

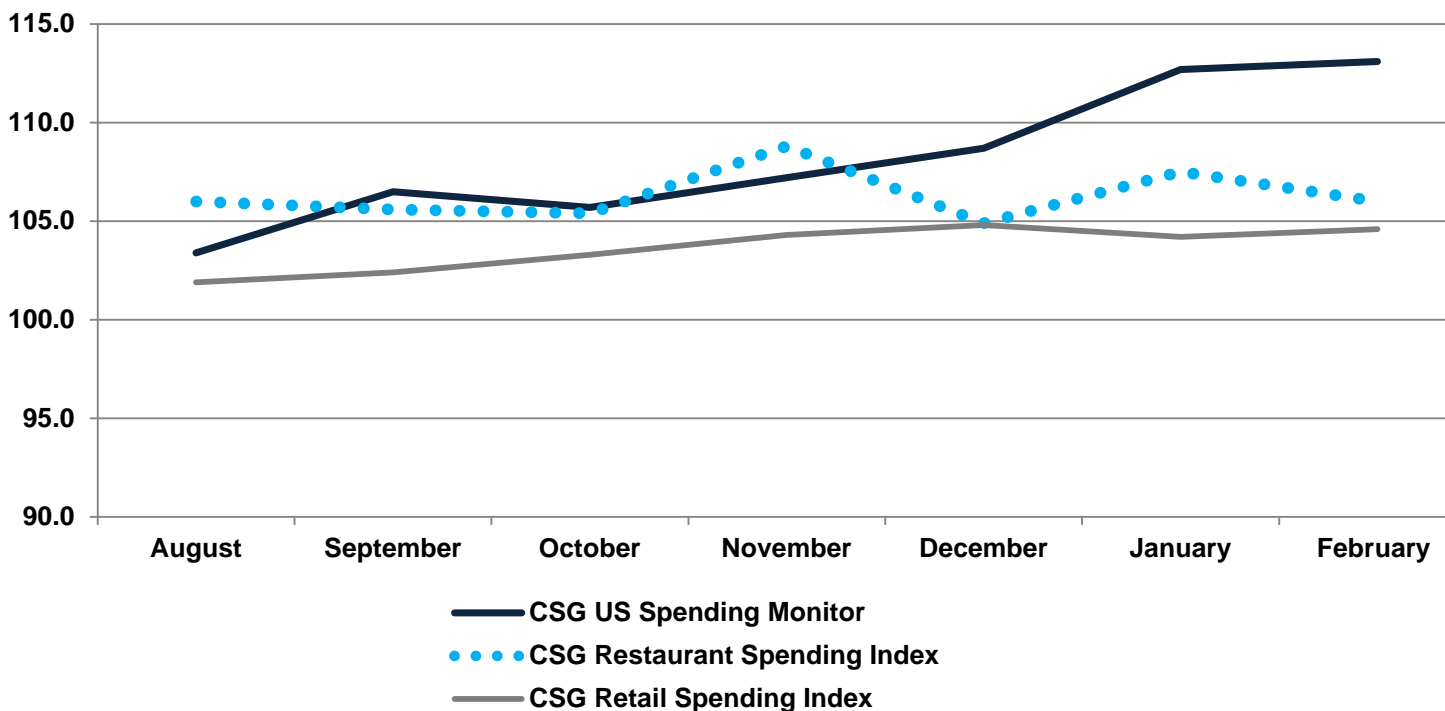


CSG'S March CSR: Consumer Confidence Remains Strong

March 2017

The Chain Store Guide US Spending Monitor reached another all-time high during February polling, indicating continued consumer confidence in the economy and personal finances. While fewer respondents rated the US economy as excellent or good, those indicating a 'poor' economy fell to 19%, an all-time low. The overwhelming majority of Americans have a positive current economic view (excellent, good, or fair). Additionally, only 18% of respondents rated current personal finances as 'poor', also an all-time low.

