Downtown Boulder User Survey
Summer 2012

Final Report

Prepared for:

Downtown Boulder Inc.

Boulder Convention & Visitors Bureau

City of Boulder Downtown Management Commission

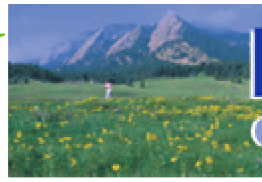
Prepared by:

RRC Associates, Inc.

4940 Pearl East Circle, Ste 103
Boulder, CO 80301
303/449-6558
www.rrcassoc.com

RRC ASSOCIATES
An STR Company

TABLE *of* CONTENTS



USER SURVEY SUMMARY **SUMMER 2012**

Introduction

This report summarizes the results of the 2012 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 750 interviews were completed during the research period between late July 2012 and mid-September 2012.

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 has been conducted annually, with a brief hiatus in 2009 and 2011, for the past 14 summers. 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 mall 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 B-Cycle, panhandlers' behavior, suggestions for improvements, and other important issues. Additionally, Boulder County residents were asked about competitive issues (including the frequency of visiting other major shopping areas), awareness of downtown parking alternatives, 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 Downtown Boulder, Inc, 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 16th Street. Similar to the research conducted in 2010 and prior years, the surveys were concentrated on the pedestrian area of Pearl Street Mall, though a portion of the research was done both one block 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 2012 survey is the seventeenth Downtown Boulder User Survey that RRC Associates has conducted for Downtown Boulder, Inc., the City of Boulder, and the Boulder Convention & Visitors Bureau. In this report, the 2012 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 and County residents); as a result, only the segment to which the question was posed is discussed. In other situations, however, only the segments with notable changes are discussed in an effort to highlight a particular issue and avoid repetitive, less noteworthy situations.

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.
- Local: Residents of the City of Boulder and Boulder County (non-City) but delineated when appropriate. In addition, City of Boulder residents are segmented as non-student and student.
- Boulder County resident: Living in Boulder County, outside the City of Boulder.
- Colorado resident: Colorado visitors residing outside Boulder County.
- Visitor residing outside Colorado: Except for an initial discussion of visitor mix residency, this term includes US visitors residing in other states, international visitors and part-time/summer resident.
- Overnight visitor: Visitors staying the night regardless of residency.

Executive Summary

This brief section highlights some of the most important and most 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 surveys documented a similar mix of users to historic results, including residents of the city of Boulder (32 percent total user mix) and out-of-state visitors (29 percent).
- Spending Penetration and Amounts. The ***percentage of respondents spending money declined somewhat*** (84 percent, down from 89 percent). However, the ***average spending amount was up*** to $60.23 per person, up from $52.12 in 2010. In particular, average spending at restaurants/bars rebounded from 2010 to return to 2008 levels.
- General Satisfaction. ***Levels of satisfaction were generally very high***, though down slightly from exceptionally high levels in 2010. Most highly rated were the feeling of security/safety, the overall cleanliness & maintenance, family orientation/kids play areas, and variety of restaurants.
- Transients. Results show that the presence of transients had a more negative impact on the experience this summer compared to 2010. Half (50 percent) said it has no impact (3 on a one to five scale). ***Thirty-nine percent said it has a negative impact*** (up from 25 percent), while 11 percent said it has a positive impact (up slightly from 10 percent). Clearly, the overall opinion is a more negative impact on the experience than in 2010.
- Parking Satisfaction. ***Satisfaction with parking was good overall***, though lower than levels recorded in 2010. Satisfaction is particularly high among out of state visitors but relatively low among city residents. Overall satisfaction with parking in downtown declined to 3.9, down from 4.1. Notably, city of Boulder residents (non-students) exhibit the lowest satisfaction with the ease use of pay stations (3.8), even though they would presumably be the most familiar with the pay stations
- Demographics. The demographic results show a ***healthy and diverse mix*** of different ages, incomes, and household status among downtown users. The average age is 42.3 years, with a gender split of about 50-50.
- Special Events. Among the various specific events, ***Farmer's Market, Boulder Creek Festival, Bands on the Bricks, and Art Fair*** proved to be the most popular.
- Primary Motivations for Visiting. The number one reason for visiting downtown Boulder is "***enjoying the setting/ people watching/ hanging out***," as 26 percent overall cited it as the primary reason for coming downtown. Visitors from out of state are particularly apt to mention this reason (40 percent). Other primary reasons for visiting downtown include a meal (15 percent), employment reasons (15 percent), or shopping (13 percent).

Final Report Findings

Visitor Mix

This survey defines visitors by residency in broad terms (City, County, State, International and part-time/summer residents) and by segmenting the largest, local population into locations within Boulder County and City. All categories are presented below with relevant highlights.

- Full-time City of Boulder residents. The largest group of Downtown users this summer was residents of the city of Boulder; the proportion of survey respondents who live in Boulder was 32 percent, up from 29 percent in 2010, though somewhat below the traditional range of about 35 to 37 percent historically.
    - Residence within Boulder. Of those living in the City, 27 percent live in the immediate Downtown core area (within a five-minute walk of Downtown), 23 percent reside in North Boulder, 21 percent live in Central/West Boulder (beyond the 5-minute walking radius), and 12 percent live in South Boulder. This distribution suggests that the Downtown area has a broad appeal, beyond just those who live in the immediate vicinity. The fluctuations over the past several years evince the popularity of the area with residents of various parts of the city. Despite these minor year-to-year fluctuations, the general rank order of the importance of the neighborhoods remains the same, with the greatest reliance on the closest residents (Downtown core area, followed by North Boulder and Central/West Boulder).
- US visitors residing outside Colorado. The second largest group of Downtown users this summer was out of state US residents (27 percent, typical of the historical range of 25 to 27 percent). This important group shows the overall broad appeal of the downtown area in general and the importance of out of state tourism to Boulder in particular.
- Colorado residents outside Boulder County. The third largest group of Downtown users is Colorado residents outside Boulder County (21 percent this year, stable from 2010). This group is generally from the Denver metro area outside of Boulder County (like Denver, Broomfield, Arvada, Aurora, and others).
- Boulder County residents outside the City of Boulder. This group, primarily residents of Longmont, Louisville, and Lafayette, represents 11 percent of the total user mix downtown, slightly lower compared to historical results.
- International visitors and part-time/summer residents. As in previous years, these segments combined account for less than 10 percent of the overall mix (5 percent part-time/summer residents of Boulder, 3 percent international). While small overall, they contribute to the vibrant mix of visitors to the downtown area.

Figure 1
User Profile
By Year

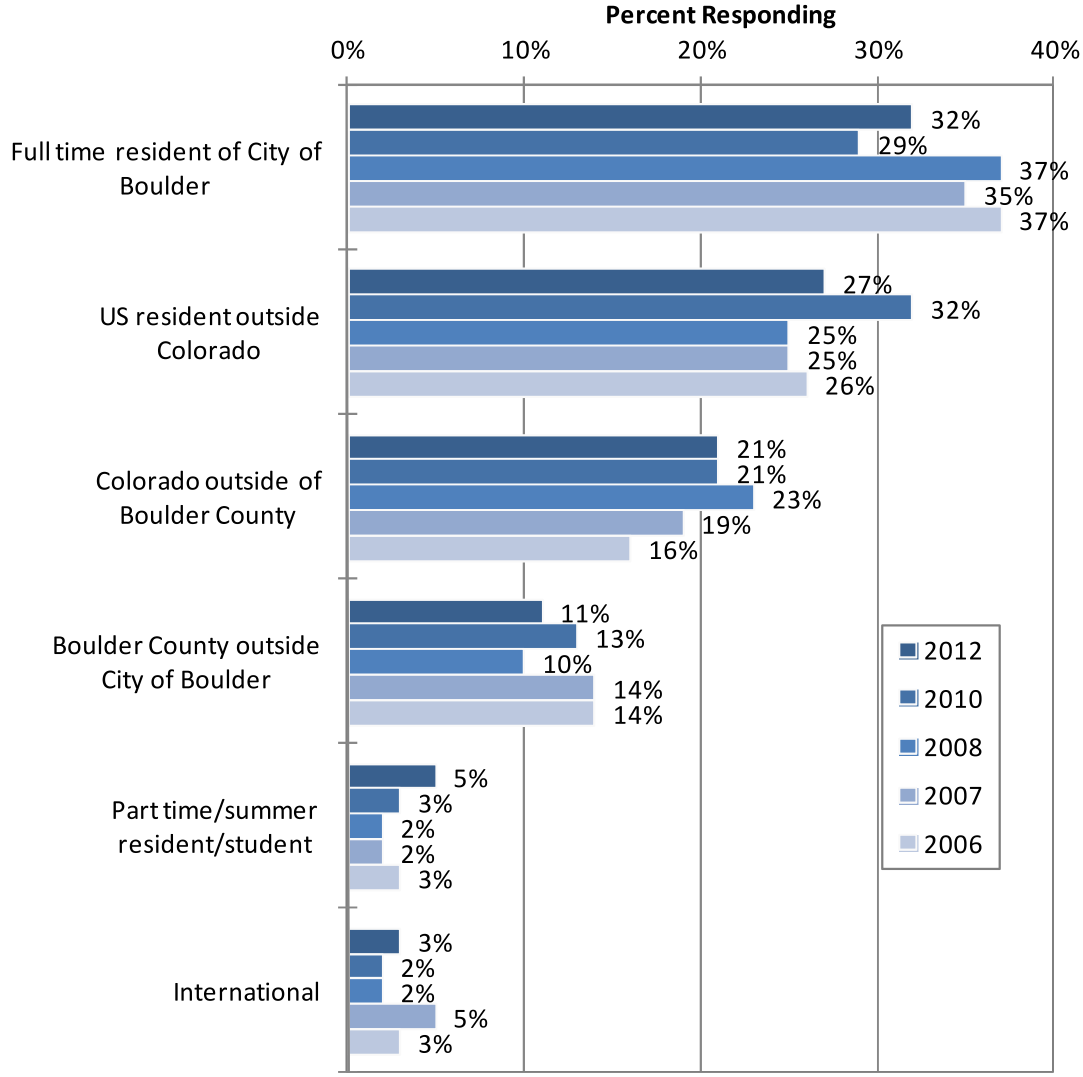
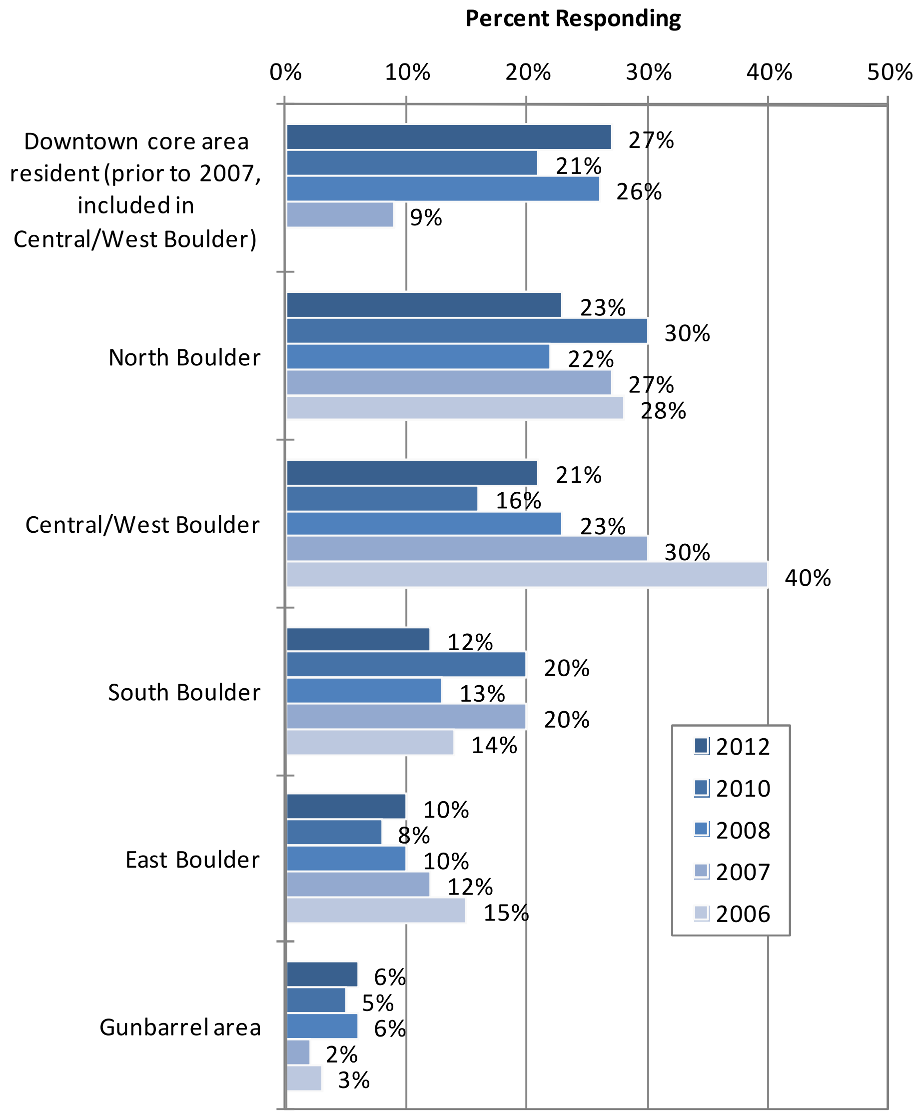


