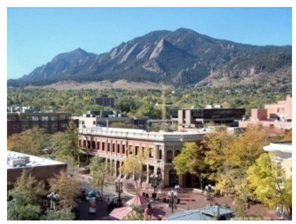
Downtown Boulder
User Survey 2012

November 2012

Presentation Overview

- Methodology
- Key findings and highlights
- Visitor Profile
- Marketing & Media
- Spending Patters
- Transportation & Parking
- Impact of Transient Behavior
- Satisfaction/Motivation to Visit
- Special Events
- Competition
- Additional Feedback

Methodology

- 750 completed interviews collected between late July and mid-September 2012
- Random intercept surveys conducted on the four blocks of Pearl Street Mall plus one block east and west of the mall proper
- Surveys conducted between 9:30am and 7:30pm
- Similar methodology to past years, allowing for comparison over time

Key Findings & Highlights

- Similar visitor profile to that of years past (roughly one-third Boulder residents and one-quarter out-of-state visitors)
- Slight decline in percentage of visitors spending money, but average spending amount increased
- Levels of satisfaction generally very high
- Presence of transients has overall negative impact on visitor experience

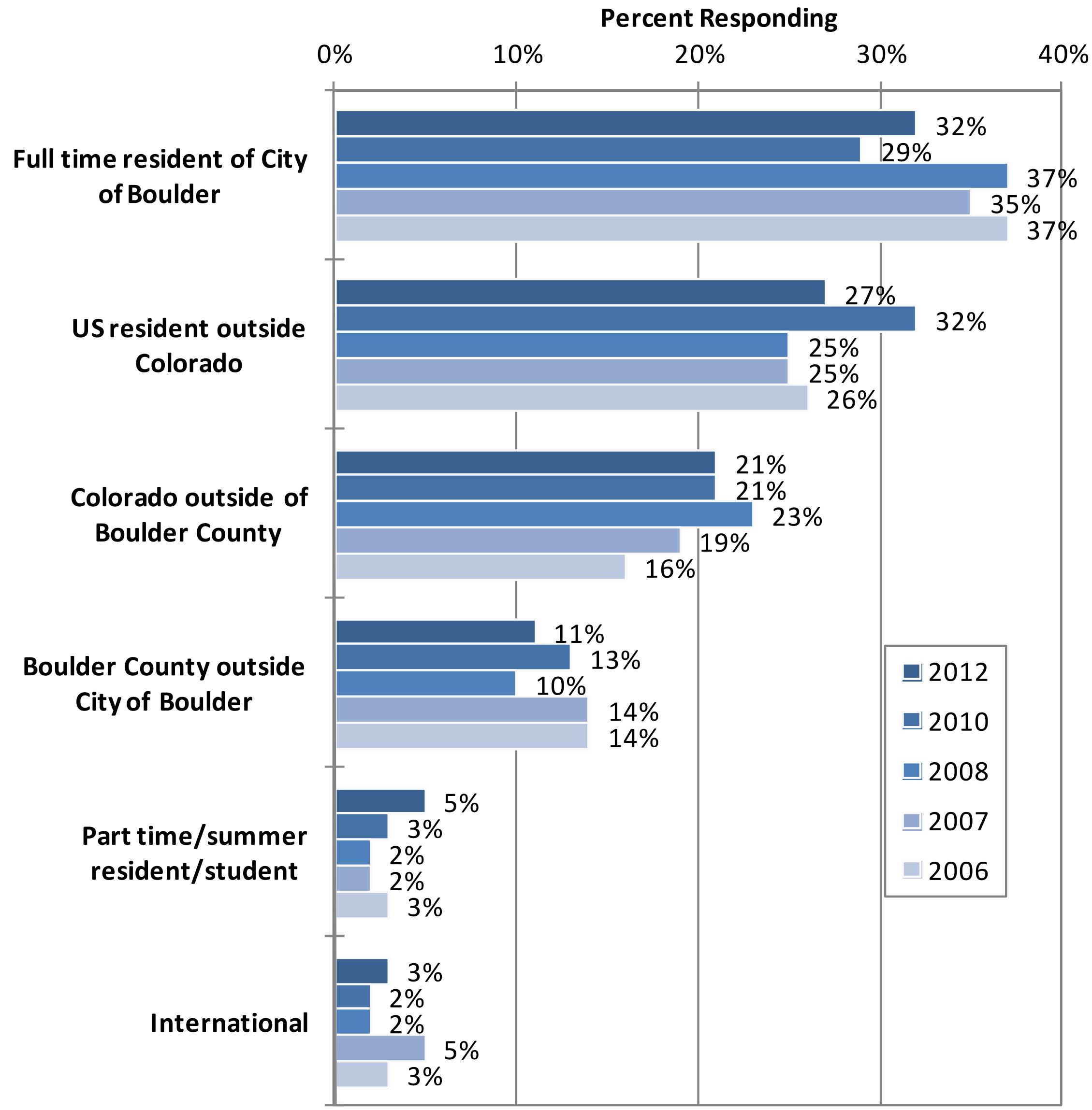
Key Findings & Highlights

- Satisfaction with parking is good overall, but higher among out-of-state visitors
- Demographic data points to a healthy, diverse mix of users
- Farmer's Market, Boulder Creek Festival, Bands on the Bricks, and Art Fair most popular special events
- Primary motivation for visiting is "enjoying the setting/people watching/hanging out," followed by a meal, employment, and shopping

User Type

- City of Boulder residents: 32%
  - Downtown Boulder: 27%
  - North Boulder: 23%
  - Central/West Boulder: 21%
  - South Boulder: 12%
- Out-of-state visitors: 27%
- Colorado outside Boulder County: 21%
- Boulder County outside city of Boulder: 11%
- International & part-time/summer residents: 8%

Visitor Profile by Year



Overnight Visitors

- 47% of visitors who live outside Boulder County were spending the night
- About half were staying with family/friends and half staying in commercial lodging
- Average length of stay approximately five nights
- Average party size of 2.4 people; single-person parties more common this year than in years past
- Visiting family or friends (37%) and general recreation/ vacation (30%) top two reasons for trip

