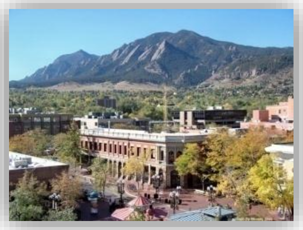
Downtown Boulder User Survey 2014

October 2014

DOWNTOWN Boulder

BOULDER colorado usa

CITY OF BOULDER

RRC ASSOCIATES

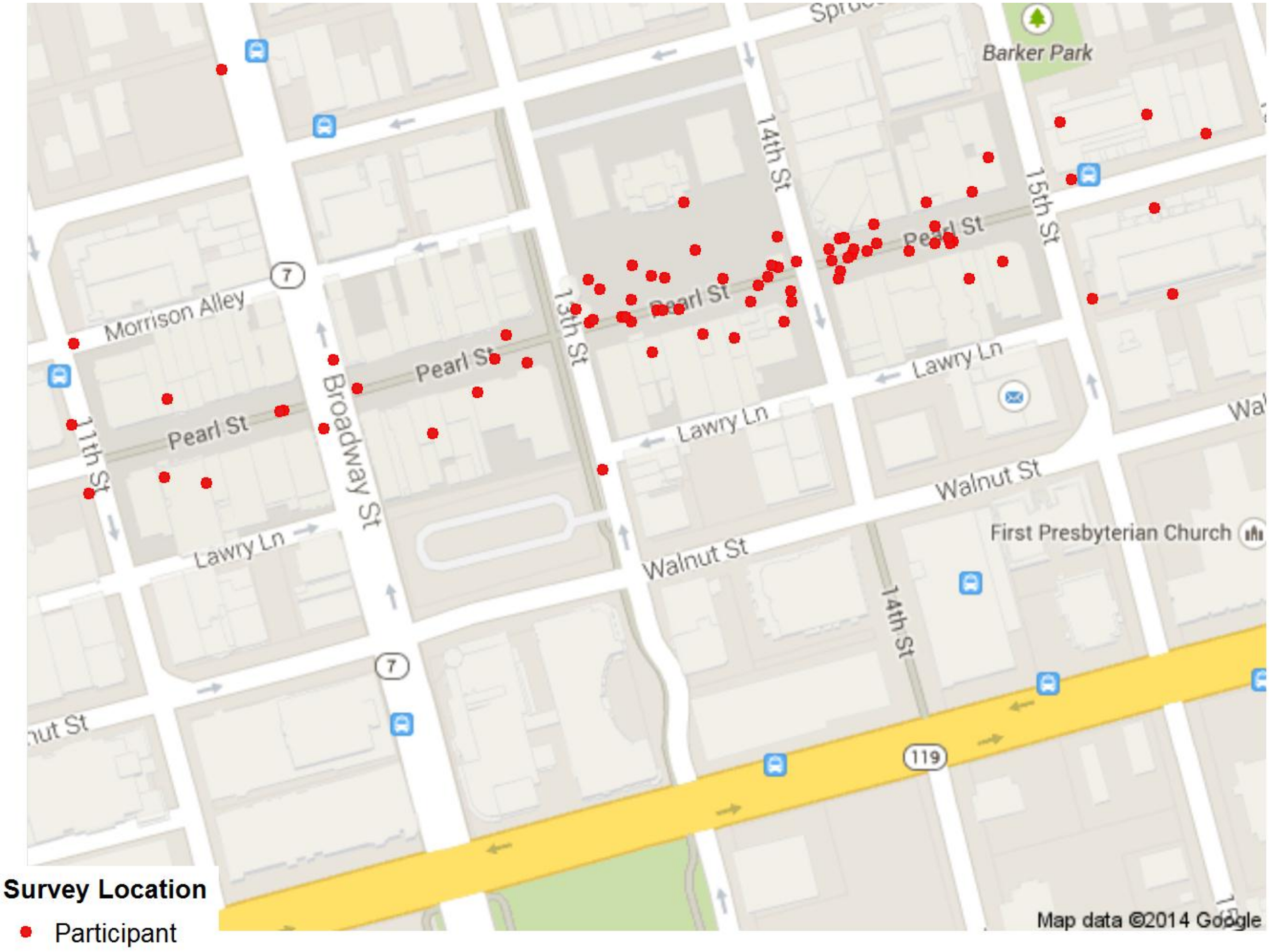
Presentation Overview

- 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 June and late August 2014
- Random intercept surveys conducted between the 1000 and 1500 blocks of Pearl Street Mall
- Surveys conducted between 9:30am and 7:30pm
- Similar methodology to past years, allows for comparison over time
- Tablets used this summer

Location of Surveys



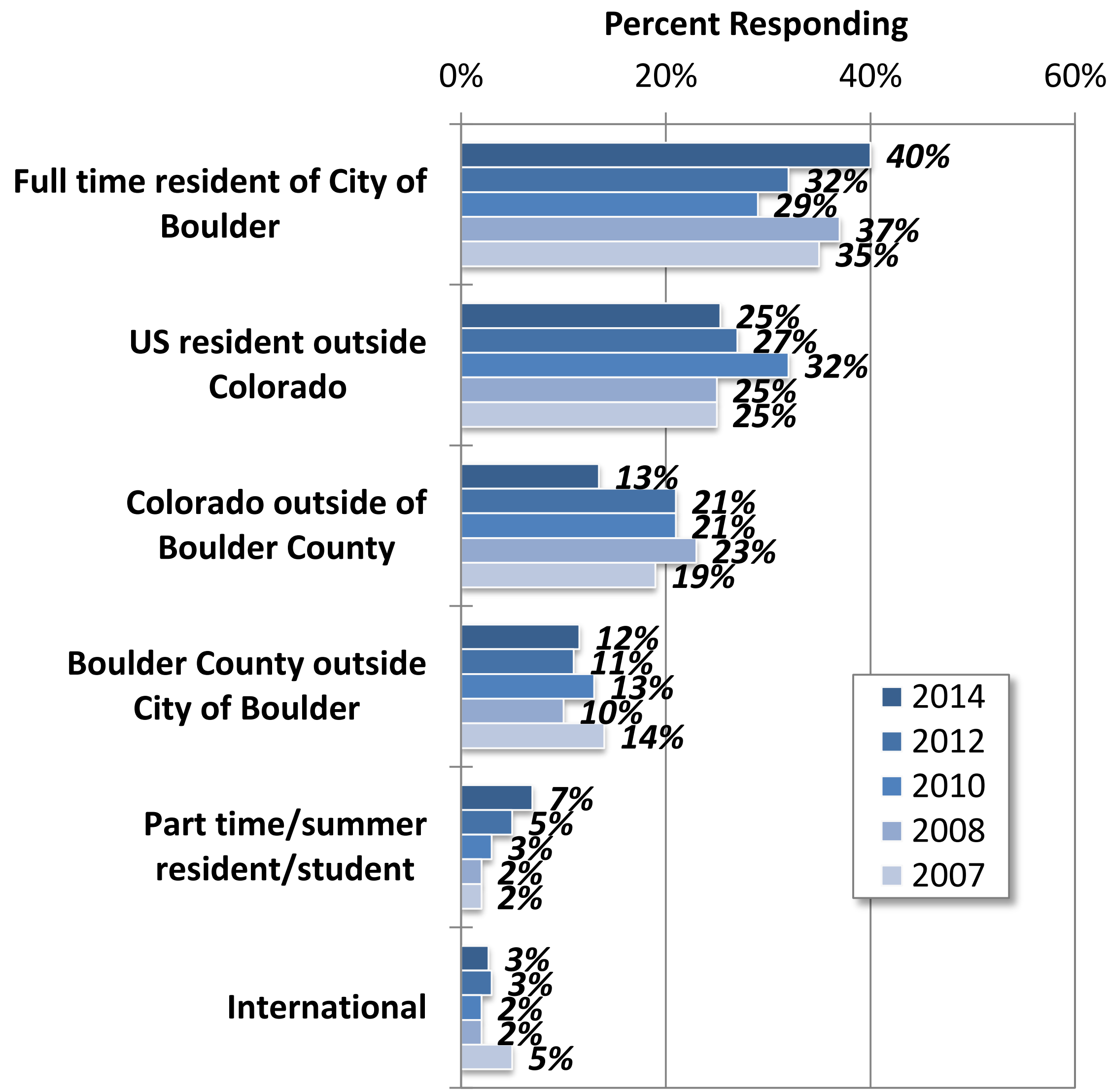
Key Findings & Highlights

- High levels of satisfaction with most all aspect of the experience, although information ratings slightly down
- Higher representation among university students and City of Boulder residents
- Spending penetration down overall, but average spending similar to 2012
- Healthy and diverse mix of visitors relative to age, household status, income
- Special events continue to be a strong draw, with Farmers' Market attendance playing a particularly large role