CSG Spending Monitor and Index Trends

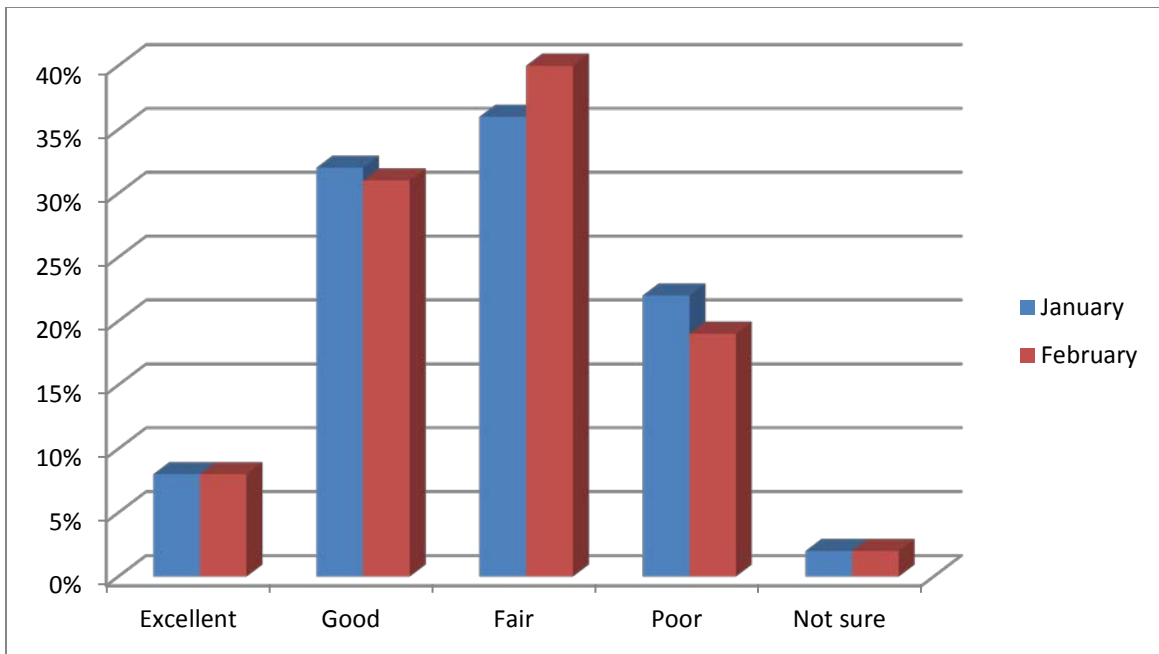


- The **CSG US Spending Monitor** increased to 113.1
- The **CSG Restaurant Spending Index** decreased to 106.0
- The **CSG Retail Spending Index** increased to 104.6



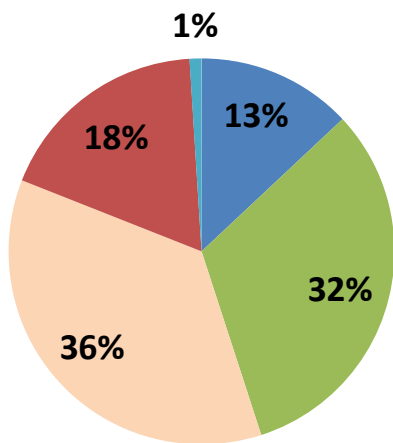
US Economy and Consumer Finances

How would you rate the U.S. economy?