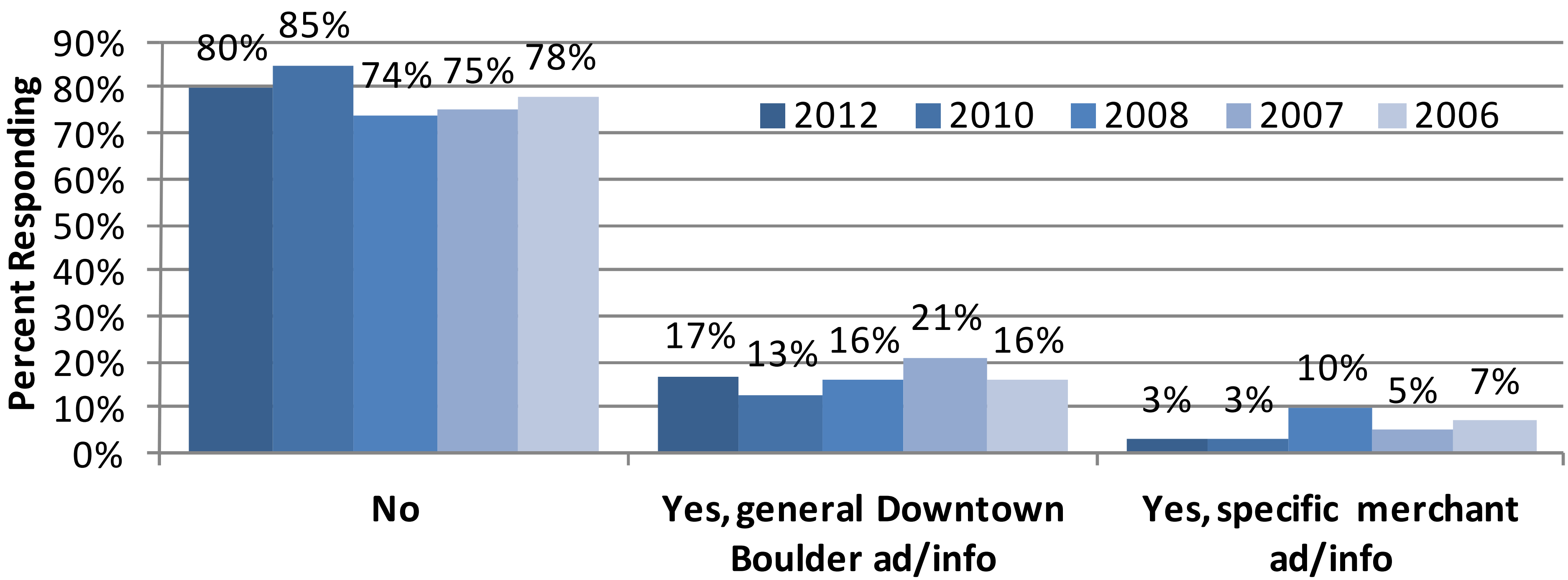
User Demographics

- Average age: 42.3 years, most between 25 and 64
- Healthy mix of family types: 28% single no kids, 15% couple no kids, 28% household with kids, 22% empty nesters
- 52% male and 48% female
- Range of HHI: Most between $25k and $200k
- 7% of users students

Marketing & Media

- The Internet (42%) and word of mouth (40%) were the top two sources of information for trip planning among overnight visitors
- 20% of users were aware of advertising prior to their visit to Downtown Boulder
- Of those who were aware of Downtown Boulder advertising, newspaper (38%), boulderdowntown.com (12%), "other" websites (11%), and radio (6%) were the most common sources of information

Advertising Awareness by Year



Spending Patterns

- 84% made or will make a purchase
- Average per person spending is $60.23, above every year prior
  - $28.90 in retail stores/art galleries
  - $27.69 at restaurants/bars
  - $3.64 on other purchases
- Slight decline in overall purchase frequency, increase in average spending per person, rebound in spending patterns for restaurants/bars from 2010 levels

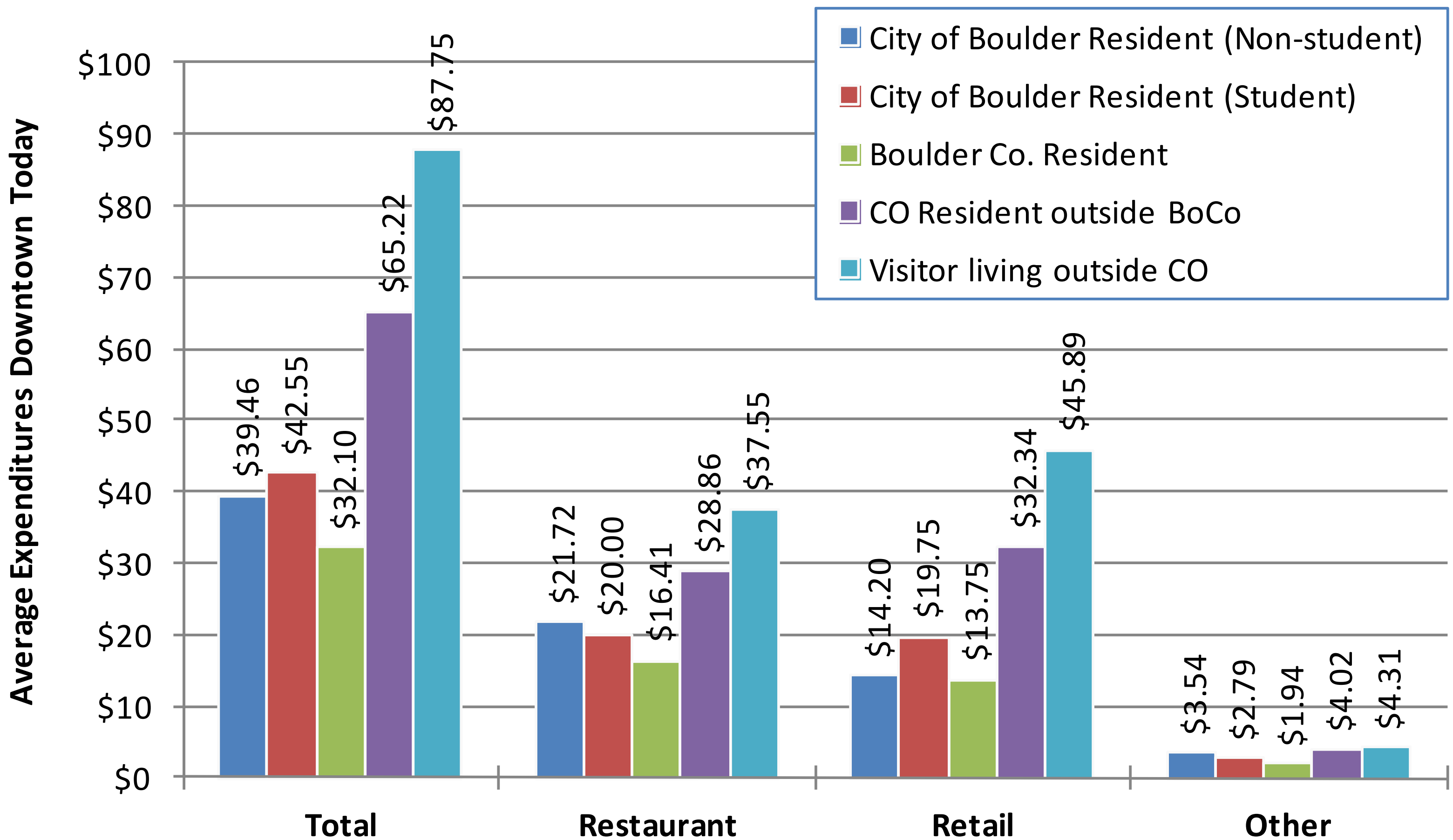
Spending Patterns

Average Spending by Year, by Category

	Year of Survey					
Spending Patterns	**2005**	**2006**	**2007**	**2008**	**2010**	**2012**
% Making Purchase Today	89%	88%	89%	84%	89%	84%
Restaurant/Bar	$19.46	$24.62	$21.88	$27.82	$22.13	$27.69
Retail Store/Art Gallery	$27.54	$25.84	$28.38	$26.55	$28.59	$28.90
Other	$1.67	$0.80	$1.32	$1.16	$1.41	$3.64
Total	$48.67	$51.26	$51.58	$55.53	$52.12	$60.23

