

DAMASCUS

Zip Code Survey Study Damascus, Virginia

November 2023

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& ASSOCIATES

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Introduction

In 2014, as part of the process for the Downtown Revitalization and Improvement Plan for the Town of Damascus, local businesses participated in a zip code survey of customers. The results of the zip code survey helped define the primary market trade areas for local businesses and determine the Town's market reach. This survey was the foundation for a broader market analysis to detail demand for new and expanding businesses and activities. In the decade since, the Town has implemented much of that plan including the Damascus Trail Center, recruitment of new business, and implementation of a marketing strategy. This study seeks to update the zip code research to understand how Damascus' market has evolved over time through these efforts.

Instead of a single week-long survey, the Town partnered with local businesses to conduct three separate surveys throughout the year:

- **April** – during the same timeframe in which the 2014 survey was conducted.
- **July** – the peak of the summer season.
- **October** – the peak of the leaf season.

Each survey lasted for one week and included as many businesses as possible. There was also an effort to include as many of the same businesses that did the survey 10 years ago. Like that study, a simple personalized and confidential report was prepared for each participating business as a thank-you for their assistance.

The goal of the updated survey is to understand the primary local market area as well as the visitor market reach for Damascus, allowing the Town to refine marketing and promotional strategies to grow the customer base for all businesses.



Survey Details

Damascus businesses conducted zip code surveys in the spring, summer and fall seasons during the following weeks:

- ☐ April 14th – 20th, 2023
- ☐ July 21st – 27th, 2023
- ☐ October 6th – 12th, 2023

37 businesses participated in at least one of the three surveys, representing an array of business types including retail, dining, lodging, services, and recreation-based businesses. Participating businesses were provided with a form to record customer zip codes and asked to keep the log of all customers during the survey period.

Data from the three surveys were tallied and analyzed individually and then combined and analyzed as an overall 2023 survey result. Additionally, the survey data was compared to the 2014 survey results to compare how the Damascus market has shifted and expanded.

Zip Code Survey of Customers – Town of Damascus, VA

Business Name: _____ Dates: _____

Instructions

- Simply ask customers, "Were conducting research for the Town, can I have your zip code?"
- Please record the residence zip code for each customer who enters your business.
- At the end of the week, please write the total number of tallies in the total box to the right.
- Someone from Town will collect surveys.

DAMASCUS
For more information, contact Aaron Arnett at
aaron@arnettmudrow.com

24236 - Damascus	Sample -	<div style="border: 1px solid black; padding: 2px;"> </div>	Total
24211 - Abingdon			Total
24210 - Abingdon			Total
24361 - Meadowview			Total
24292 - Whitetop			Total
37688 - Shady Valley			Total
37680 - Laurel Bloomery			Total
24340 - Glade Spring			Total

Other Zip Codes	Sample -	<div style="border: 1px solid black; padding: 2px;">29609</div>	<div style="border: 1px solid black; padding: 2px;">31794</div>	<div style="border: 1px solid black; padding: 2px;">27106</div>

Figure 1: Zip Code Survey Instrument



Customer Origin

The pie charts below illustrate where Damascus customers live by state, county and zip code. Data is shown for the combined 2023 surveys. Of the 5,921 customer visits recorded in the 2023 surveys, 51% of customers live in Virginia, 19% live in Tennessee, 14% live in North Carolina. 41% of customers live in Washington County, VA and 11% live in Johnson County, TN. 28% of customers live in the 24236 Damascus Zip Code.

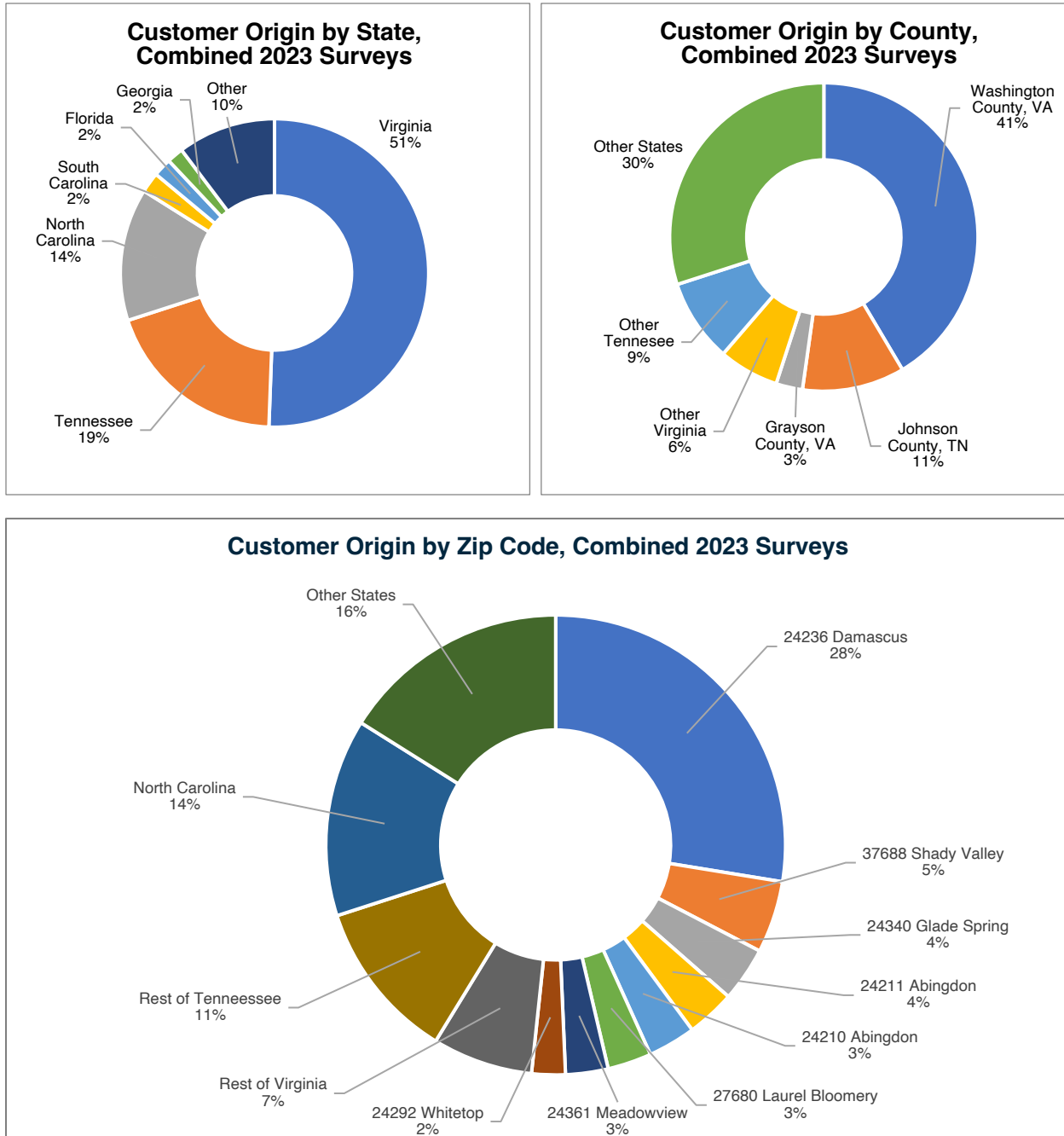


Figure 2: Customer Origin by State (Top Left), County (Top Right), and Zip Code (Bottom) for the Combined April, July, and October 2023 Zip Code Surveys

Customer Origin by Business Type

Participating businesses were categorized into one of five categories:

- ☐ food and beverage
- ☐ general retail
- ☐ specialty retail
- ☐ bike shop and rental
- ☐ lodging.

The zip code data was then used to determine the differences in market bases for the various business types.

The data confirms what would be expected in terms of which businesses serve local versus visitor markets. General retail – stores that sell grocery and general merchandise items – have the highest percentage of customers from Damascus. Food and beverage businesses and specialty retail businesses serve a mix of local and tourist markets, while lodging and bicycle-related businesses serve mostly tourist markets.