User Type

- City of Boulder residents: 40%
  - Central/West Boulder: 33%
  - Downtown Boulder: 25%
  - North Boulder: 15%
  - South Boulder: 12%
  - East Boulder: 14%
- Out-of-state visitors: 25%
- Colorado outside Boulder County: 13%
- Boulder County outside city of Boulder: 12%
- Part-time/summer residents: 7%
- International: 3%

Visitor Profile by Year



Overnight Visitors

- 60% 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 4.8 nights
- Average party size of 2.6 people
- Visiting family or friends (37%) and recreation/vacation/sightseeing (22%) top two reasons for trip
- CU-related (11%), business (8%), and special event (8%) also important drivers of overnight visitation

User Demographics

- Average age: 40.5 years
- Healthy mix of family types:
  - 27% single no kids
  - 13% couple no kids,
  - 26% household with kids,
  - 21% empty nesters
- 49% male and 51% female
- Range of HHI: about 40% below $50K, 33% $50 to $100K, 25% $100K+
- 28% of users are students; 26% are employees

Spending Patterns

- 75% made or will make a purchase
- Average spend is $58.43 per person
  - $33.21 in retail stores/art galleries
  - $24.47 at restaurants/bars
  - $0.75 on other purchases
- Decline in share of visitors making a purchase
  - In part attributable to higher share of locals and university students

Spending Patterns

Average Spending by Year by Category

	Year of Survey					
Spending Patterns	**2006**	**2007**	**2008**	**2010**	**2012**	**2014**
% Making Purchase Today	88%	89%	84%	89%	84%	75%
Restaurant/Bar	$24.62	$21.88	$27.82	$22.13	$27.69	$24.47
Retail Store/ Art Gallery	$25.84	$28.38	$26.55	$28.59	$28.90	$33.21
Other	$0.80	$1.32	$1.16	$1.41	$3.64	$0.75
Total	**$51.26**	**$51.58**	**$55.53**	**$52.12**	**$60.23**	**$58.43**

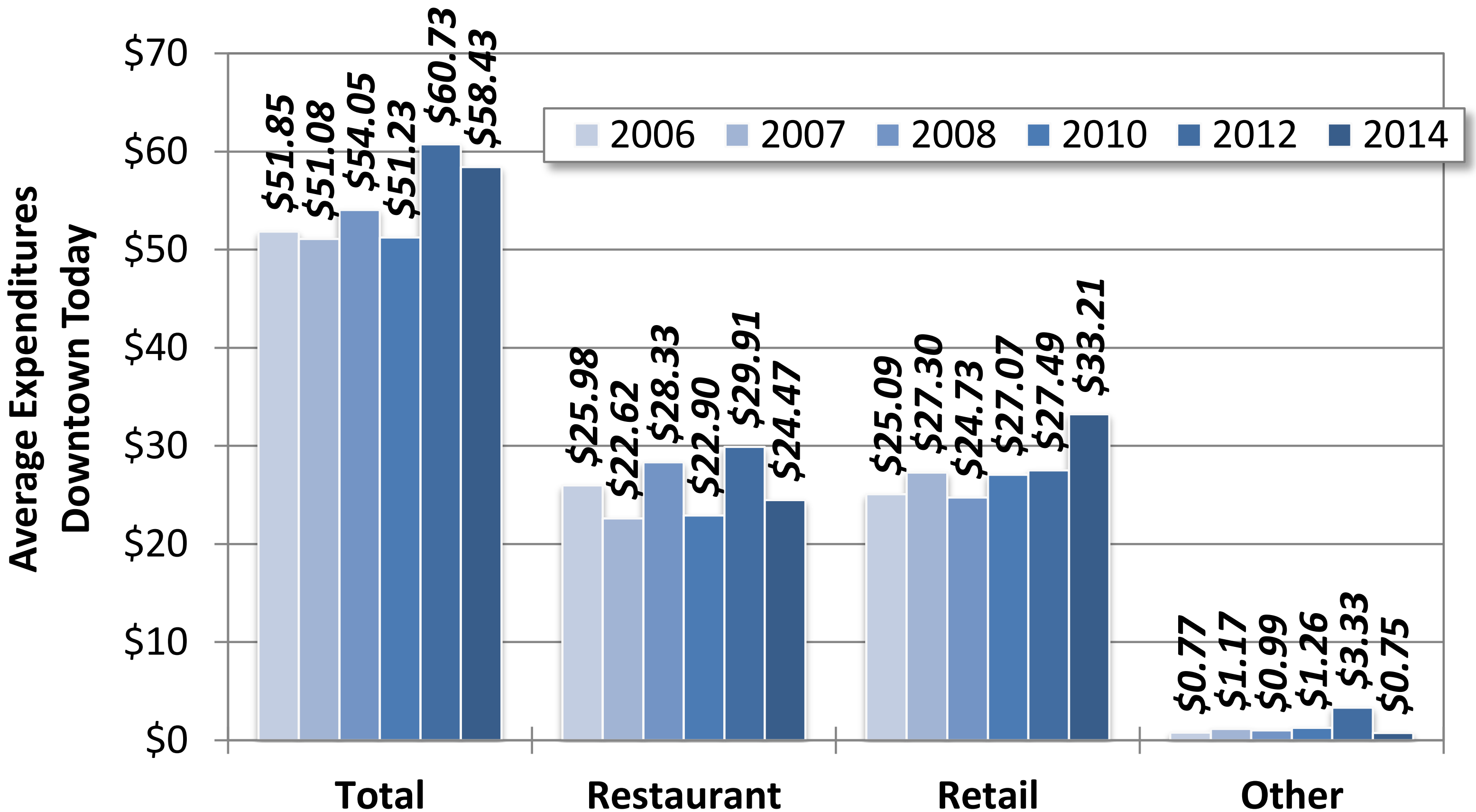
Spending Patterns

Average Spending by Visitor Type by Category

	2014 User Type				
	City of Boulder Resident (Non-student)	City of Boulder Resident (Student)	Boulder County Resident	CO Resident Outside BoCo	Visitor Living Outside Colorado
% Making Purchase Today	79%	59%	75%	68%	81%
Restaurant/Bar	$16.70	$15.24	$25.84	$24.53	$36.18
Retail Store/ Art Gallery	$14.20	$19.75	$13.75	$32.34	$45.89
Other	$0.32	$1.37	$0.00	$0.14	$1.51
Total	**$44.16**	**$32.90**	**$62.33**	**$64.74**	**$80.28**

