	\$711,551	0.2
Total Miscellaneous Store Retailers	\$6,646,721	\$2,023,388	0.3

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	\$9,767,677	\$4,731,947	0.5
Expenditures at Limited-service Eating Places	\$8,770,155	\$9,974,386	1.1
Expenditures at Special Foodservices	\$1,807,646	\$692,956	0.4
Expenditures at Drinking Places -Alcoholic Beverages	\$962,925	\$542,225	0.6
<b>Total Foodservice &amp; Drinking Places</b>	<b>\$21,308,403</b>	<b>\$15,941,514</b>	<b>0.7</b>

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## Sources and Methodology

The primary data sources used in the construction of the database include:

- Current year AGS (Applied Geographic Solutions) Consumer Expenditure Estimates
- Census of Retail Trade, Merchandise Line Sales
- Census Bureau Monthly Retail Trade

The Census of Retail Trade presents a table known as the Merchandise Line summary, which relates approximately 120 merchandise lines (e.g. hardware) to each of the store types. For each merchandise line, the distribution of sales by store type can be computed, yielding a conversion table which apportions merchandise line sales by store type.

The AGS (Applied Geographic Solutions) Consumer Expenditure database was re-computed to these merchandise lines by aggregating both whole and partial categories, yielding, at the block group level, a series of merchandise line estimates which are consistent with the AGS Consumer Expenditure database.

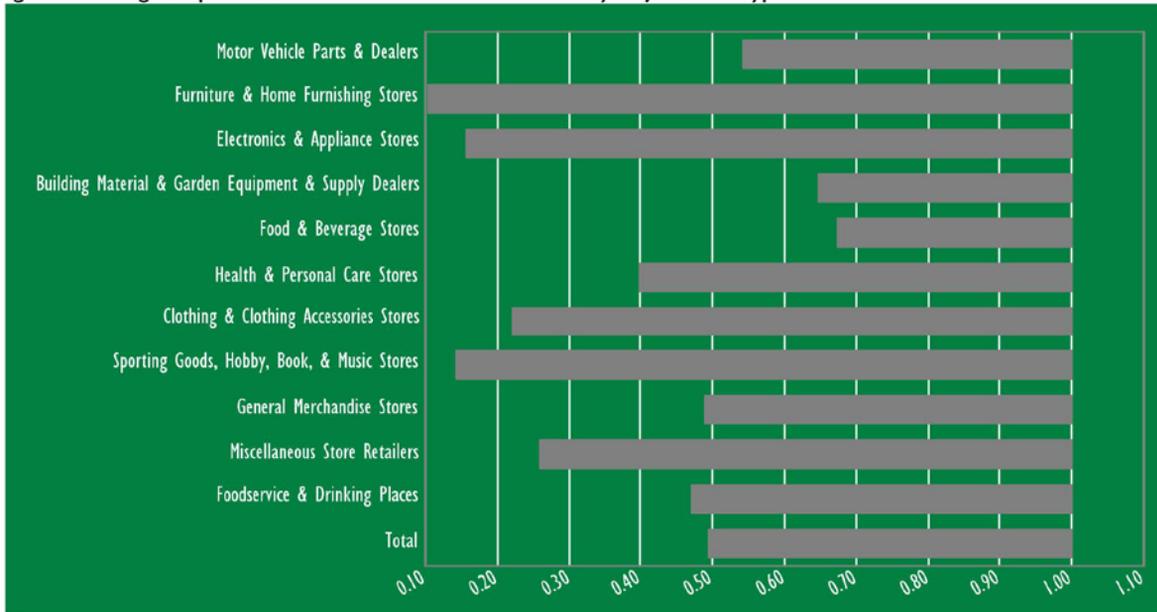
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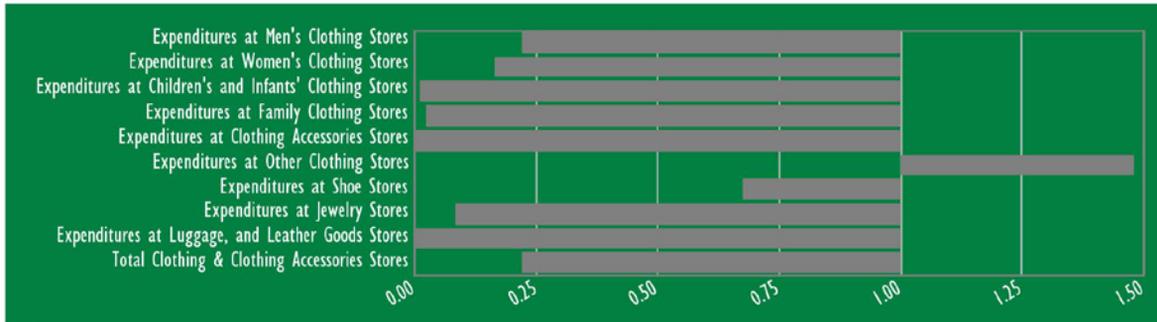
Store Type	Potential	Actual Sales	Leakage
Motor Vehicle Parts & Dealers	\$166,668,554	\$90,505,053	0.5
Furniture & Home Furnishing Stores	\$18,390,421	\$1,937,424	0.1
Electronics & Appliance Stores	\$17,242,234	\$2,723,250	0.2
Building Material & Garden Equipment & Supply Dealers	\$86,438,025	\$56,059,389	0.6
Food & Beverage Stores	\$91,836,337	\$61,973,529	0.7
Health & Personal Care Stores	\$41,699,240	\$16,645,903	0.4
Clothing & Clothing Accessories Stores	\$31,977,832	\$7,104,787	0.2
Sporting Goods, Hobby, Book, & Music Stores	\$14,250,856	\$2,044,305	0.1
General Merchandise Stores	\$91,348,445	\$44,823,774	0.5
Miscellaneous Store Retailers	\$20,178,480	\$5,228,252	0.3
Foodservice & Drinking Places	\$65,687,248	\$30,851,486	0.5
<b>Total</b>	<b>\$645,717,672</b>	<b>\$319,897,152</b>	<b>0.5</b>

