Downtown Boulder User Survey

Summer 2018

Final Report

Prepared for:

Downtown Boulder Partnership

Boulder Convention & Visitors Bureau

City of Boulder Downtown Management Commission

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USER SURVEY SUMMARY **SUMMER 2018**

Introduction

This report summarizes the results of the 2018 Downtown Boulder User Survey, a randomly administered intercept survey of Downtown area pedestrians conducted on and near the Pearl Street Mall area of Boulder, Colorado. A total of 714 interviews were completed during the research period between July 20 and September 21, 2018.

The purpose of the Downtown user research program is to identify and monitor on an ongoing basis the characteristics and experiences of mall users. The survey, originally conducted annually, is now undertaken every other summer, with research data going back to 1993. One of the key attributes of this research project is the ability to benchmark current results against past figures and to monitor important trends over time.

Key topics in this year's survey include the downtown visitor mix (visitors and residents), spending patterns, quality of the visitor experience, advertising awareness, mode of travel to the Downtown area, awareness and usage of the pay-by-phone system, reaction to panhandlers' behavior, suggestions for improvements, and other important issues. Additionally, City of Boulder residents were asked about competitive issues (including the frequency of visiting other major shopping areas) and attendance at special events and festivals. Out-of-town visitors were asked if they were spending the night, information sources they used for planning their visit, total spending while in Boulder and the primary purpose of their trip to Boulder.

Presentation of research results are intended to assist the Downtown Boulder Partnership, the City of Boulder Downtown Management Commission, the Downtown Business Improvement District, and the Convention & Visitors Bureau's understanding of key issues and concerns from the perspective of the visitor/user in order to set priorities for improvement, image, branding, and functioning of this key Downtown area.

Methodology

Interviews were conducted at various times throughout the day, between 9:30 a.m. and 7:30 p.m. along Pearl Street from 10th Street to 17th Street. Similar to the research conducted in prior years, the surveys were concentrated on the pedestrian area of Pearl Street Mall, though a portion of the research was done both two blocks east and one block west of the mall proper. The interviewing methodology has been consistent in terms of time of day, time of year, location of interviews, and sampling procedures; thus, year-to-year comparisons are valid.

The 2018 survey is the 19th Downtown Boulder User Survey that RRC Associates has conducted for the Downtown Boulder Partnership, the City of Boulder, and the Boulder Convention & Visitors Bureau. In this report, the 2018 results are compared to results from prior years, particularly the most recent results, to assist in identifying trends. Year to year, many questions remain similar, allowing for monitoring of longitudinal trends.

Several questions were asked only to specific sub-groups of survey respondents (such as overnight visitors or City residents); as a result, only the segment to which the question was posed is discussed. Within this report, segments only with notable changes may be discussed in an effort to highlight findings of particular interest.

Terminology

Throughout the report, in narrative form with the executive summary and graphs that follow, two points of comparison are used: year-to-year comparisons and visitor mix comparisons. Year-to-year comparisons identify long-term trends and frequently use averages of all visitor types. Delineation of the visitor mix employs the following classifications:

- Visitors/user: All survey respondents, including locals.
- Local: Residents of the City of Boulder; segmented as non-students and students.
- Boulder County resident: Those living in Boulder County, outside the City of Boulder.
- Colorado resident: Colorado visitors residing outside Boulder County.
- Visitor residing outside Colorado: This term includes U.S. visitors residing in other states, international visitors and part-time/summer resident.
- Overnight visitor: Visitors staying the night in the Boulder area, regardless of location of primary residence.

Executive Summary

This brief section highlights some of the most important and salient findings from the user survey research project. Please see the full report for more detail on these and other topics.

- Visitor Mix. This year's survey represents a slight shift in visitor mix from 2016. U.S. visitors from outside of Colorado represented the largest segment of visitors this year and in the history of the program, at 38 percent. Texas, California, Illinois, and New York were the largest out-of-state markets. Full-time City of Boulder residents and Colorado residents outside of Boulder County comprised the second and third largest visitor segments. Looking specifically at City of Boulder residents, the downtown area draws users from all parts of the City, with an uptick in residents of the Downtown Core area noted this year.
- Spending Penetration and Amounts. The percentage of respondents making a purchase (80 percent) was up from what was observed in both 2016 (74 percent) and 2014 (75 percent). However, the total average spend was slightly lower than in 2016 ($61.87 vs. $64.28). In particular, average restaurant and retail spending was down slightly this past summer compared to summer 2016. Similar to historical findings, out-of-state residents were particularly likely to make purchases (88 percent) and spent the most on average among all visitor segments ($83.74).
- General Satisfaction. Levels of satisfaction were generally very high, with most attributes of the Downtown experience on par with 2016 ratings. Most highly rated were the feeling of security/safety, the overall cleanliness and maintenance, family orientation/kids play areas, and customer service in retail stores (each averaging at least 4.5 out of 5). Modest declines in average ratings from 2016 were observed for the Downtown Visitor Information Center, variety of restaurants, and variety of retail shops/art galleries.
- Downtown Experience. An important question asked respondents to indicate whether the overall Downtown experience has improved, declined, or stayed the same. Most respondents indicated that the Downtown experience is either improving (36 percent) or staying the same (41 percent). Very few thought it was declining (7 percent) or a combination of improving in some respects and declining in others (16 percent). An open-ended follow-up invited respondents to elaborate on their answers, which prompted rich and varied responses. The full set of comments contain a breadth and depth of respondent opinion and should be viewed in their entirety. However, respondents commonly noted that the mix of stores has changed, and that the west end of Pearl Street is more developed. Many liked these changes, noting it feels more vibrant. Others were not fans of these changes, citing that, as a result of these changes, the Downtown is more expensive and missing character without the presence of as many local shops and restaurants. Some of these sentiments around distaste for chains and desire for more affordable options also came up when respondents were asked to indicate the restaurants or retailers they would like to see Downtown.

Final Report Findings

Visitor Mix

This survey defines visitors by residency in broad terms (city, county, state, and out-of-state). All categories are presented below with relevant highlights.

- U.S. visitors residing outside Colorado. The largest group of Downtown users this summer was out-of-state U.S. residents (38 percent, up from 32 percent in summer 2016 and from 25 percent in summer 2014). The most common origins of out-of-state visitors included Texas (3.6 percent of all respondents this summer), California (3.4 percent), Illinois (2.7 percent), and New York (2.4 percent) among other states across the U.S. This group of visitors demonstrates the importance of out-of-state tourism to Boulder.
- Full-time City of Boulder residents. The second largest group of Downtown users this summer was residents of the City of Boulder (25 percent), proportionately lower than what has been observed historically (down from 36 percent two years ago and 40 percent four years ago).
  - Residence within Boulder. Among full-time Boulder residents, the largest share of respondents lives in the Downtown core area – within a five-minute walk of Downtown Boulder (35 percent, up from 22 percent in summer 2016). These results show a higher concentration of Boulder residents who live in very close proximity to Downtown Boulder than has been noted in the past. Twenty-one percent reside in North Boulder, 19 percent in Central/West Boulder, 15 percent in South Boulder, 9 percent in East Boulder, and 2 percent in the Gunbarrel area. Results highlight that the Pearl Street Mall area attracts a wide variety of residents; while Downtown residents were most represented this summer, nearly two-thirds of full-time Boulder residents reside in other areas of the City.
- Colorado residents outside Boulder County. The third largest group of Downtown users was Colorado residents outside Boulder County (20 percent, in line with the historical range after proportionate declines observed in 2014 and 2016). This group is generally from the Denver metro area outside of Boulder County (including residents of Denver, Broomfield, Littleton, Arvada, and Golden, among other Front Range cities).
- Boulder County residents outside the City of Boulder. This group, primarily residents of Longmont, Louisville, and Lafayette, represents 9 percent of the total user mix Downtown, up from 6 percent in 2016 and closer to the historical range of 10 to 14 percent.
- Part-time/summer residents/students. This segment accounts for 2 percent of the overall visitor mix.
- International visitors. International visitors account for 7 percent of the overall visitor mix, identical to 2016, and up from 2 to 3 percent recorded in the 2010 to 2014 period for this segment. This result highlights the sustained international draw of the Downtown Boulder area.

Figure 1
User Profile
By Year

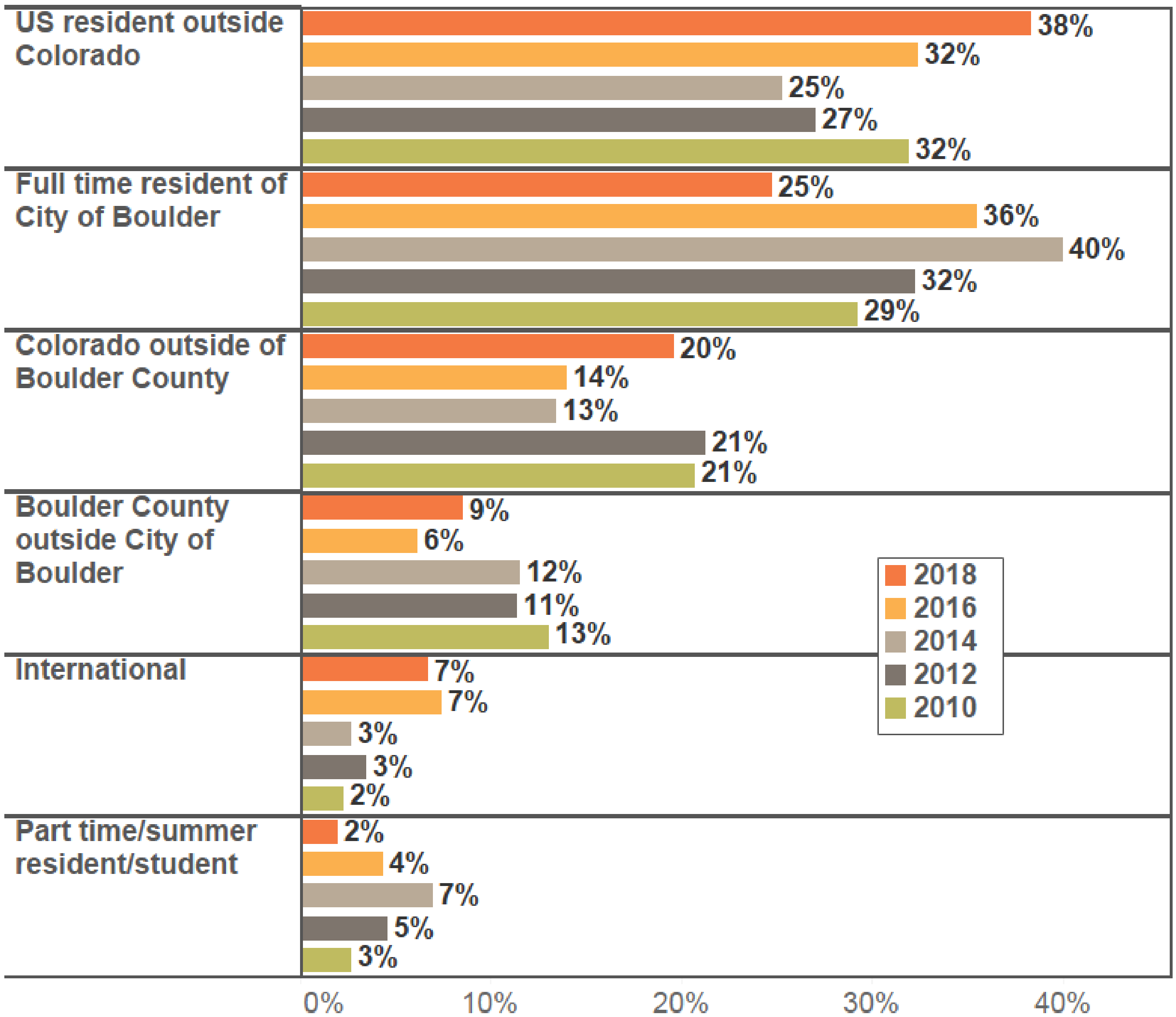
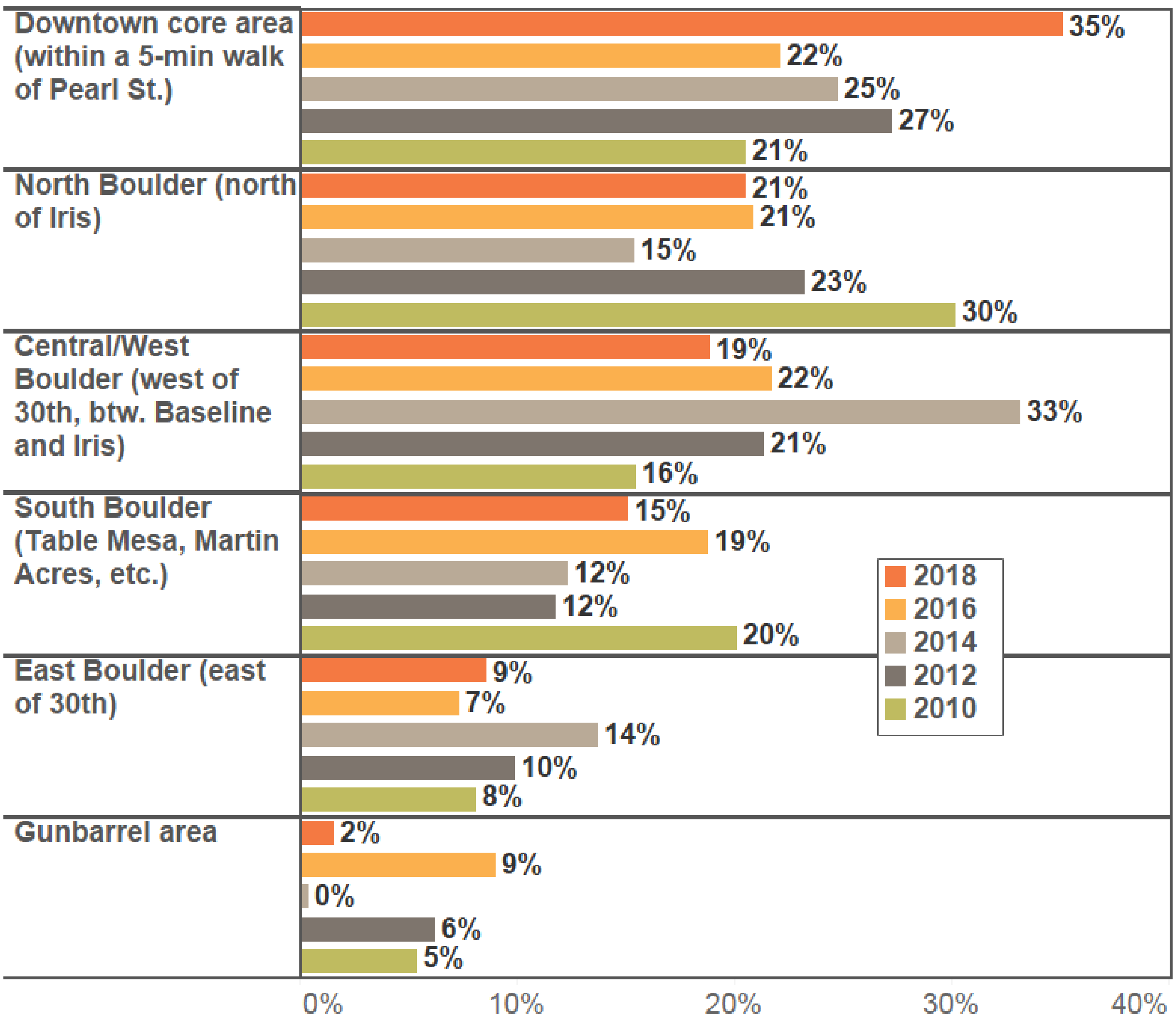


Figure 2
In What Part of the City of Boulder Do You Live?
By Year



Overnight Visitors

Among those who live outside Boulder County (67 percent of all users), 44 percent were spending the night in the Boulder area, and the other 56 percent were visiting Boulder for the day only. Overnight visitors were asked a series of dedicated questions about their trip, including length of stay, spending patterns on the trip, purpose of the visit, size of travel party, information sources used to plan the trip, and others.