Figure 2
In What Part of the City of Boulder do you Live?
By Year



Overnight Visitors

Among those who live outside Boulder County (57 percent of all users), 47 percent were spending the night in the Boulder area, and the other 53 percent were visiting 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, 49 percent were staying with family or friends, and 45 percent were staying in commercial lodging, including 36 percent in commercial lodging in the city of Boulder and 9 percent in commercial lodging outside the city but in the Boulder area. The remaining 9 percent were staying in other locations.
- Length of Stay. The average length of stay in Boulder is 4.9 nights, with a median of 4 nights. These results show a relatively lengthy visit to the area, which contributes to the overall economy of the city.
- Size of Travel Party. The average size of the travel party is 2.4 people, with a median of two people. The average party size was slightly lower this summer than past summers (typically about 2.7 people), with an increase in single-person parties recorded the past few summers (35 percent in 2012 and 30 percent in 2010).
- Spending Patterns. Overnight visitor spending is important to local businesses and is an important contributor to the lodging and sales tax collections. Average figures for spending were fairly consistent with historic expenditure patterns, and included Lodging ($323 per party), Shopping ($215), Dining/Entertainment ($255), and Other Spending ($38). The total amount spent in Boulder on the trip averaged $792 per travel party, with a median of $415 per travel party. This average figure is up from an average of $717, though the median is down from $450 in 2010.
- Purpose of Trip. Visiting family or friends (37 percent) and general recreation/ vacation (30 percent) are the top two reasons for visiting Boulder among overnight visitors. Business represents 12 percent of overnight trips, while combined business/ pleasure (9 percent), visiting for college reasons (8 percent), or a special event/fair/festival (4 percent) were also important motivators for visitors.
- Information Sources Used. Word of mouth and the Internet were the top two sources that visitors used to plan their trip to Boulder, with 40 percent and 42 percent, respectively, citing those sources. Twenty-eight percent said they used the experience of a prior visit, while 5 percent used a brochure and 5 percent leveraged the Downtown Boulder Guide.

Figure 3
Out-of-County User Questions
By Year

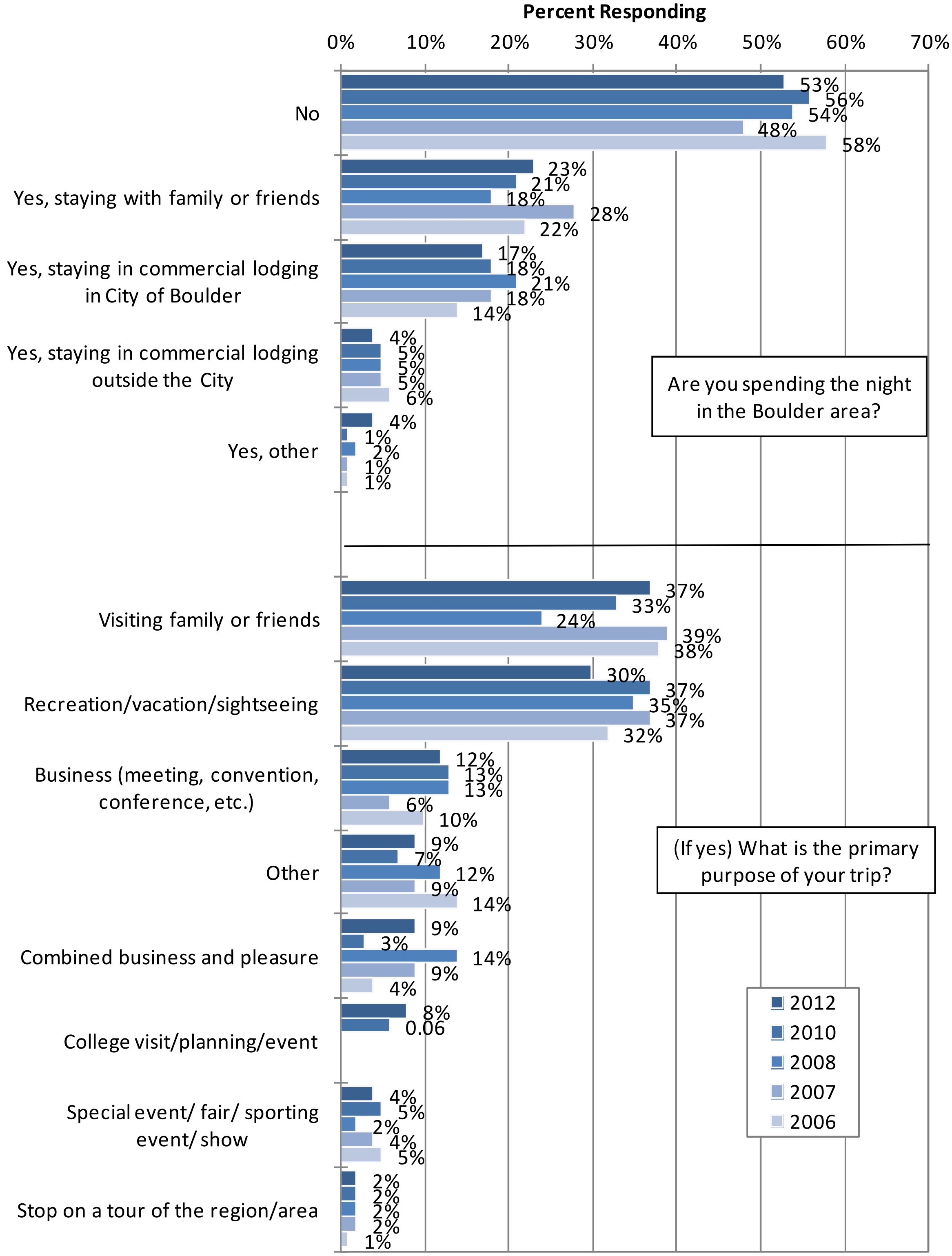
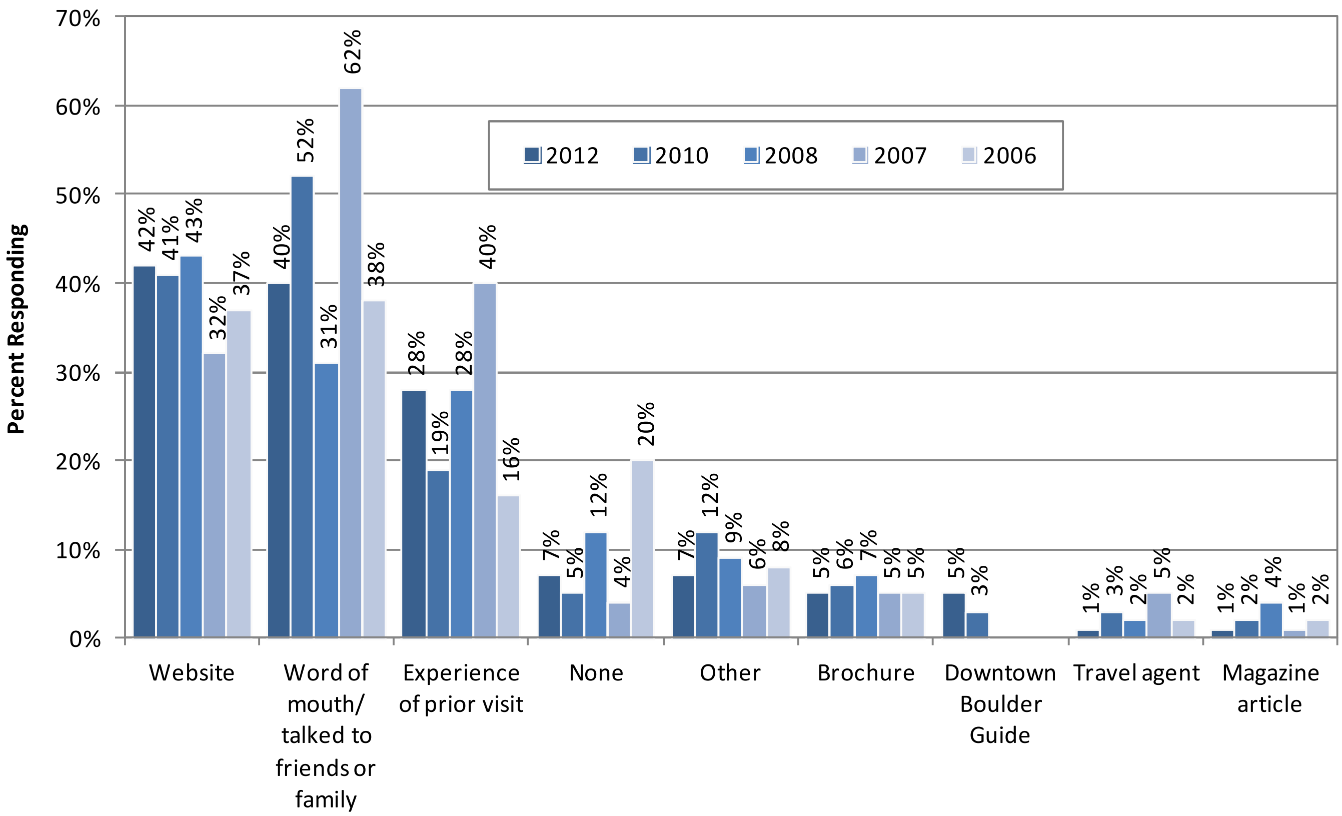