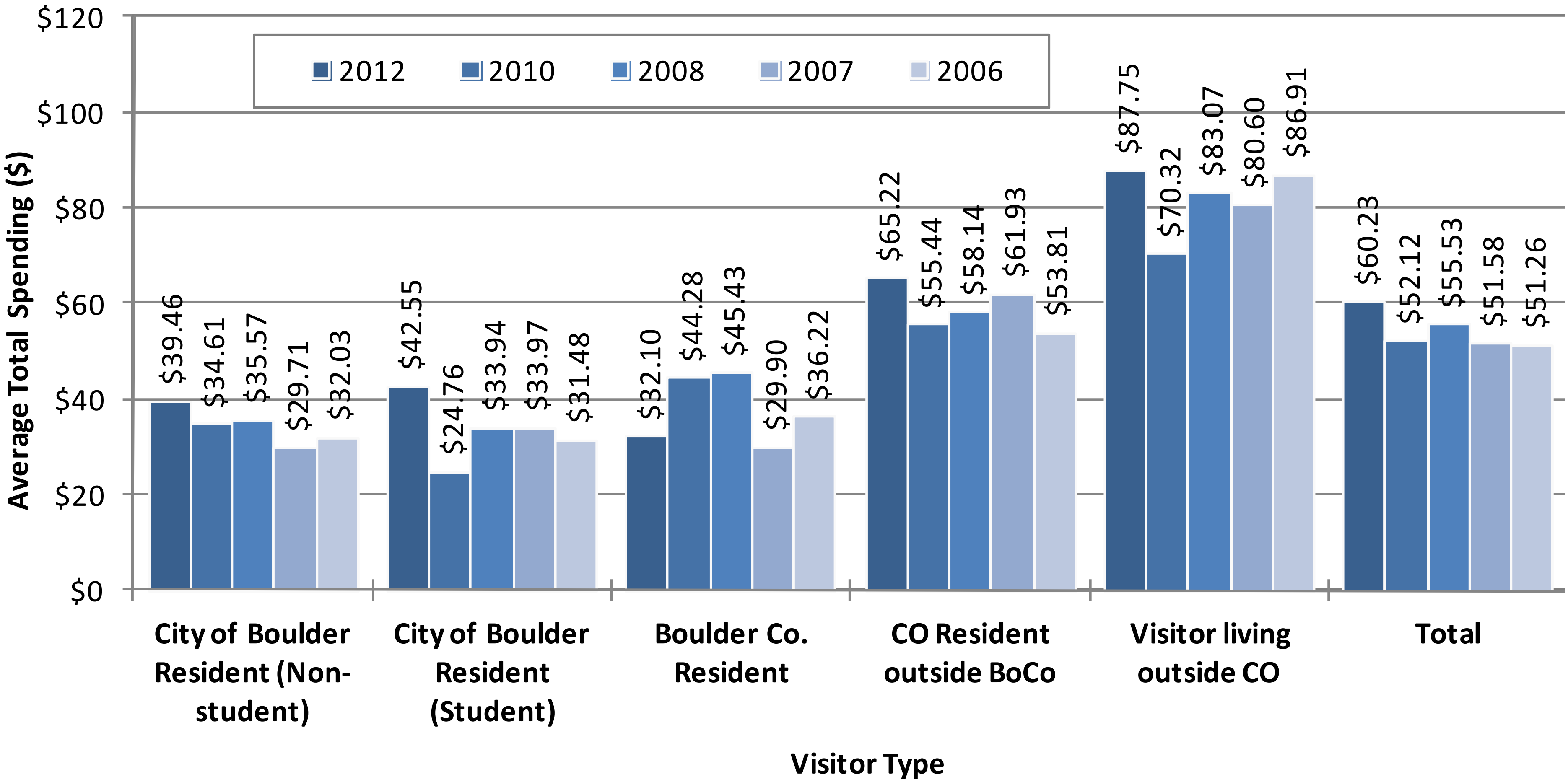
Spending Patterns

Average Spending by Visitor Type



Spending Patterns

Average Total Spending by Year, by Visitor Type

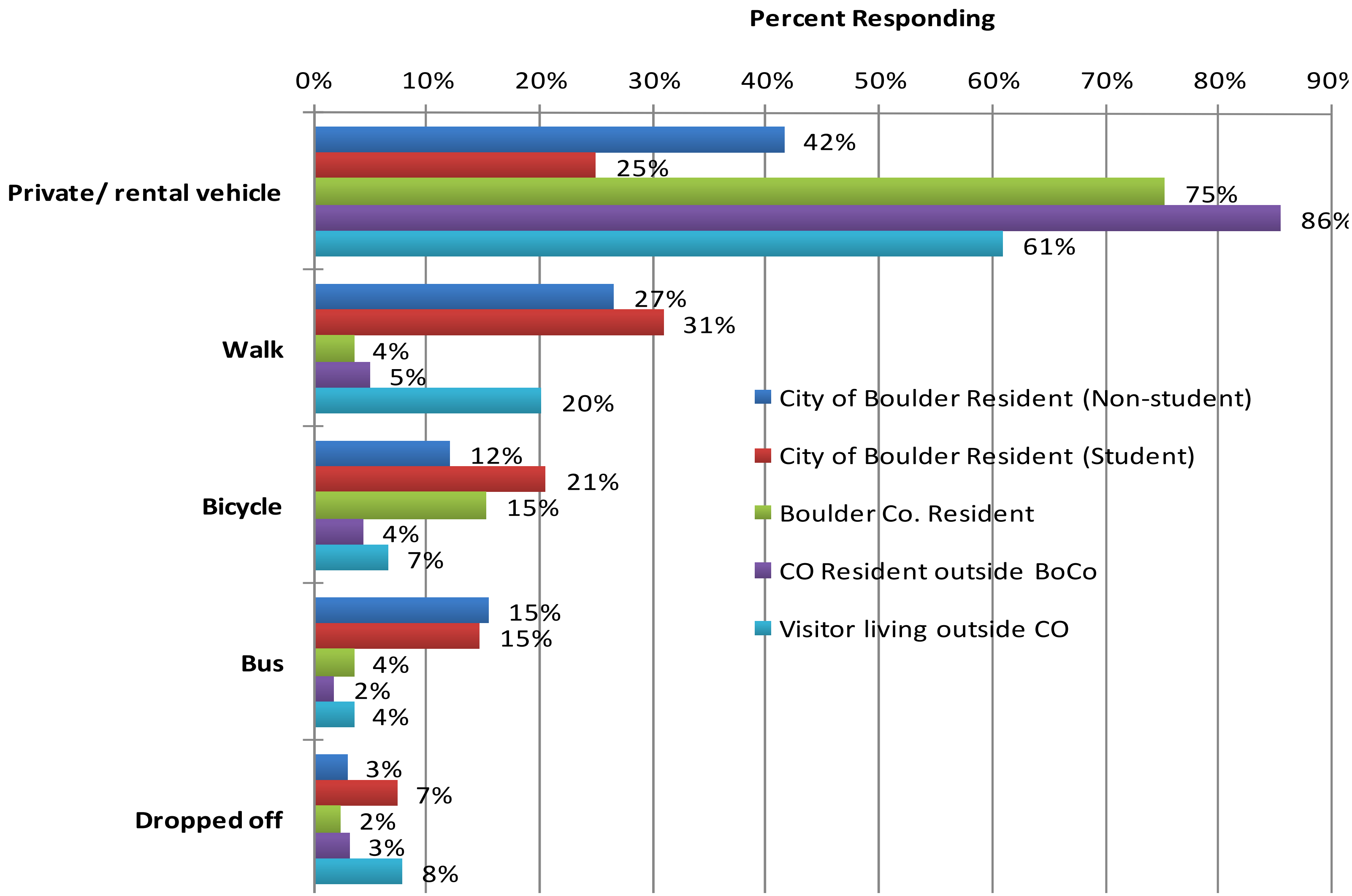


Transportation & Parking

- 64% drove or were "dropped off", 18% walked, 10% rode a bus, 7% rode a bike
- Alternative modes of transportation highest among students (75%) and non-student residents (58%)
- 42% pay for on-street parking at pay stations and 24% use parking garages
  - Overall decrease in garage usage from 30% in 2008
- Parking satisfaction generally high, but noticeably higher for out-of-state visitors, and relatively low among city residents