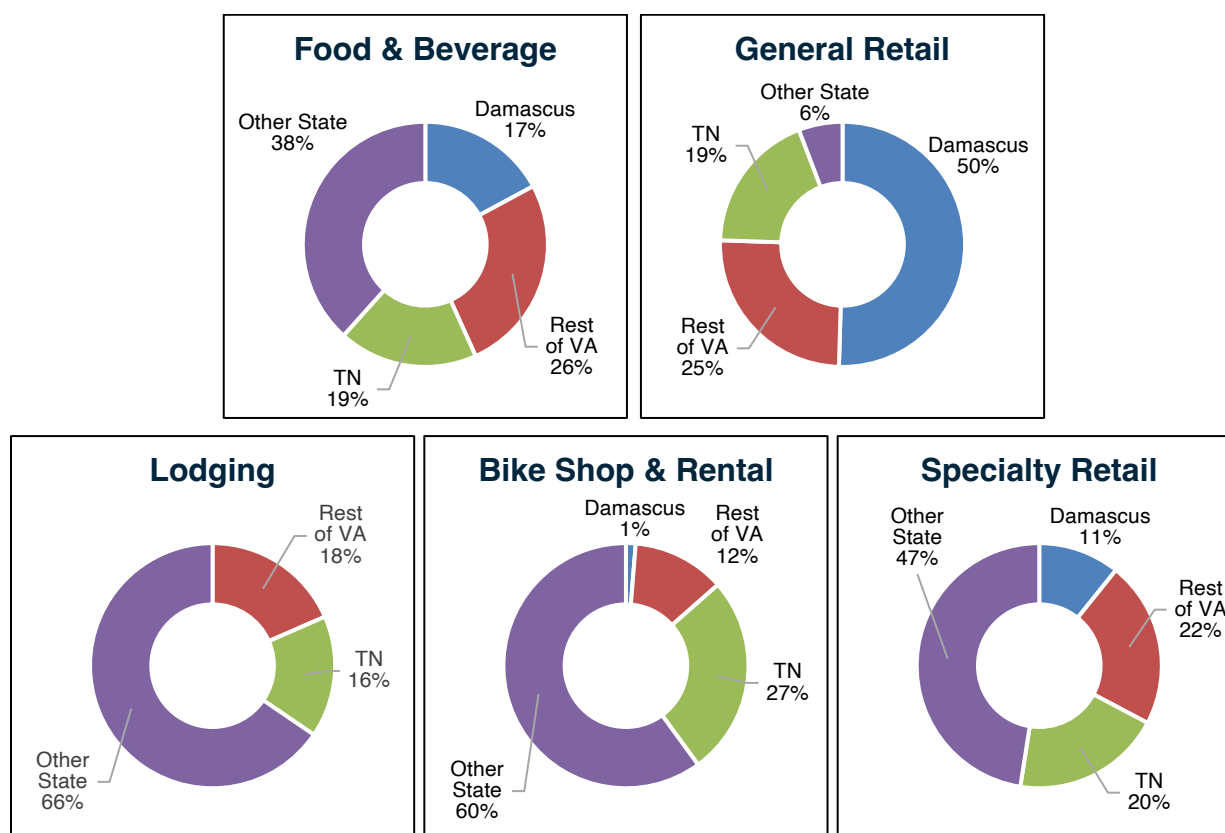


Figure 3: Customer Origin by Business Type, for the Combined 2023 Zip Code Survey Results. Customer Origin is broken down by the 24236 Damascus Zip Code, the Rest of Virginia, Tennessee, and Other States.

Customer Origin by Location

Zip code data from participating businesses was also analyzed in terms of location to determine if businesses in downtown Damascus reached a different market than businesses outside of the downtown. Businesses in both locations served a mix of local, regional and tourist markets. However, businesses located in downtown Damascus had a larger percentage of customers from outside of Virginia and Tennessee. Businesses located outside of downtown had a larger percentage of customers from the 24236 Damascus zip code.

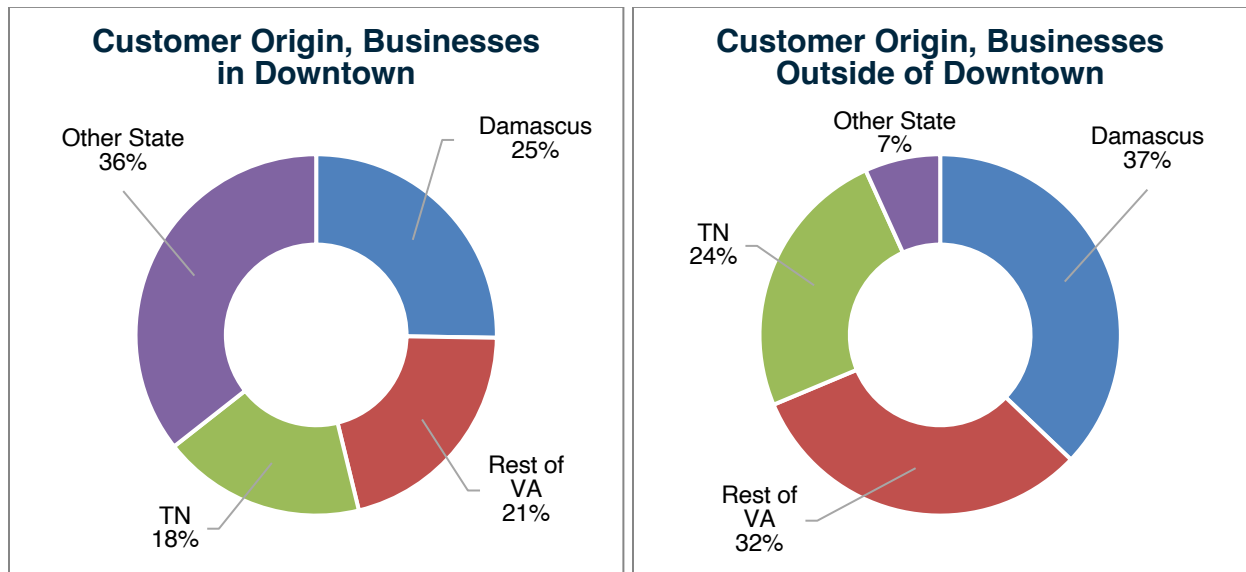


Figure 4: Customer Origin for Businesses Located in Downtown Damascus (Left) and Businesses Located Outside of Downtown Damascus (Right) for the Combined 2023 Zip Code Survey. Customer Origin is broken down by the 24236 Damascus Zip Code, the Rest of Virginia, Tennessee, and Other States.



Figure 5: Map of Businesses that Participated in the 2023 Zip Code Surveys

Trade Area: Local Market

Primary and secondary trade areas – those local and regional areas that make up the core of the Damascus market – are determined by the number of visits in relation to the population of a given area. This method accounts for differences in population among zip codes and reflects a more accurate picture of market penetration. The table below shows customer visits per 1,000 residents for the top zip codes recorded in the survey.

Primary Trade Area

Damascus' primary trade area is defined as: 24236 Damascus, 24292 Whitetop, 37688 Shady Valley, and 37680 Laurel Bloomery. These four zip codes each had over 263 customer visits per 1,000 population and represented 38% of the all customer visits across the three surveys. The Primary Trade Area represents Damascus' bread and butter local market. These are the people that would consider Damascus to be their home.

Secondary Trade Area

Damascus' secondary trade area is defined as: 24340 Glade Spring, 24361 Meadowview, 24211 Abingdon, 24210 Abingdon, and 37683 Mountain City. These five zip codes each had at least 10 customer visits per 1,000 population and represented 16% of the all customer visits. The Secondary Trade area is also a loyal local market, however these residents live far enough from the core that they can make a decision to visit Damascus or other markets for their day-to-day commerce.

Zip Code	Area	2023 Population	Visits	Visits/1000 Pop
24236	Damascus	2,918	1632	559.29
24292	Whitetop	376	140	372.34
37688	Shady Valley	973	300	308.32
37680	Laurel Bloomery	695	183	263.31
24340	Glade Spring	5,145	227	44.12
24361	Meadowview	5,379	177	32.91
24211	Abingdon	9,963	202	20.28
24210	Abingdon	17,207	199	11.57
37683	Mountain City	12,824	133	10.37

Figure 7: Primary Trade Area (Highlighted in Orange) and Secondary Trade Area (Shown in Purple) as Determined by Visits Per 1,000 Population, Combined 2023 Zip Code Surveys

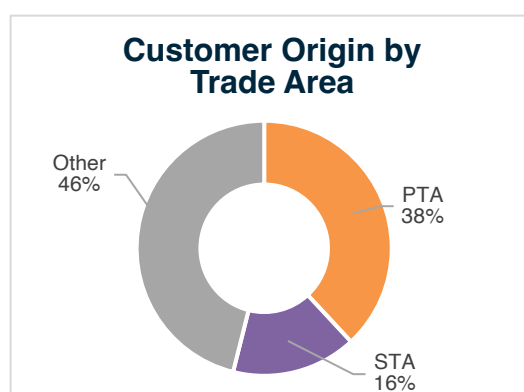
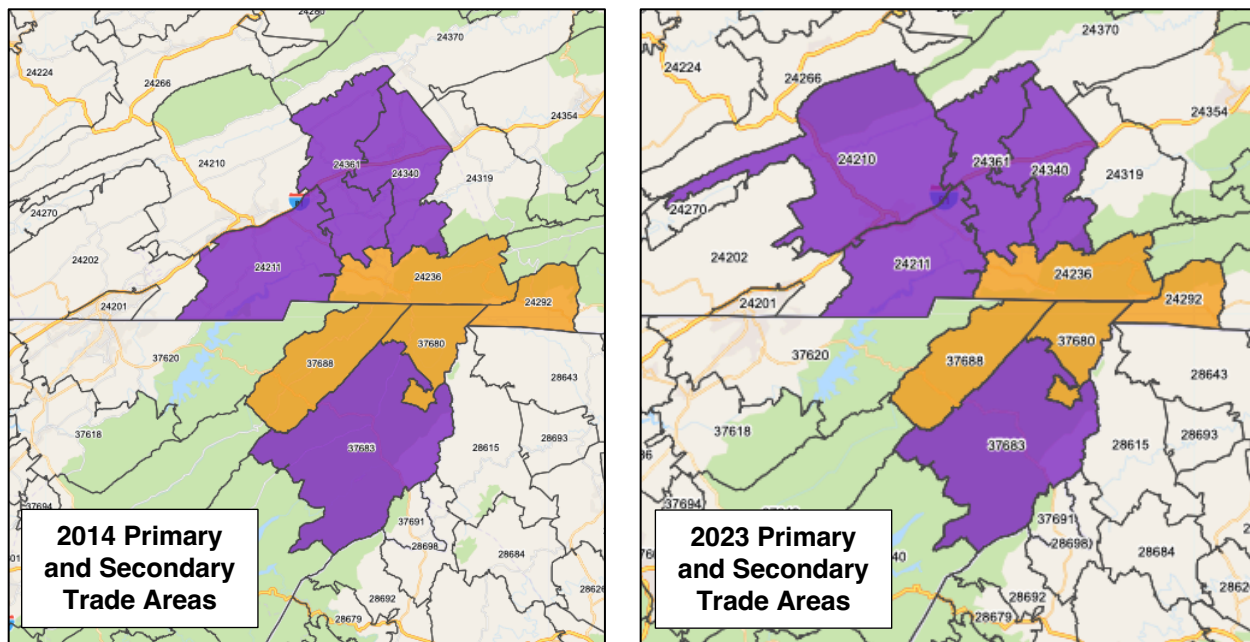


Figure 6: Customer Origin by Trade Area, Combined 2023 Zip Code Surveys

Together, these trade areas sustain Damascus businesses throughout the year. The town has a critical mass of visitor-oriented businesses and trade, but the local market still represents 54% of the customer base for the community. This is true even in some of the most visitor-oriented businesses in the community. This is important to understand and points to the fact that local businesses and the town should not focus all of their merchandising and marketing efforts on visitors at the expense of the local market.