Sub-Categories of Building Material & Garden Equipment & Supply Dealers



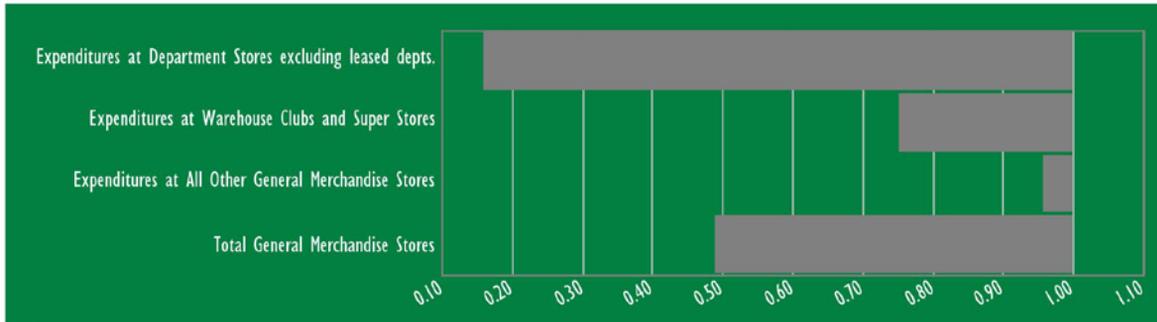
Store Type	Potential	Actual Sales	Leakage
Expenditures at Home Centers	\$31,586,109	\$7,075,797	0.2
Expenditures at Paint and Wallpaper Stores	\$1,690,353	\$42,385	0.0
Expenditures at Hardware Stores	\$6,507,765	\$2,769,592	0.4
Expenditures at Other Building Materials Dealers	\$39,733,406	\$17,150,350	0.4
Expenditures at Outdoor Power Equipment Stores	\$1,067,897	\$1,171,341	1.1
Expenditures at Nursery and Garden Centers	\$5,852,494	\$27,849,924	4.8
Total Building Material & Garden Equipment & Supply Dealers	\$86,438,025	\$56,059,389	0.6