Figure 4
Information Sources Used In Trip Planning
Visitors from Outside Boulder County Only, By Year



User Demographics

The demographics of downtown users are an important result of the research program. Overall, the results show a mix of users, including students, families, empty nesters, and singles.

- Age. The average age of users is 42.3 years, somewhat higher than historical results, which have generally been about 39 to 40 years. Most of the respondents generally range in age from 25 to 64. City of Boulder residents (non-students) show the broadest age distribution between 25 and 64 (average age 43.3), while county residents tend to be somewhat older (average age 43.6), and out of state visitors older still (average age 46.6).
- Household Status. The profile shows a healthy mix of household types, with about one-third (34 percent) singles without children and slightly fewer families with children at home (28 percent). About equal proportions were couples without children (17 percent) and Empty Nesters (16 percent).
- Household Income. Household income levels were 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), 24 percent earn between $15,000 and $49,999, 17 percent earn $50,000 to $74,999, 15 percent are in the $75,000 to $99,999 bracket, 21 percent report between $100,000 and $199,999, while finally 8 percent are in the $200,000 or more category. Out of state users have the highest household income profile, with 38 percent earning over $100,000 annually.
- Gender. The gender split is almost even, with 52 percent male and 48 percent female, 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 2012 results segmented by various visitor types. The subsequent graphs also illustrate the demographic patterns historically and by 2012 user type.

Table 1
Selected User Demographics

				2010 User Type		
Demographics	2012 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%	52%	43%	51%	54%	52%
Female	48%	48%	57%	49%	46%	48%
HOUSEHOLD INCOME						
$0 - $14,999	15%	13%	59%	12%	12%	8%
$15,000 - $24,999	8%	9%	18%	13%	6%	5%
$25,000 - $49,999	16%	20%	8%	12%	21%	12%
$50,000 - $74,999	17%	18%	2%	21%	17%	18%
$75,000 - $99,999	15%	14%	2%	18%	16%	18%
$100,000 - $199,999	21%	19%	4%	21%	20%	27%
$200,000 or more	8%	6%	6%	4%	7%	11%
AGE						
20 or younger	7%	4%	30%	5%	6%	3%
21 - 24	13%	8%	45%	11%	13%	10%
25 - 34	20%	27%	19%	18%	23%	14%
35 - 44	17%	19%	4%	19%	18%	19%
45 - 54	16%	14%	1%	24%	14%	20%
55 to 64	17%	16%		16%	19%	21%
65 to 74 (2010 & prior: 65 or older)	8%	9%		7%	6%	10%
75 or older	2%	2%		1%	1%	3%
AVERAGE AGE	42.3	43.3	24.0	43.6	41.7	46.6
HOUSEHOLD STATUS						
Single, no children	28%	38%	37%	20%	25%	23%
Couple, no children	15%	13%	4%	14%	24%	13%
Household with children at home	28%	28%	7%	46%	23%	30%
Empty Nester	22%	21%		15%	22%	32%
University Student	7%		51%	5%	6%	3%