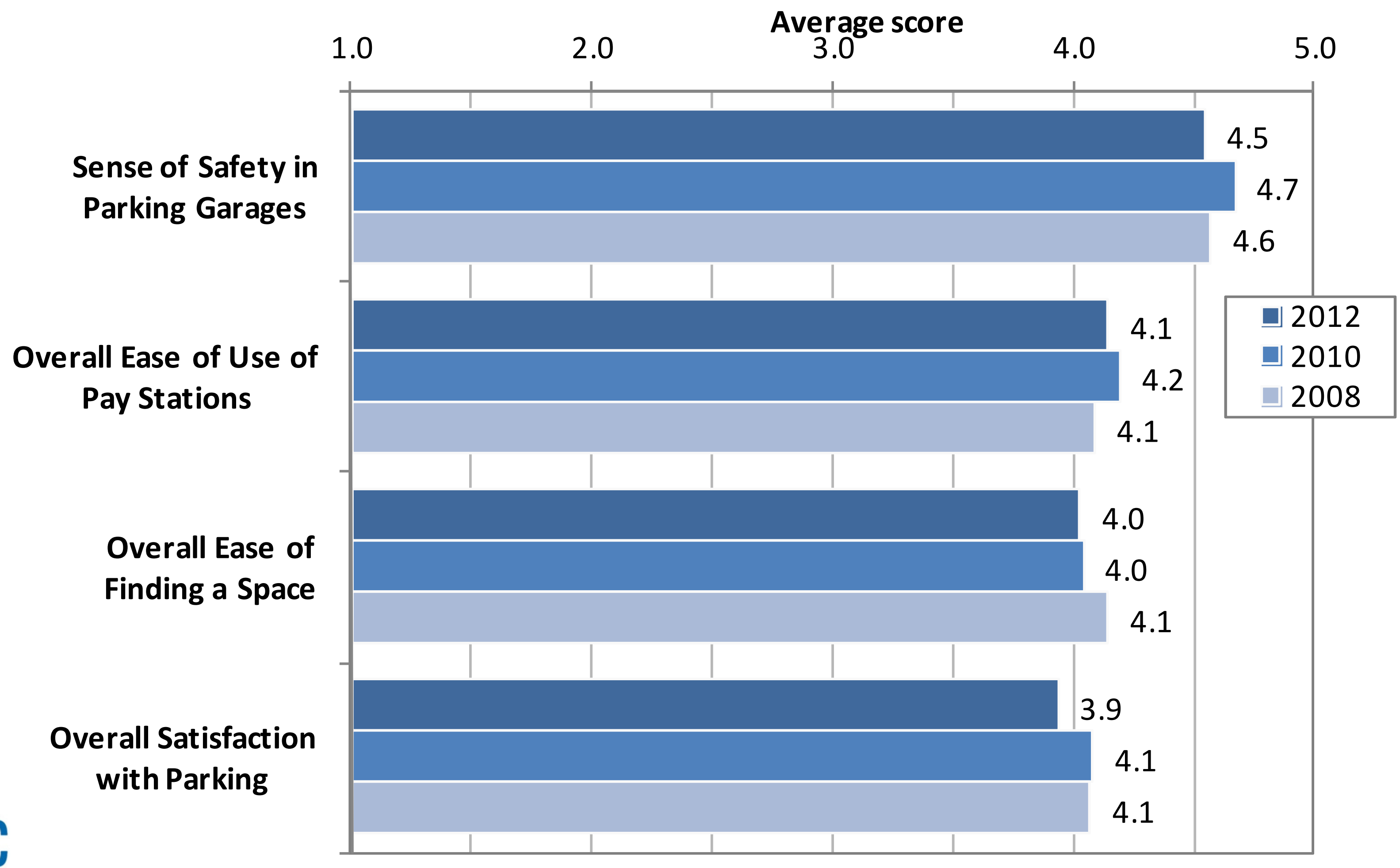
Transportation & Parking

Mode of Transportation, by Visitor Type



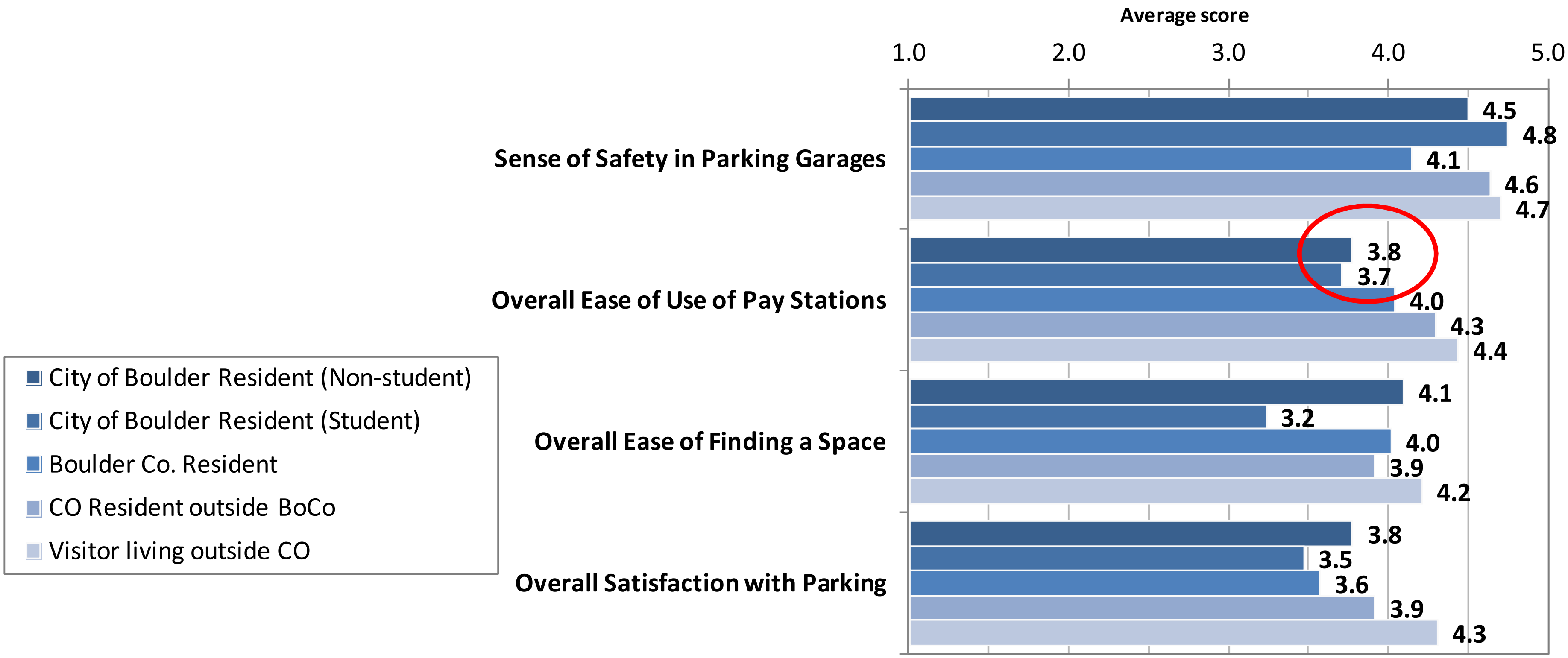
Transportation & Parking

Ratings of Parking Experience, by Year



Transportation & Parking

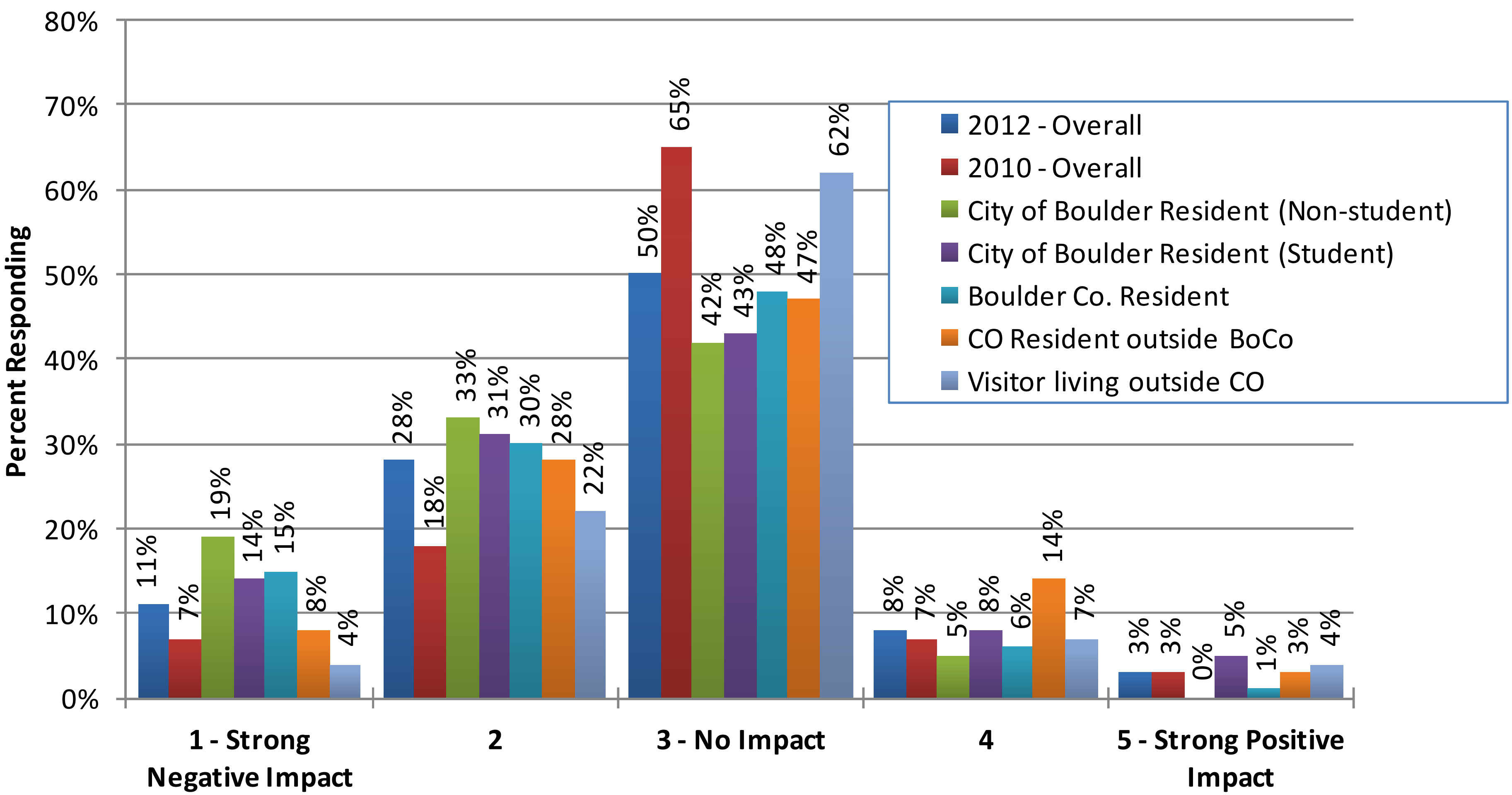
Ratings of Parking Experience, by Year



Transient Behavior

- Half of respondents indicate that transient activities/behaviors have no impact on downtown experience
- 39% said transient behavior has a negative impact, while 11% said it has a positive impact
- Overall opinion shows a more negative impact on experience