- Accommodations. Among overnight visitors only, 44 percent were staying with family or friends, 35 percent were staying in commercial lodging, and 17 percent were staying in vacation home rentals. The remaining 5 percent were staying in other locations. Compared to 2016, proportionately more overnight visitors were staying with family or friends or in a vacation rental, while the share of those staying in paid commercial lodging decreased.
- Length of Stay. The average length of stay in Boulder was 3.9 nights, with a median of 3 nights—identical to summer 2016.
- Size of Travel Party. The average travel party size was 2.6 people, with a median of two people; this result is very similar to historical figures.
- Purpose of Trip. Out-of-County visitors were asked to identify the primary purpose of their trip to Boulder. This summer, the most common reason cited was recreation/general vacation/sightseeing (37 percent), followed by visiting family or friends (27 percent). Progressively smaller shares of respondents noted visiting for business (7 percent), a college-related visit (7 percent), a special event (5 percent), a combined business and pleasure trip (4 percent), a stop on a tour of the region/area (1 percent), or an “other” reason (12 percent). As compared to prior summers, visiting family or friends or for business has trended down.
- Information Sources Used. Word of mouth again played a large role in information planning this summer, with 54 percent of respondents noting it as at least one of the sources they relied on for trip planning information. Websites (42 percent), the experience of a prior visit (39 percent), and social media (9 percent) were also largely utilized.
- Spending Patterns. Overnight visitor spending is important to local businesses and is an important contributor to the lodging and sales tax collections. This summer, average expenditures were up in each category from 2016 with the exception of lodging, due to an increased share of visitors staying with friends or family. Average figures for the spending categories include the following: Lodging ($294 per party, down from $324 in 2016), Shopping ($222, up from $188 in 2016), Dining/Entertainment ($278, up slightly from $274 in 2016), and Other Spending ($29, up from $9 in 2016). The total amount spent in Boulder on the trip averaged $823 per travel party, with a median of $550 per travel party. 2018 results are generally within the range of historical figures and up from an average travel arty spend of $794 in 2016.

Figure 3
Spending the Night in Boulder?
By Year

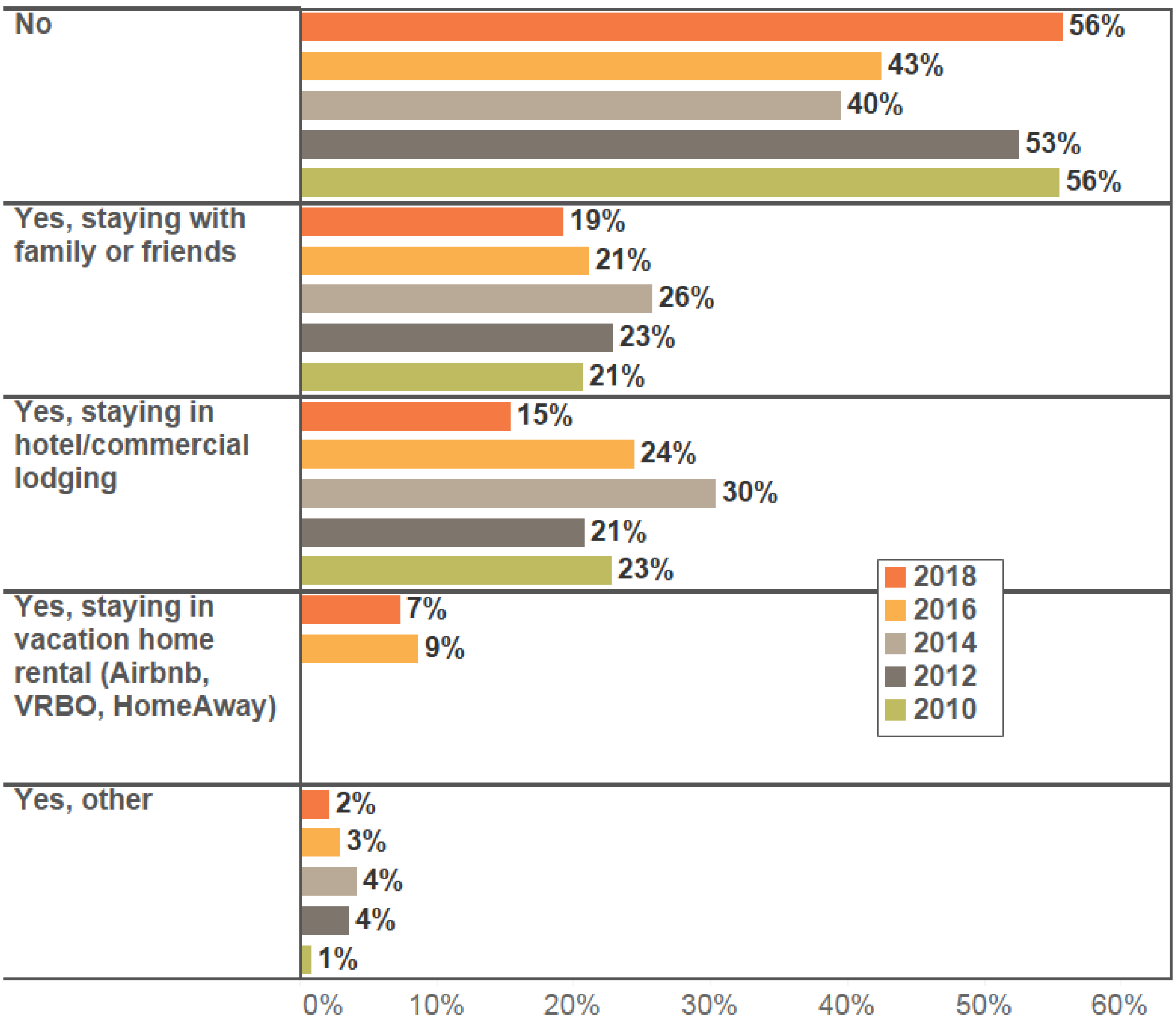


Figure 4
Primary Trip Purpose
By Year

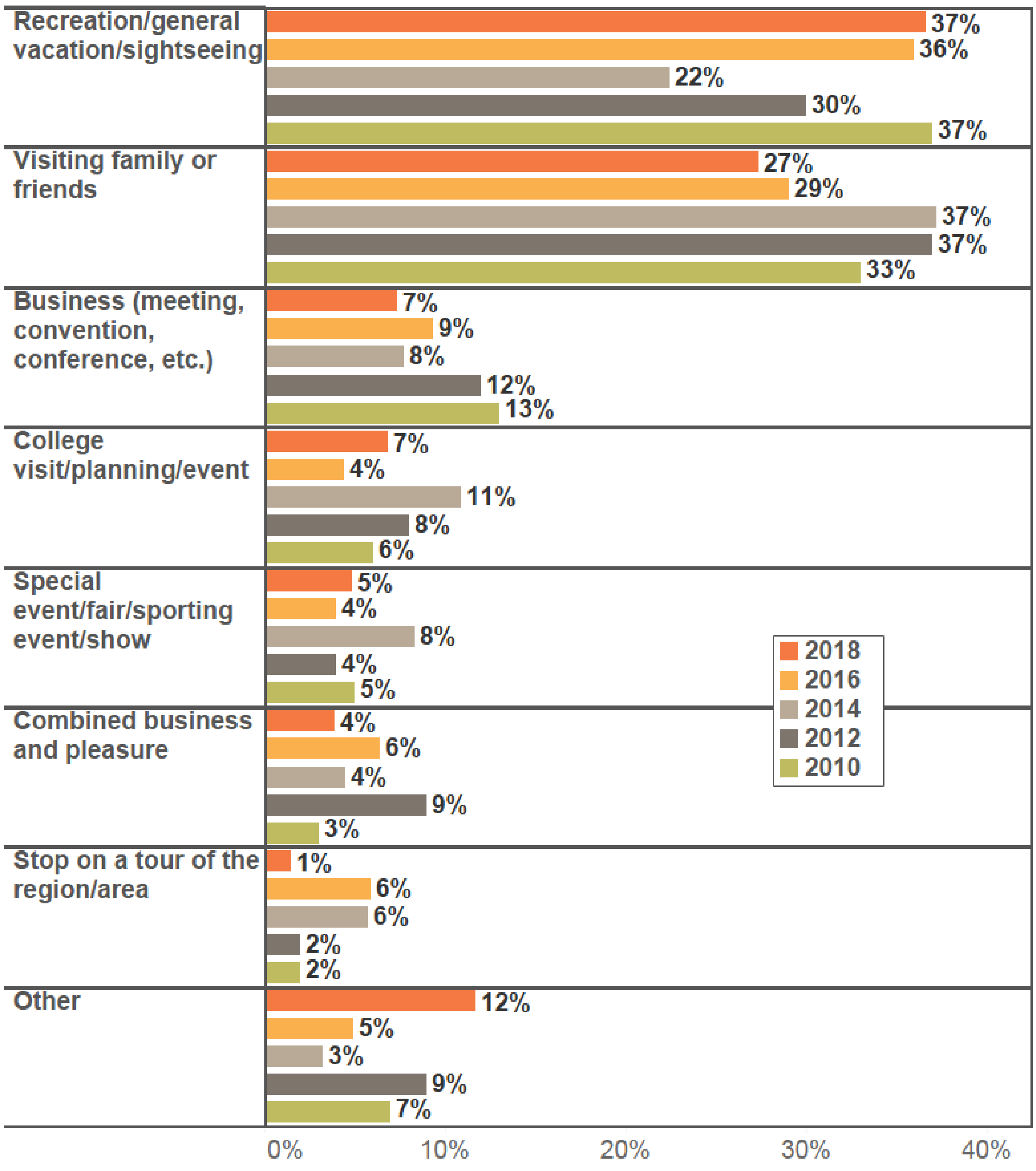
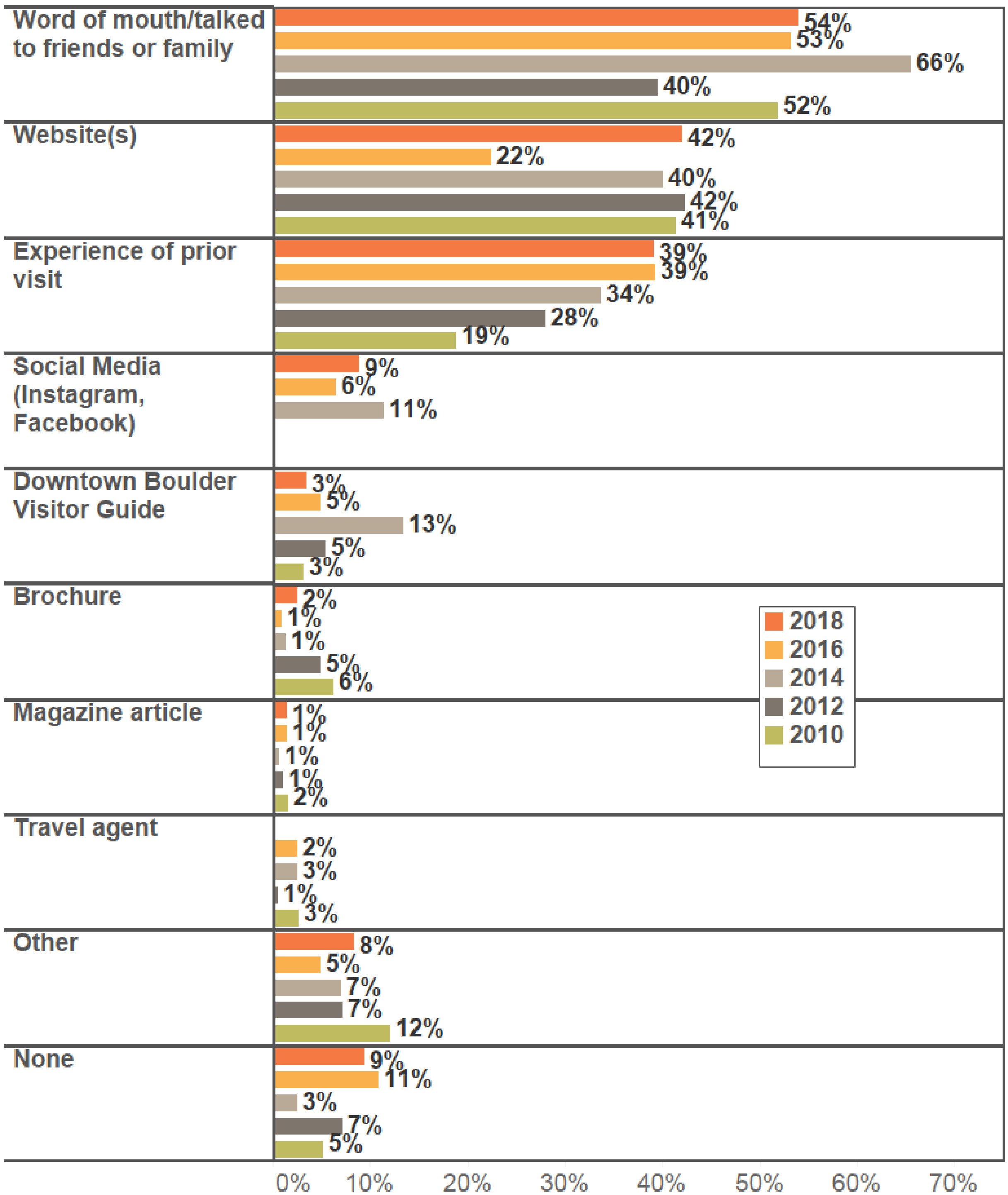


Figure 5
Information Sources Used in Trip Planning
Overnight Visitors Only, By Year



User Demographics

The demographics of Downtown users are worth paying attention to, as they have implications for visitor perceptions, interests, and behaviors. Overall, the results show a mix of users, including students, families, empty-nesters, and singles.