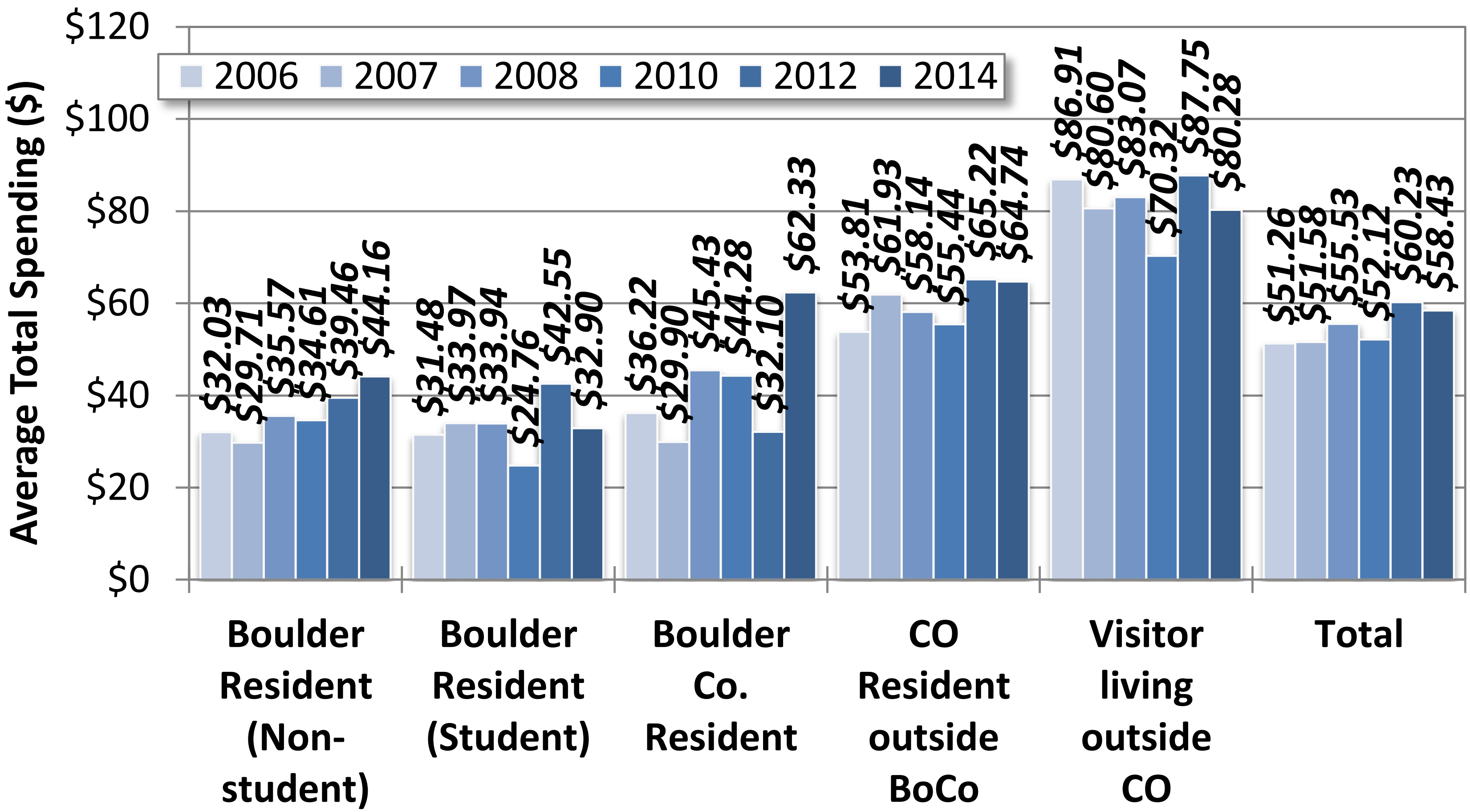
Spending Patterns

Average Total Spending by Category by Year



Spending Patterns

Average Total Spending by Year by Visitor Type

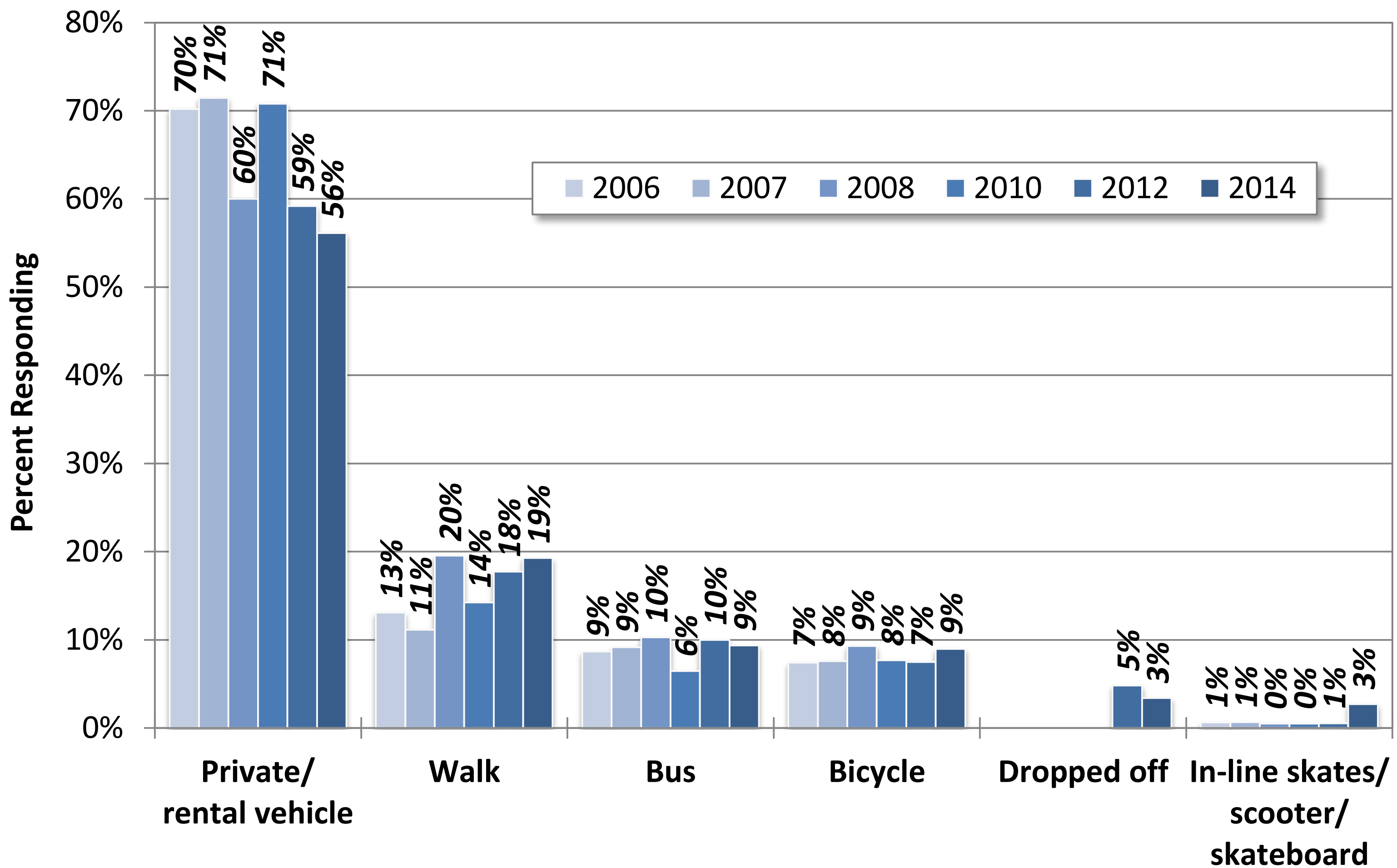


Transportation & Parking

- 59% drove or were "dropped off", 19% walked, 9% rode a bus, 9% rode a bike
- Alternative modes of transportation highest among students (82%) and non-student residents (55%)
- 42% use parking garages and 30% use pay stations
  - Overall increase in garage usage (from 24% in 2012)
- Parking satisfaction generally high, but slight declines in ratings noted relative to overall satisfaction and ease of finding a space