- City residents most likely to feel negatively impacted (52%), followed by county residents (45%)

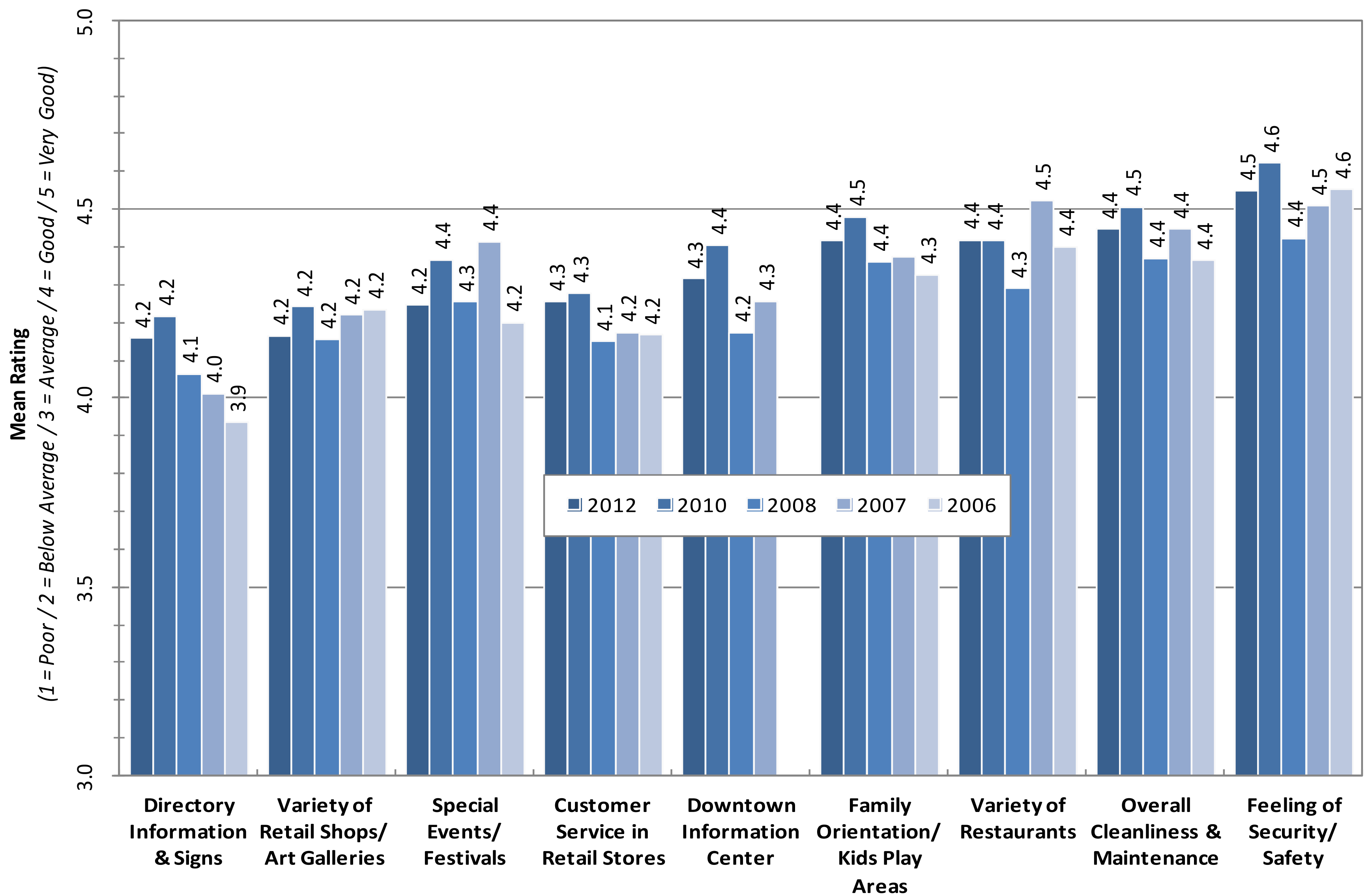
Transient Behavior



Satisfaction

- When asked about opinions on the general direction of downtown experience, most respondents indicated it was improving (35%) or staying the same (44%)
- General satisfaction very high
- Highest rated aspects of the experience:
  - Sense of security/safety
  - Overall cleanliness and maintenance
  - Family orientation/kids play areas
- Although most satisfaction levels down slightly, restaurants receive consistently high ratings