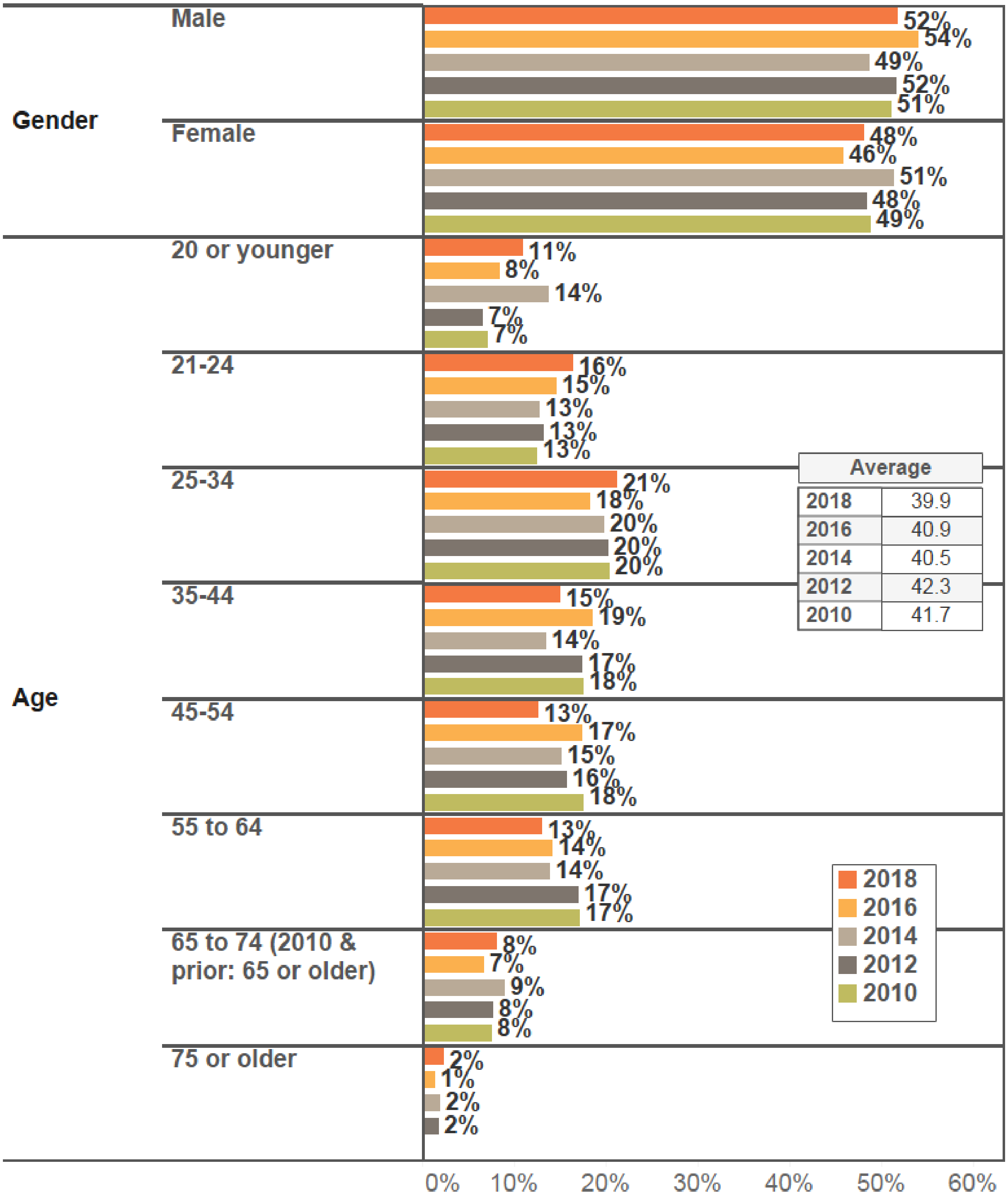
- Age. The average age of users is 39.9 years, slightly younger on average than in 2016 (40.9 years). Most respondents fall within the 25 to 34 age range (21 percent), with relatively even distribution in the other age cohorts. Age varies by visitor type, with Boulder residents who are students averaging 24.6 years on the low end and visitors from outside Colorado on the high end, with an average age of 43.5.
- Household Status. The profile shows a mix of household types, but with singles without children most represented (37 percent, up from 34 percent in 2016). The next most common household type is households with children at home (23 percent, down from 28 percent in 2016), followed by empty-nesters (20 percent—generally unchanged), couples without children (16 percent, up from 13 percent), and university students (4 percent—generally unchanged).
- Household Income. Household income levels were relatively similar to past years, with some slight variations observed. Generally, the household income profile is wide ranging and relatively moderate overall. Fifteen percent indicated earning less than $15,000 (primarily students), 25 percent earn between $15,000 and $49,999, 15 percent earn $50,000 to $74,999, 13 percent are in the $75,000 to $99,999 bracket, 20 percent report between $100,000 and $199,999, while 11 percent are in the $200,000 or more category. Out-of-state users have the highest household income profile, with 41 percent earning over $100,000 annually.
- Gender. The gender split is almost even, with 52 percent male and 48 percent female, fairly consistent with historical averages.

Table 1 on the following page outlines some of the demographic characteristics of users documented in this year’s survey, with 2018 results segmented by various visitor types. The subsequent graphs also illustrate demographic patterns by survey year and by 2018 user type.

Table 1
Selected User Demographics

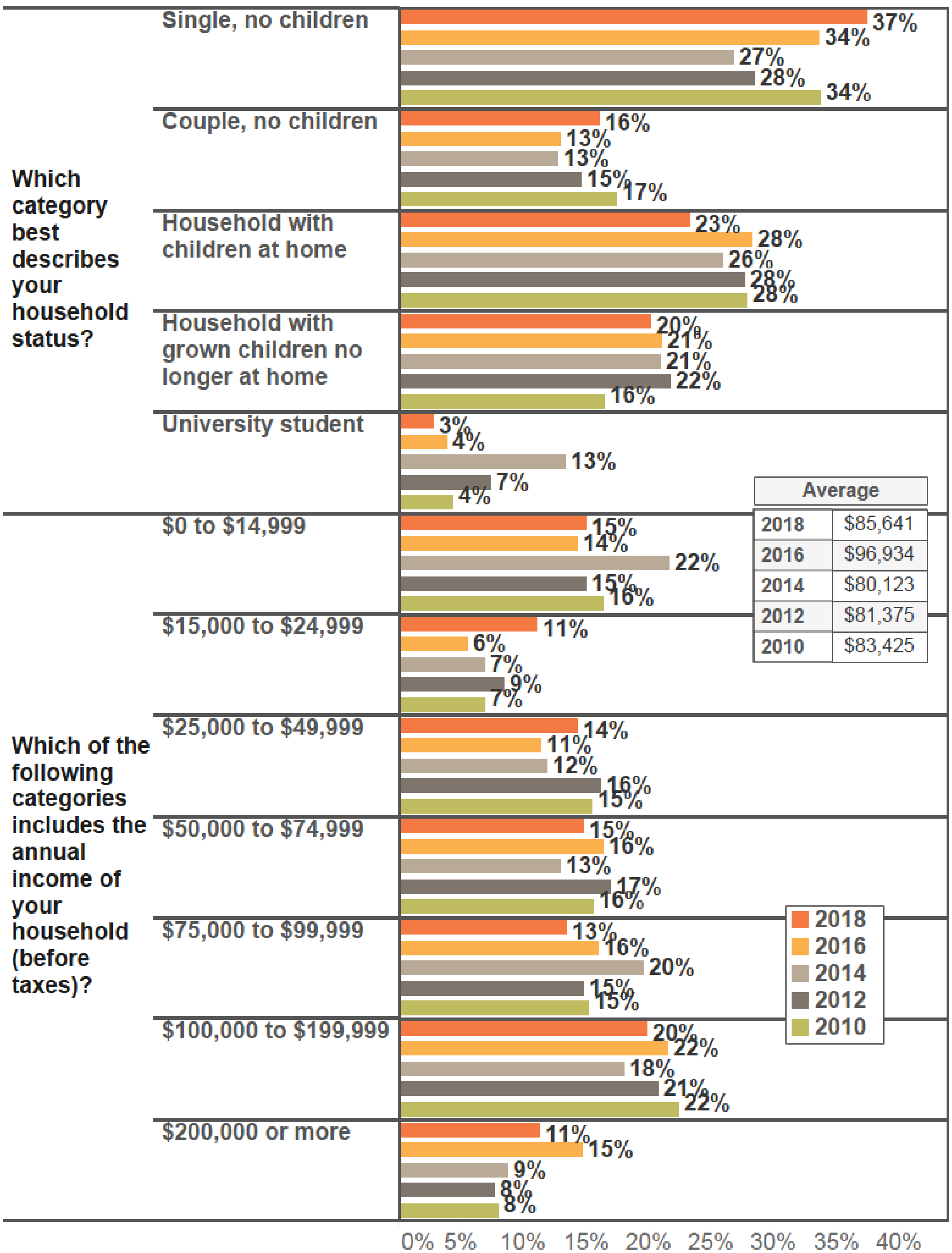
		2018 User Type				
Demographics	2018 Overall	City of Boulder Resident (Non-student)	City of Boulder Resident (Student)	Boulder Co. Resident	CO Resident outside BoCo	Visitor living outside CO
GENDER						
Male	52%	57%	46%	58%	50%	50%
Female	48%	43%	54%	42%	50%	50%
HOUSEHOLD INCOME						
$0 - $14,999	15%	17%	50%	6%	14%	10%
$15,000 - $24,999	11%	11%	25%	9%	14%	8%
$25,000 - $49,999	14%	20%	9%	21%	15%	11%
$50,000 - $74,999	15%	15%	9%	19%	16%	14%
$75,000 - $99,999	13%	12%	0%	15%	16%	15%
$100,000 - $199,999	20%	19%	7%	17%	17%	24%
$200,000 or more	11%	7%	0%	13%	7%	16%
AGE						
20 or younger	11%	6%	26%	8%	16%	9%
21 - 24	16%	15%	53%	8%	16%	13%
25 - 34	21%	27%	15%	22%	30%	16%
35 - 44	15%	19%	2%	23%	13%	15%
45 - 54	13%	10%	0%	20%	12%	14%
55 to 64	13%	9%	4%	10%	8%	19%
65 to 74	8%	12%	0%	3%	4%	11%
75 or older	2%	3%	0%	5%	1%	3%
AVERAGE AGE	39.9	41.0	24.6	41.5	35.0	43.5
HOUSEHOLD STATUS						
Single, no children	37%	48%	63%	25%	43%	29%
Couple, no children	16%	14%	9%	25%	22%	14%
Household with children at home	23%	22%	2%	42%	23%	24%
Empty Nester	20%	16%	4%	7%	10%	31%
University Student	3%	0%	22%	2%	1%	2%

Figure 6
Visitor Demographics - Gender/Age
By Year



Average	
2018	39.9
2016	40.9
2014	40.5
2012	42.3
2010	41.7

Figure 7
Visitor Demographics – Household Status/Household Income
By Year



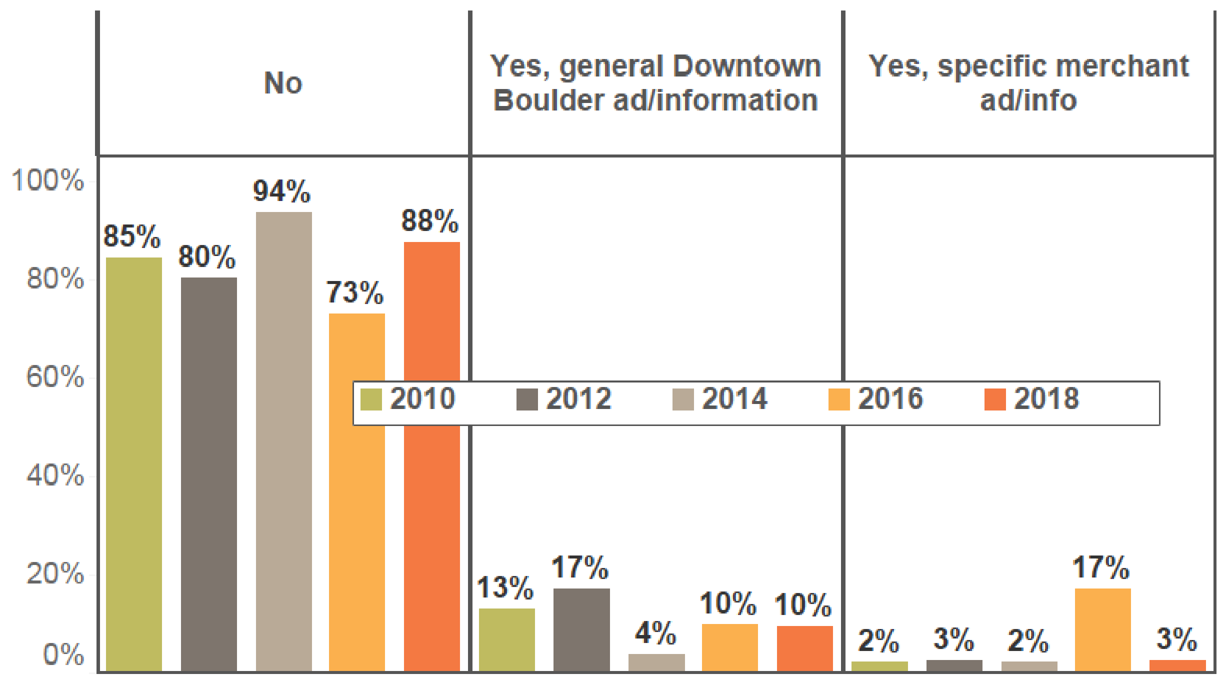
Marketing and Media

Interest exists in understanding awareness of advertisements among Downtown users. Given a fast-paced media environment, in which social media plays a particularly large role, it is worthwhile to evaluate what vehicles of marketing messages "stick" the most. All visitors were asked if they were aware of any advertising or information sources prior to their visit. Results indicate that a majority were not aware (88 percent).

Of the 10 percent who said they were aware of Downtown Boulder advertising, a notable 30 percent indicated a social media source (Facebook, Instagram, Twitter, Pinterest), 10 percent noted they saw it in a newspaper, 10 percent read the Downtown Boulder Visitor Guide, 9 percent visited BoulderDowntown.com, 9 percent visited the Boulder Visitor Guide, and 9 percent used an "other" web page. A notable 45 percent used "other" information sources not listed, with comments suggesting that travel guides were somewhat influential.

Meanwhile, just 3 percent of visitors were aware of advertising from specific merchants, down notably from 17 percent in summer 2016, but consistent with prior summer results.

Figure 8
Advertising Awareness
By Year



Primary Reason for Visiting Downtown

All visitors were asked their primary reason for coming to Downtown Boulder that day. The number one reason for visiting Downtown Boulder was enjoying the setting/ people watching/ hanging out, cited by 35 percent of visitors. This has historically been the first or second most reported answer since the survey program began asking this question. Out-of-state visitors are particularly likely to cite this reason (49 percent).