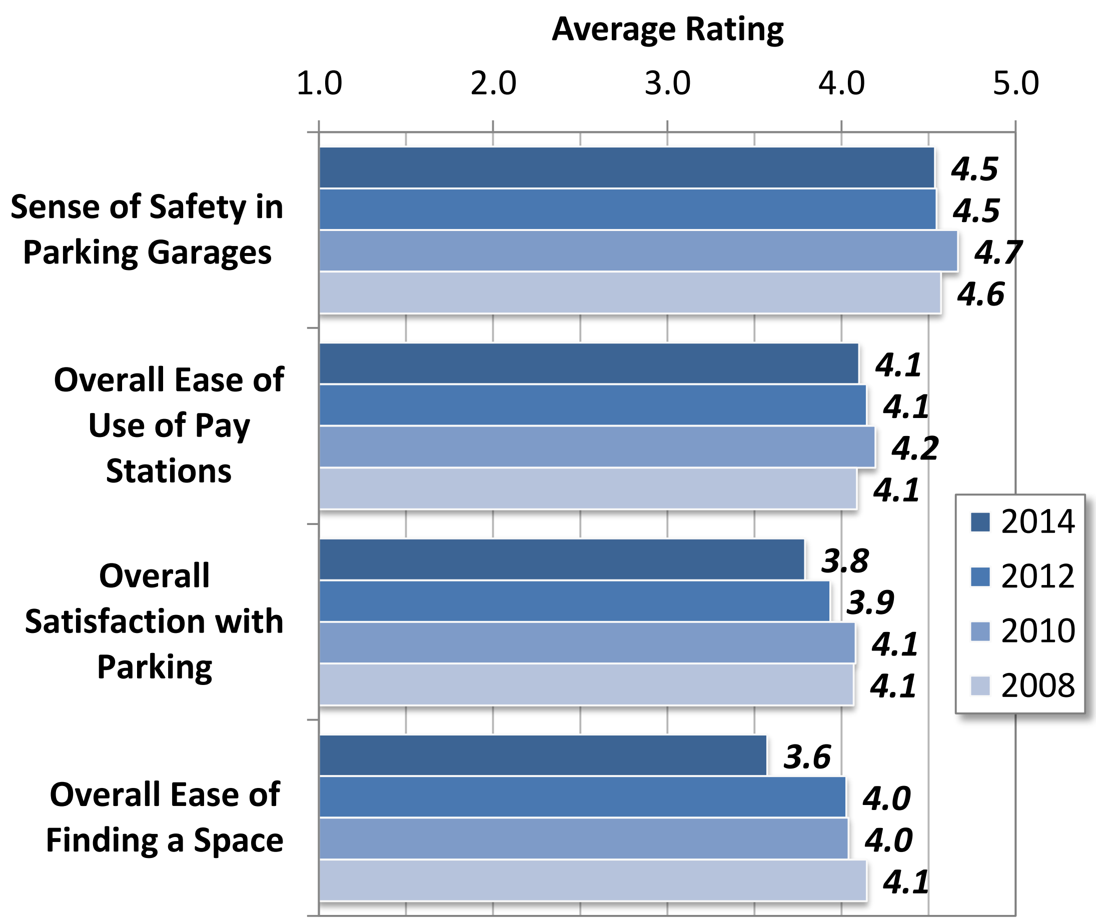
Transportation & Parking

Mode of Transportation by Year



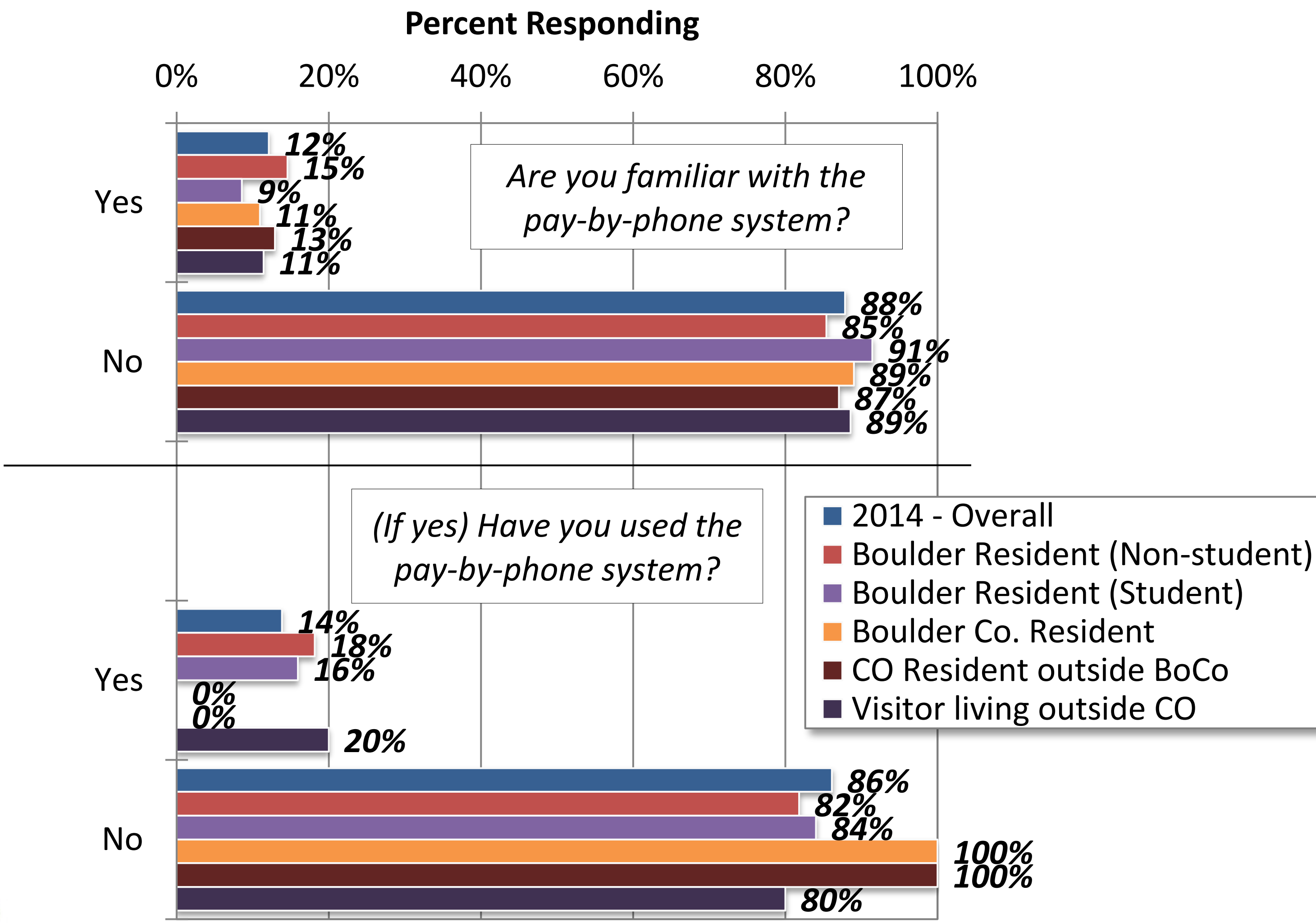
Transportation & Parking

Ratings of Parking Experience by Year



Transportation & Parking

Awareness and Use of Pay-by-Phone System by Visitor Type

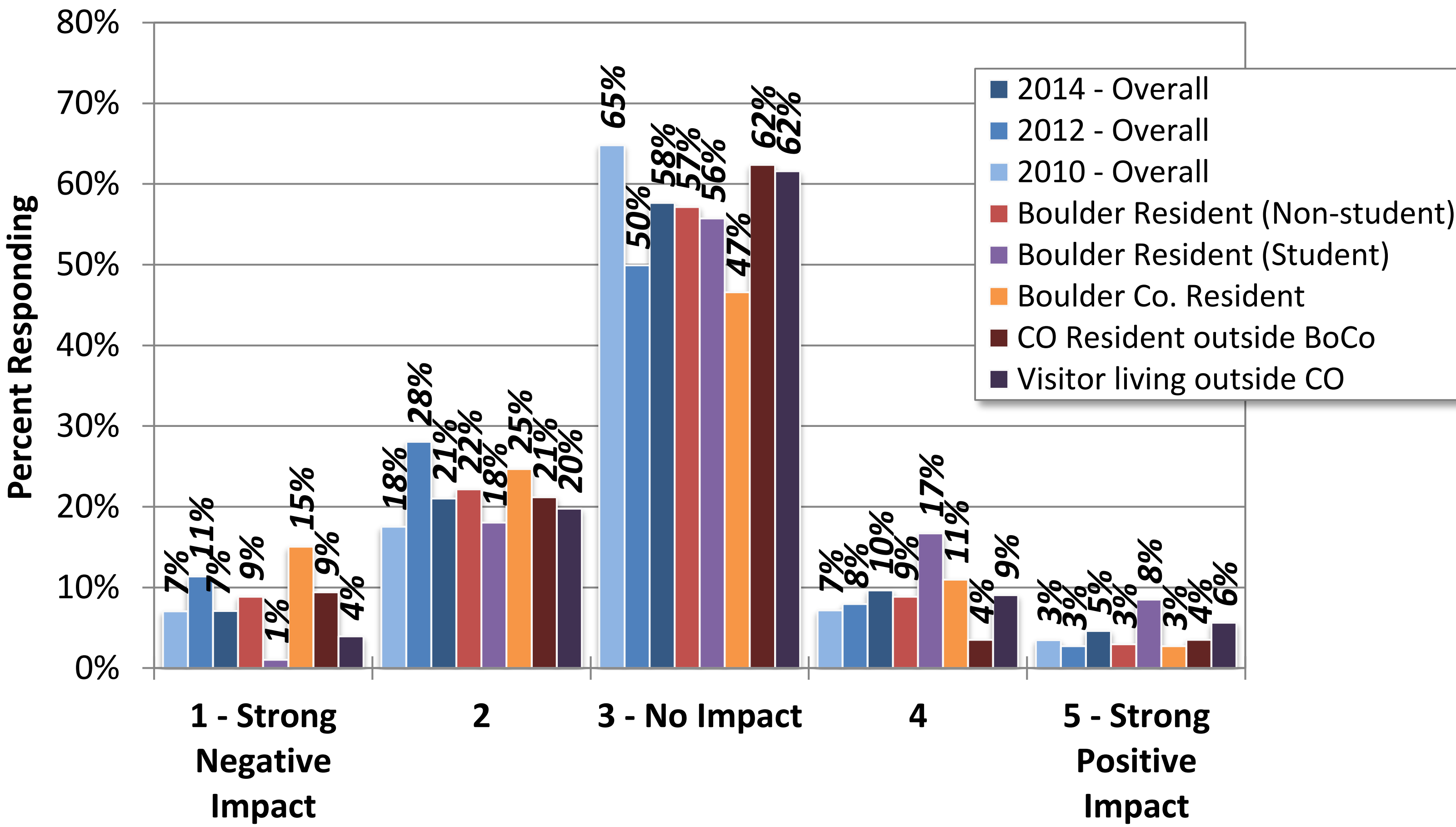


Transient Behavior

- 58% of respondents indicate that transient activities/behaviors have no impact on downtown experience
- 28% said transient behavior has a negative impact, while 14% said it has a positive impact
- Overall perceptions are less negative than in 2012
- Boulder County residents most likely to note negative impact while student residents of Boulder least likely