Figure 5
Visitor Demographics - Gender/Age
By Year

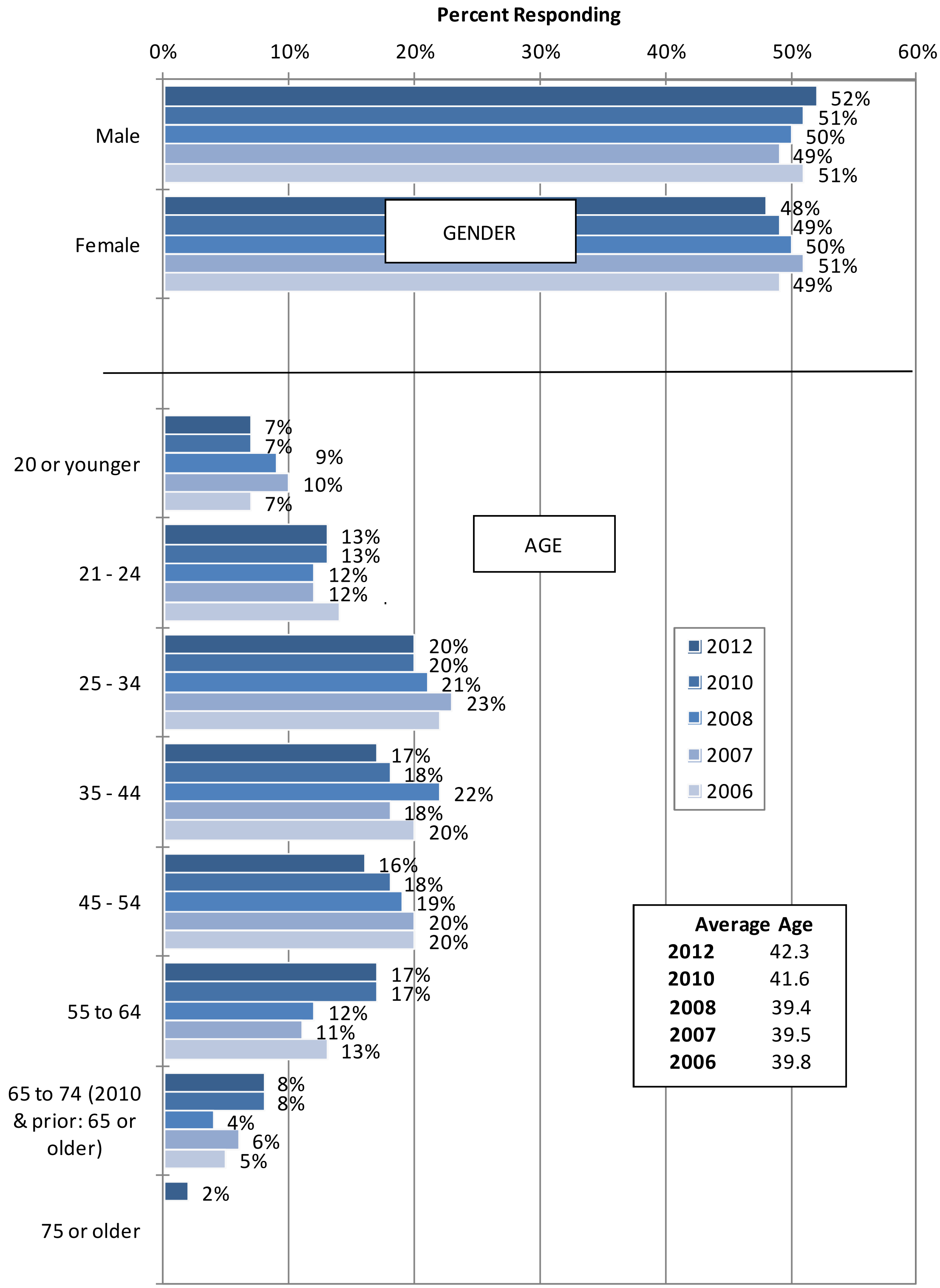


Figure 6
Visitor Demographics - Gender/Age
By 2012 Visitor Type

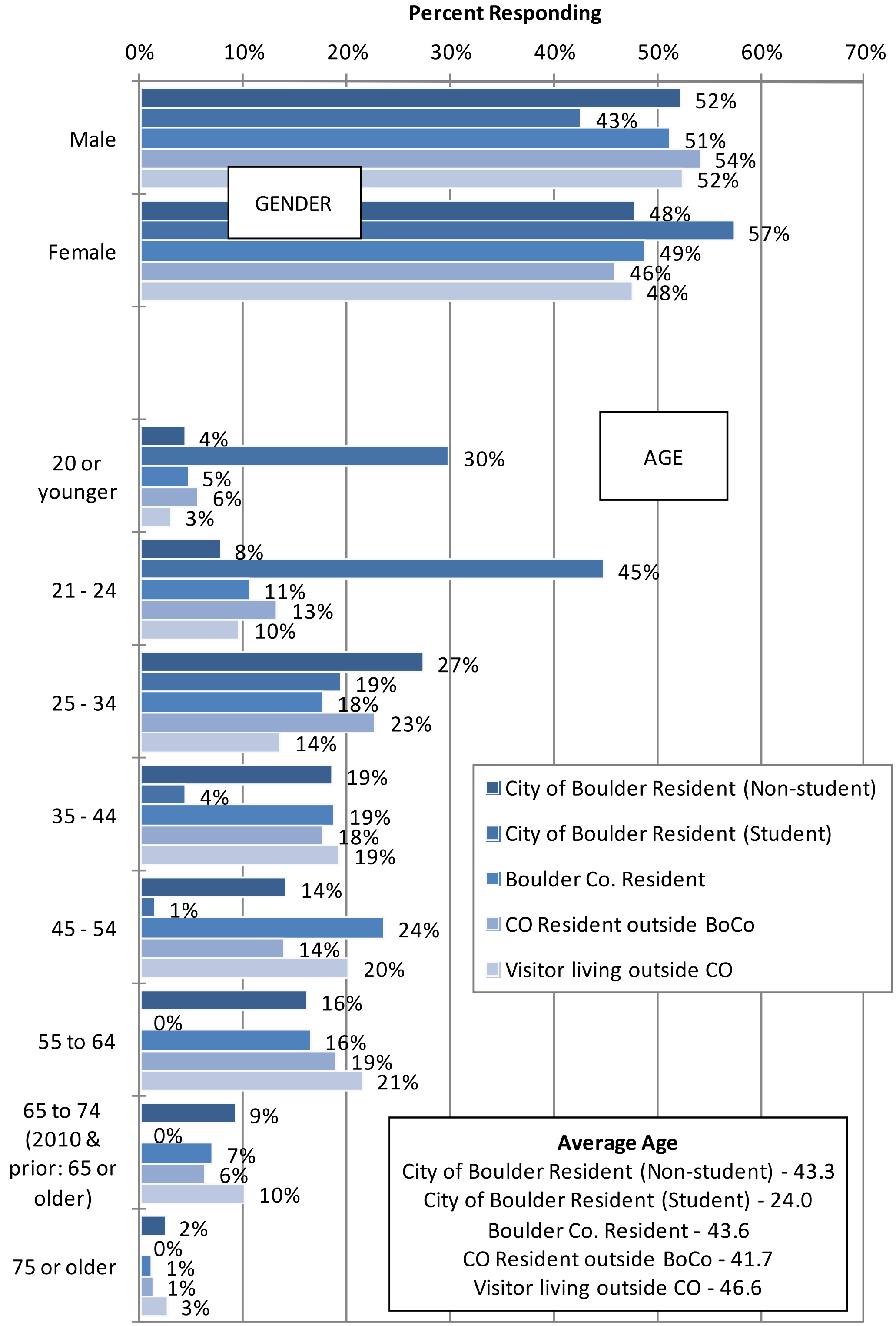


Figure 7
Visitor Demographics – Household Status/Household Income
By Year

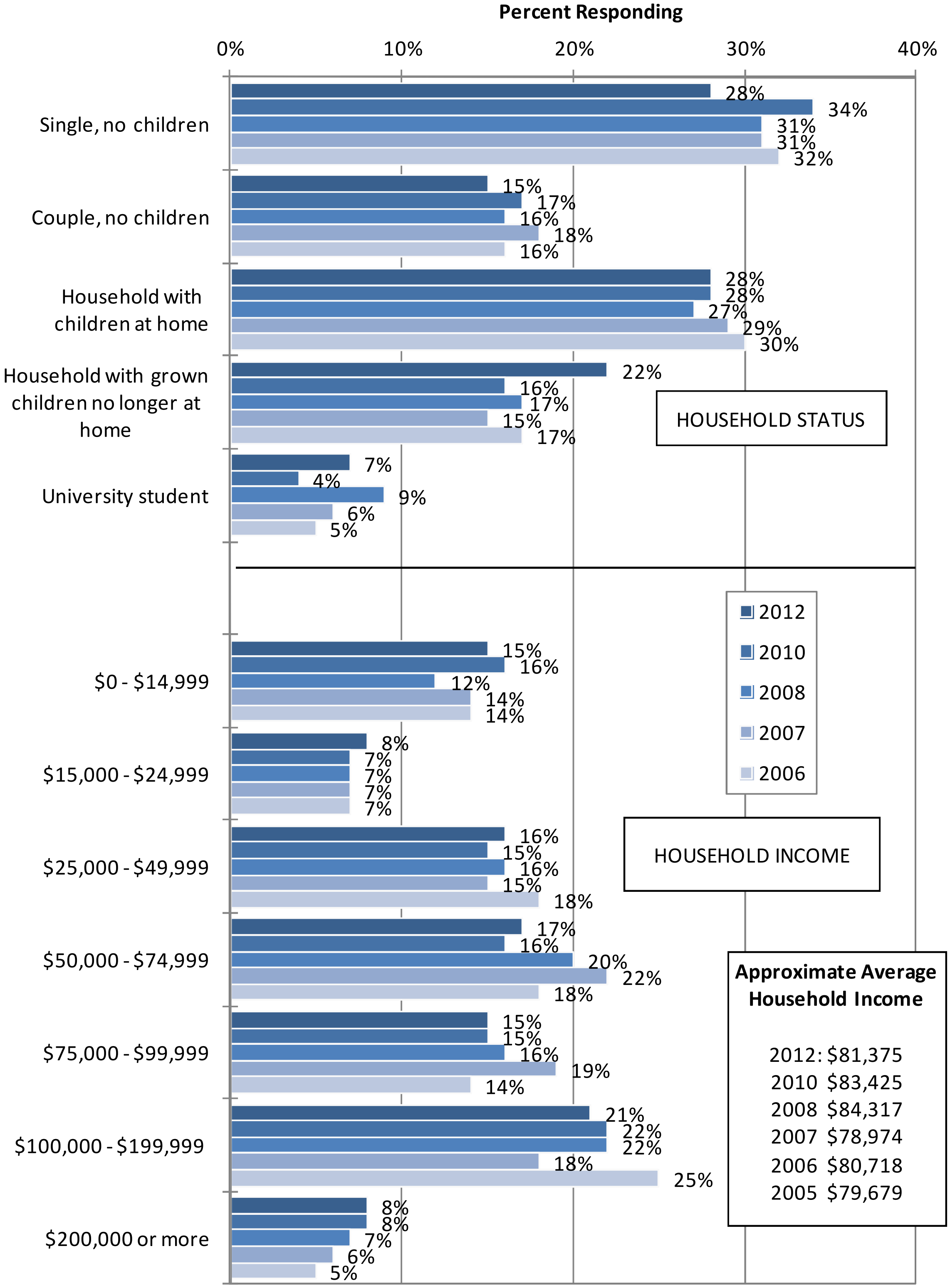
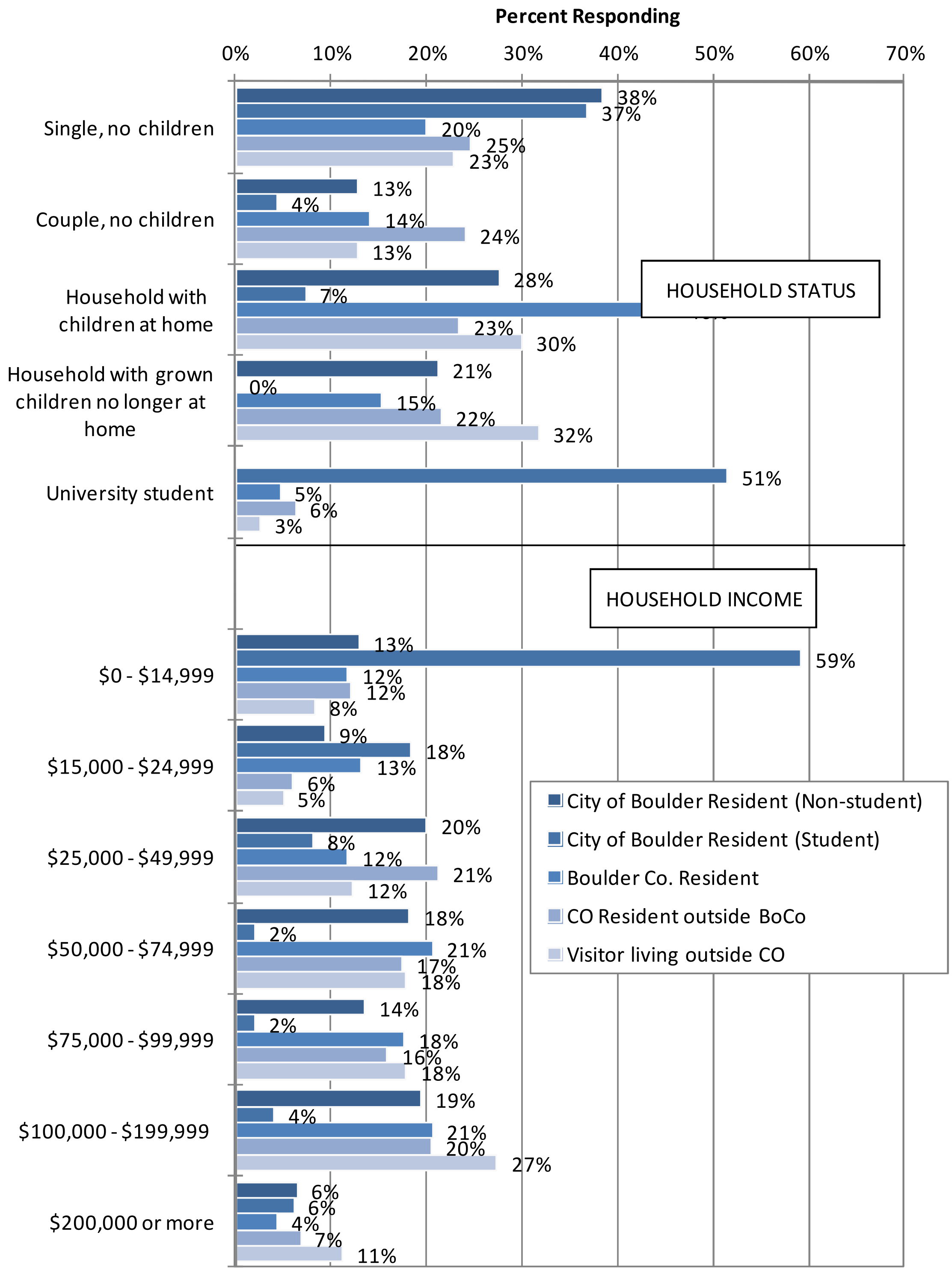