Other primary reasons for visiting Downtown include employment/job related/job search (17 percent), a meal (15 percent), and shopping (9 percent), with other reasons each cited by fewer than 5 percent of respondents. In-state visitors were much more likely to cite employment-related reasons (28 percent) than those from out-of-state (4 percent). Students were more likely to be getting coffee/ice cream/snack (not a full meal) than other visitor segments (15 percent vs. 1 to 5 percent).

All Activities Participated in Downtown

Overall, respondents participated in an average of 2.3 activities while downtown—this result is consistent with summer 2016, but slightly lower than the few summers prior. Enjoying the setting/ people watching/ hanging out is most popular (done by 54 percent of all respondents), followed by eating a meal (51 percent), coffee/ice cream/snack (41 percent), shopping (37 percent), watching street entertainment (18 percent), and employment/job-related activities (11 percent). These patterns are relatively consistent across the various major user groups, with out-of-state residents generally participating with greater frequency in most all of the top activities compared to Boulder City and County residents. As compared to the other visitor segments, out-of-state visitors were particularly like to shop (51 percent vs. 20 to 29 percent) and watch the street entertainment (24 percent vs. 12 to 17 percent).

Figure 9
Primary Reason for Coming to Downtown Boulder Today
By Year

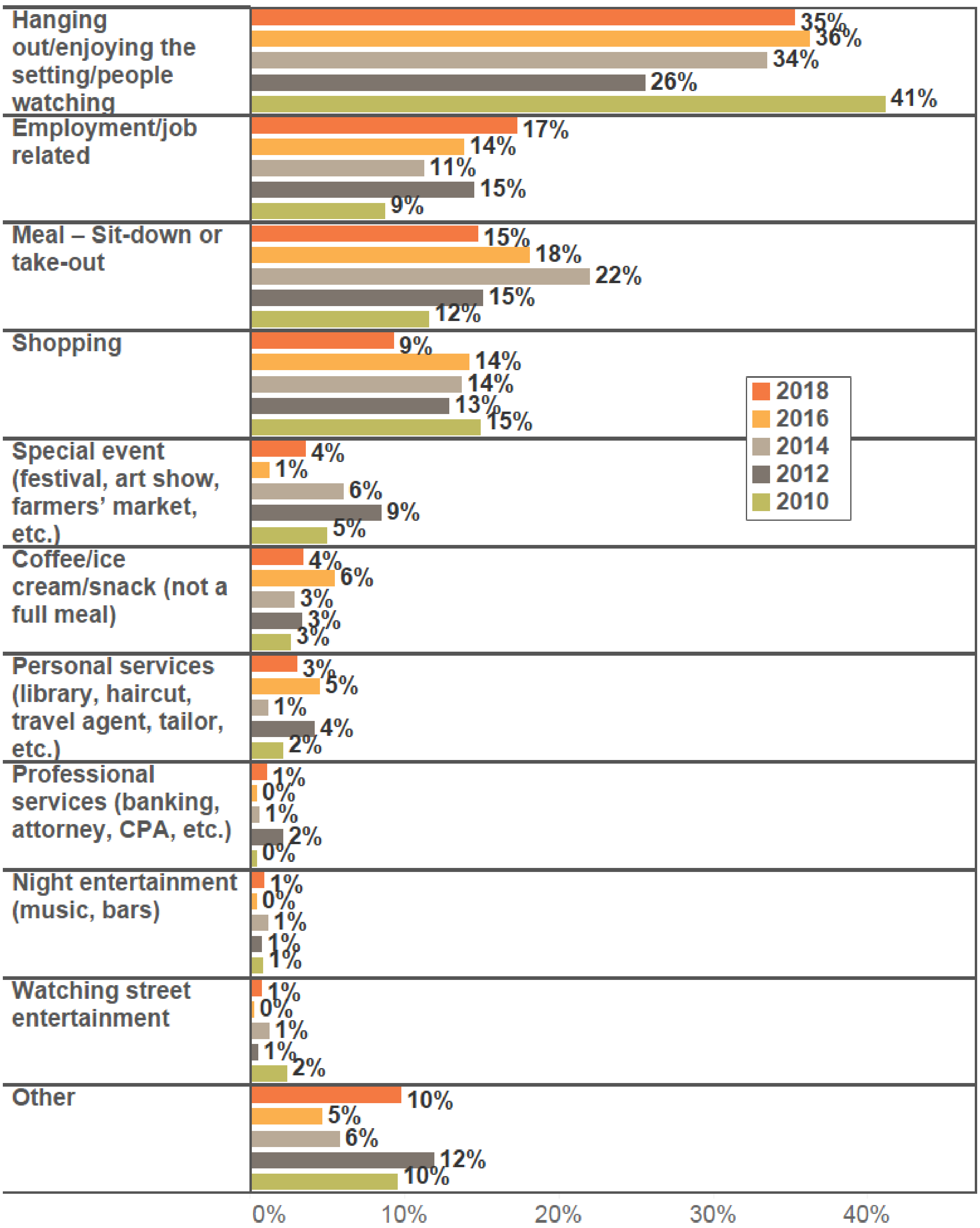
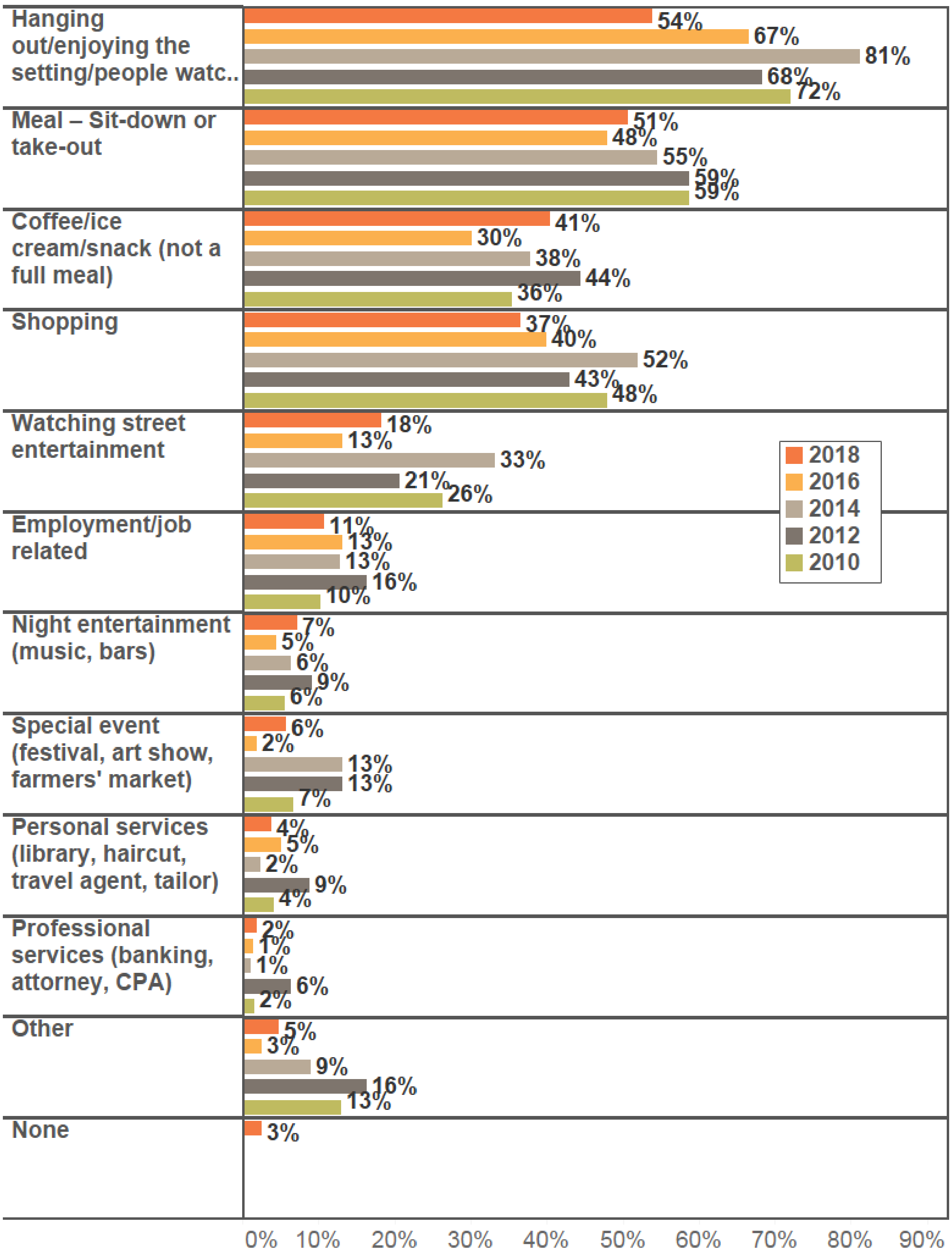


Figure 10
All Activities This Visit (Primary Activity, plus Other Activities)
By Year



Spending Patterns

An important metric developed out of the research is the average amount of money Downtown users spend on various purchases (restaurant/bar, shopping, retail, and “other”), as well as total spending by person. The results show that a majority of those surveyed indicated that they planned to spend some amount of money in the Downtown area on the day they were surveyed (80 percent), and the average amount per person was about $62 (down about $2 from two summers ago).

Purchase Frequency. Overall, four in five respondents (80 percent) said they would make a purchase of some kind.

Average Amount Spent. The average amount spent per person averaged $61.87, slightly lower than in 2016 ($64.28). The distribution of this amount was $28.01 spent at retail stores/art galleries, $31.91 spent at restaurants/bars, and $1.96 spent on other purchases. The table below illustrates the spending patterns documented in this and in prior summers.

Table 2
Spending Penetration and Average Spending
2005 to 2018

	Year of Survey				
Spending Patterns	**2010**	**2012**	**2014**	**2016**	**2018**
Percent making a purchase today	89%	84%	75%	74%	80%
Restaurant/Bar	$22.13	$27.69	$24.47	$33.08	$31.91
Retail store/Art gallery	$28.59	$28.90	$33.21	$31.06	$28.01
Other	$1.41	$3.64	$0.75	$0.13	$1.96
Total	**$52.12**	**$60.23**	**$58.43**	**$64.28**	**$61.87**

Segmentation of Spending. Some variation is seen in the spending figures between different visitor segments. Most spenders made a restaurant/bar purchase (about 93 percent overall). However, those residing outside of the City of Boulder were slightly more likely to make a restaurant/bar purchase (93 to 96 percent) than non-student residents (91 percent) or students (87 percent). Meanwhile, 41 percent of all respondents made some sort of retail purchase, with varying levels of purchasing frequency by visitor type. Visitors from outside of Colorado were most likely to make a retail purchase (53 percent). Boulder residents (non-students) were the least likely to make a retail purchase (only 25 percent).

Spending by User Type. Consistent with historical patterns, out-of-town users spent more per person on average on their daily trip than did City or County residents. Out-of-state users spent an average of $83.74 per person, Boulder County residents spent $46.05, Colorado residents from outside of Boulder County spent $43.45, student users spent an average of $37.94, and City non-student users spent $34.55.

Table 3
Spending Penetration and Average Spending
2018 User Type

	2018 User Type				
Spending Patterns	City of Boulder Resident (Non-student)	City of Boulder Resident (Student)	Boulder Co. Resident	CO Resident outside BoCo	Visitor living outside CO
Percent making a purchase today	70%	70%	72%	76%	88%
Restaurant/Bar	$20.01	$16.69	$30.18	$24.76	$40.82
Retail store/Art gallery	$12.66	$19.22	$14.73	$17.07	$40.68
Other	$1.88	$2.03	$1.14	$1.62	$2.23
Total	**$34.55**	**$37.94**	**$46.05**	**$43.45**	**$83.74**

Figure 11
Are You Making a Purchase Today?
By Year

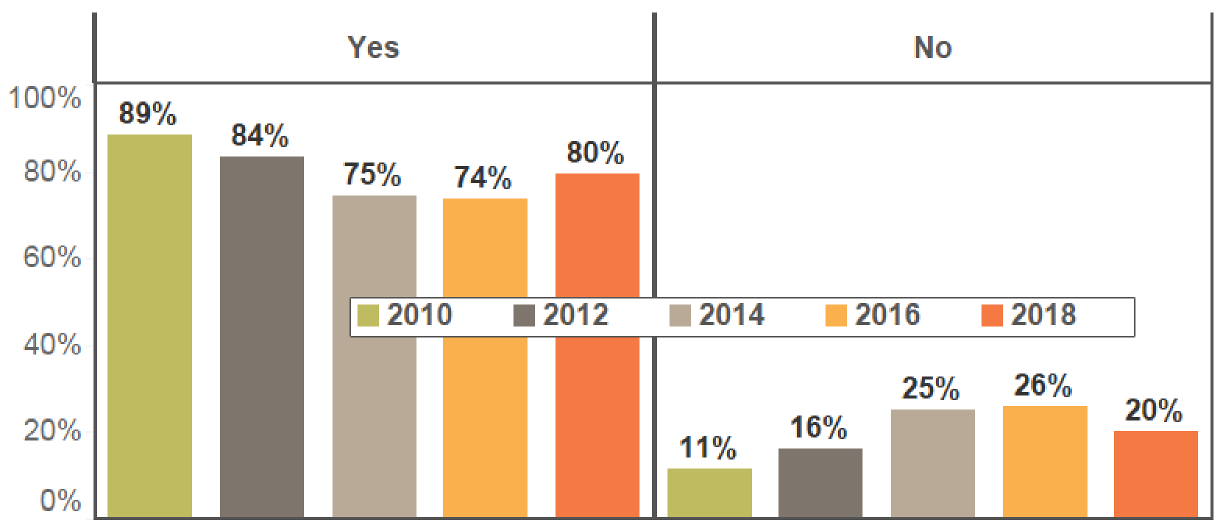
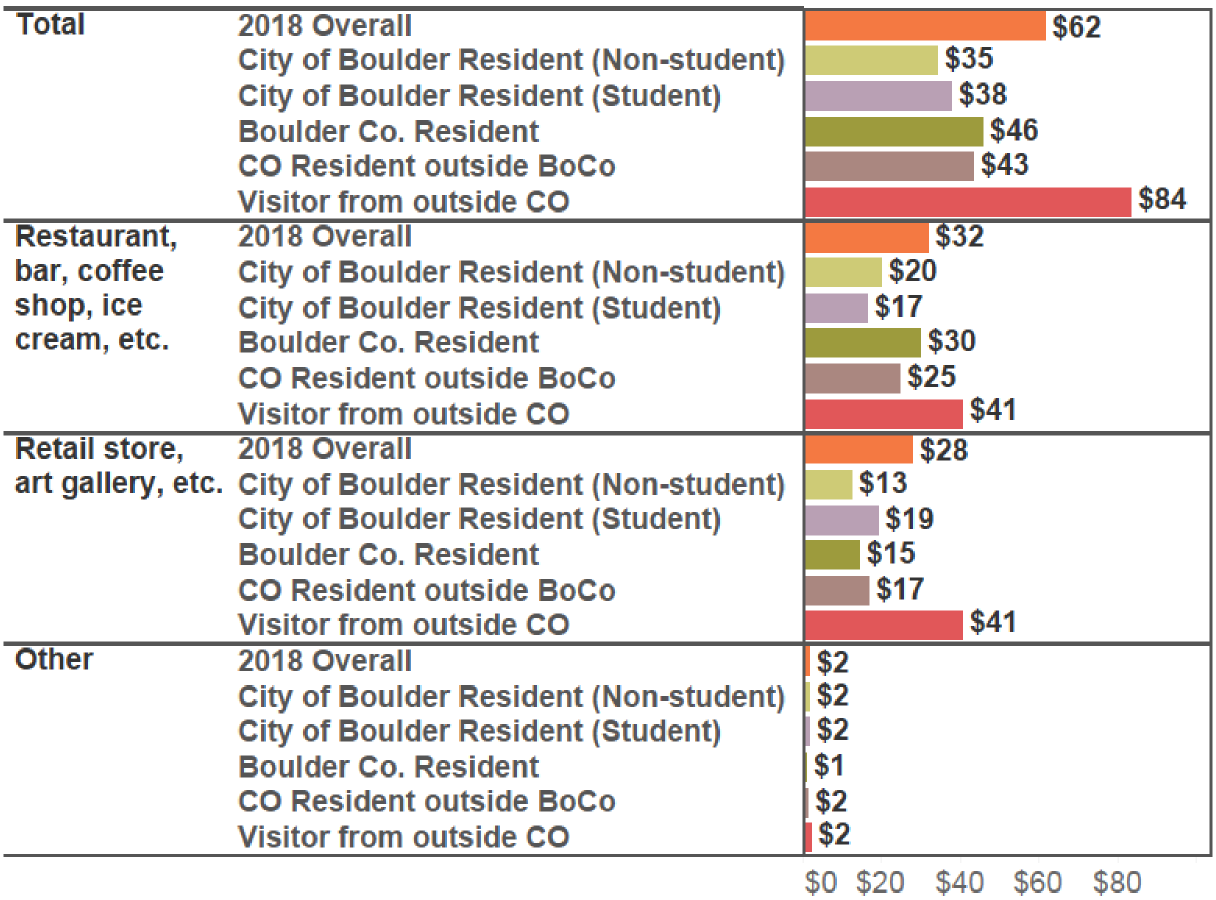