It should be noted that the primary and secondary trade areas were the same across all three 2023 zip code surveys. This is to be expected and was confirmed by the surveys. While the visitor market varies significantly during the course of the year, the local market stays consistent throughout the year.



9

Market Reach: Visitor Market

The market reach for Damascus is analyzed by determining the percentage of customers outside of the local and regional market as well as examining the breadth of locations from which Damascus customers originate. Throughout the 2023 surveys, Damascus businesses recorded 5,921 visits from 1,324 unique zip codes. Customers originated from 49 states, Washington DC, Guam, Puerto Rico, and 13 foreign countries. Arnett Muldrow has conducted these zip code surveys in hundreds of communities across Virginia and the US. No community before Damascus has had 49 states represented!

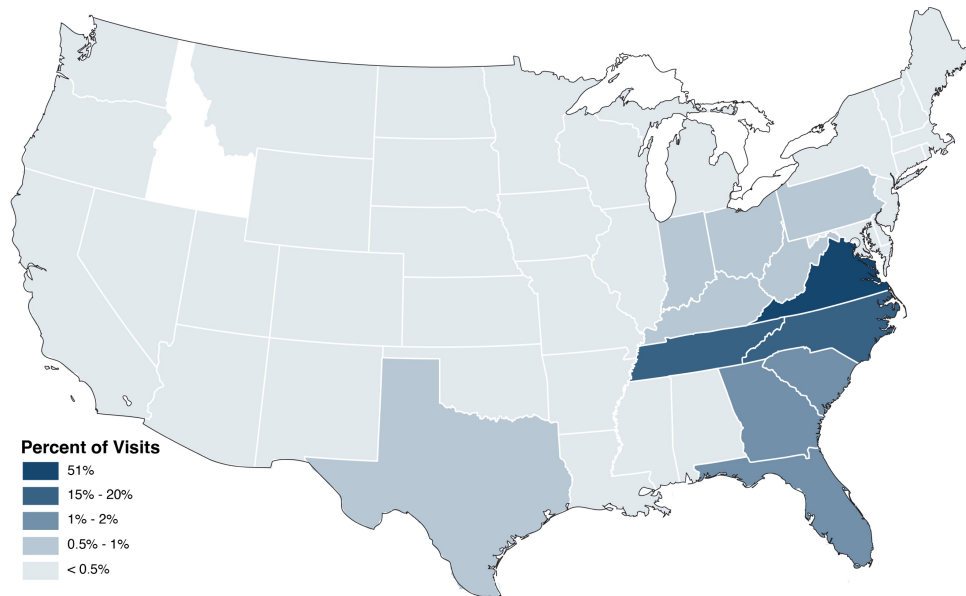


Figure 9: Percent of Total Visits Per State, Combined 2023 Zip Code Surveys

The chart to the right shows the number of unique zip codes recorded in previous zip codes conducted by Arnett Muldrow in peer communities. The number of unique zip codes recorded in each of the individual 2023 zip code surveys in Damascus exceeded that of a similar survey previously conducted in Abingdon, VA. Combining the 2023 zip code surveys, the number of unique zip codes in Damascus is on par with Waynesville, NC and Hendersonville, NC. The number of unique zip codes recorded in Damascus was highest in the October 2023 survey, with 706 unique zip codes across 43 states.

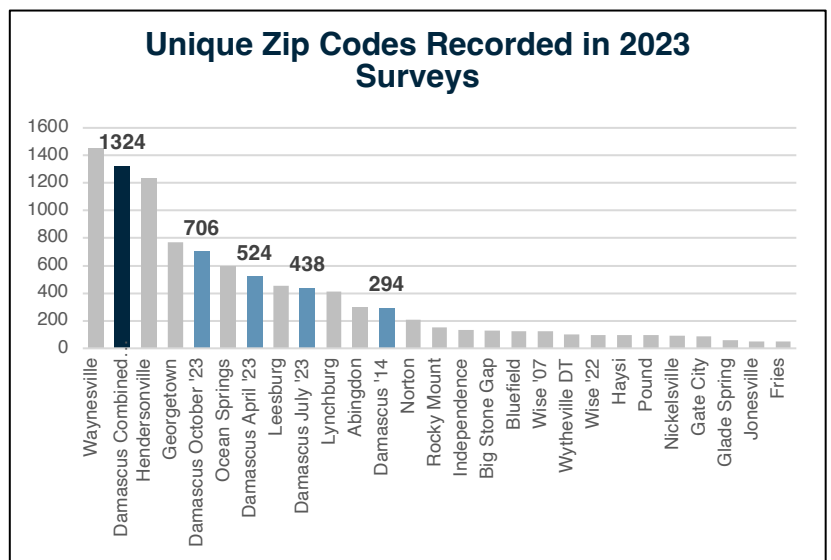


Figure 10: Unique Zip Codes Recorded in Damascus and Peer Communities

As previously noted, 30% of customers recorded throughout the 2023 zip code surveys live outside of Virginia and Tennessee and 59% of customers lived outside of Washington County, VA. In the 2014 survey, only 10% of recorded customers lived outside of Virginia and Tennessee and 40% lived outside of Washington County. This confirms that tourism is becoming a larger market for Damascus businesses.

Top Counties in the 2023 Surveys				Top Metro Areas in the 2023 Surveys			
County	State	Visits	% of Visits	Metro Area or County (if not in metro)	State	Visits	% of Visits
Washington County	VA	2456	41%	Johnson City Metro	TN-VA	2617	44%
Johnson County	TN	636	11%	Johnson County (outside of metro)	TN	636	11%
Grayson County	VA	165	3%	Charlotte-Concord Metro	NC-SC	239	4%
Mecklenburg County	NC	112	2%	Knoxville-Morristown Metro	TN	178	3%
Knox County	TN	89	2%	Grayson County (outside of metro)	VA	165	3%
Sullivan County	TN	76	1%	Greensboro Metro	NC	116	2%
Wake County	NC	64	1%	Asheville-Marion-Brevard Metro	NC	114	2%
Buncombe County	NC	59	1%	Raleigh-Durham-Cary Metro	NC	113	2%
Washington County	TN	52	1%	Chattanooga Metro	TN-GA	67	1%
Smyth County	VA	39	1%	Nashville-Davidson Metro	TN	48	1%
Forsyth County	NC	36	1%	Smyth County (not in metro)	VA	39	1%
Blount County	TN	31	1%	Atlanta-Sandy Springs-Roswell Metro	GA	31	1%
Hamilton County	TN	30	1%	Other		1558	26%
York County	SC	28	0%	Total		5921	100%
Sevier County	TN	26	0%				
Catawba County	NC	26	0%				
Guilford County	NC	25	0%				
Iredell County	NC	25	0%				
Fairfax County	VA	25	0%				
Other		1921	32%				
Total		5921	100%				

Figure 11: Top Counties (Left) and Metro Areas (Right) by Number and Percentage of Customer Visits in the Combined 2023 Zip Code Surveys

Key Observations

The three zip code surveys conducted throughout 2023 demonstrate how Damascus' market has grown over the past decade. Damascus has both increased the size of its local trade area and expanded its visitor market reach. While the local market remains the largest percent of the customer base, visitors from outside the region are becoming an important component of the market.

Key observations from the zip code include:

- Damascus' core market is still the local market, with 28% of customers from the 24236 Damascus zip code, 41% from Washington County, and 54% from the primary and secondary trade areas.
- Damascus expanded its secondary trade area, as its market penetration into the 24210 Abingdon zip code area increased since 2014.
- The breadth of the visitor market reach increased significantly from 2014 to 2023, growing from 294 unique zip codes across 36 states in 2014 to 1,324 unique zip codes across 49 states in 2023.
- The visitor market is becoming a larger portion of Damascus' market share. In 2014, only 10% of visits were from outside of Virginia and Tennessee. In 2023, that increased to 30%.
- The visitor market is strongest in the fall, compared to the spring and summer. In October of 2023, 40% of visits were from outside of Virginia and Tennessee, compared to 27% in April and 25% in July.
- Local and visitor market base varied by business type, with general retail serving more locals, lodging and bicycle related businesses serving more visitors, and specialty retail and food and beverage businesses serving a mix of locals and visitors.
- In general, businesses located in downtown Damascus served more visitors than those located outside of downtown.

