

Downtown Retail Consumer Origin Report July 2014

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Report Background and Method

Background

- Church Street Marketplace conducted 2 Consumer Origin Studies in May and October of 2011
 - May and October represent Downtown's "Shoulder Seasons"
 - Survey: seven day period (including a weekend) in May and October.
 - 52 downtown retailers collected a total of 4,000 Zip Codes for each survey
- Most recent Consumer Origin Study completed in July, 2014
 - July, 2014 represents Church Street's "High Season"
 - Time gap between 2011 and 2014 studies can be treated as insignificant because no major changes to region's retail economy
 - Survey: seven day period (including a weekend) in May and October
 - 36 downtown retailers collected a total of 2,636 Zip Codes

Method

- Zip Codes and Canadian Postal Codes have been cross-referenced with CSM Zip/Postal Code Database to analyze origins of our downtown shoppers

Customer Origins for Downtown Retail

Location	May/October 2011 % of All Visitors Surveyed	July 2014 % of All Visitors Surveyed
Burlington	32%	21%
South Burlington	7%	5%
Colchester, Essex, Shelburne, Williston, Winooksi	16%	12%
Total Burlington MSA less Burlington	23%	17%
PLUS: Rest of Vermont	17%	15%
Total VT	72%	53%
NY	5%	7%
MA	5%	5%
CT	2%	2%
NH	2%	1%
Total NY, CT, MA, NH	13%	16%
Province of Quebec	3%	9%
Rest of US, Foreign Countries	12%	22%
Total Outside VT	28%	47%
Grand Total Surveyed	100%	100%

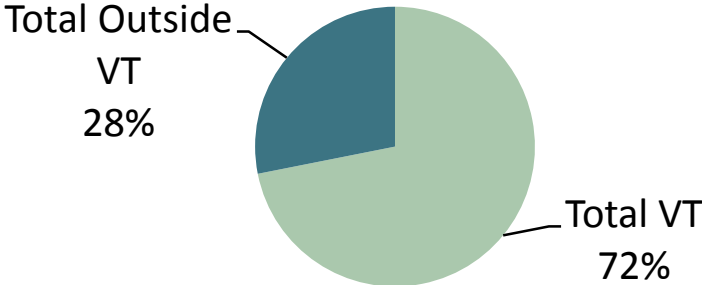
Snapshot of July 2014 Findings

Downtown Consumer Origin Results

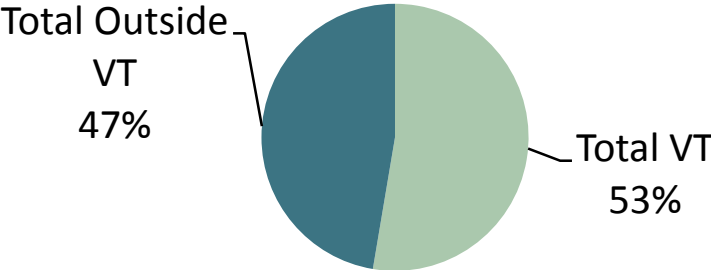
- 45 different States represented from over 1,400 unique American zip codes
- Visitors from 24 foreign countries including Brazil, China, Germany and South Africa
- 5 Canadian Provinces represented
- 53% of visitors from VT, 21% of which were from Burlington
- 47% of visitors from outside of Vermont
- 19% increase in visitors from outside of Vermont between May/October and July, indicating tourism increases in the summer high season