Sub-Categories of Clothing & Clothing Accessories Stores



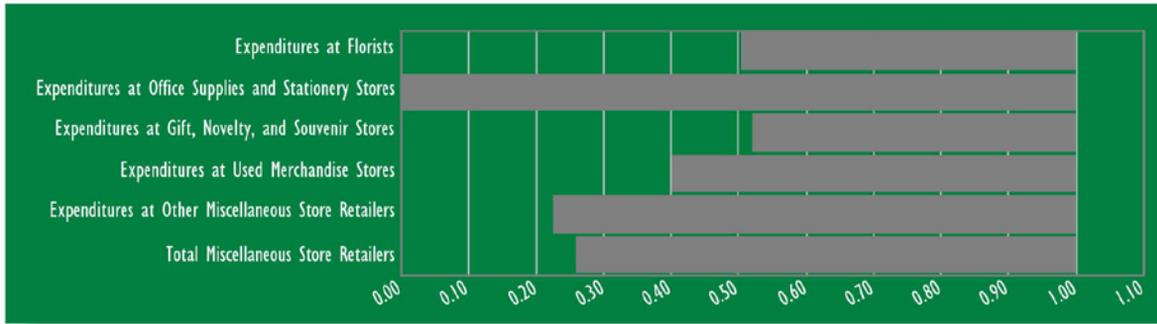
Store Type	Potential	Actual Sales	Leakage
Expenditures at Men's Clothing Stores	\$1,563,437	\$348,460	0.2
Expenditures at Women's Clothing Stores	\$5,754,726	\$953,923	0.2
Expenditures at Children's and Infants' Clothing Stores	\$1,350,647	\$15,418	0.0
Expenditures at Family Clothing Stores	\$12,718,103	\$326,732	0.0
Expenditures at Clothing Accessories Stores	\$503,516	\$102	0.0
Expenditures at Other Clothing Stores	\$1,493,187	\$2,211,821	1.5
Expenditures at Shoe Stores	\$4,316,799	\$2,922,121	0.7
Expenditures at Jewelry Stores	\$3,922,495	\$326,209	0.1
Expenditures at Luggage, and Leather Goods Stores	\$354,923	\$0	0.0
<b>Total Clothing &amp; Clothing Accessories Stores</b>	<b>\$31,977,832</b>	<b>\$7,104,787</b>	<b>0.2</b>

Sub-Categories of General Merchandise Stores



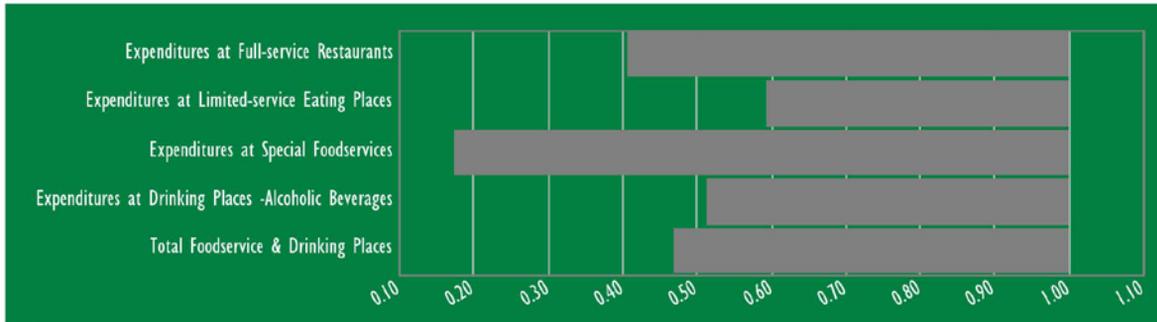
Store Type	Potential	Actual Sales	Leakage
Expenditures at Department Stores excluding leased depts.	\$42,665,556	\$6,816,595	0.2
Expenditures at Warehouse Clubs and Super Stores	\$41,865,146	\$31,480,867	0.8
Expenditures at All Other General Merchandise Stores	\$6,817,743	\$6,526,312	1.0
<b>Total General Merchandise Stores</b>	<b>\$91,348,445</b>	<b>\$44,823,774</b>	<b>0.5</b>