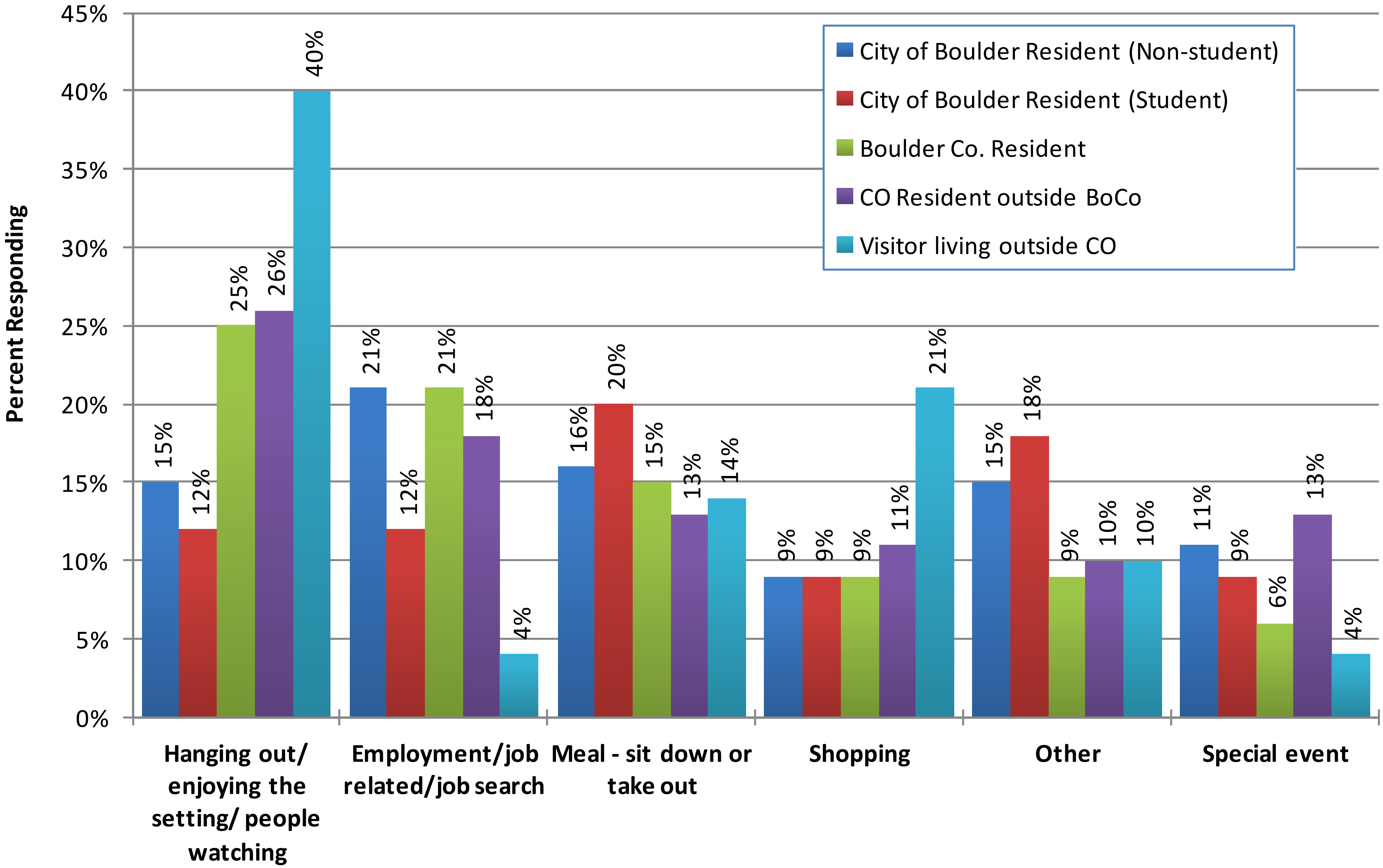
Satisfaction



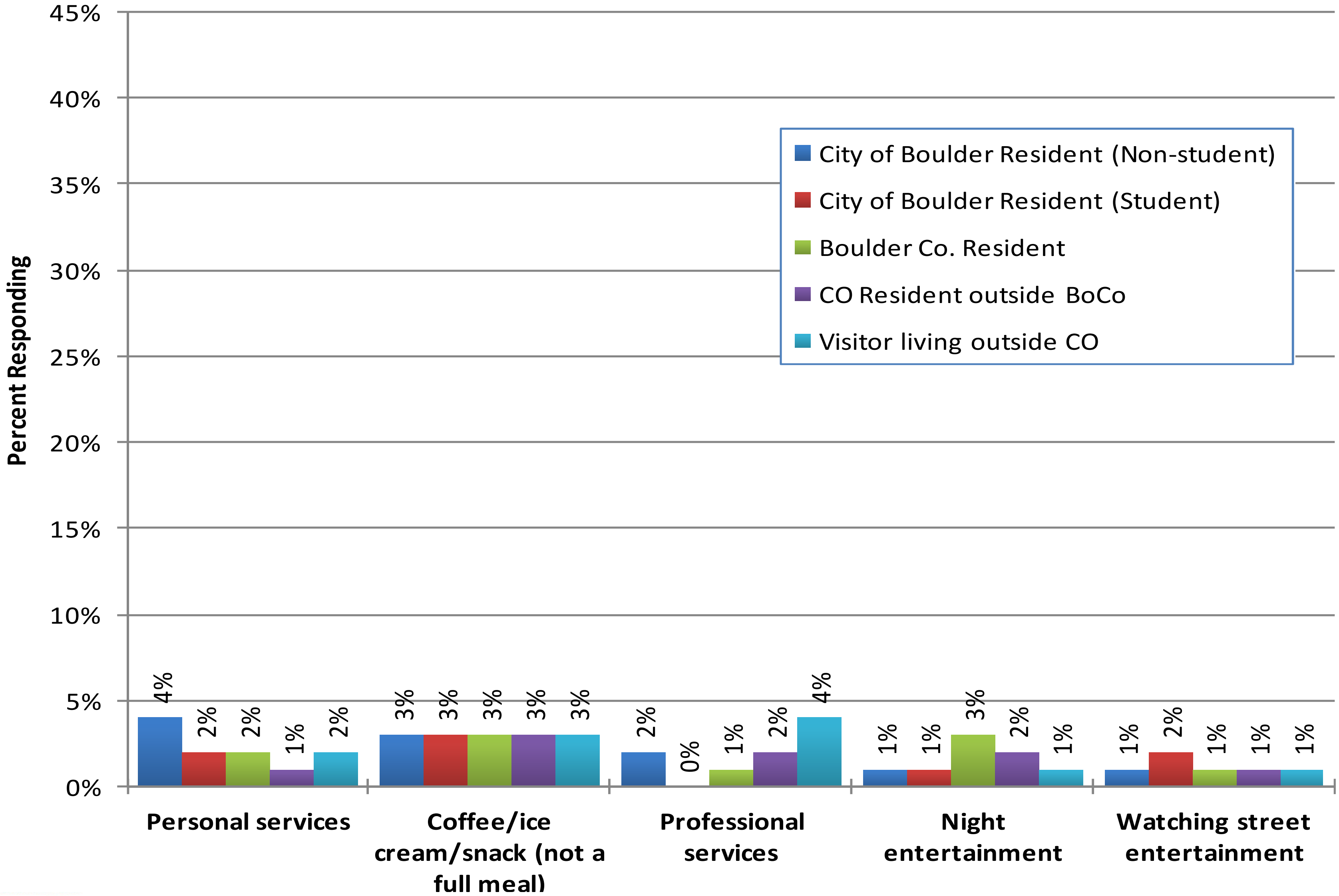
Motivation to Visit

- Primary reason for coming downtown
  - "Enjoy the setting/people watching/hanging out" (26%)
  - Eating a meal (15%)
  - Employment reasons (15%)
  - Shopping (13%)
- Top secondary reasons
  - Eating a meal (49%)
  - Hanging out (49%)
  - Coffee/ice cream/snack (46%)
  - Shopping (34%)
  - Watching street entertainment (23%)

Primary Reason for Visit (1 of 2)



Primary Reason for Visit (2 of 2)