Figure 8
Visitor Demographics - Household Status/Household Income
By 2012 Visitor Type

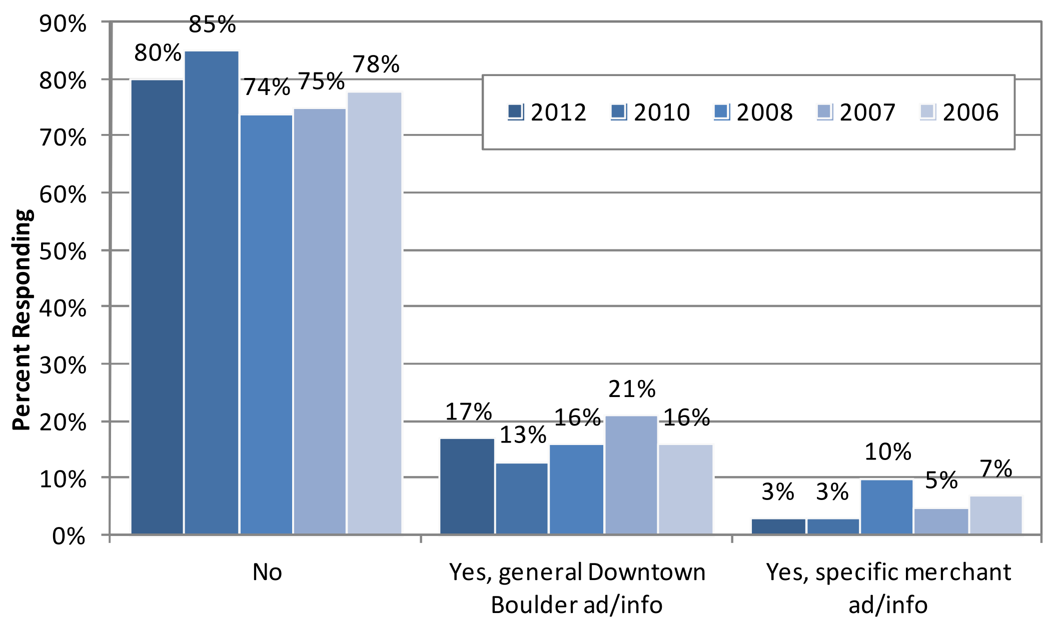


Marketing and Media

Interest exists in understanding the media consumption habits and patterns of downtown users, particularly in the fast changing environment of social media. Twenty percent indicated that they were aware of advertising or other information sources prior to their visit, aligned with historic results.

Of those who said they were aware of Downtown Boulder advertising, 38 percent said they saw it in a newspaper, 12 percent on boulderdowntown.com, 11 percent on an “other” website, and 6 percent on the radio. Additionally, 6 percent mentioned a general article or feature article as the source of the information, with another 6 percent citing the printed Downtown Boulder Guide. Three percent selected Facebook or Twitter, and 2 percent cited either 5280 magazine or 9News.

Figure 9
Advertising Awareness
By Year



Primary Reason for Visiting Downtown

The number one reason for visiting downtown Boulder is "enjoying the setting/ people watching/ hanging out," as 26 percent overall cited it as the primary reason for coming downtown. Visitors from out of state are particularly apt to mention this reason (40 percent). See Figure 10.

Other primary reasons for visiting downtown include a meal (15 percent), employment reasons (15 percent), or shopping (13 percent). Shopping is a greater draw among out-of-state users (21 percent) than it is for city or county residents (about 9 to 11 percent).

Fewer cited other factors as the primary reason, including a special event (9 percent), personal services (4 percent), coffee/ice cream/snack (3 percent), or professional services (2 percent).

Secondary Reasons for Visiting Downtown

Survey respondents were also asked about other activities they were doing while downtown. The top secondary reason is a meal (49 percent), and hanging out (49 percent), followed by coffee/ ice cream/ snack (46 percent), shopping (34 percent), and watching street entertainment (23 percent).

When combined with the primary reason discussed above, the total results in a measure of all activities people are doing downtown. Overall, enjoying the setting/ people watching/ hanging out is most popular (68 percent), followed by eating a meal (59 percent), shopping (43 percent), coffee/ice cream/snack (44 percent), and watching street entertainment (21 percent). See Figure 12. These patterns are relatively consistent across the various major user groups, with out of state residents generally participating with greater frequency in all activities compared to Boulder city and county residents. See Figure 13.

Figure 10
Primary Reason for Coming to Downtown Boulder Today
By Year

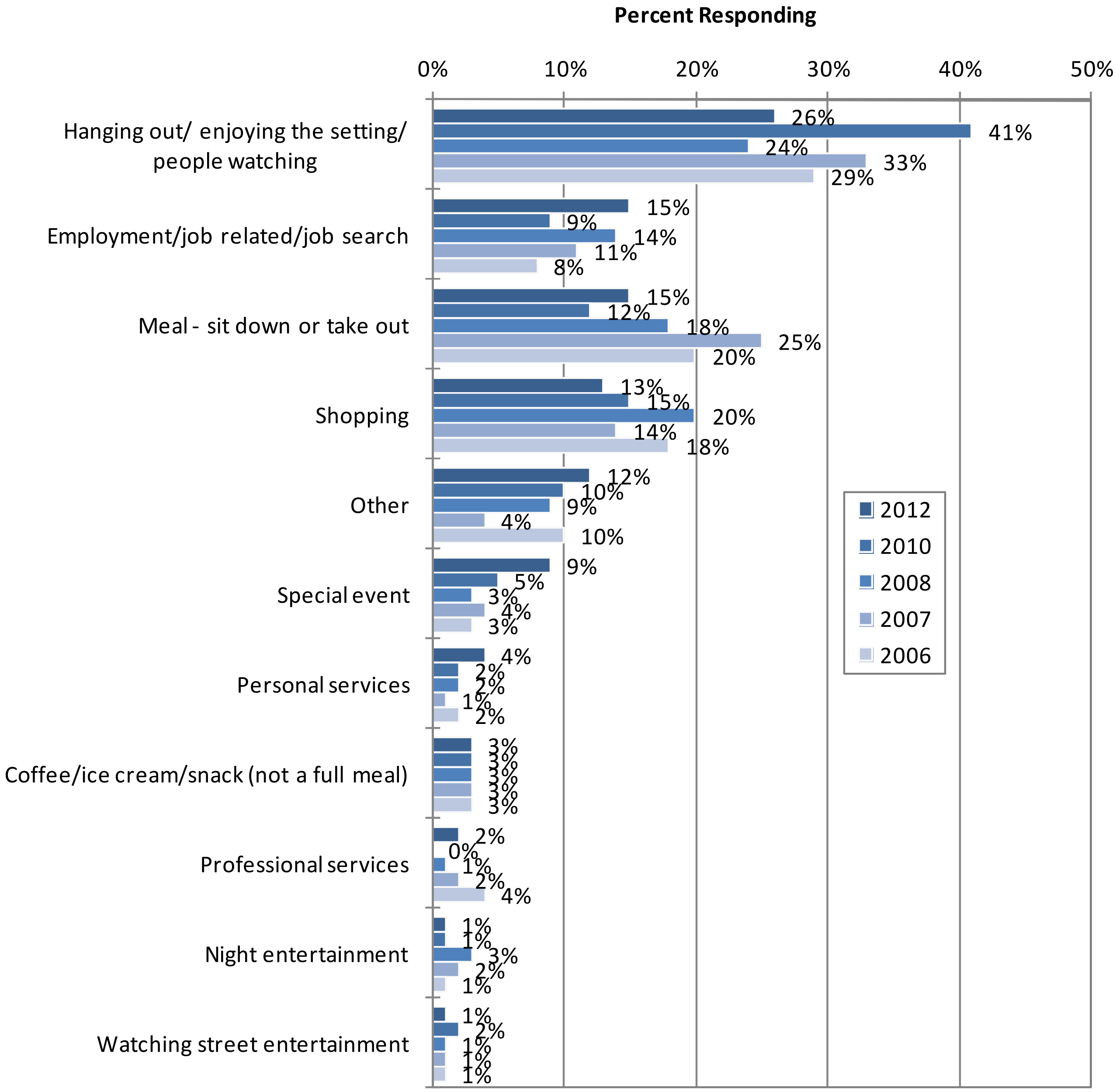


Figure 11
Primary Reason for Coming to Downtown Boulder Today
By 2012 Visitor Type