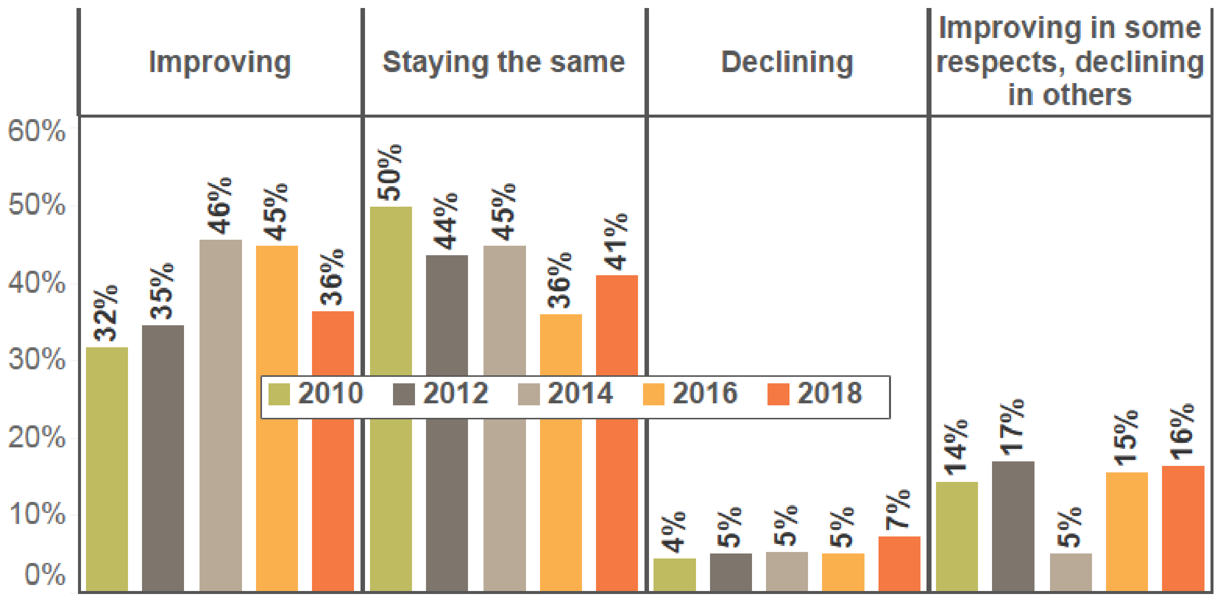
Figure 12
Average Total Spending (Not Including Non-Spenders)
By 2018 Visitor Type



Improve/Decline

Respondents were asked for their opinion about the general direction of the experience in Downtown Boulder over the past several years – whether it is improving, declining, staying the same, or some combination. Most respondents indicated that the Downtown experience is either improving (36 percent) or staying the same (41 percent). Very few thought it was declining (7 percent) or a combination of improving in some respects and declining in others (16 percent). This feedback is very positive for the Downtown area and points to a visitor audience that is satisfied with the improvements to the area.

Figure 13
Downtown Experience Improving or Declining over Past Few Years
By Year



A follow-up question asked the respondents why they answered the way they did to the improve/decline question. Below is a sampling of some of the comments to this question.

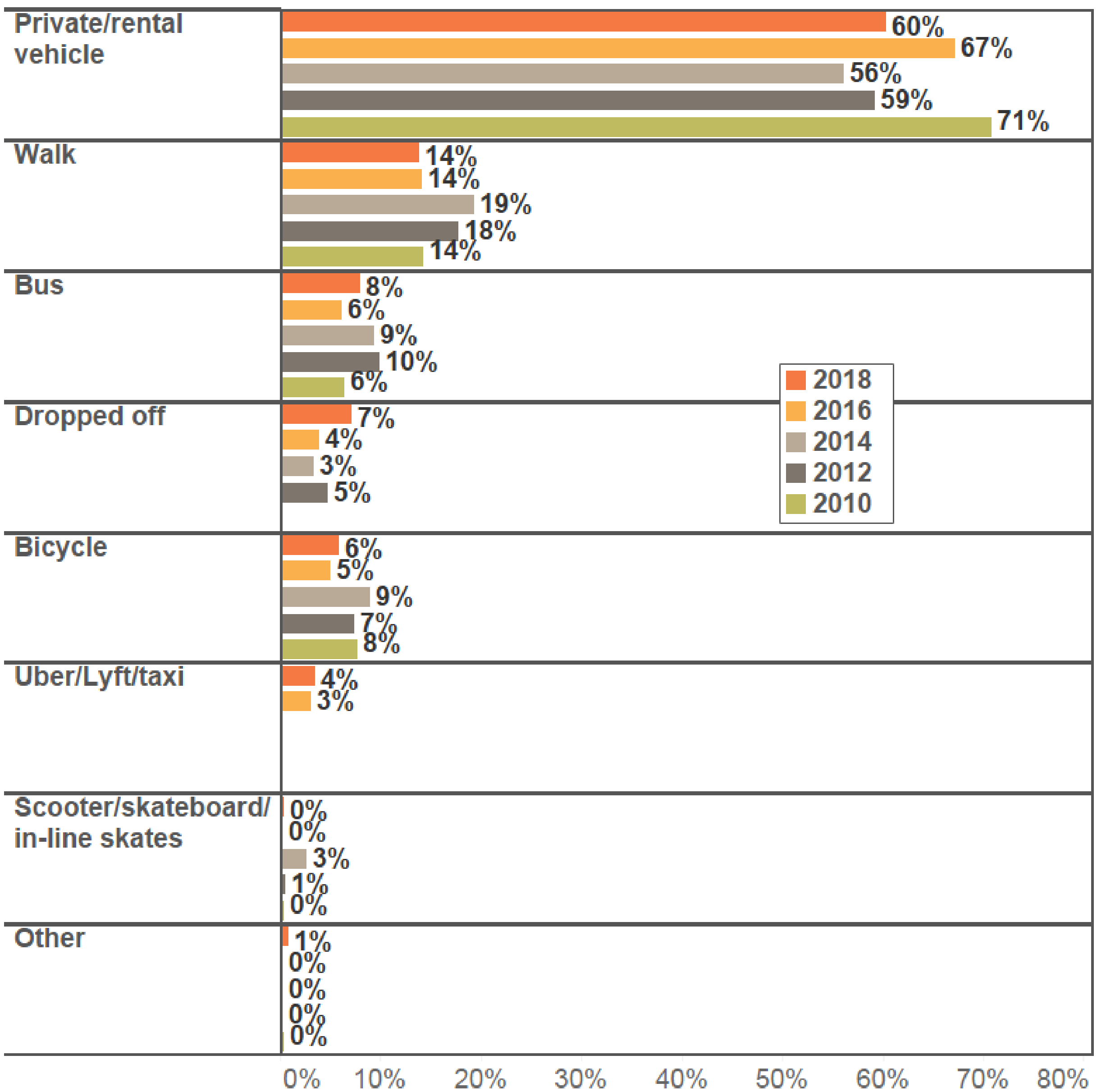
[Over the past few years, would you say the quality of the Downtown experience has been:] Why do you feel that way?

Improving	*Always cool things to do, good food, pleasant* *Atmosphere feels better* *Because it's getting busier, always things happening.* *Because of the music, and street performers* *Benches and maintenance and landscaping are improving* *Great job on gardens and landscaping, artistry, telling history of here. Still captures essence of creative intelligent town. Great place for raising family* *It's become more vibrant and the homeless are less aggressive* *Sad that homeless have been moved, but cleaner commercial environment* *Signage, seems more visitor friendly* *West end has become more exciting and eventful*
Improving in some respects, declining in others	*A lot of boulder staples have been priced out and left, but gotten cleaner and safer, upgraded landscaping* *A lot of shops that made boulder what it was had to leave, maybe because of high rents. Don't want more chains,* *Can be really busy, but has good energy and activities* *Downtown boulder is a beautiful place to visit but it is very crowded* *Growing in cool ways but getting very expensive* *More people and congestion, but am liking more diversity* *Local businesses closing, more events and services like Wi-Fi*
Declining	*City is poorly managed, too development orientation not caring about citizens that live here* *Getting crowded. Hard to get into restaurants without reservations* *Parking g getting to be a hassle* *It's to the point of diminishing return for locals, it seems only for tourists, too many local businesses leaving, Boulder losing its appeal. Less and incentives for local businesses to stay economically.* *Lots of closing businesses* *Not as personal, a lot more corporations* *Too many things for rich people, needs a more quirky vibe* *Too much tourism*
Staying the same	*18 years, stores come and go* *26 years lived here, likes that some things are still here, like train, family friendly, etc.* *Always been nice, love the flowers* *It's good that its consistent* *Natural progression of change* *Safe easy cheap*

Transportation and Parking

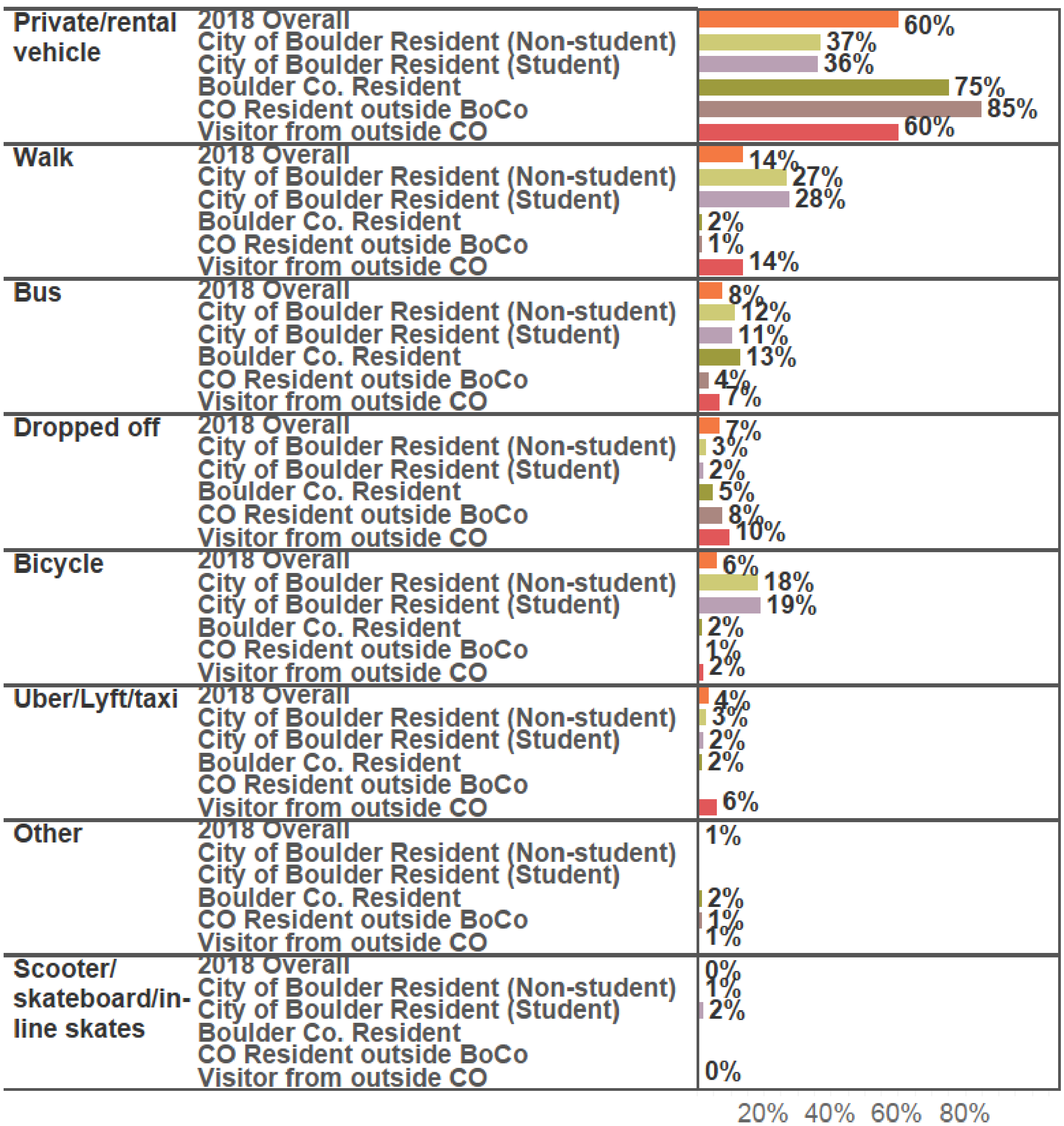
Most respondents take a private or rental vehicle as their transportation method to Downtown (60 percent). The next most common method of transportation is walking (14 percent), followed by bus (8 percent), getting dropped off (7 percent), biking (6 percent), or using Uber/Lyft or a taxi (4 percent).