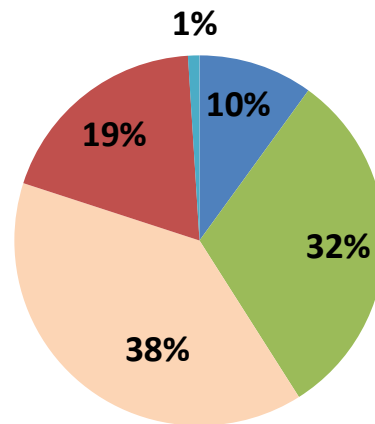
Current Personal Finances

February Polling



■ Excellent ■ Good ■ Fair ■ Poor ■ Not Sure

12-Month Average

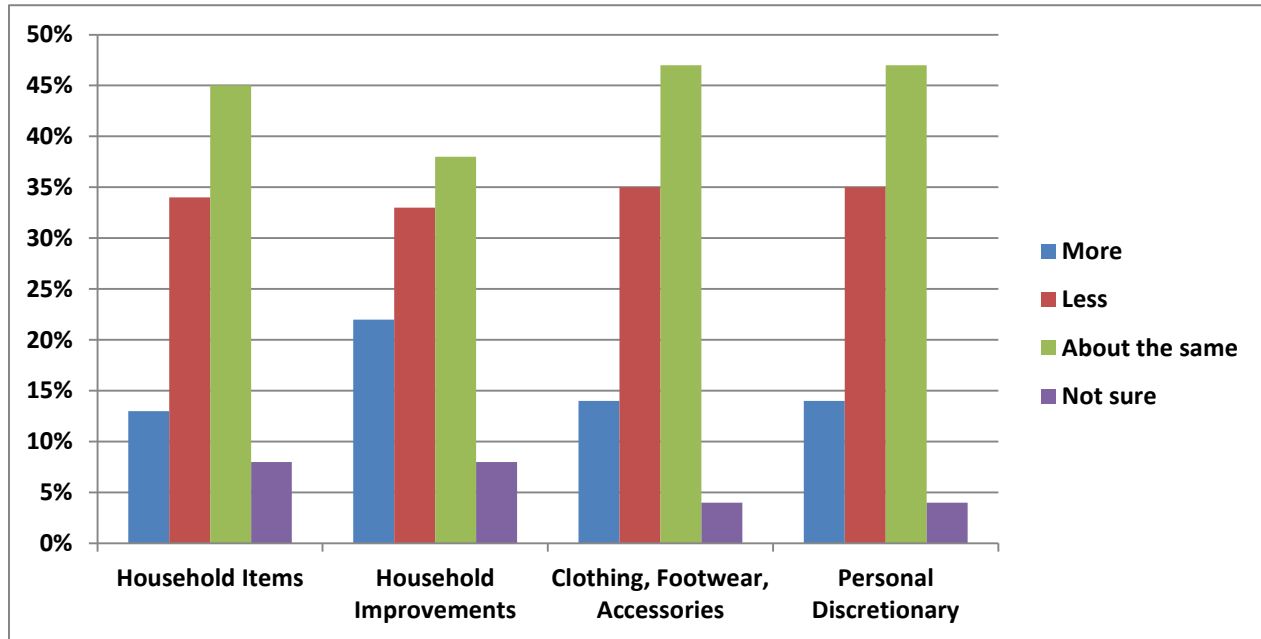


■ Excellent ■ Good ■ Fair ■ Poor ■ Not Sure

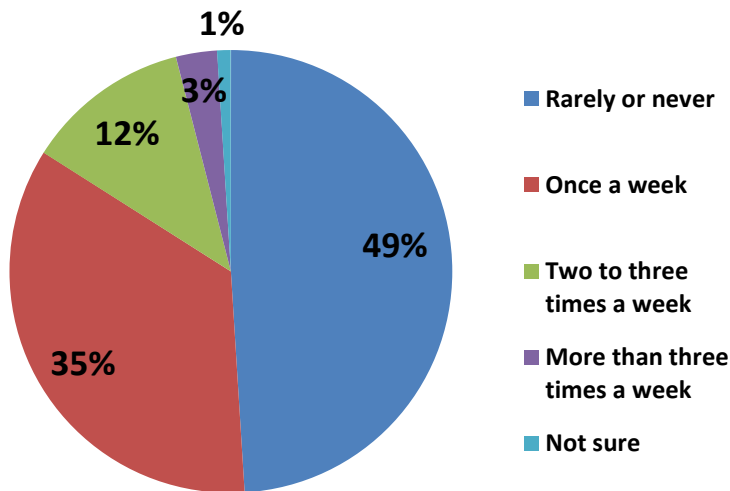


Consumer Spending Insights

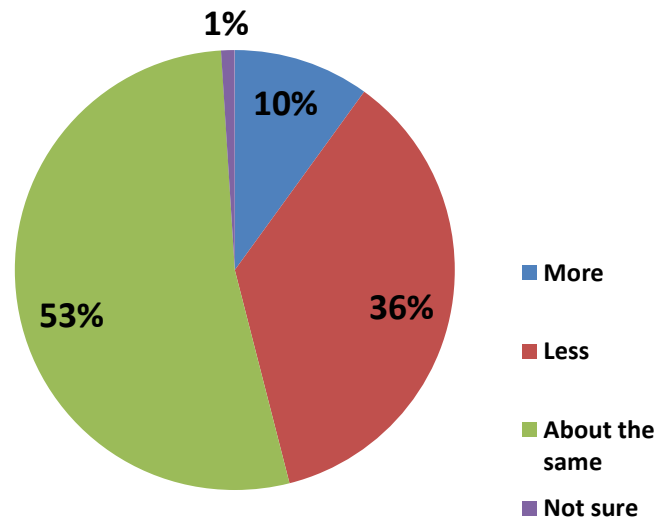
In the next month, will you spend more, less or about the same on . . .



In a typical week, how often do you go out to eat?



Compared to six months ago, are you going out to eat more often, less often or about the same as before?





About Chain Store Guide

For 80 years, Chain Store Guide (CSG) has been the leading provider of comprehensive and definitive retail and foodservice intelligence to businesses around the world.

Chain Store Guide data is the definitive source that is used by manufacturers, suppliers, service providers, brokers, real estate professionals, retailers, analysts, consultants and other professionals seeking to gain insight into retail and foodservice markets in the U.S. and Canada.

Chain Store Guide Data Is Used For:

Market Forecasting & Data Blending

CSG can forecast predictive analysis through 2025 using six to ten years of historical data and sound logic algorithms.

Consumer Spending Data

The CSR is a sampling of the data that we provide. Additional data can be customized to fit any business or media needs.

Competitive Analysis

Perform your own competitive benchmarking to gain key insight into your marketplace or let the CSG experts do it for you.

Proximity & Market Share

Keep your eye on the competition. Knowing who the players are on the field is essential for developing a successful strategic plan.

Market & Trend Analysis

Analyze over 750,000 locations for strategic planning and market positioning.

Industry Profiling

Specific industry data to support your sales, marketing, and business development needs.

Site Planning

Determine market and territory potential for expansion or relocation. Map and plot for site, geographic and demographic analysis.

Data Appending/Cleansing

Utilize CSG data to append your records and track changes. Our list augmentation experts can match records against our master data bank and append any missing information. We can also correlate & convert multiple Unique Company Identifiers and match them to the CSG Company ID.

Sales Leads Generation

Updated daily to add to your sales & marketing prospects database.

If you would like additional analyses that we have not provided in this report, please contact Brian List at blist@chainstoreguide.com.

Brian List

Sr. Manager, Market Research
813 627-6943