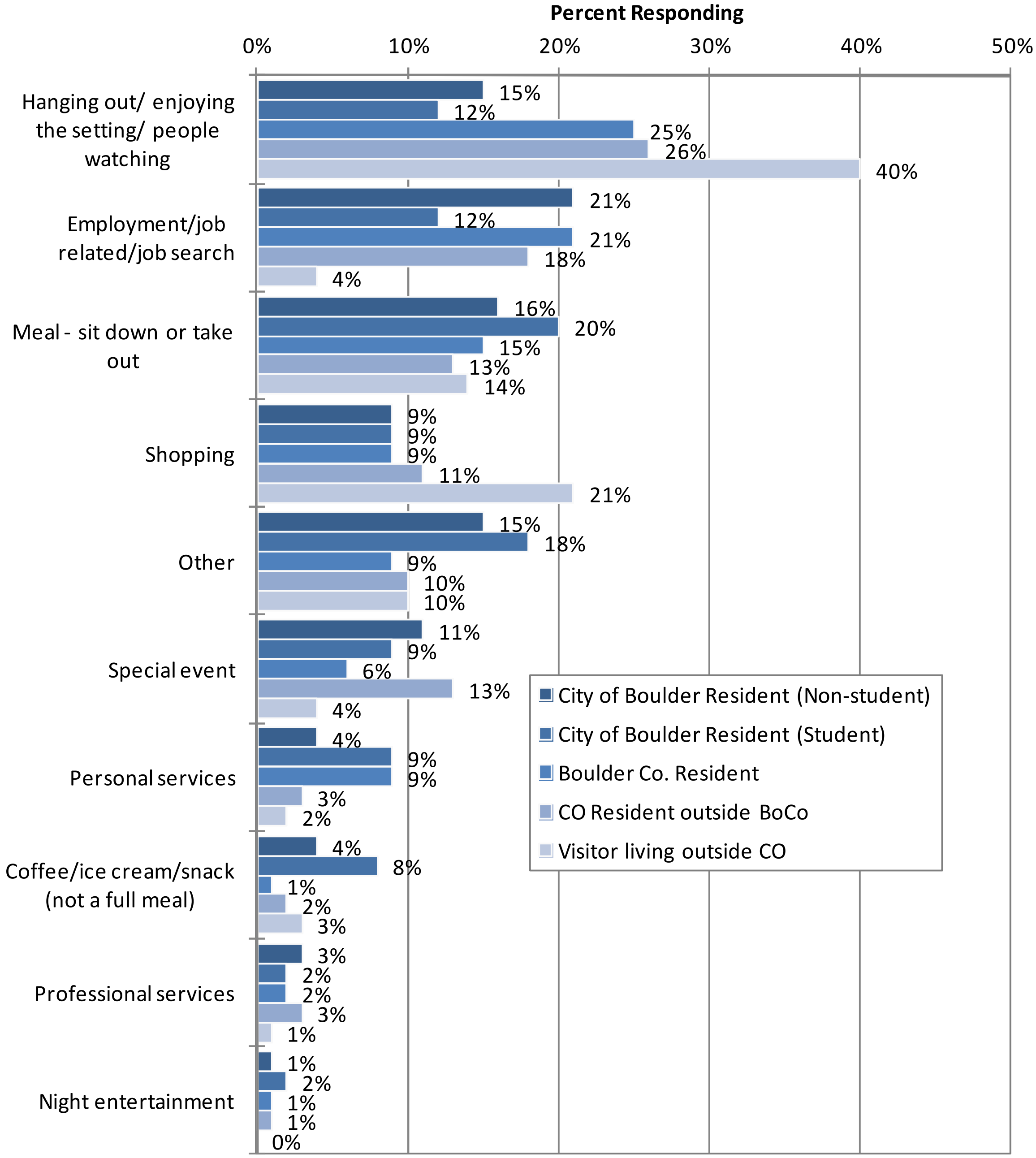


Figure 12
All Activities This Visit (Primary Activity plus Other Activities)
By Year

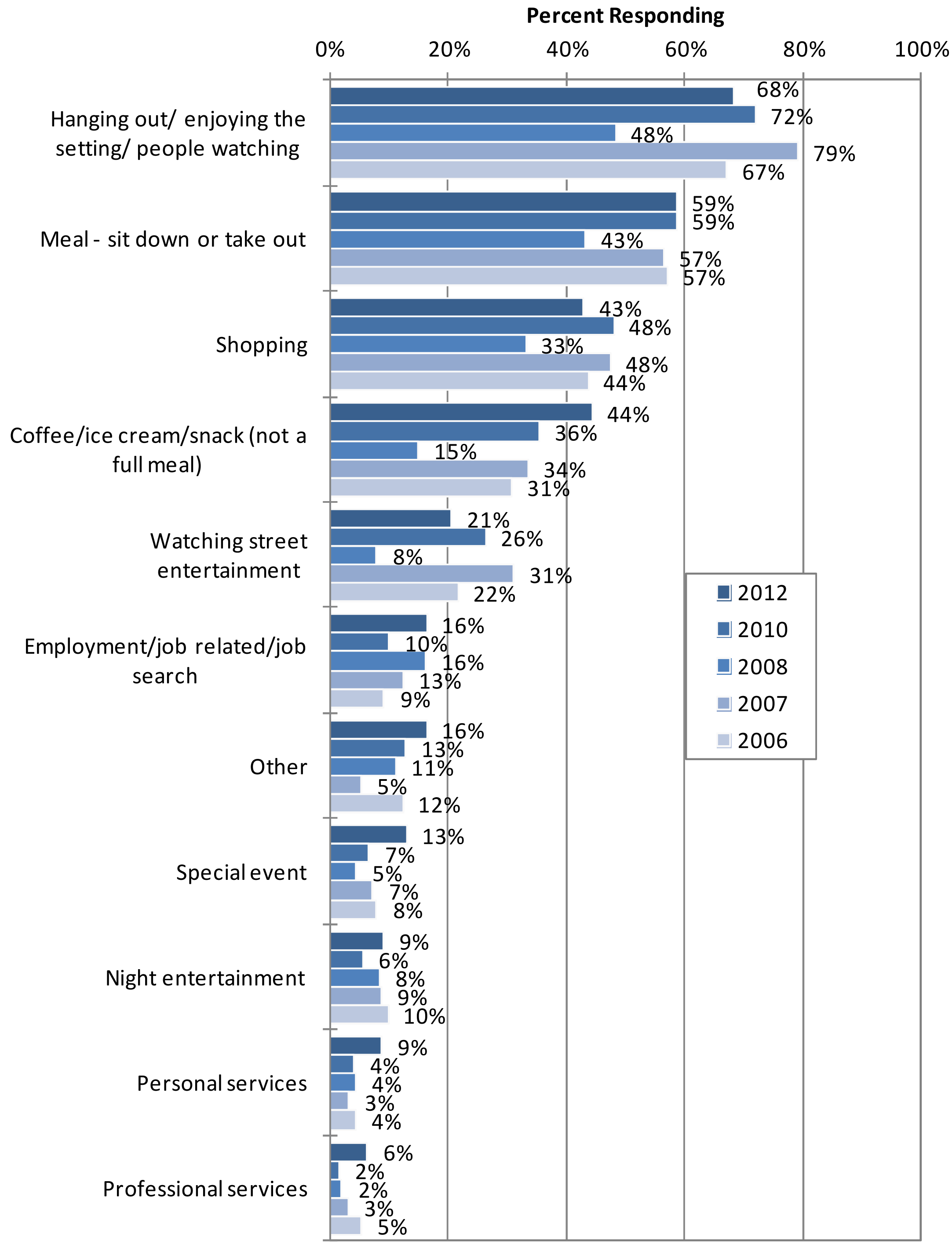
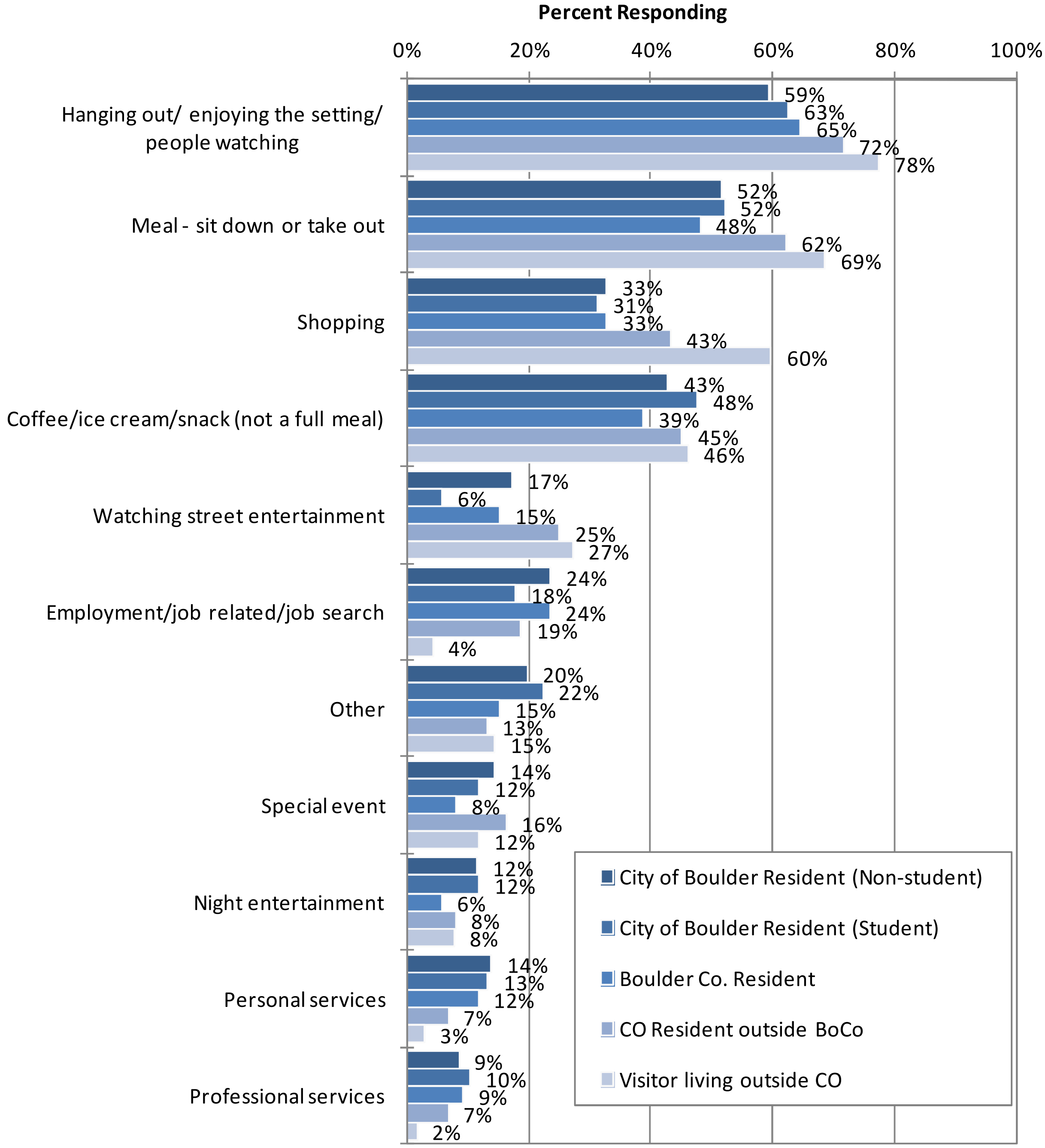


Figure 13
All Activities This Visit (Primary Activity plus Other Activities)
By 2012 Visitor Type



Spending Patterns

An important issue tackled in the survey research is the amount of money users spend while downtown. The results show that the vast majority of those surveyed indicated that they planned to spend some amount of money in the downtown area on the day they were surveyed, and the average amount per person was about $60.