Figure 14
Mode of Transportation Downtown
By Year



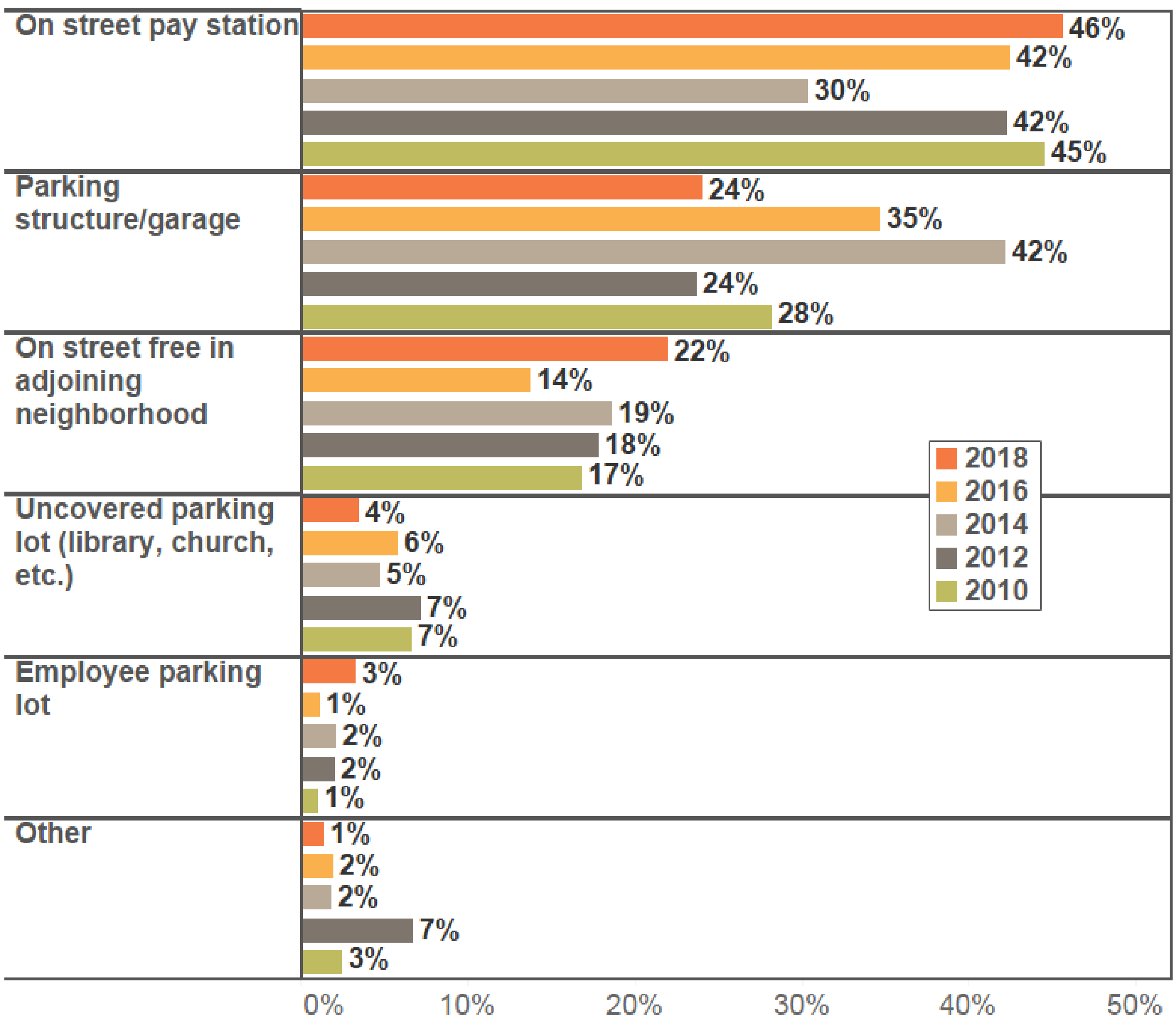
When transportation modes are evaluated by visitor type, some variations are observed. For example, Colorado residents (outside Boulder County) are most likely to drive to Downtown (85 percent), followed by Boulder County residents (75 percent). Boulder County residents are most likely to ride the bus to reach downtown (13 percent). City of Boulder residents are the most likely to walk (27 to 28 percent) or bicycle (18 to 19 percent).

Figure 15
Mode of Transportation Downtown
By 2018 Visitor Type



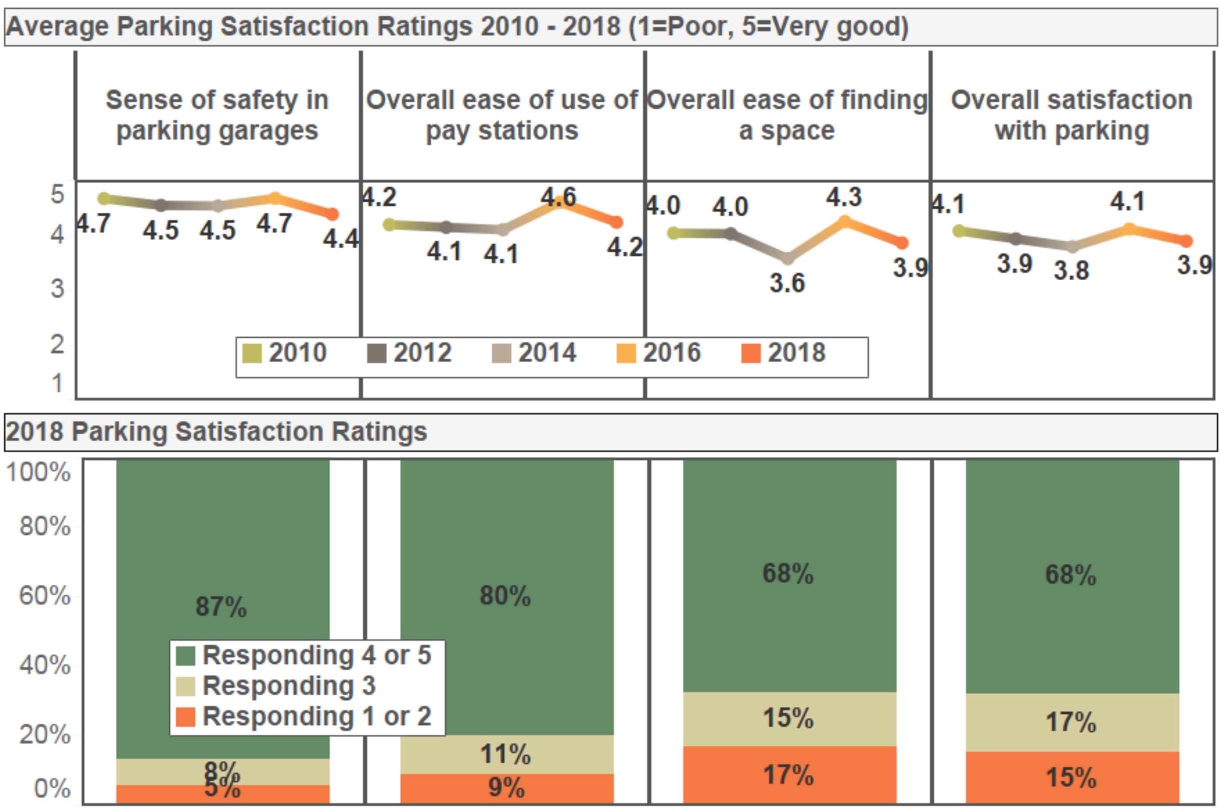
Those who took a private or rental vehicle Downtown were asked where they parked their car. On-street pay stations (46 percent), parking garages (24 percent), and free on-street parking in an adjoining neighborhood (22 percent) represent the majority of parking locations. This summer, respondents were proportionately less likely to park in a structure or garage, and more likely to on-street park for free.

Figure 16
Location of Parked Vehicle
By Year



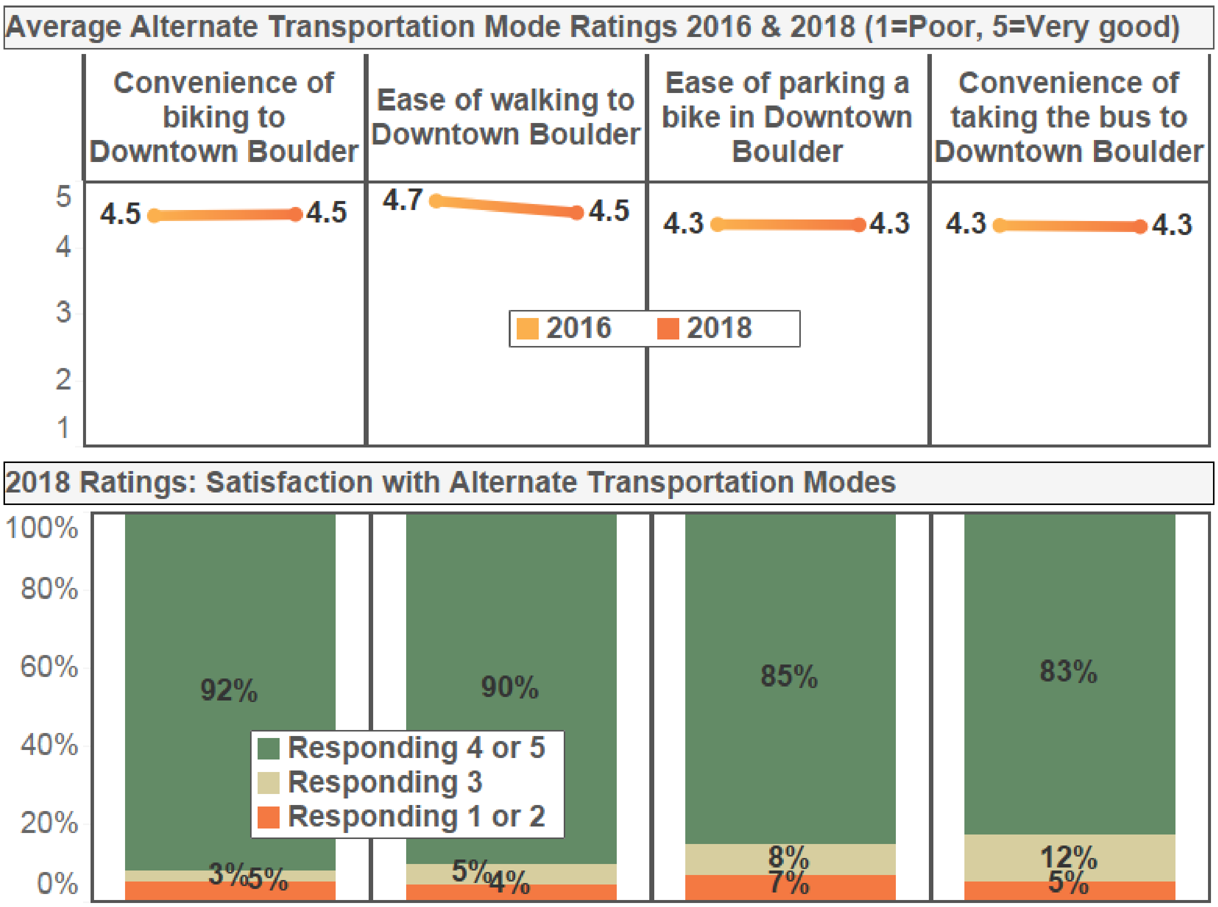
Using a scale of 1 to 5 where 1 was "poor" and 5 "very good," respondents who drove Downtown were asked to rate aspects of their parking experience. Overall, average ratings declined from 2016 across-the-board. Sense of safety in parking garages (4.4, down from 4.7) and overall ease of use of pay station (4.2, down from 4.6) were rated most highly. Also down from 2016 were overall ease of finding a space (3.9, down from 4.3) and overall satisfaction with parking (3.9, down from 4.1). Worth noting is that out-of-state visitors consistently provided higher average ratings for each of these items, while non-student City residents provided lower average ratings. This highlights that the parking experience is perceived more positively among destination visitors than among locals.

Figure 17
Ratings of Parking Experience



Respondents also rated their satisfaction with accessing downtown Boulder via a variety of alternate modes of transportation. Ratings were quite high overall and generally consistent with summer 2016, the first year these questions were asked. As seen in Figure 18 below, respondents were generally quite satisfied with the ease of walking to Downtown Boulder (4.5) and the convenience of biking to Downtown Boulder (4.5). The convenience of taking the bus to and of parking a bike in Downtown Boulder (each 4.3) were similarly rated.

Figure 18
Accessing Downtown Boulder via Alternative Modes



Transient Issues

A question on the survey, asked since 2010, was "To what extent, if any, do the activities or behaviors of panhandlers/transients impact your enjoyment of the experience in Downtown Boulder, either positively or negatively?" Results show that the majority of respondents (74 percent) indicate no impact on their experience. As well, the 2018 results show less of a negative impact as compared to prior summers– 17 percent of respondents noted that panhandlers had a strong or moderate negative impact, compared to 21 percent in 2016, 28 percent in 2014, 39 percent in 2012, and 25 percent in 2010. At the same time, 9 percent indicated that panhandler behavior had a positive impact on their experience downtown.

Looking at the results in greater detail shows that student residents of City of Boulder were most negatively impacted by panhandlers (26 percent indicated a negative impact), followed by Boulder County residents (25 percent), and City of Boulder non-students (20 percent). Meanwhile, Colorado residents outside of Boulder County (19 percent) and visitors from outside of Colorado (13 percent) were not as negatively impacted by the activities and behaviors of panhandlers.

A related survey question asked whether the situation with panhandlers/transients has improved, declined, or stayed the same. The largest share of respondents (49 percent) did not know or were unsure whether the situation had changed. This is mostly driven by Colorado residents outside of Boulder County (40 percent) and visitors from outside of Colorado (72 percent), whereas nearby residents were more likely to have an opinion on the situation. Meanwhile, nearly one-third of all respondents (31 percent) thought the situation has stayed the same over the past few years, and equal shares of respondents thought it has improved or declined (10 percent each). As compared to 2016, fewer respondents thought the situation has declined (10 vs. 20 percent).