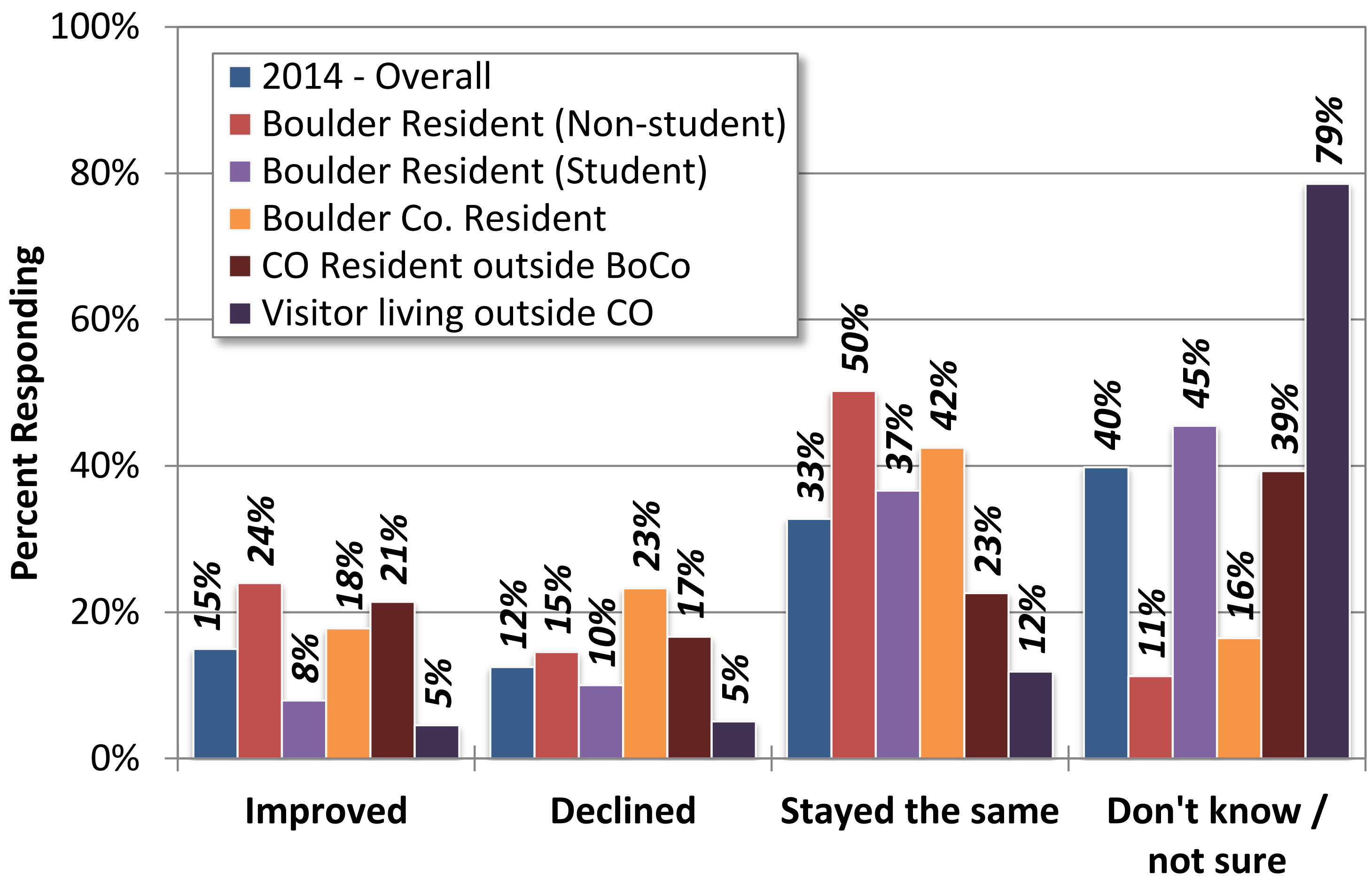
Transient Behavior

Perceptions of Impact by Year and Visitor Type



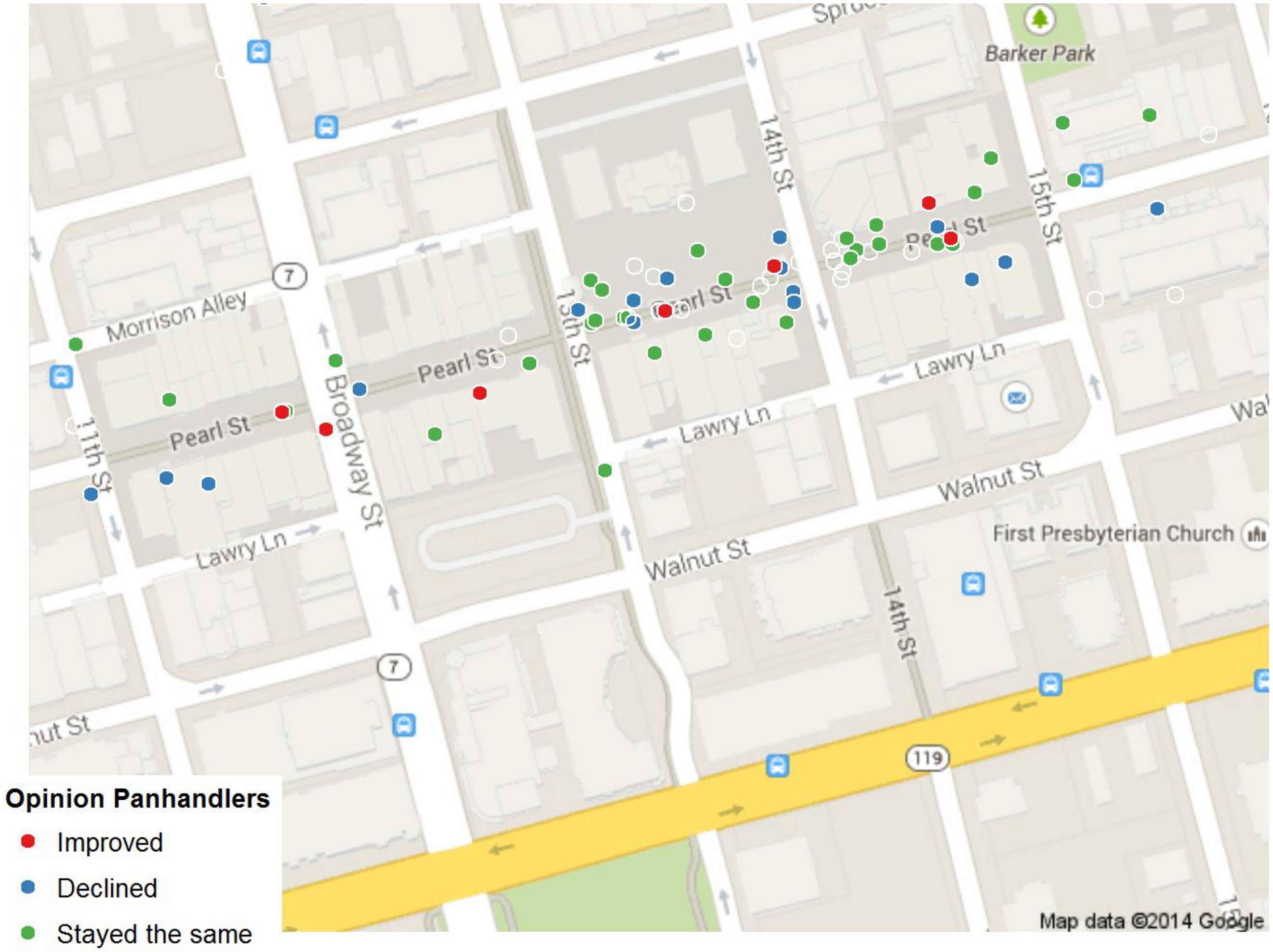
Transient Behavior

Improving or Declining by Overall and Visitor Type



Transient Behavior

Improving or Declining by Visitor Type



Marketing & Media

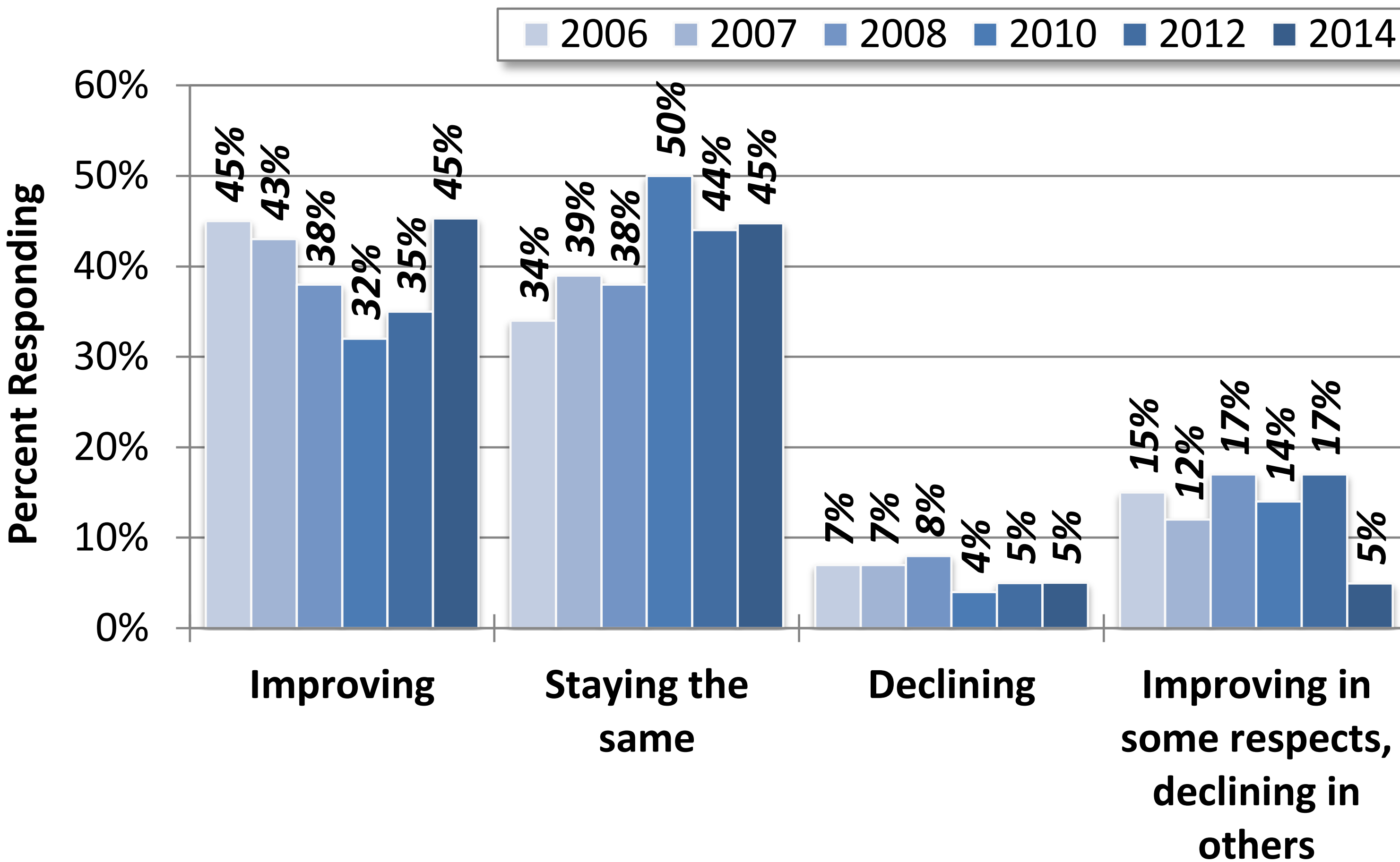
- Of those who were aware of Downtown Boulder advertising (6%), they most commonly saw or heard the following sources:
  - Downtown Boulder Visitor Guide (25%)
  - “Other” (23%)
  - General article or feature article (18%)

Satisfaction

- When asked about opinions on the general direction of downtown experience, most respondents indicated it was improving (45%) or staying the same (45%)
  - Highest share of respondents noting the experience has been improving since 2006
- General satisfaction very high
- Highest rated aspects of the experience:
  - Sense of security/safety
  - Overall cleanliness and maintenance
  - Family orientation/kids play areas