Sub-Categories of Miscellaneous Store Retailers



Store Type	Potential	Actual Sales	Leakage
Expenditures at Florists	\$1,394,082	\$702,708	0.5
Expenditures at Office Supplies and Stationery Stores	\$4,468,259	\$0	0.0
Expenditures at Gift, Novelty, and Souvenir Stores	\$3,417,772	\$1,780,097	0.5
Expenditures at Used Merchandise Stores	\$1,605,860	\$647,243	0.4
Expenditures at Other Miscellaneous Store Retailers	\$9,292,506	\$2,098,204	0.2
Total Miscellaneous Store Retailers	\$20,178,480	\$5,228,252	0.3

Sub-Categories of Foodservice & Drinking Places



Store Type	Potential	Actual Sales	Leakage
Expenditures at Full-service Restaurants	\$30,153,963	\$12,296,647	0.4
Expenditures at Limited-service Eating Places	\$26,884,345	\$16,002,204	0.6
Expenditures at Special Foodservices	\$5,553,562	\$960,434	0.2
Expenditures at Drinking Places -Alcoholic Beverages	\$3,095,379	\$1,592,201	0.5
<b>Total Foodservice &amp; Drinking Places</b>	<b>\$65,687,248</b>	<b>\$30,851,486</b>	<b>0.5</b>

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## Sources and Methodology

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- Current year AGS (Applied Geographic Solutions) Consumer Expenditure Estimates
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The AGS (Applied Geographic Solutions) Consumer Expenditure database was re-computed to these merchandise lines by aggregating both whole and partial categories, yielding, at the block group level, a series of merchandise line estimates which are consistent with the AGS Consumer Expenditure database.

These two components were then combined in order to derive estimated potential by store type. The results were then compared to current retail trade statistics to ensure consistency and completeness.



