

Downtown Retail Consumer Origin Report

July 6-13, 2016

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**CHURCH
STREET**
MARKETPLACE

Report Background and Method

Background

- ▷ Church Street Marketplace conducted this Consumer Origin Study from July 6 - July 13, 2016
 - July is during the “High Season” for Church Street Retailers
 - This was the first Consumer Origin Study completed since July 2014
 - Time gap between 2014 and 2016 studies can be treated as insignificant because there were no major changes to the region’s retail economy
 - Survey was given over 7 day period in July with 46 downtown retailers collecting 4,809 zip codes

Method

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

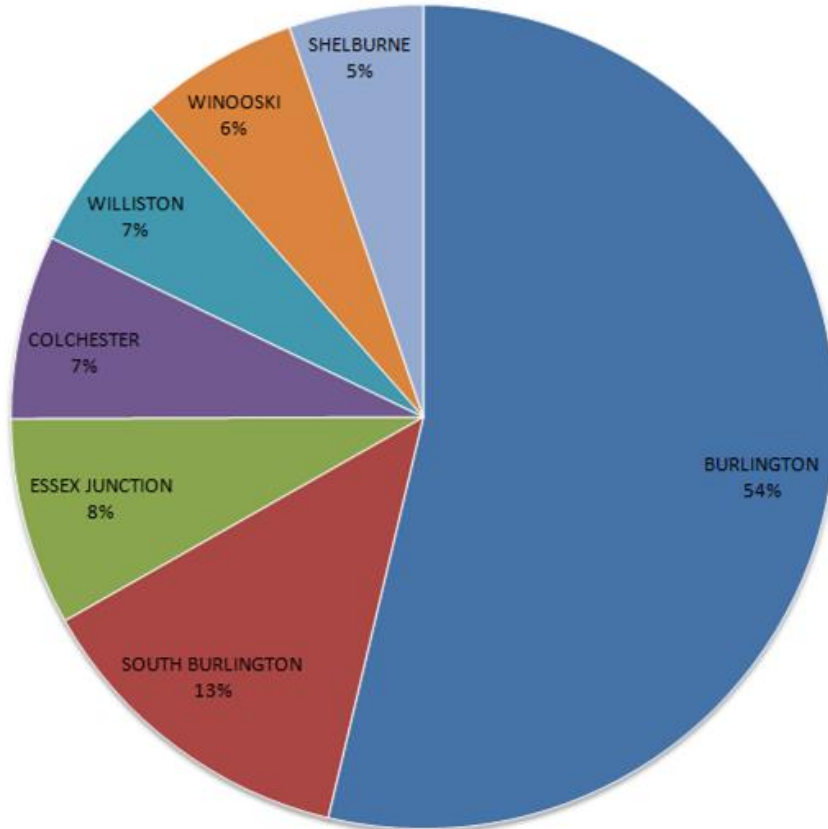
Customer Origins for Downtown Retail

Location	July 2016 % of All Visitors Surveyed	July 2014 % of All Visitors Surveyed
Burlington	21%	21%
South Burlington	5%	5%
Colchester, Essex, Shelburne, Williston, Winooski	13%	12%
Total Surrounding Burlington	18%	17%
PLUS: Rest of Vermont	16%	15%
TOTAL VERMONT	55%	53%
New York	8%	7%
Massachusetts	6%	5%
Connecticut	3%	2%
New Hampshire	2%	1%
Total NY, CT, MA, NH	19%	16%
Province of Quebec	2%	9%
Rest of US, Foreign Countries	23%	22%
Total Outside Vermont	45%	47%
Grand Total Surveyed	100%	100%