Figure 19
Impact of Panhandlers in Downtown Boulder on Enjoyment

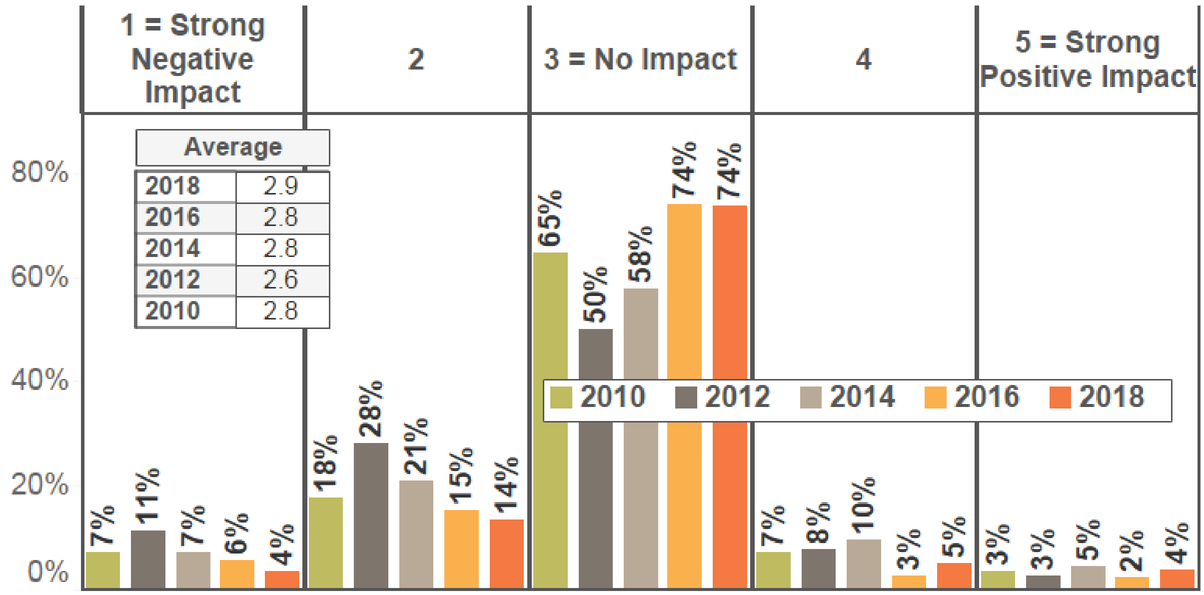
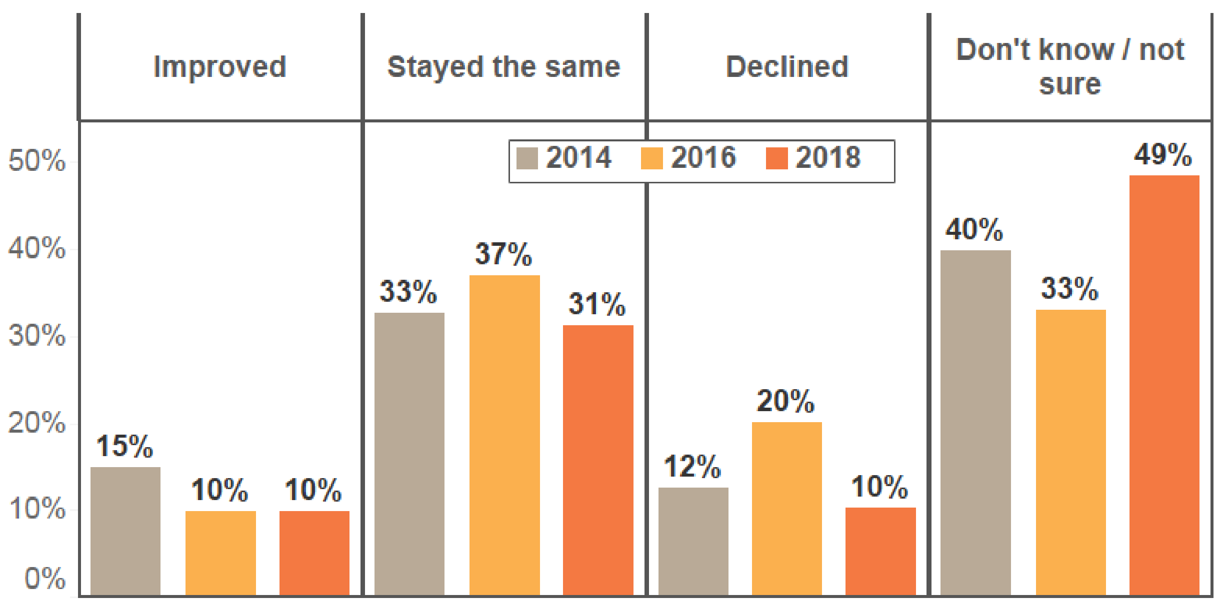


Figure 20
Would You Say the Situation with Panhandlers/Transients Has…?

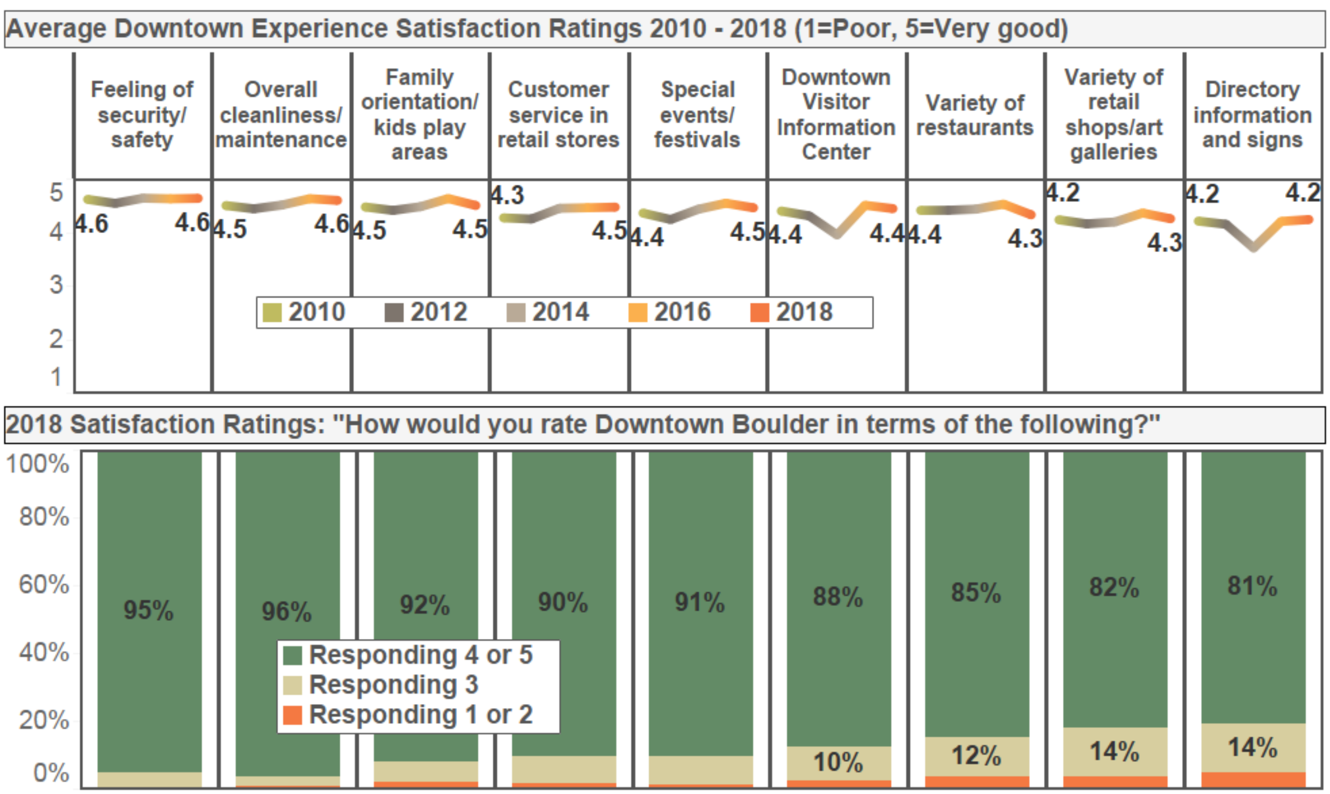


Satisfaction

An important section of the survey questionnaire asked respondents to rate their satisfaction with a variety of general attributes related to the experience Downtown. The satisfaction ratings were very strong again this year, with many categories sustaining the high averages they earned in 2016. Slight declines were observed for a few categories this summer.

Results show that the highest rated aspects of the experience were the feeling of security/ safety (average of 4.6 out of five, same as in 2016; 95 percent rated a 4 or 5 out of five), overall cleanliness and maintenance (4.6, identical to 2016; 96 percent rated a 4 or 5), family orientation/ kids play areas (4.5, down from 4.6; 92 percent rated a 4 or 5), customer service in retail stores (4.5, same as in 2016; 90 percent rated a 4 or 5), special events/ festivals (4.5, identical to 2016; 91 percent rated a 4 or 5), Downtown Visitor Center (4.4, down from 4.5; 88 percent rated a 4 or 5), variety of restaurants (4.3, down from 4.5; 85 percent provided a rating of 4 or 5), variety of retail shops/art galleries (4.3, down from 4.4; 82 percent rated a 4 or 5), and directory information/signs (4.2, identical to 2016; 81 percent rated a 4 or 5).

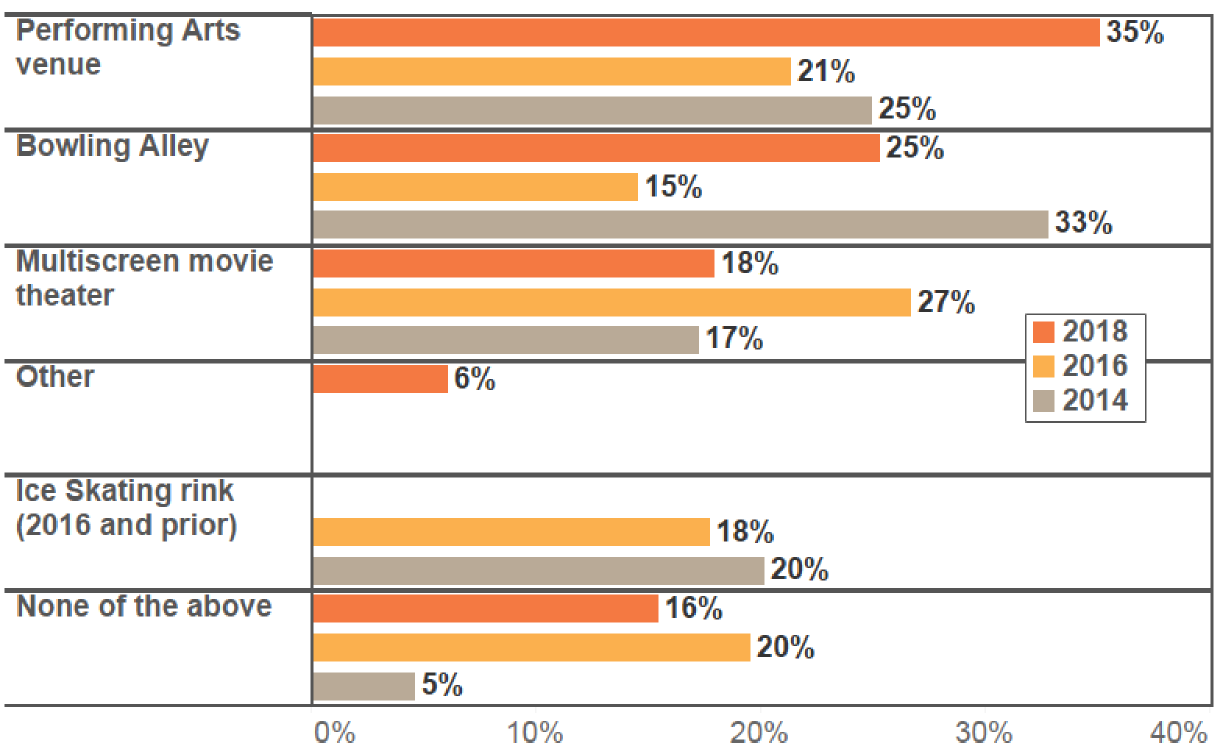
Figure 21
General Ratings of the Downtown Experience
By Year



For the third year, a question asked Boulder City and County residents which entertainment venues they would most like to see added to Downtown Boulder. As shown in Figure 22, a performing arts venue was most desired (35 percent of all respondents chose this venue), followed by a bowling alley (25 percent) and a multi-screen movie theater (18 percent). Six percent of respondents wanted to see an “other” type of venue. In prior years, respondents were asked about their interest in an ice skating rink (18 to 21 percent of respondents); this choice was not listed this summer and accounts for some year-over-year shifts in results. Sixteen percent of respondents did not want any of the choices listed.

Results vary among City non-student, City student, and Boulder County residents. While all groups were most likely to want a performing arts venue, students were the most interested in this option (43 percent vs. 32 to 36 percent). Students were also more in favor of a multiscreen movie theater (26 percent) than non-student City residents or Boulder County residents (16 percent each). In contrast, non-student residents were more interested in a bowling alley than the other subgroups (18 to 21 percent) and Boulder County Residents were more likely to cite “none of the above” than City residents (26 percent vs. 6 to 14 percent).

Figure 22
Which entertainment venues would you most like to see added?



Comments

Several open-ended questions were asked on the survey to solicit feedback from survey respondents regarding their suggestions for specific types of stores and restaurants they would like to see in Downtown Boulder. The responses are instructive and verbatim comments are included below, with a full listing of the comments in the appendix section of this report.

What specific comments/suggestions do you have about [your ratings of the Downtown Boulder experience] that would help to improve the Downtown Boulder area?

A vegan ice cream shop, actually more vegan anything
Add people to visitor center
Bathrooms could use some help
Becoming too high end, need more college age friendly places.
Better advertising of the festivals to local population. A cumulative page for all events. Hard to find out what's going on that day or week.
Better large map directories
Designated parking for special events, or at least some suggestions of where parking may be found in the nearby area
East end could have more stores
Keep the wonderful landscaping
Larger parking spaces in garages, hard to see store signs unless directly in front of them
Longer parking options at pay stations. Makes me feel rushed.
More bike parking
More incentives for small businesses
More information about how close hiking is
More men's stores, and more lower end stores
More overnight parking
Needs more shady benches and seating spaces
Public bathroom needs longer hours, and better maintenance, do more to encourage street performers.
Quicker fast casual food
Would like to see options foe compost and recycle more outside the mall. And the doors to them are scary dirty

What retailer(s) or restaurants, either local or chain, have you visited elsewhere that you wish was also located in Downtown Boulder?

“None” was the most frequent response to this question. Many others desired more local, more affordable, and fewer chain restaurants and retailers. There was more interest in restaurants than in retailers.

Figure 23
What retailer or restaurant would you like to see in Downtown Boulder?