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Special Events

- Farmer's Market is the most popular event (50% of residents have attended in past year), followed by the Boulder Creek Festival (31%)
  - Bands on the Bricks (18%) and Art Fair/special arts and craft fairs (17%) also drawing in relatively high attendance
- Increasing percentage has attended events in other surrounding communities (54%, compared to 33% in 2010)

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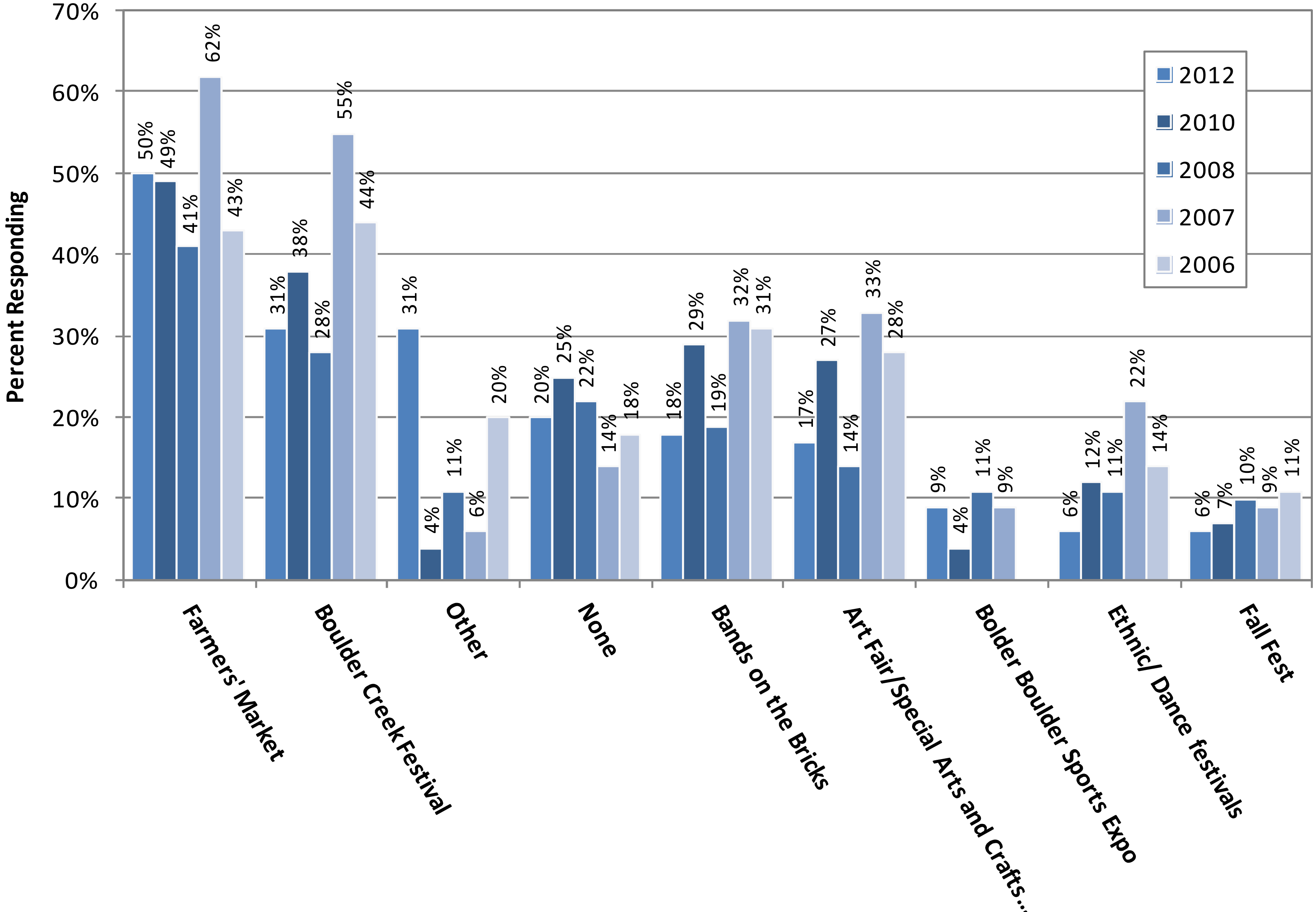
Special Events