Summer High Season Sees 19% Increase in Out of State Visitors

Composition of Downtown Consumers in Shoulder Seasons, May/October

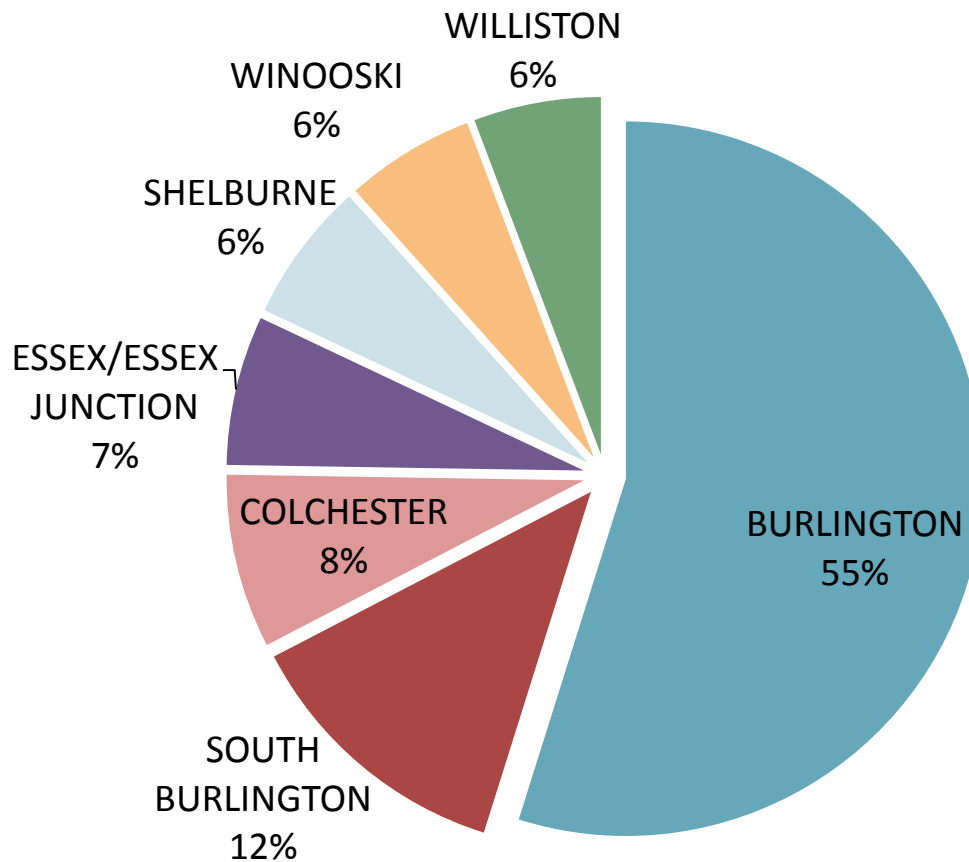


Composition of Downtown Consumers in High Season, July



South Burlington, Colchester, Essex, Shelburne, Winooski, Williston are Top Visitors, after Burlington (2)