	April 2014	April 2023	July 2023	October 2023	Combined 2023
Participating Businesses	23	24	27	27	37
Customer Visits	3,134	2,170	1,966	1,785	5,921
Unique Zip Codes	294	524	438	706	1,324
Unique States	36	41 + DC	34 + DC	43 + Guam, Puerto Rico	49 + DC, Guam, Puerto Rico
Foreign Countries	5	11	2	3	13
% 24236 Damascus	41%	35%	30%	19%	28%
% Washington County	60%	49%	47%	27%	41%
% Outside Virginia & Tennessee	10%	27%	25%	40%	30%

Figure 12: Summary of Key Statistics Across 2014 and 2023 Zip Code Surveys

Recommendations

The data above shows a robust and growing market for the town. Through the efforts of the Town of Damascus, its partners and local businesses, Damascus has solidified itself as a center of commerce for its region as well as increased its presence as a significant visitor destination. In fact, the business, activities and experiences provided in Damascus likely positively impact businesses in greater Washington County, Abingdon, and other nearby communities.

Much of this is due to the work of the Town in implementing the economic restructuring strategy imbedded in the 2014 downtown plan. The simple strategies below should be seen as a companion to the 2014 economic recommendations as they relate to the data presented above.

1. **Incorporate market data into marketing strategies:** The data should inform the marketing efforts of the Town, local businesses, and marketing partners. The Town should first share this report with any interested business, as well as tourism partners.
2. **Conduct survey at Appalachian Trail Days:** This study provides the best year-round understanding of the market for local businesses but was intentionally scheduled to avoid Trail Days and other events. The Town should recruit a volunteer or perhaps a hire a high school student to collect zip codes for Trail Days attendees. The surveyor can simply spend a few hours walking the event, approach event goers and ask for their zip code. Similar efforts could be conducted at other events as well.
3. **Consider participating in Friends of SWVA's Marketing Access Program:** The town should actively connect to the SWVA tourism network to tie Damascus into the regional marketing efforts related to outdoor recreation and tourism. Friends of SWVA provides communities a number of tools in its new M.A.P. Marketing Access Program.
4. **Consider a downtown kiosk:** This would help directly connect the visitors to local businesses. A simplified kiosk could be located at a key intersection of downtown or near the Trail Center. It could be a streamlined design utilizing the current tear-off map behind a plexiglass cover, similar to "now playing" poster signs at theaters.
5. **Enhance social media connectivity:** Damascus should actively encourage local businesses and visitors to share their experiences via social media using #damascusva, #trailtownusa, #traildays, #swva, etc. The town currently regularly posts on Instagram and Facebook, but could also provide links and tags in its posts that already highlight events and local businesses.
6. **Update market analysis:** The first part of the market analysis has been completed with the zip code survey. The towns should now consider a simple update to the 2014 study that details accomplishments made since the previous plan, identifies current opportunities, and outlines needs for new or expanded businesses, etc.
7. **Consider an update to the Visit Damascus website:** Damascus has done an incredible job of creating a marketing program from scratch after the 2014 Downtown Plan, including incorporating its brand into the town's website and creating the Visit Damascus website. The site has a wealth of information for the visitor on events, downtown businesses, etc. It is recommended that the town continue to use the website as a tool, but consider a more streamlined, graphic-intensive design that includes photos highlighting local activities, businesses, logos for events, etc. The initial page could perhaps use less copy, more links as well as more contrast to the links in the drop-down menu. Similar websites like visitstaunton.com, visit floydva.com, downtownlynchburg.com, etc. could be used for inspiration.
8. **Continue to market Damascus community year-round:** Winter months are the most difficult to get visitors in Damascus and therefore it is critical that the Town communicate to locals during the off months. It is also important to market to locals during the visitor

season. Connecting with the local region during the off months can help sustain independent businesses. The Town can do this by helping to promote events that are being held at downtown businesses (music events, etc), but also consider local-focused, small events such as a holiday craft market the farmers market, kids-focused event at the Trail Town Event Center, etc. Active social media, quarterly newsletters, etc. can help sustain that local market as well.

9. **Update the brand:** The town has expressed a need to refresh and update the brand created in 2014 and should continue its efforts to make its brand provide the most impact to connect to its market. Recent projects incorporating the brand font and style into the new gateway sign in town build further equity in the Town's current brand, but additional updates to colors, and perhaps tweaks to the compass rose could also be investigated. Ultimately, the town should continue to use a consistent brand to present itself across all of its marketing efforts.

APPENDIX A:

APRIL 2023 ZIP CODE SURVEY RESULTS

April 2023 Zip Code Survey Results

During the week of April 14th-20th, twenty-four Damascus businesses participated in the zip code survey. Collectively, businesses recorded 2,170 customer visits from 524 unique zip codes across 41 states, Washington DC and 11 foreign countries. Approximately 58% of customer visits were from Virginia, 49% from Washington County, and 35% from the 24236 Damascus zip code.

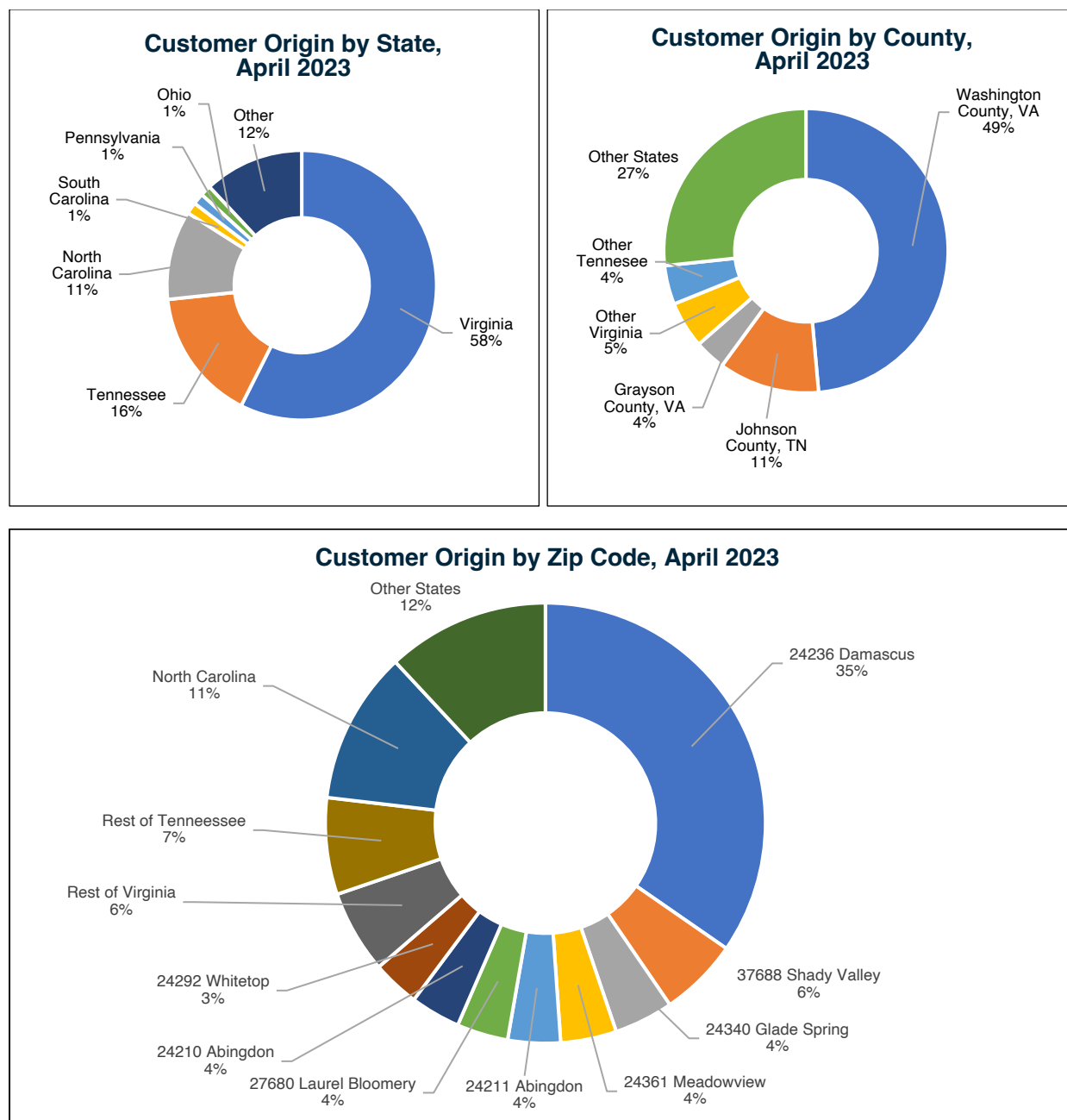


Figure 13: Customer Origin by State (Top Left), County (Top Right) and Zip Code (Bottom) from the April 2023 Zip Code Survey

Customer Origin by Business Type (April 2023 Survey)

General retail businesses had a greater percentage of local customers while specialty retail, lodging, and bicycle-related businesses had a greater percentage of out-of-state customers. Food and beverage businesses served a mix of local, regional, and out-of-state customers.