- Purchase Frequency. Overall, 84 percent said they would make a purchase of some kind, down from 89 percent in 2010 and on the low end of the normative historic range. While some variations were observed depending on the visitor type (92 percent of out of state visitors planned to make a purchase, while 79 percent of students and non-student city residents planned to do the same), the general pattern is of similarly high spending frequency among all groups and all segments in the survey. See Figure 14 and Figure 15.

- Average Amount Spent. Though spending penetration was down, the average amount spent per person was up, averaging $60.23, up from $52.12. The distribution of this amount was $28.90 spent at retail stores/art galleries, $27.69 spent at restaurants/bars, and $3.64 spent in other purchases. In particular, average spending at restaurants/bars rebounded from 2010 to return to 2008 levels, while spending in retail stores was up slightly from 2010 and other spending was up by over two dollars. The table below illustrates some of the spending patterns documented in historical surveys.

Table 2A
Spending Penetration and Average Spending
2005 to 2012

	Year of Survey					
Spending Patterns	**2005**	**2006**	**2007**	**2008**	**2010**	**2012**
Percent making a 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

- Segmentation of Spending. Some variation is seen in the spending figures between different visitor segments. Most spenders made a food purchase (about 92 percent overall), but the frequency of spending in retail stores varied greatly by visitor type: out of state visitors were most likely to make a retail purchase (60 percent did) and averaged the highest amount on retail spending ($45.89), while only 33 percent of (non-student) residents of the city made a retail purchase, for an average of $14.20.

- Spending by User Type. Consistent with historic 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 $87.75 per person (including $45.89 on retail spending); Colorado out-of-county residents spent $65.22 on average per person (including $32.34 on retail). City non-student users spend an average of $39.46, less than do students ($42.55). County residents spend the least on average, at just $32.10.

Table 2B
Spending Penetration and Average Spending
2012 User Type

	2012 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	79%	79%	80%	83%	92%
Restaurant/Bar	$21.72	$20.00	$16.41	$28.86	$37.55
Retail store/Art gallery	$14.20	$19.75	$13.75	$32.34	$45.89
Other	$3.54	$2.79	$1.94	$4.02	$4.31
Total	$39.46	$42.55	$32.10	$65.22	$87.75

Figure 14
Are You Spending Money Today?
By Year

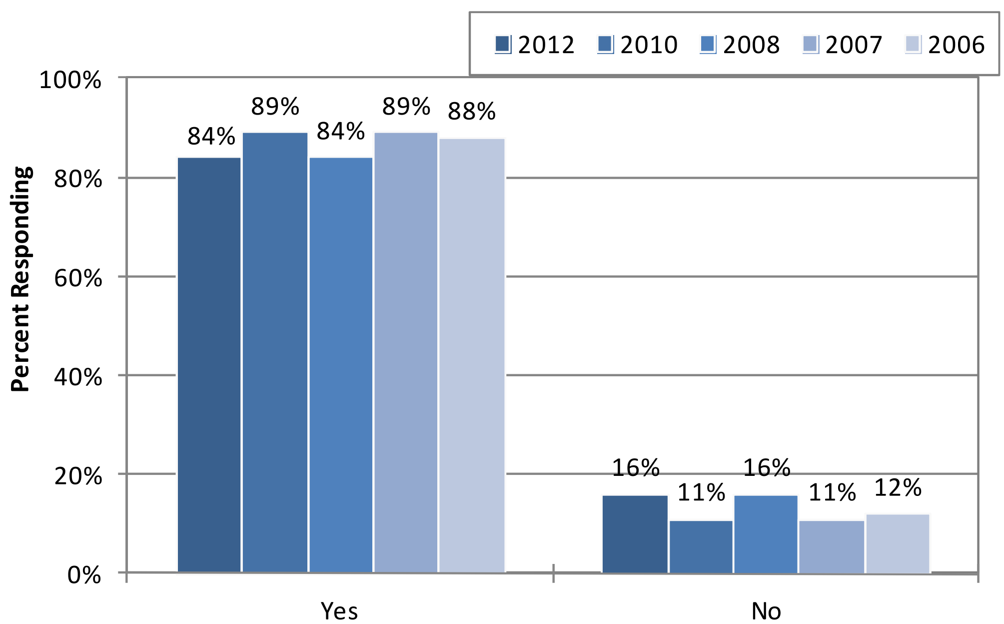


Figure 15
Are You Spending Money Today?
By 2012 Visitor Type

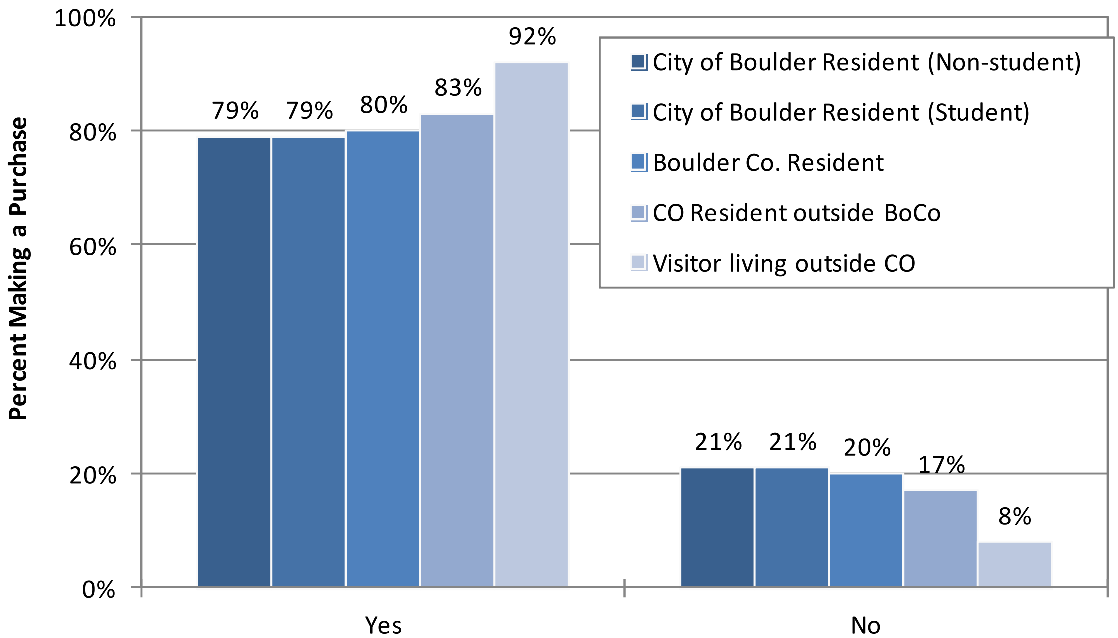


Figure 16
Average Total Spending (Not Including Non-Spenders)
By Spending Category, By Year

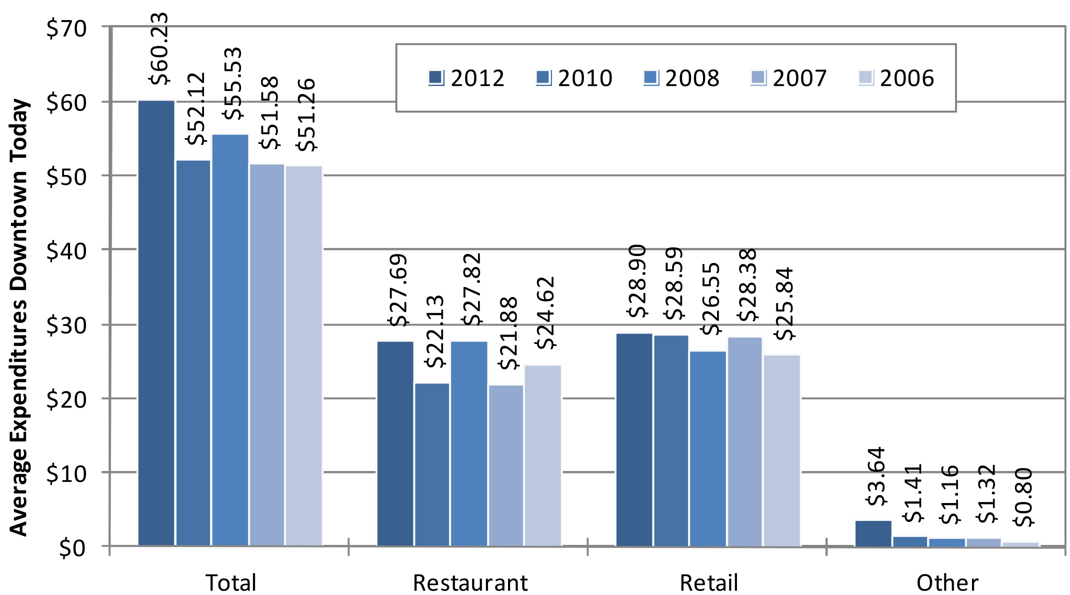


Figure 17
Average Total Spending (Not Including Non-Spenders)
By 2012 Visitor Type