Percent of Most Frequent Visitors from VT



Snapshot of Visitors from the Rest of Vermont

City

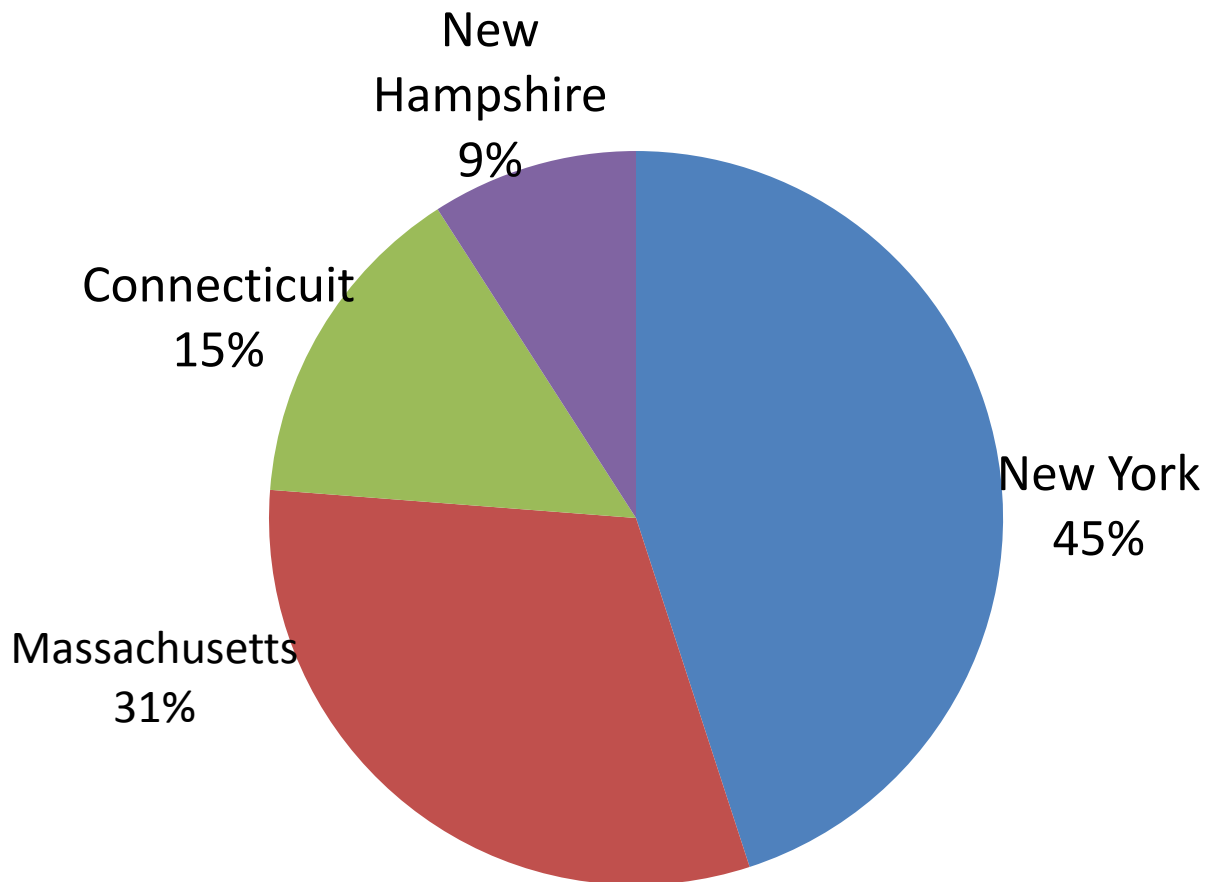
Charlotte
Milton
Hinesburg
Richmond
Jericho
Montpelier
Waterbury
Westford
Stowe
Middlebury
Saint Albans
Bristol
Underhill
Huntington
North Hero
Fairfax
Swanton

City

Waitsfield
Waterbury Center
Barre
Grand Isle
Northfield
Rutland
White River Junction
Warren
Hyde Park
Randolph
Jeffersonville
Saint Johnsbury
Starksboro
North Ferrisburgh
Norwich
Enosburg Falls
Peacham