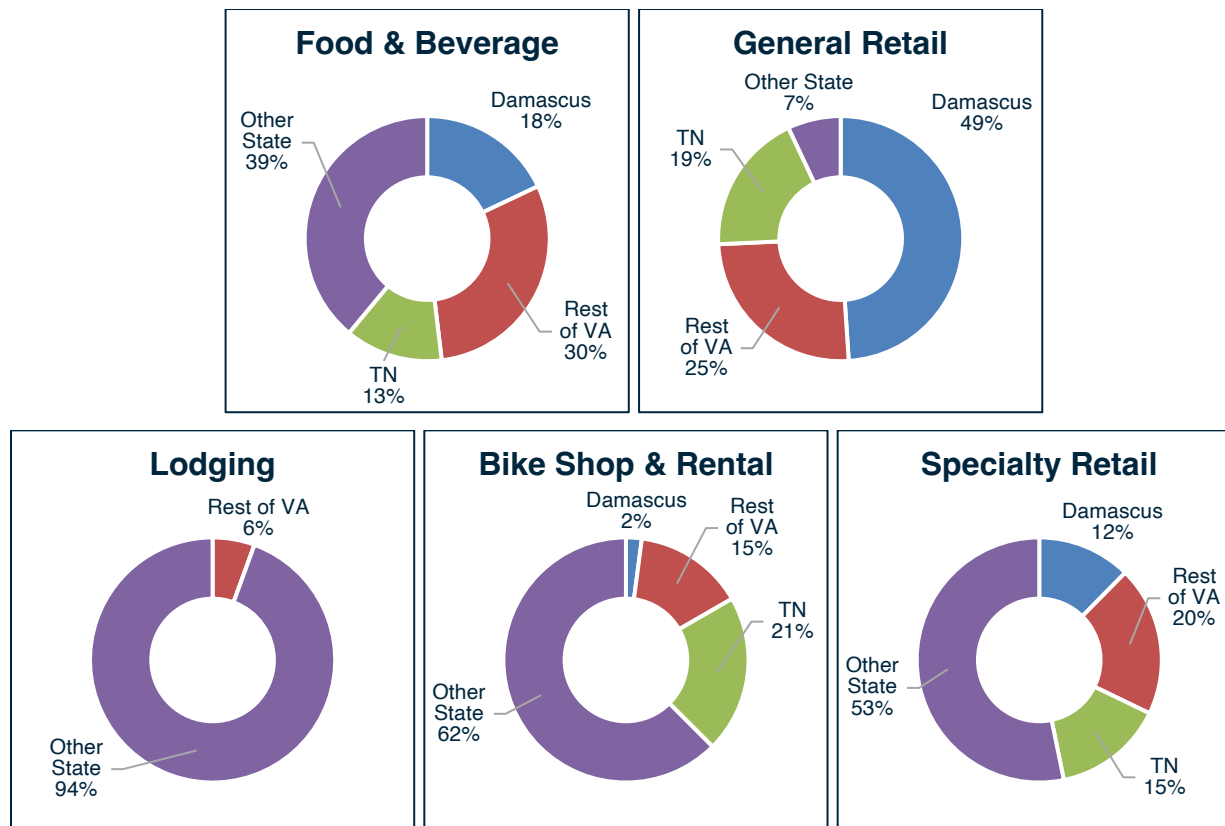


Figure 14: Customer Origin by Business Type, April 2023 Zip Code Survey

Customer Origin by Location (April 2023 Survey)

Businesses located in downtown Damascus had a greater percentage of out-of-state customers than businesses located outside of downtown.

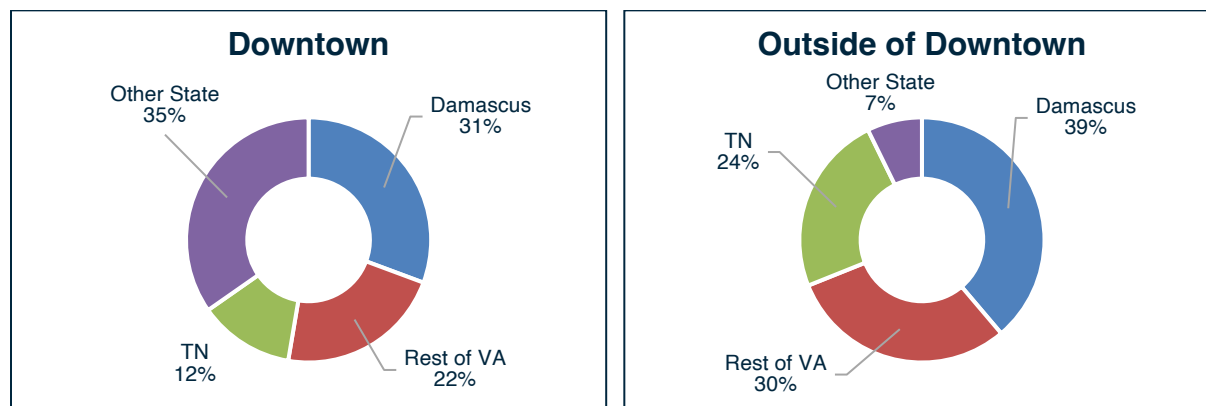


Figure 15: Customer Origin for Businesses in Downtown Damascus (Left) and Outside of Downtown (Right), April 2023 Survey

Primary and Secondary Trade Area

Primary and secondary trade areas are determined by the number of visits in relation to the population of a given area. The table below shows customer visits per 1,000 residents for the top zip codes recorded in the April 2023 survey.

Primary Trade Area

Damascus' primary trade area is defined as the following four zip codes:

- ☐ 24236 Damascus
- ☐ 24292 Whitetop
- ☐ 37688 Shady Valley
- ☐ 37680 Laurel Bloomery

Secondary Trade Area

Five zip codes make up Damascus' secondary trade area:

- ☐ 24340 Glade Spring
- ☐ 24361 Meadowview
- ☐ 24211 Abingdon
- ☐ 24210 Abingdon
- ☐ 37683 Mountain City

Approximately 46% of customer visits recorded in the April 2023 survey were from the primary trade area, 17% were from the secondary trade area, and 37% were from outside of the trade areas.

Zip Code	Area	2023 Population	Visits	Visits/1000 Pop
24236	Damascus	2,918	717	245.72
24292	Whitetop	376	72	191.49
37688	Shady Valley	973	120	123.33
37680	Laurel Bloomery	695	78	112.23
24340	Glade Spring	5,145	90	17.49
24361	Meadowview	5,379	85	15.80
24211	Abingdon	9,963	80	8.03
24210	Abingdon	17,207	76	4.42
37683	Mountain City	12,824	48	3.74

Figure 17: Primary Trade Area (Highlighted in Orange) and Secondary Trade Area (Shown in Purple) as Determined by Visits Per 1,000 Population, April 2023 Zip Code Survey

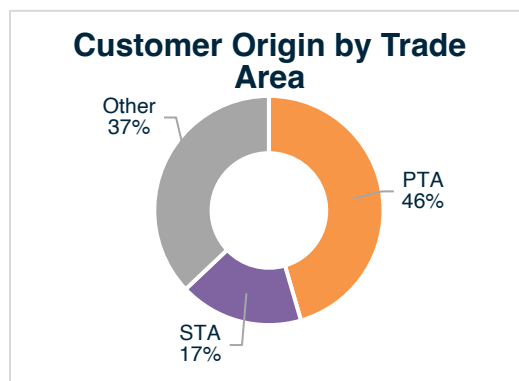


Figure 16: Customer Origin by Trade Area, April 2023 Zip Code Survey

Unique Zip Codes and States

During the April 2023 zip code survey, visits were recorded from 524 unique zip codes across 41 states, Washington DC and 11 foreign countries. The number of unique zip codes increased significantly from the 294 recorded in the 2014 zip code survey, indicating that Damascus' market reach has expanded over the past decade.

Top Counties and Metro Areas

Nearly half of all customer visits recorded in the April 2023 survey were from Washington County, VA. Johnson County, TN represented 11% of visits and Grayson County, VA represented 4%. A significant number of visitors were from various metropolitan areas in North Carolina. Approximately 3% of visitors were from the Charlotte-Concord metropolitan area, and 2% each from the Raleigh-Durham-Cary metro, Asheville-Marion-Brevard metro, and Greensboro metro.

Top Counties				Top Metro Areas			
County	State	Visits	% of Visits	Metro Area or County (if not in metro)	State	Visits	% of Visits
Washington County	VA	1,054	49%	Johnson City Metro	TN-VA	1,099	51%
Johnson County	TN	249	11%	Johnson County (outside of metro)	TN	249	11%
Grayson County	VA	77	4%	Grayson County (outside of metro)	VA	77	4%
Mecklenburg County	NC	40	2%	Charlotte-Concord Metro	NC-SC	61	3%
Sullivan County	TN	28	1%	Raleigh-Durham-Cary Metro	NC	39	2%
Wake County	NC	20	1%	Asheville-Marion-Brevard Metro	NC	34	2%
Buncombe County	NC	19	1%	Greensboro Metro	NC	33	2%
Smyth County	VA	14	1%	Knoxville-Morristown Metro	TN	20	1%
Knox County	TN	13	1%	Smyth County (not in metro)	VA	14	1%
Durham	NC	11	1%	Nashville-Davidson Metro	TN	11	1%
Randolph	NC	11	1%	Atlanta-Sandy Springs-Roswell Metro	GA	9	0%
Washington County	TN	11	1%	Chattanooga Metro	TN-GA	5	0%
Fairfax County	VA	11	1%	Other		519	24%
Other		612	28%				
Total		2170	100%	Total		2170	100%

Figure 18: Top Counties (Left) and Metropolitan Areas (Right) by Number and Percent of Visits, April 2023 Survey

APPENDIX B:

JULY 2023 ZIP CODE SURVEY RESULTS

July 2023 Zip Code Survey Results

During the week of July 21st – 27th, twenty-seven Damascus businesses participated in the zip code survey. Collectively, businesses recorded 1,966 customer visits from 438 unique zip codes across 34 states, Washington DC, and 2 foreign countries. Approximately 57% of customer visits were from Virginia, 47% from Washington County, and 30% from the 24236 Damascus zip code.