# Appendix C: Segmentation Guide

## Group Structure

Segment Group	Label	Segment Name	% of US Households	Page #	
<b>A</b>	Affluent Suburbia 11.19%	A01	America's Wealthiest	1.14%	8
		A02	Dream Weavers	1.74%	9
		A03	White-collar Suburbia	1.43%	10
		A04	Upscale Suburbanites	0.84%	11
		A05	Enterprising Couples	0.84%	12
		A06	Small-town Success	2.38%	13
		A07	New Suburbia Families	2.82%	14
<b>B</b>	Upscale America 13.26%	B01	Status-conscious Consumers	1.55%	15
		B02	Affluent Urban Professionals	1.44%	16
		B03	Urban Commuter Families	6.33%	17
		B04	Solid Suburban Life	0.63%	18
		B05	Second-generation Success	2.40%	19
		B06	Successful Suburbia	0.91%	20
<b>C</b>	Small-town Contentment 7.64%	C01	Second City Homebodies	0.74%	21
		C02	Prime Middle America	3.52%	22
		C03	Suburban Optimists	0.61%	23
		C04	Family Convenience	1.93%	24
		C05	Mid-market Enterprise	0.84%	25
		C06	Small-town Success	0.84%	26
<b>D</b>	Blue-collar Backbone 6.57%	D01	Nuevo Hispanic Families	2.73%	26
		D02	Working Rural Communities	1.06%	27
		D03	Lower-income Essentials	0.83%	28
		D04	Small-city Endeavors	1.95%	29
<b>E</b>	American Diversity 9.73%	E01	Ethnic Urban Mix	1.89%	30
		E02	Urban Blues	1.74%	31
		E03	Professional Urbanites	2.09%	32
		E04	Suburban Advantage	1.15%	33
		E05	American Great Outdoors	1.37%	34
		E06	Mature America	1.48%	35
<b>F</b>	Metro Fringe 10.63%	F01	Steadfast Conservatives	6.51%	36
		F02	Moderate Conventionalists	1.60%	37
		F03	Southern Blues	0.92%	38
		F04	Urban Grit	0.55%	39
		F05	Grass-roots Living	1.05%	40
<b>G</b>	Remote America 7.39%	G01	Hardy Rural Families	2.70%	41
		G02	Rural Southern Living	2.71%	42
		G03	Coal and Crops	1.81%	43
		G04	Native Americana	0.18%	44
<b>H</b>	Aspiring Contemporaries 11.18%	H01	Young Cosmopolitans	3.22%	45
		H02	Minority Metro Communities	2.20%	46
		H03	Stable Careers	4.29%	47
		H04	Aspiring Hispania	1.48%	48
<b>I</b>	Rural Villages and Farms 4.77%	I01	Industrious Country Living	1.30%	49
		I02	America's Farmlands	1.04%	50
		I03	Comfy Country Living	0.73%	51
		I04	Small-town Connections	0.48%	52
		I05	Hinterland Families	1.23%	53
<b>J</b>	Struggling Societies 8.20%	J01	Rugged Rural Style	1.62%	54
		J02	Latino Nuevo	2.91%	55
		J03	Struggling City Centers	1.72%	56
		J04	College Town Communities	0.98%	57
		J05	Metro Beginnings	0.98%	58
		J06	Struggling City Centers	0.98%	59
<b>K</b>	Urban Essence 8.63%	K01	Unattached Multi-cultures	0.38%	59
		K02	Academic Influences	0.47%	60
		K03	African-American Neighborhoods	1.93%	61
		K04	Urban Diversity	2.44%	62
		K05	New Generation Activists	2.37%	63
		K06	Getting By	1.05%	64
<b>L</b>	Varying Lifestyles 0.80%	L01	Military Family Life	0.31%	65
		L02	Major University Towns	0.27%	66
		L03	Gray Perspectives	0.22%	67



## Mosaic USA Group Descriptions

A full Mosaic media guide is available online at: [www.buxtonco.com/tools/mosaic](http://www.buxtonco.com/tools/mosaic)

### Group A: Affluent Suburbia

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***The wealthiest households in the U.S. living in exclusive suburban neighborhoods enjoying the best of everything that life has to offer***

The seven Segments in the Affluent Suburbia group comprise the wealthiest households in the nation. These segments outrank all other Mosaic Segments in terms of household income, home value and educational achievement. Concentrated in exclusive suburban neighborhoods, these households are predominantly white, college educated and filled with Baby Boom parents and their children. With their managerial and executive positions paying six-figure-plus incomes, they enjoy the good life in fashionable houses outfitted with the latest technology. These are the Americans who drive luxury cars, belong to country clubs, travel abroad and relax by sailing, golfing or skiing. Many are culture buffs who attend the theater, art shows, dance performances and concerts, all at high rates. Both their purchasing behavior and media choices reflect their interests in money management, travel, computers and gourmet foods.

### Group B: Upscale America

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***College-educated couples and families living in the metropolitan sprawl earning upscale incomes providing them with large homes and very comfortable and active lifestyles***

The six Segments in Upscale America are populated with mainly white, college-educated couples and families living in the metropolitan sprawl. Most of the adults work as executives and white-collar professionals, and their upscale incomes provide them with large homes and comfortable lifestyles. They like to spend their leisure time getting exercise—jogging, biking and swimming are popular—or shopping for the latest in-fashion and high-tech electronics. They are active in community affairs as members of business clubs, environmental groups and arts associations. They're selective media fans who prefer magazines and cable TV channels that cover business, fashion and the arts. Their one exception is the Internet. These Americans are omnivorous Web users who go online for everything from banking and trading stocks to downloading music and buying merchandise.