Snapshot of July 2016 Findings

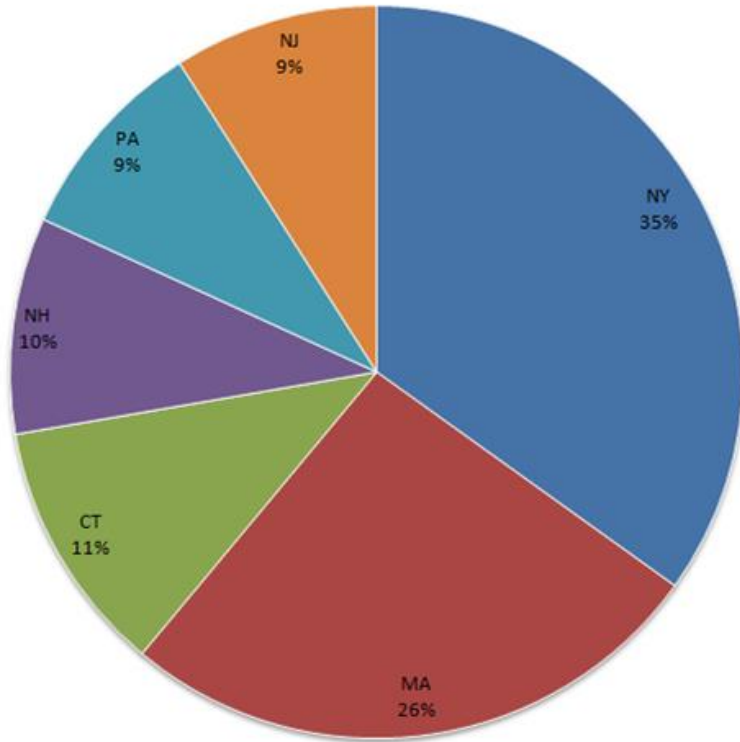
- ▷ 47 US states and Washington, D.C.
- ▷ Visitors from 25 countries including South Korea, Sri Lanka, New Zealand, and Switzerland
- ▷ 5 Canadian provinces
- ▷ 55% of visitors were from Vermont, 21% from Burlington
- ▷ 45% of visitors were from outside of Vermont
- ▷ Data from July 2016 very similar to data from July 2014 but with a slight increase in Vermont shoppers and decrease in out of state shoppers

Breakdown of Most Frequent In-State Visitors



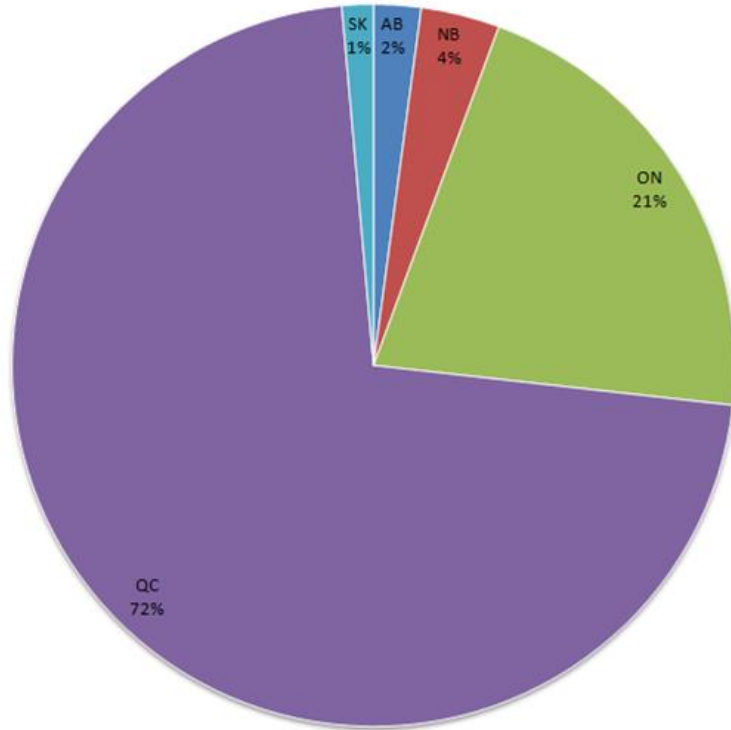
- 1020 from Burlington
- 248 from South Burlington
- 155 from Essex Junction
- 137 from Colchester
- 121 from Williston
- 118 from Winooski
- 100 from Shelburne

Breakdown of Visitors from Neighboring States



- 398 from New York
- 298 from Massachusetts
- 128 from Connecticut
- 109 from New Hampshire
- 104 from Pennsylvania
- 103 from New Jersey

Canadian Province Breakdown



- 102 from Quebec
- 30 from Ontario
- 5 from New Brunswick
- 3 from Alberta
- 2 from Saskatchewan

There was a 7% decrease in visitors from Quebec from July 2014 to July 2016, this can be explained by the exchange rate