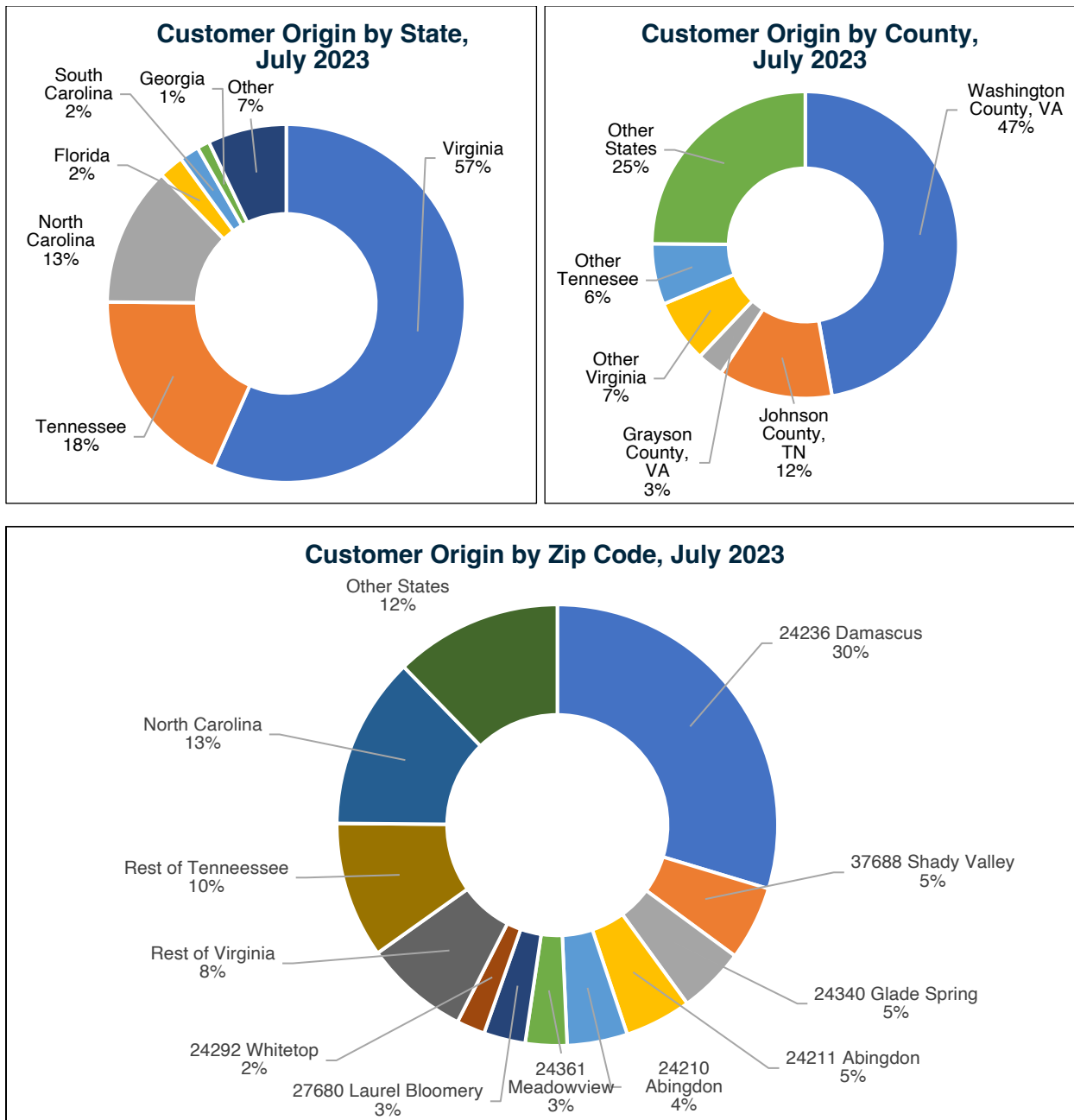


Figure 19: Customer Origin by State (Top Left), County (Top Right), and Zip Code (Bottom) from the July 2023 Zip Code Survey

Customer Origin by Business Type (July 2023 Survey)

General retail businesses had a greater percentage of local customers while lodging, and bicycle-related businesses had a greater percentage of out-of-state customers. Specialty retail and food and beverage businesses served a mix of local, regional and out-of-state customers.

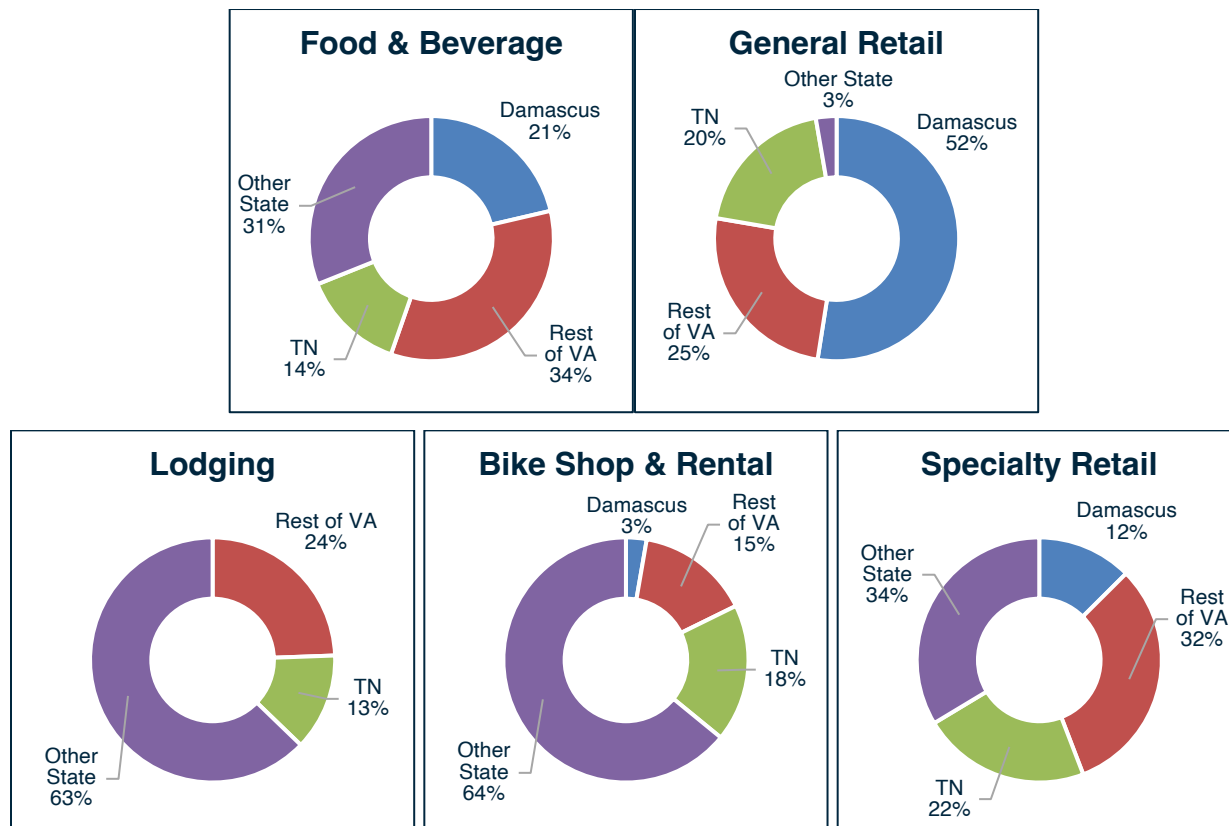


Figure 20: Customer Origin by Business Type, July 2023 Zip Code Survey

Customer Origin by Location (July 2023 Survey)

Businesses located in downtown Damascus had a greater percentage of customers from outside of Virginia and Tennessee than businesses located outside of downtown.

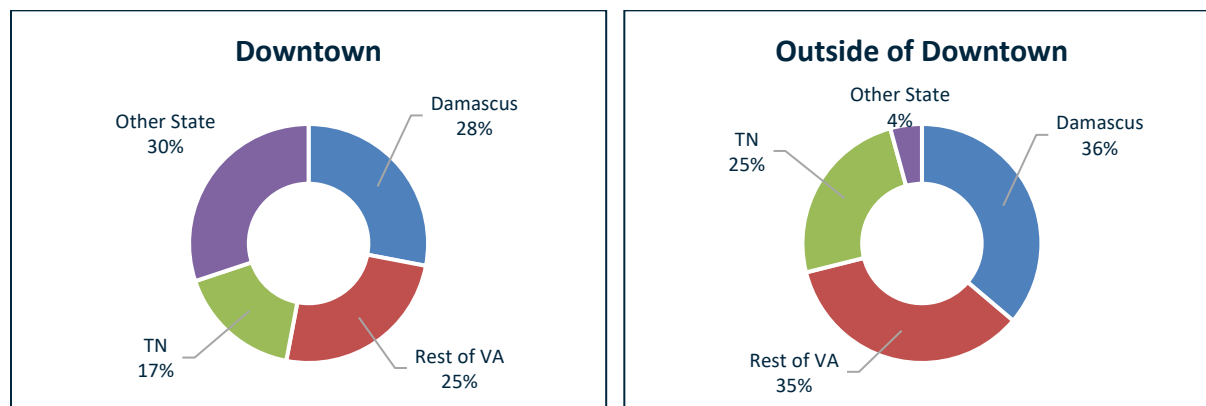


Figure 21: Customer Origin for Businesses in Downtown Damascus (Left) and Outside of Downtown (Right), July 2023 Survey

Primary and Secondary Trade Area

Primary and secondary trade areas are determined by the number of visits in relation to the population of a given area. The table below shows customer visits per 1,000 residents for the top zip codes recorded in the July 2023 survey.