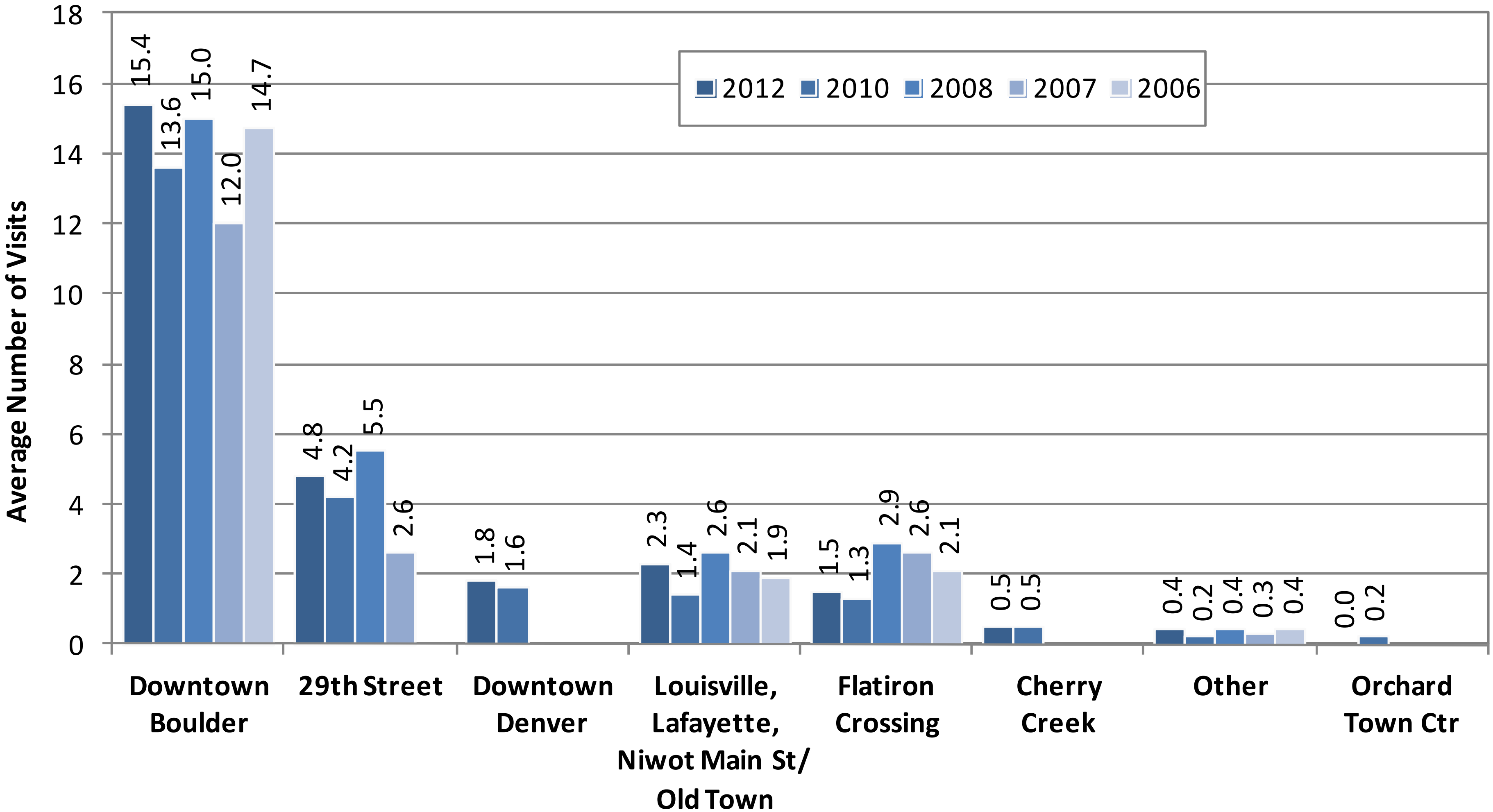


Competition

- Average city/county resident has visited downtown 15.4 times in the past two months
- 29th Street Mall also a popular destination (4.8 times)
- Downtown Denver averages 1.8 visits
- Louisville, Lafayette, Niwot averaged 2.3 visits

Competition

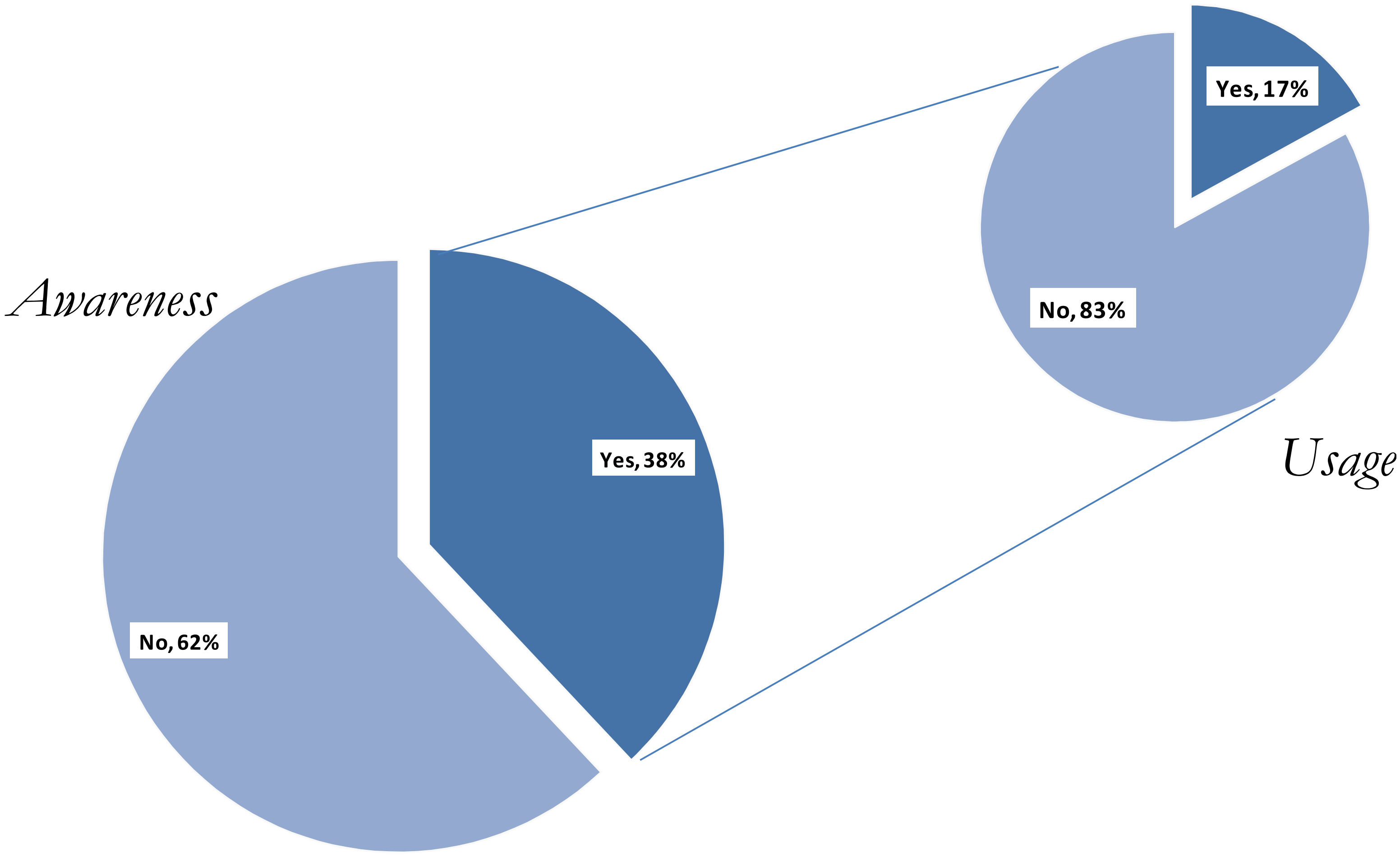
Average Visits by Location, Past 2 Months



Competition

- Downtown Boulder users have visited other communities for special events, festivals, etc.
  - Downtown Denver (20%)
  - 29th Street (10%)
  - Louisville (10%)
  - Niwot (7%)
  - Longmont (6%)

B-Cycle



Additional Stores Desired

- *Apple store*
- *Banana Republic*
- *Bookstore*
- *H&M*
- *J Crew*
- *Non-franchise stores/ less chains*
- *Thrift store*
- *Pottery Barn*

RRC ASSOCIATES
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Additional Restaurants Desired

- *Authentic Mexican*
- *Breweries (Avery, Upslope, Oskar Blues)*
- *Greek*
- *Locally owned/ less chains*
- *Mongolian BBQ*
- *Pizzeria (Woody's, Rusty's, Louisville Lucky Pie)*
- *Sushi Den*

Additional Comments

- *The meters aren't clear*
- *Add more signs- because of traffic it is difficult to navigate*
- *Discourage smoking*
- *Would like to be able to walk my dog*
- *The homeless drives public away*
- *There's not a lot of moderately priced places to go*
- *Open container law would be nice to carry beer on street*

Observations/Conclusions

- Satisfaction remains high, particularly among out-of-state visitors
- Downtown attracts a healthy, diverse mix of visitors
- Average spending up
- Potential growth/higher penetration among South Boulder and Boulder County residents
- Threats exist from other shopping centers and other communities
- Transient behavior has overall negative impact on visitor experience

Thank you!

Discussion & Questions