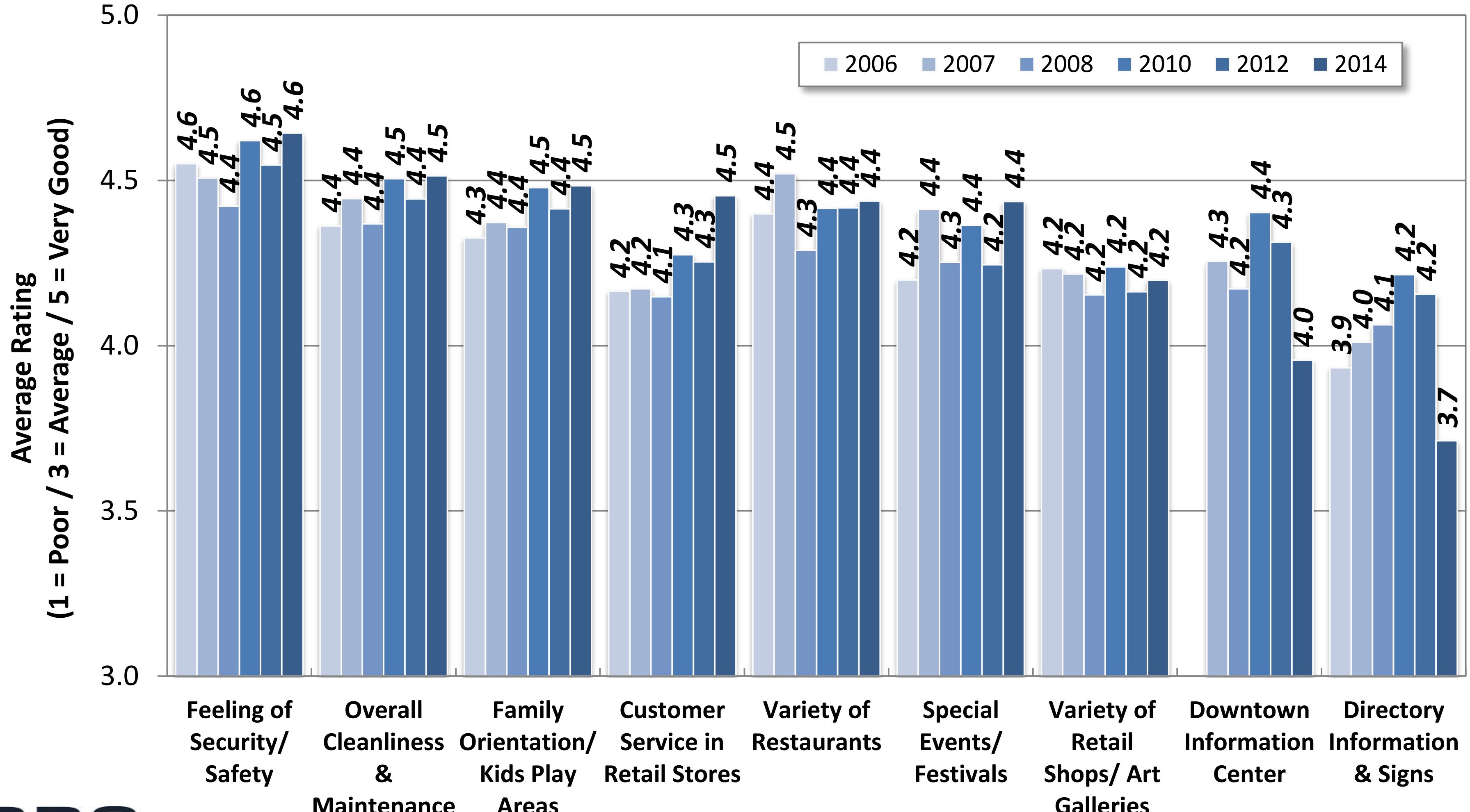
Satisfaction

Improving or Declining by Year



Satisfaction

Ratings of the Downtown Experience by Year

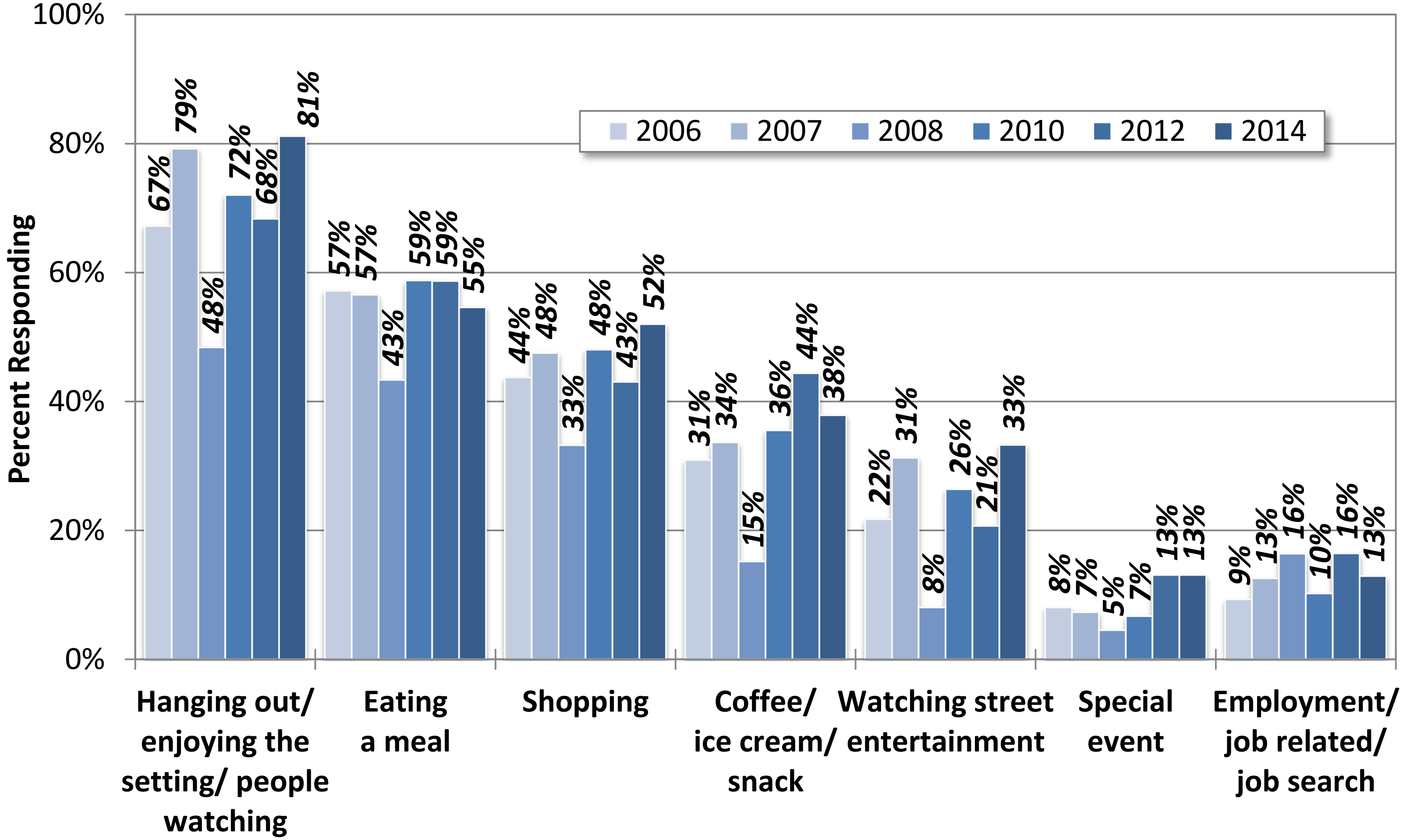


Motivation to Visit

- Primary reason for coming downtown
  - Hanging out/enjoying the setting/people watching (34%)
  - Eating a meal (22%)
  - Shopping (14%)
  - Employment-related (11%)
- All activities engaged in during visit
  - Hanging out (81%)
  - Eating a meal (55%)
  - Shopping (52%)
  - Coffee/ice cream/snack (38%)
  - Watching street entertainment (33%)