Primary Trade Area

Damascus' primary trade area is defined as the following four zip codes:

- ☐ 24236 Damascus
- ☐ 24292 Whitetop
- ☐ 37688 Shady Valley
- ☐ 37680 Laurel Bloomery

Secondary Trade Area

Five zip codes make up Damascus' secondary trade area:

- ☐ 24340 Glade Spring
- ☐ 24361 Meadowview
- ☐ 24211 Abingdon
- ☐ 24210 Abingdon
- ☐ 37683 Mountain City

Approximately 40% of customer visits recorded in the July 2023 survey were from the primary trade area, 21% were from the secondary trade area, and 39% were from outside of the trade areas.

Zip Code	Area	2023 Population	Visits	Visits/1000 Pop
24236	Damascus	2,918	583	199.79
37688	Shady Valley	973	107	109.97
24292	Whitetop	376	41	109.04
37680	Laurel Bloomery	695	60	86.33
24340	Glade Spring	5,145	96	18.66
24361	Meadowview	5,379	60	11.15
24211	Abingdon	9,963	96	9.64
24210	Abingdon	17,207	87	5.06
37683	Mountain City	12,824	64	4.99

Figure 23: Primary Trade Area (Highlighted in Orange) and Secondary Trade Area (Shown in Purple) as Determined by Visits Per 1,000 Population, July 2023 Zip Code Survey

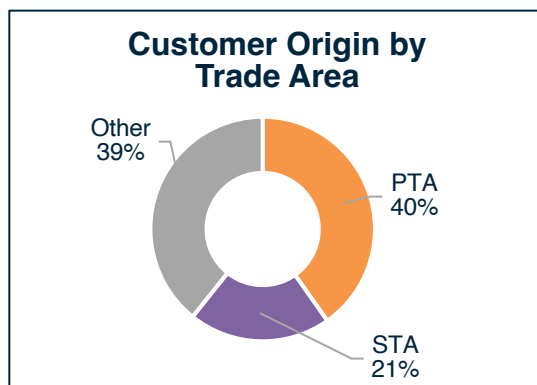


Figure 22: Customer Origin by Trade Area, July 2023 Survey

Unique Zip Codes and States

During the July 2023 zip code survey, businesses recorded visits from 438 unique zip codes across 34 states, Washington DC and 2 foreign countries. The number of unique zip codes was less than the 524 recorded in April of 2023, but still higher than the 294 recorded in April 2014.

Top Counties and Metro Areas

51% of customer visits recorded in the July 2023 survey were from the Johnson City metropolitan area, and 12% were from Johnson County, TN which is outside of the metropolitan area. The Charlotte-Concord metropolitan area represented 4% of visits and the Greensboro metro represented 2% of visits.

Top Counties				Top Metro Areas			
County	State	Visits	% of Visits	Metro Area or County (if not in metro)	State	Visits	% of Visits
Washington County	VA	928	47%	Johnson City Metro	TN-VA	998	51%
Johnson County	TN	237	12%	Johnson County (outside of metro)	TN	237	12%
Grayson County	VA	55	3%	Charlotte-Concord Metro	NC-SC	79	4%
Mecklenburg County	NC	34	2%	Grayson County (outside of metro)	VA	55	3%
Sullivan County	TN	33	2%	Greensboro Metro	NC	44	2%
Forsyth County	NC	19	1%	Knoxville-Morristown Metro	TN	28	1%
Washington County	TN	19	1%	Asheville-Marion-Brevard Metro	NC	26	1%
Smyth County	VA	18	1%	Raleigh-Durham-Cary Metro	NC	23	1%
Buncombe County	NC	14	1%	Smyth County (not in metro)	VA	18	1%
Guilford County	NC	14	1%	Atlanta-Sandy Springs-Roswell Metro	GA	14	1%
Avery County	NC	13	1%	Avery County (not in metro)	NC	13	1%
New Hanover County	NC	12	1%	New Hanover County (not in metro)	NC	12	1%
Wake County	NC	12	1%	Chattanooga Metro	TN-GA	12	1%
Knox County	TN	12	1%	Ashe County (not in metro)	NC	10	1%
Bristol City	VA	11	1%	Nashville-Davidson Metro	TN	6	0%
Ashe County	NC	10	1%	Other		391	20%
Cabarrus County	NC	10	1%				
Rowan County	NC	10	1%				
Hamilton County	TN	10	1%				
Other		495	25%				
Total		1966	100%	Total		1966	100%

Figure 24: Top Counties (Left) and Metropolitan Areas (Right) by Number and Percent of Visits, July 2023 Survey

APPENDIX C:

OCTOBER 2023 ZIP CODE SURVEY RESULTS

October 2023 Zip Survey Results

During the week of October 6th – 12th, twenty-seven Damascus businesses participated in the zip code survey. Collectively, businesses recorded 1,785 customer visits from 706 unique zip codes across 43 states, Puerto Rico, Guam, and 3 foreign countries. Approximately 36% of customer visits were from Virginia, 27% from Washington County, and 19% from the 24236 Damascus zip code.

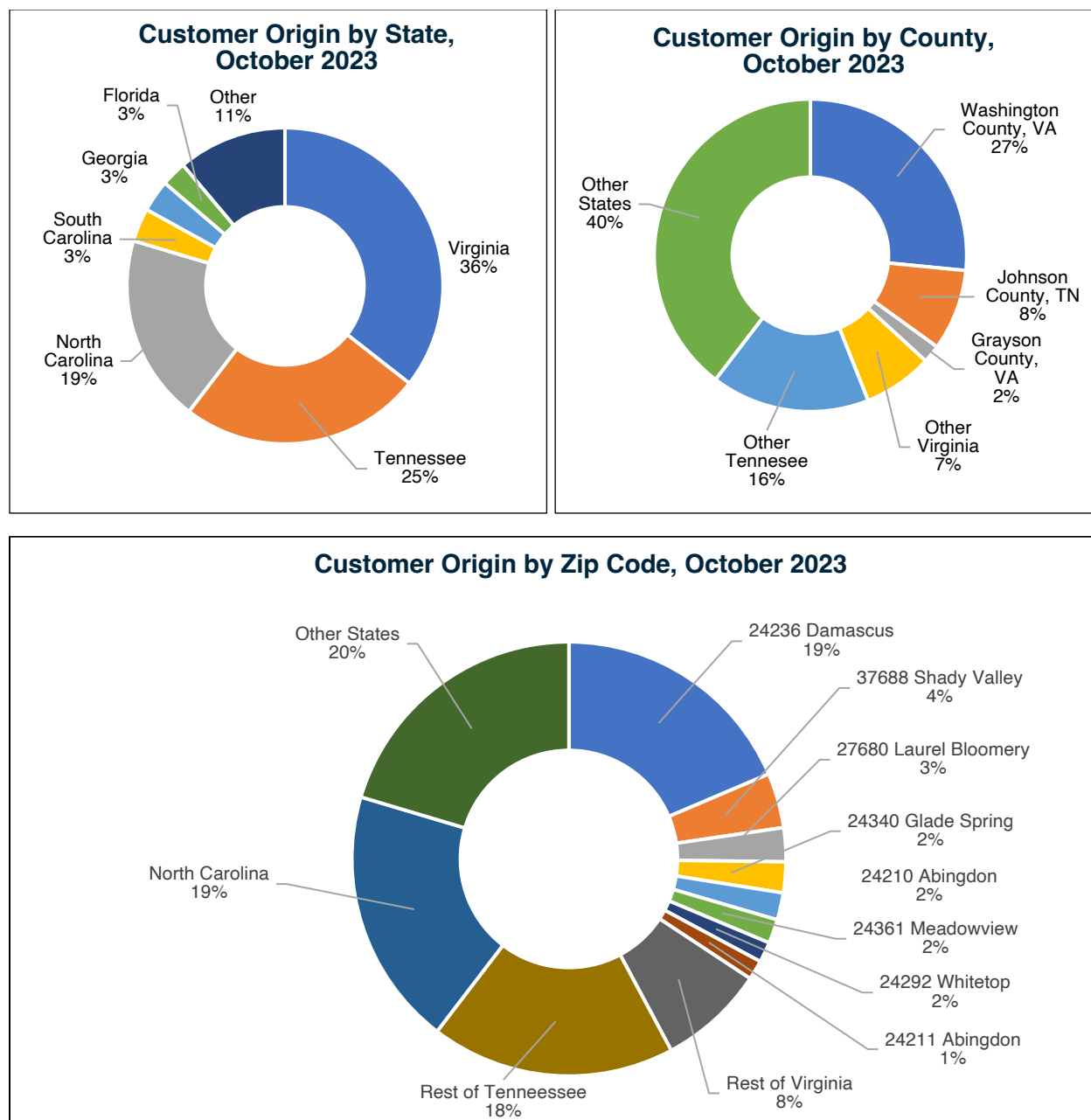


Figure 25: Customer Origin by State (Top Left), County (Top Right), and Zip Code (Bottom) in the October 2023 Zip Code Survey

Customer Origin by Business Type (October 2023 Survey)

For general retail businesses, local residents from the 24236 Damascus zip code made up the largest percentage of customers. For all other business types, customers from outside of Virginia and Tennessee made up the largest percentage of customers.