Special Events

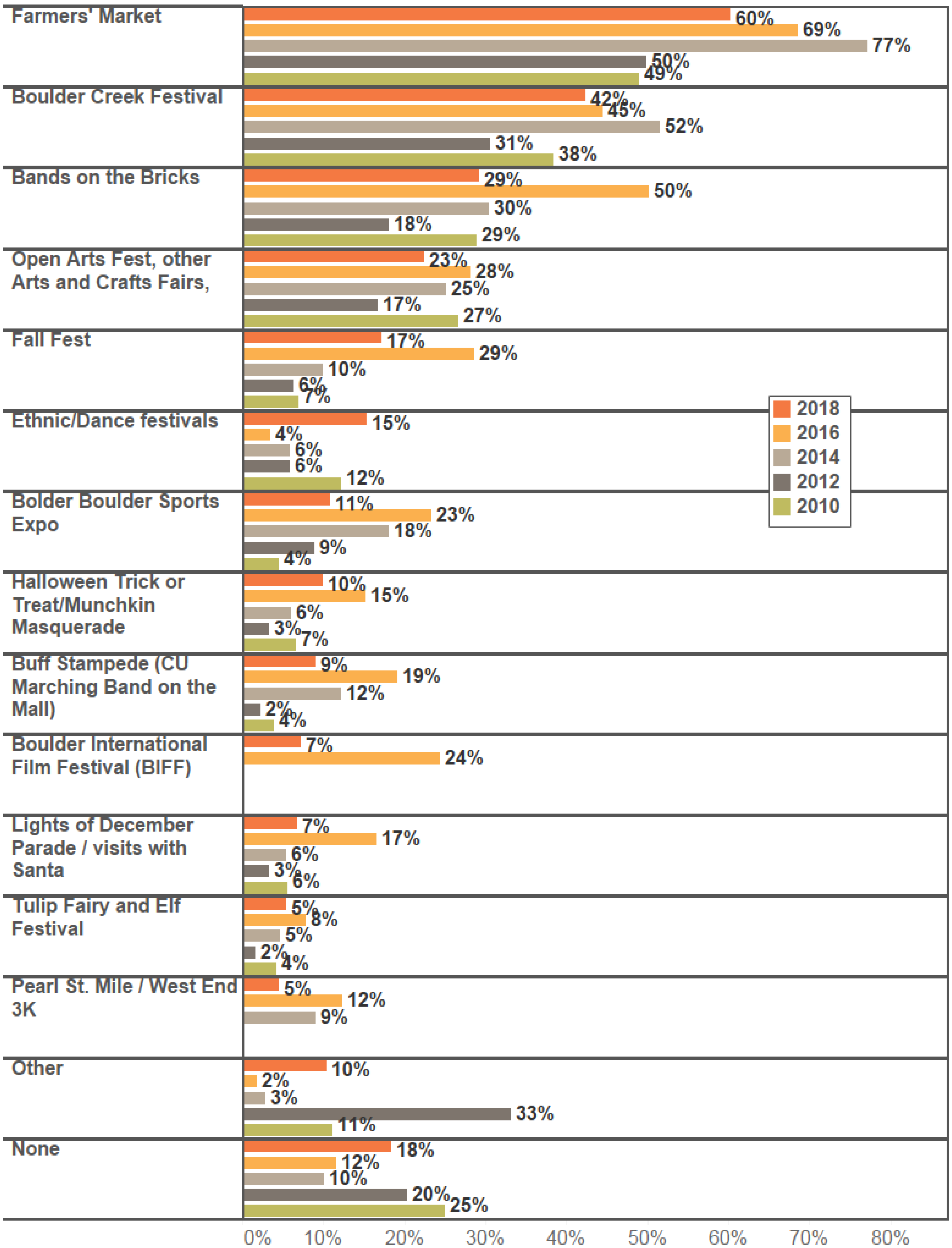
Several activities, concerts, special events, and festivals have motivated City and County residents to make a trip to Downtown Boulder. The Farmers' Market has been a strong motivator in particular, with 60 percent of all visitors noting they specifically came Downtown in the past year to attend this event (although trending down from 69 percent in 2016 and 77 percent in 2014).

Other events that had relatively high shares of City and County respondents reporting they came Downtown specifically to attend, include the Boulder Creek Festival (42 percent), the Bands on the Bricks (29 percent), Open Arts Fest and other arts and crafts fairs (23 percent), Fall Fest (17 percent), and ethnic/dance festivals (15 percent).

Year-over-year trends worthy of note include the decrease in locals attending events in general (with respondents reporting making a trip specifically Downtown for an average of 2.5 events in 2018 vs. 3.4 events in 2016). Relatedly, a higher share of respondents indicated that no events specifically brought them Downtown (18 percent vs. 12 percent in 2016). In contrast, ethnic/dance festivals and "other" events were more influential in bringing City and County residents Downtown this summer. Other write-in comments suggest that concerts drove some of this visitation.

There were differences in event attendance by visitor type. City residents (both student and non-student) were more likely to attend a variety of events than Boulder County residents (2.5 to 2.8 on average, vs. 1.9). City residents were particularly more likely to attend the Farmer's Market, Boulder Creek Festival, Bands on the Bricks, and Buff Stampede. Non-students were more likely than both students and Boulder County residents to attend ethnic/dance festivals and Halloween Trick or Treat/Munchkin Masquerade. Students were more likely than non-students and County residents to attend Fall Fest. And even though County residents were less likely to attend each of the events listed, they were most likely to make a trip Downtown for the Farmer's Market (45 percent) and Boulder Creek Festival (27 percent).

Figure 24
Which Activities, Special Events, etc. have you Attended this Past Year?
City of Boulder/Boulder County Residents, By Year



Competition

Significant interest exists in understanding the patterns of City of Boulder residents related to shopping, entertainment, and dining out at other areas. It should be noted that, because this survey was administered in Downtown Boulder, infrequent or non-customers of the Downtown area are not represented in the results.

Overall, City and County respondents indicated that they have visited Downtown Boulder 16.7 times during the prior two months, on the high end of the historical range for this question. Also popular was the 29th Street Mall, with 75 percent visiting at least once for an average of 4.2 times in the past two months (down from 5.3 times two years ago). Other shopping areas are not as popular, including Louisville, Lafayette, or Niwot Downtowns (45 percent have visited at least once, for an average of 1.8 times in the past two months), Downtown Denver/LoDo (44 percent, 1.7 times), FlatIron Crossing (40 percent, 1.1 times), and Cherry Creek (16 percent, 0.3 times).

Figure 25
Average Visits to Downtown Boulder / Other Regional Shopping Areas in Past 2 Months
City of Boulder/Boulder County Residents

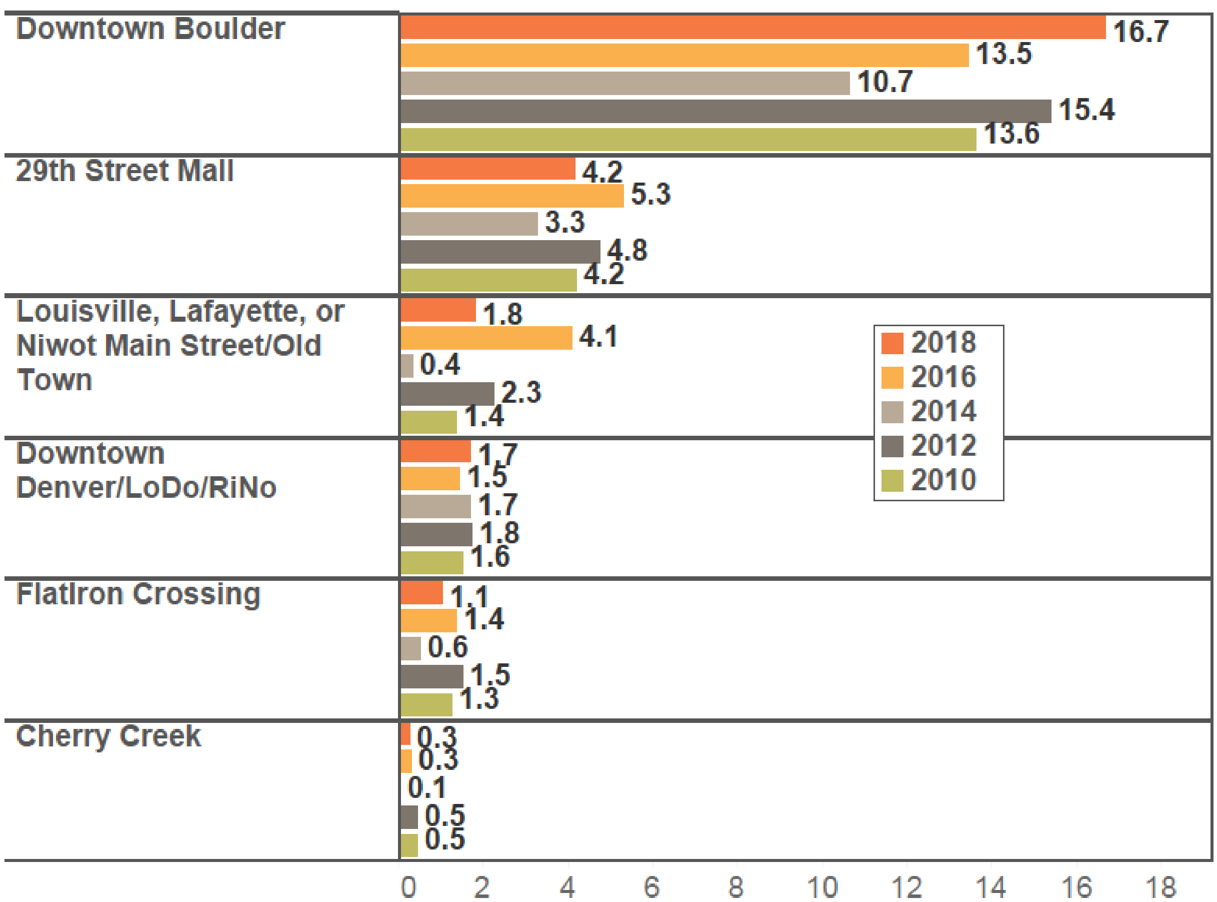
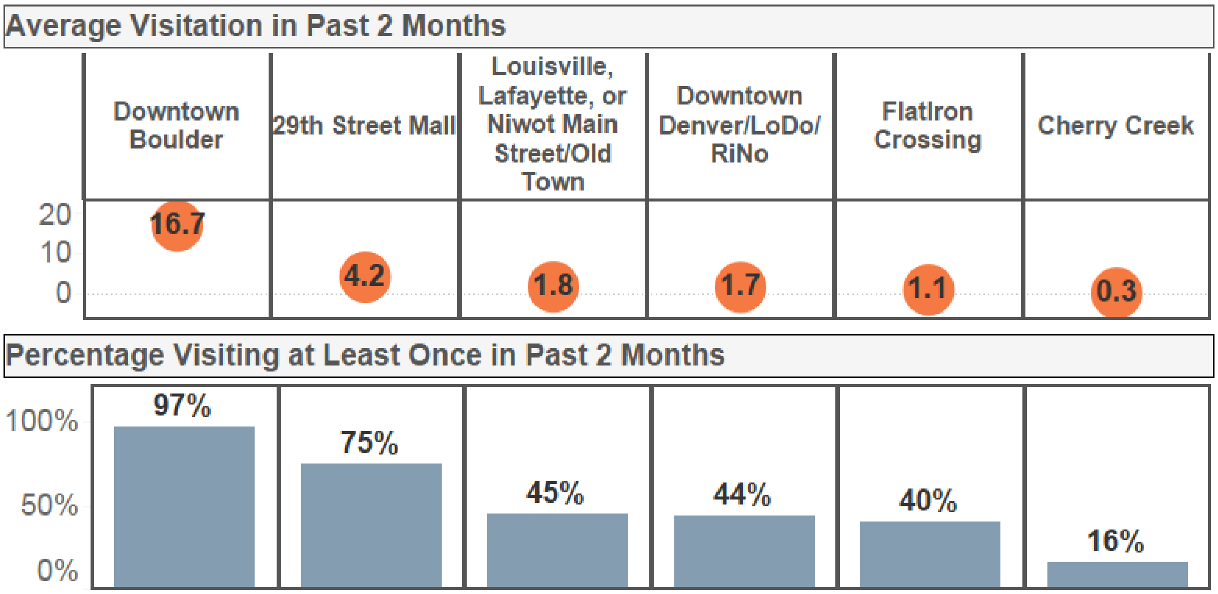


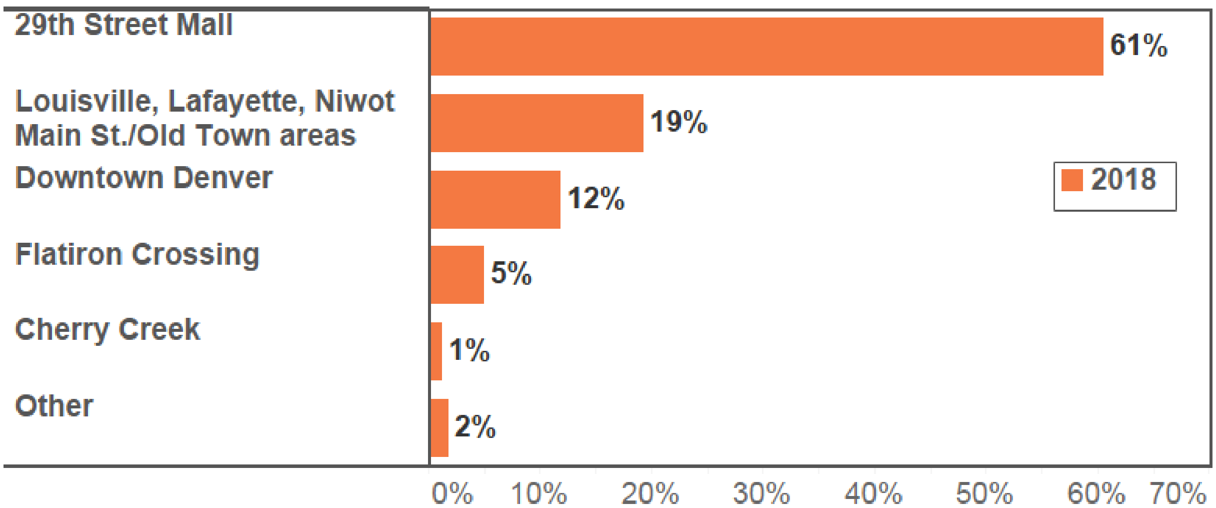
Figure 25 above shows the average number of visits over the past several summers. In Figure 26 to below, average visits and percentages having visited are presented.

Figure 26
Visits to Downtown Boulder / Other Regional Shopping Areas in Past 2 Months
City of Boulder/Boulder County Residents, 2018



A new question to the survey this summer asked local respondents to identify the other shopping area they visit the most (outside of Downtown Boulder). Overall, the 29th Street Mall was the most selected (61 percent), distantly followed by Louisville, Lafayette, Niwot Main St./Old Town areas (11 percent) and Downtown Denver (12 percent). The 29th Street Mall was the most popular other shopping area for non-student City residents (66 percent) and student residents (72 percent). Meanwhile, Boulder County residents are most likely to go to Louisville, Lafayette, Niwot Main St./Old Town areas (43 percent). Students were more likely to indicate they go to Downtown Denver (21 percent) than the other respondent segments.

Figure 27
Other Shopping Area You Visit Most
City of Boulder/Boulder County Residents



Conclusion

The results of the user survey research program provide important information about the users of the Downtown Boulder area. The information contained within this report is intended to assist Downtown Boulder Partnership, the City of Boulder Downtown Management Commission, the Downtown Business Improvement District, and the Boulder Convention & Visitors Bureau's understanding of key issues and concerns from the perspective of the visitor/user, with the intent to set priorities for improvement, image, branding, and functioning of this key Downtown area. User satisfaction is generally very high, a positive finding of the research, though many suggestions were offered regarding improvements and changes to the area. It will remain important to continue to monitor issues such as competition with other shopping and entertainment areas, transportation, the impact of panhandlers, potential entertainment areas of interest, parking, crowding, and other subjects of interest as they emerge.