New York and Massachusetts are Most Frequent Visitors from Neighboring States

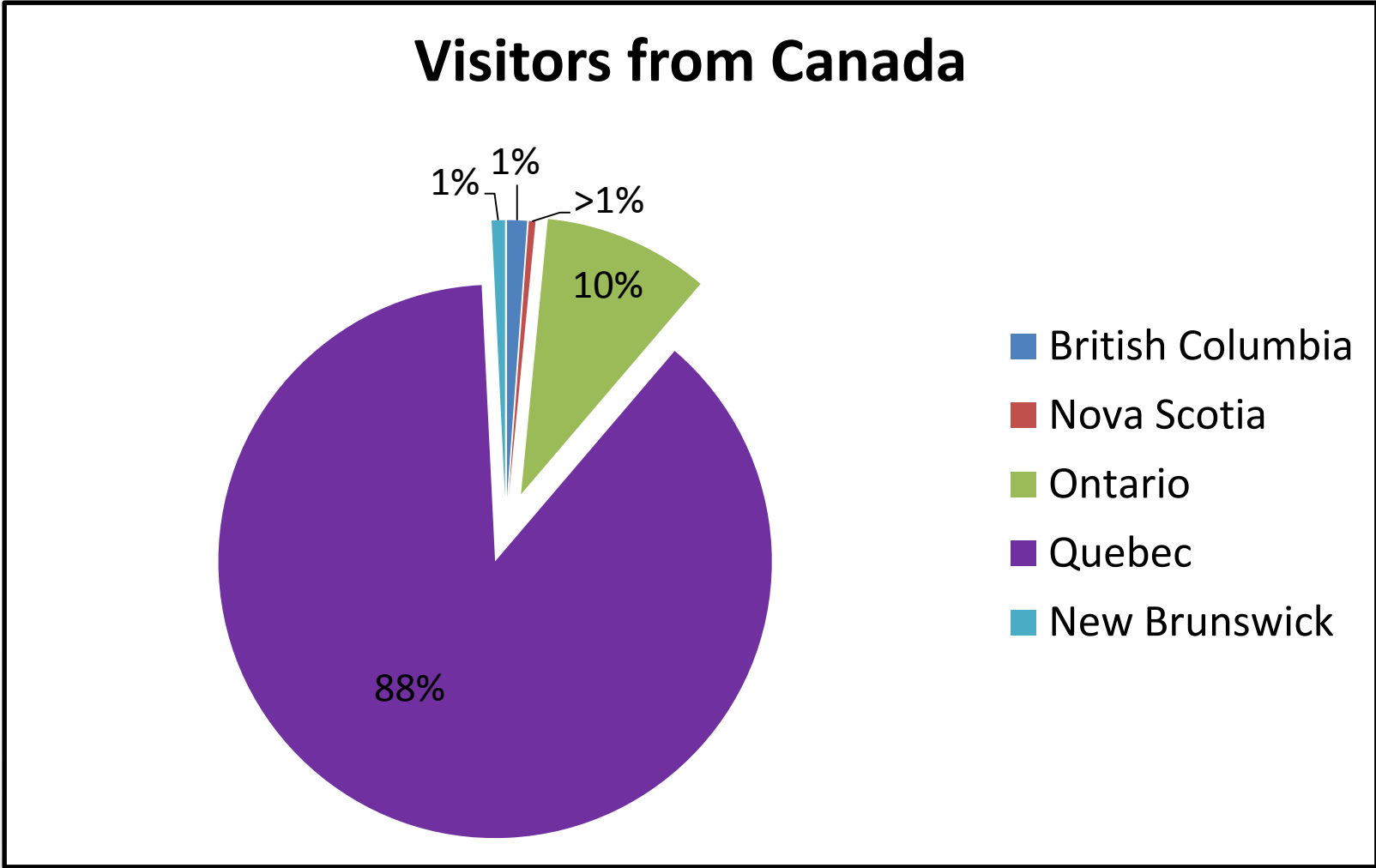
Percent of Visitors from Neighboring States



Most Visitors from beyond New England and N.Y. are from New Jersey, Florida, California, and Pennsylvania

ALL OTHER USA STATES represented on Church Street and in Downtown					
	Largest to Smallest	14	MI	28	LA
1	NJ	15	RI	29	WY
2	FL	16	WA	30	KY
3	CA	17	WI	31	DE
4	PA	18	AZ	32	OK
5	TX	19	MO	33	MT
6	VA	20	OR	34	ND
7	MD	21	MN	35	AK
8	CO	22	IN	36	NV
9	GA	23	NM	37	AR
10	NC	24	TN	38	NE
11	OH	25	DC	39	ID
12	ME	26	KS	40	UT
13	IL	27	SC	41	IA

Canadian Visitors Hail Primarily from Quebec



Visitors from Quebec increase by 6% during High Season in Summer