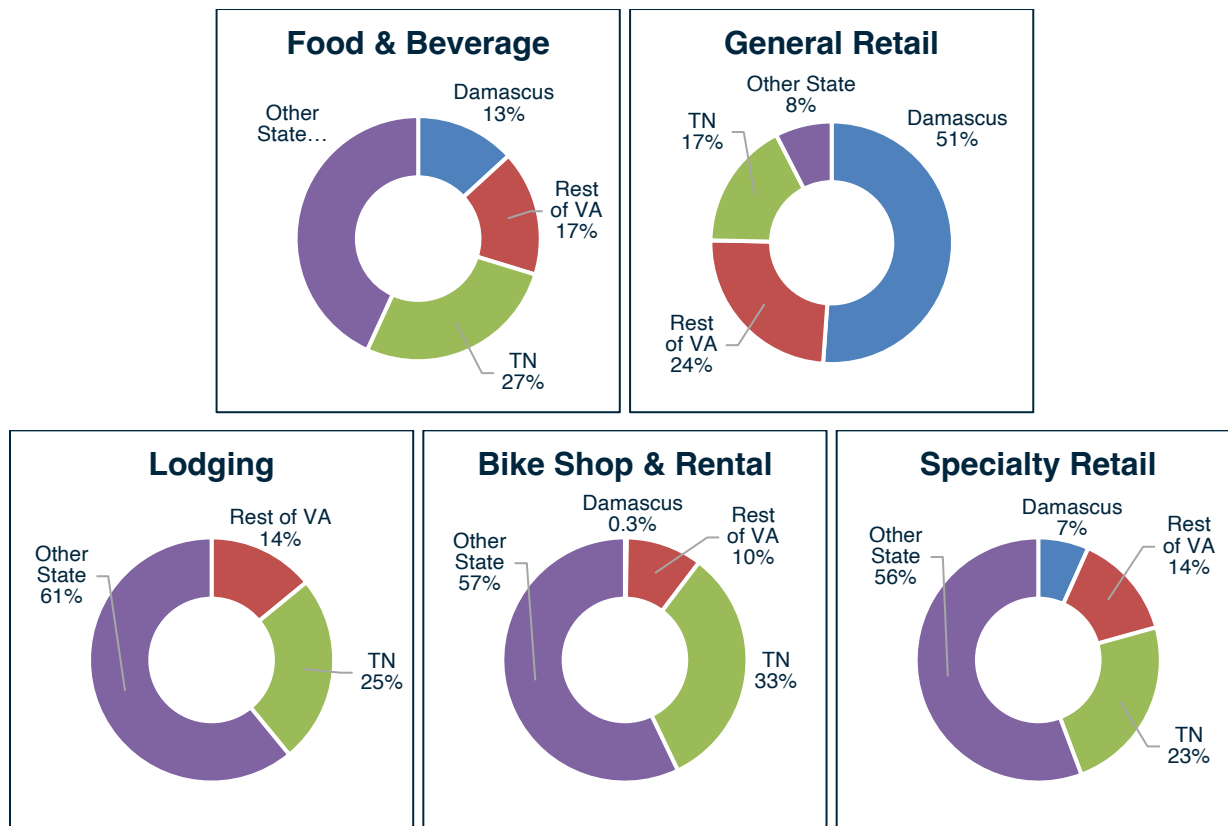


Figure 26: Customer Origin by Business Type, October 2023 Zip Code Survey

Customer Origin by Location (October 2023 Survey)

Businesses located in downtown Damascus had a greater percentage of customers from outside of Virginia and Tennessee than businesses located outside of downtown.

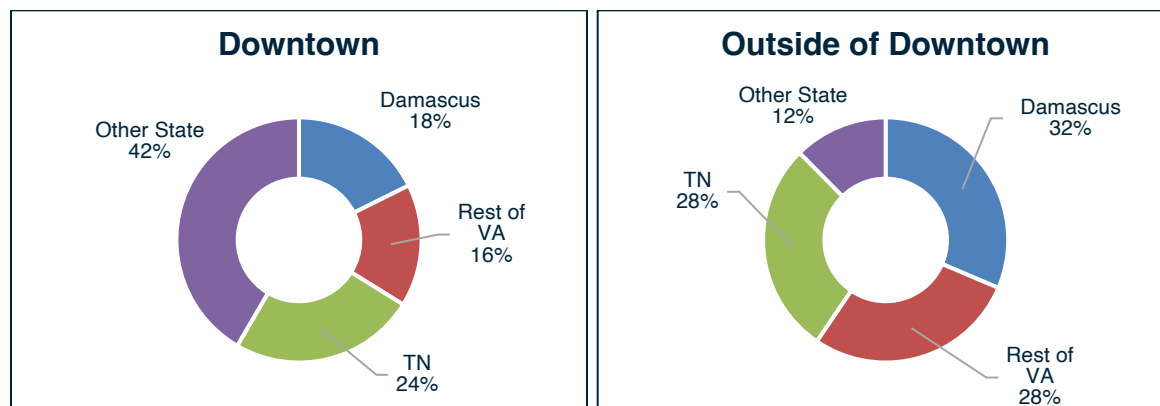


Figure 27: Customer Origin for Businesses in Downtown Damascus (Left) and Outside of Downtown (Right), October 2023 Zip Code Survey

Primary and Secondary Trade Area

Primary and secondary trade areas are determined by the number of visits in relation to the population of a given area. The table below shows customer visits per 1,000 residents for the top zip codes recorded in the October 2023 survey.

Primary Trade Area

Damascus' primary trade area is defined as the following four zip codes:

- ☐ 24236 Damascus
- ☐ 37688 Shady Valley
- ☐ 24292 Whitetop
- ☐ 37680 Laurel Bloomery

Secondary Trade Area

Five zip codes make up Damascus' secondary trade area:

- ☐ 24340 Glade Spring
- ☐ 24361 Meadowview
- ☐ 24211 Abingdon
- ☐ 24210 Abingdon
- ☐ 37683 Mountain City

Approximately 27% of customer visits recorded in the October 2023 survey were from the primary trade area, 9% were from the secondary trade area, and 64% were from outside of the trade areas.

Zip Code	Area	2023 Population	Visits	Visits/1000 Pop
24236	Damascus	2,918	332	113.78
37688	Shady Valley	973	73	75.03
24292	Whitetop	376	27	71.81
37680	Laurel Bloomery	695	45	64.75
24340	Glade Spring	5,145	41	7.97
24361	Meadowview	5,379	32	5.95
24211	Abingdon	9,963	26	2.61
24210	Abingdon	17,207	36	2.09
37683	Mountain City	12,824	21	1.64

Figure 29: Primary Trade Area (Highlighted in Orange) and Secondary Trade Area (Shown in Purple) as Determined by Visits Per 1,000 Population, October 2023 Zip Code Survey

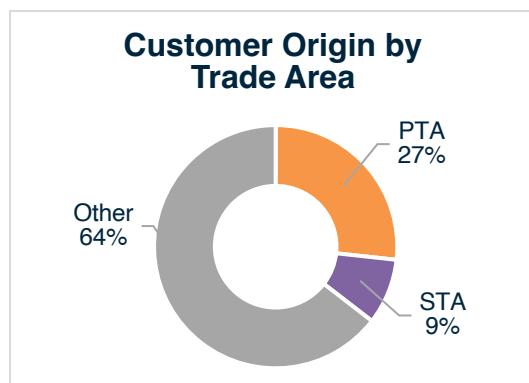


Figure 28: Customer Origin by Trade Area, October 2023 Survey

Unique Zip Codes and States

During the October 2023 zip code survey, businesses recorded visits from 706 unique zip codes across 43 states, Puerto Rico, Guam, and 3 foreign countries. The number of unique zip codes in the October survey far exceeded the number of unique zip codes in the previous zip code surveys.

Top Counties and Metro Areas

The October zip code survey indicated a deeper market penetration into metropolitan markets throughout the southeast, including Knoxville, TN (7% of visits), Charlotte, NC (6% of visits), Asheville, NC (3% of visits), Raleigh-Durham-Cary, NC (3% of visits), and Chattanooga (3% of visits).

Top Counties				Top Metropolitan Areas			
County	State	Visits	% of Visits	Metro Area or County (if not in metro)	State	Visits	% of Visits
Washington County	VA	474	27%	Johnson City Metro	TN-VA	520	29%
Johnson County	TN	150	8%	Johnson County (outside of metro)	TN	150	8%
Knox County	TN	64	4%	Knoxville-Morristown Metro	TN	130	7%
Mecklenburg County	NC	38	2%	Charlotte-Concord Metro	NC-SC	99	6%
Grayson County	VA	33	2%	Asheville-Marion-Brevard Metro	NC	54	3%
Wake County	NC	32	2%	Raleigh-Durham-Cary Metro	NC	51	3%
Blount County	TN	26	1%	Chattanooga Metro	TN-GA	50	3%
Buncombe County	NC	26	1%	Greensboro Metro	NC	39	2%
Washington County	TN	22	1%	Grayson County (outside of metro)	VA	33	2%
Sevier County	TN	20	1%	Nashville-Davidson Metro	TN	31	2%
Hamilton County	TN	19	1%	Atlanta-Sandy Springs-Roswell Metro	GA	8	0%
York County	SC	18	1%	Smyth County (not in metro)	VA	7	0%
Bradley County	TN	17	1%	New Hanover County (not in metro)	NC	5	0%
Sullivan County	TN	15	1%	Avery County (not in metro)	NC	4	0%
Iredell County	NC	15	1%	Ashe County (not in metro)	NC	3	0%
Henderson County	NC	14	1%	Other		601	34%
Catawba County	NC	12	1%				
Greenville County	SC	12	1%				
Fairfax County	VA	11	1%				
Other		767	43%				
Total		1785	100%	Total		1785	100%

Figure 30: Top Counties (Left) and Metropolitan Areas (Right) by Number and Percent of Visits, October 2023 Survey