Motivations to Visit

All Activities This Visit by Year

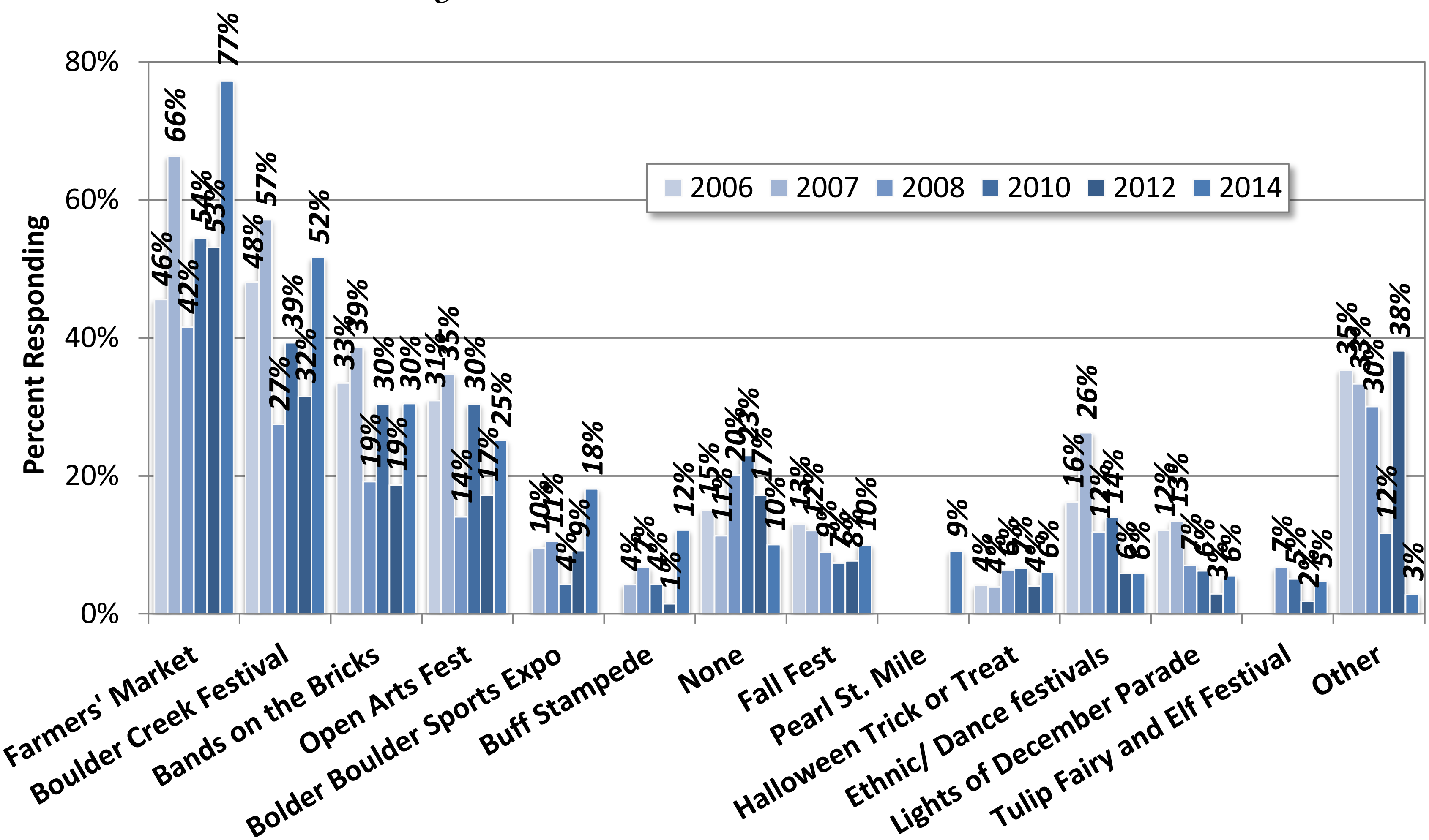


Special Events

- Farmer's Market is the most popular event (77%), showing a significant increase in the share of visitors drawn Downtown to attend
  - Boulder Creek Festival (52%), Bands on the Bricks (30%), Open Arts Fest (25%), and Bolder Boulder Sports Expo (18%) also attracted notable attendance
- Fewer Boulder residents attending events in neighboring communities than in 2012

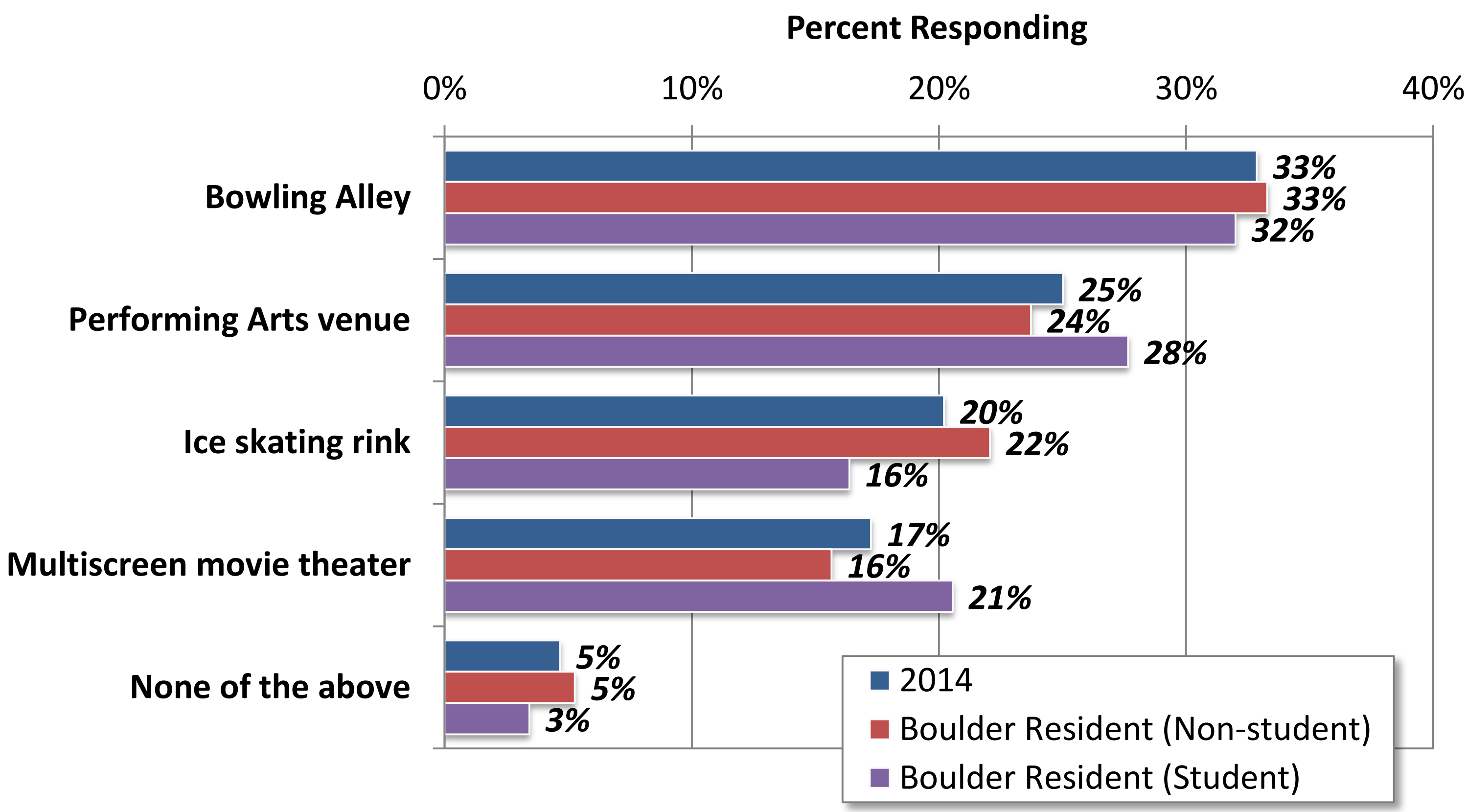
Special Events

Special Events Attended by Year



Desired Amenities

Entertainment Venues Desired by Overall and City of Boulder Visitor Type



Additional Stores Desired

- *Burger/sandwich shop or Jewish deli*
- *Food trucks*
- *Cupcake shop*
- *Donut/bagel/pastry shop*
- *More brunch places*
- *More diversity like incentives for ethnic bookstores and community centers or shared spaces*
- *Salad shop like Mod Market and Mad Greens and dual piano upscale bar or speakeasy*
- *Steakhouse restaurant*

Additional Comments

- *Covered areas for when its raining*
- *Downtown Pearl street rewards program with a point system and stores participate and offer gifts/special discounts*
- *Drinking fountains that are easier to fill water bottles*
- *Hard to see street signs, fix and improve ground level pay stations*
- *Have designated area for street performers that do not get in the way of the flow of foot traffic*
- *It would be cool to have an open container law after a certain hour so you could walk from bar to bar with a drink*
- *No diversity in the population. Promoting events for diversity like the World Cup on Pearl Street*

Conclusions and Takeaways

- Very positive feedback related to the overall experience and with individual aspects of Downtown
- Feeling of safety & security as high as it's ever been
- Homeless situation seen as having little impact and not changing to a great degree over the past few years
- Visitor Center, signs, parking availability potential areas for improvement
- Diversity of user base a key strength
- Alternate transportation modes increasing
- A wonderful place to hang out and bring your out-of-town family

Thank you!

Discussion & Questions