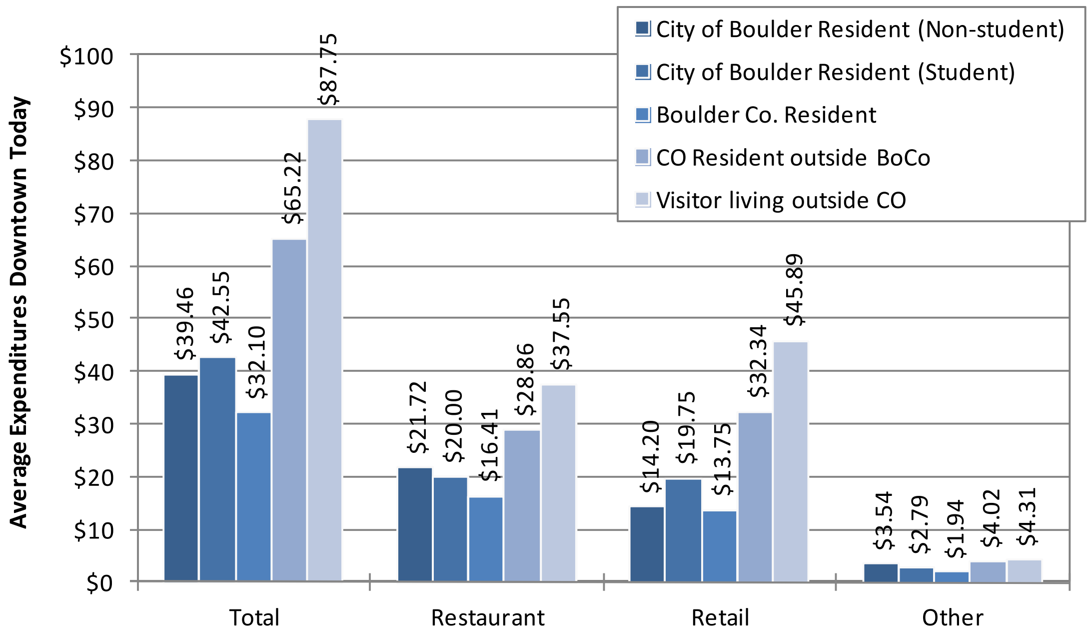
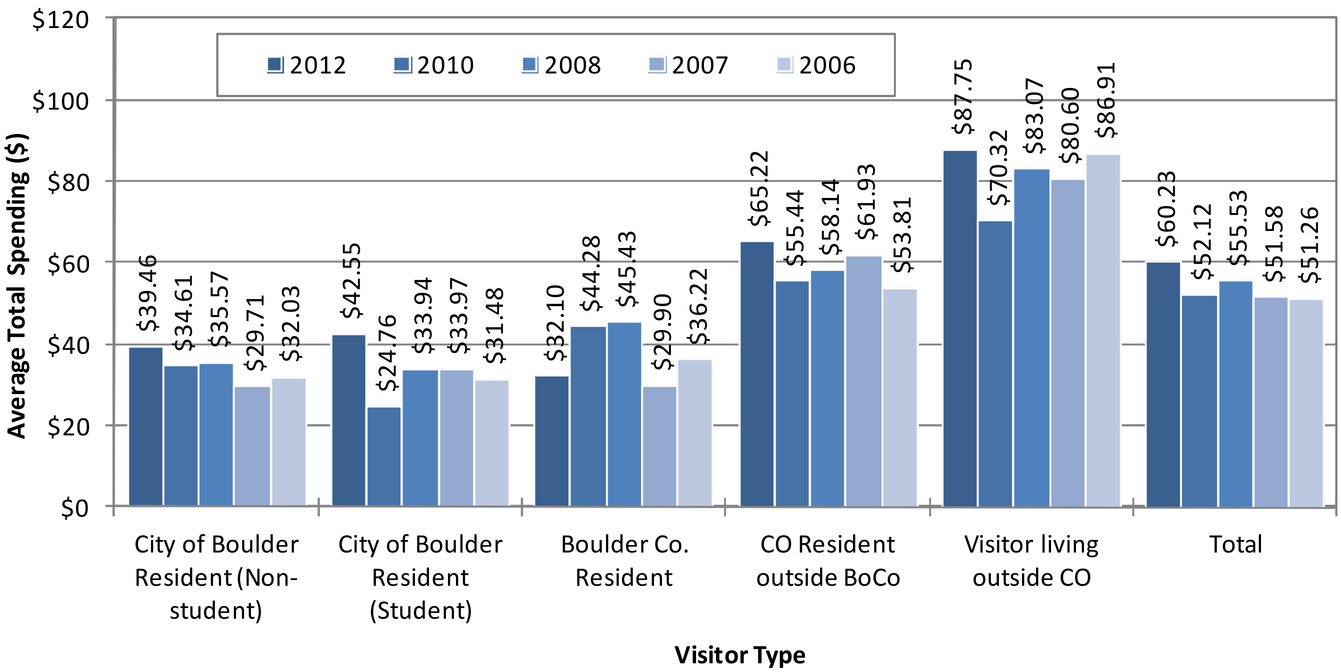


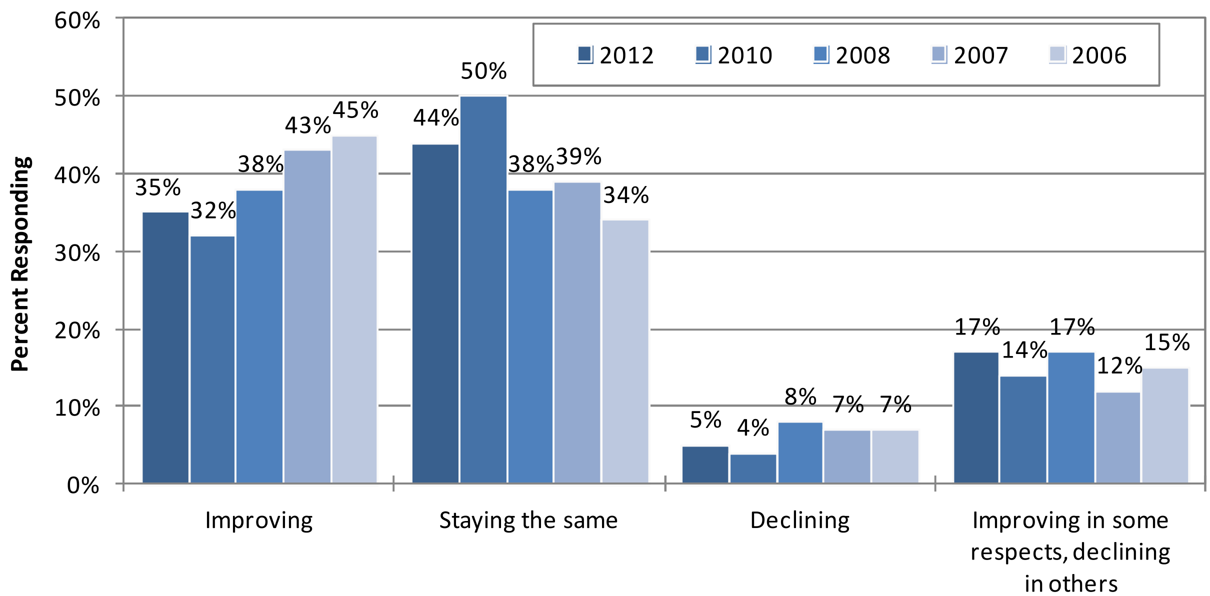
Figure 18
Average Total Spending (Not Including Non-Spenders)
By Year, By Visitor Type



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 (35 percent) or staying the same (44 percent); very few thought it was declining (5 percent). These results evince an overall positive experience in the area.

Figure 19
Downtown Experience Improving or Declining over Past Few Years



Transportation and Parking

The transportation patterns of downtown users are relatively stable, with 59 percent driving (plus 5 percent who were “dropped off”), 18 percent walking, 10 percent riding a bus, and 7 percent riding a bike. In all, 64 percent came via car and 35 percent utilized alternative modes of transport. See Figure 20. Most of those utilizing alternate modes are students (75 percent) and non-student residents of Boulder (58 percent). See Figure 21.

Figure 20
Mode of Transportation Downtown
By Year

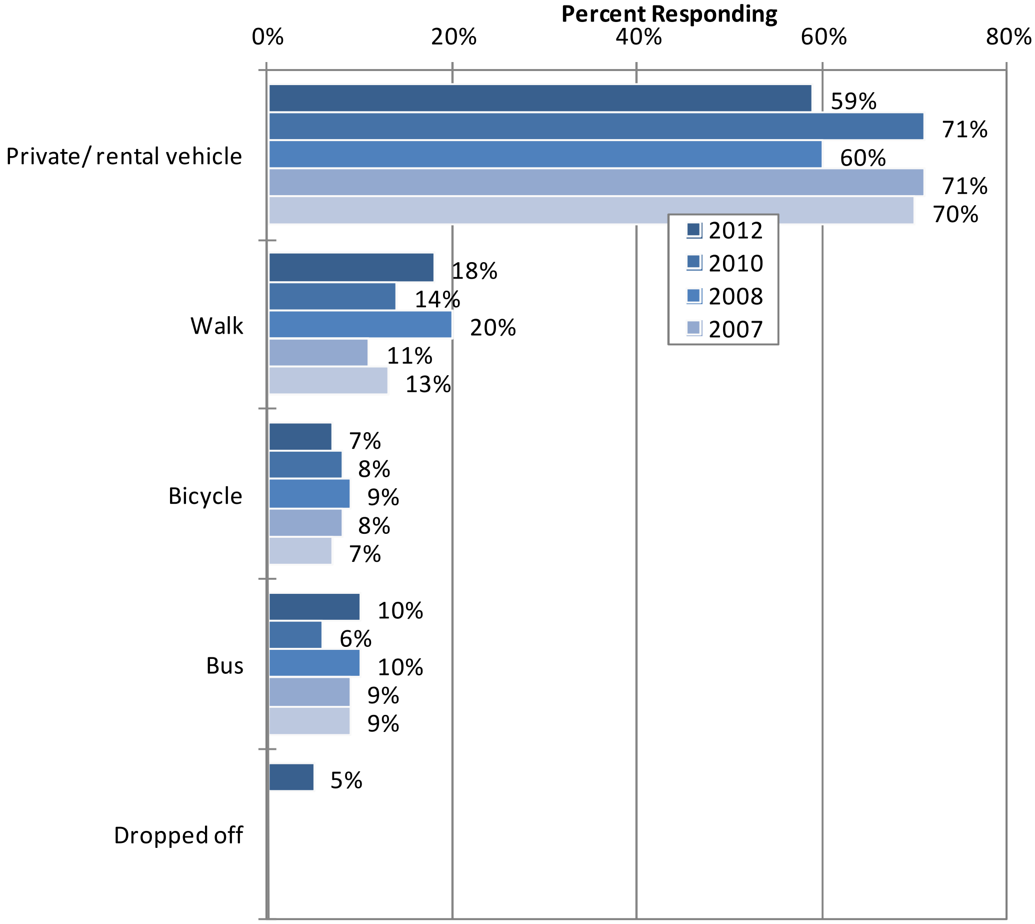
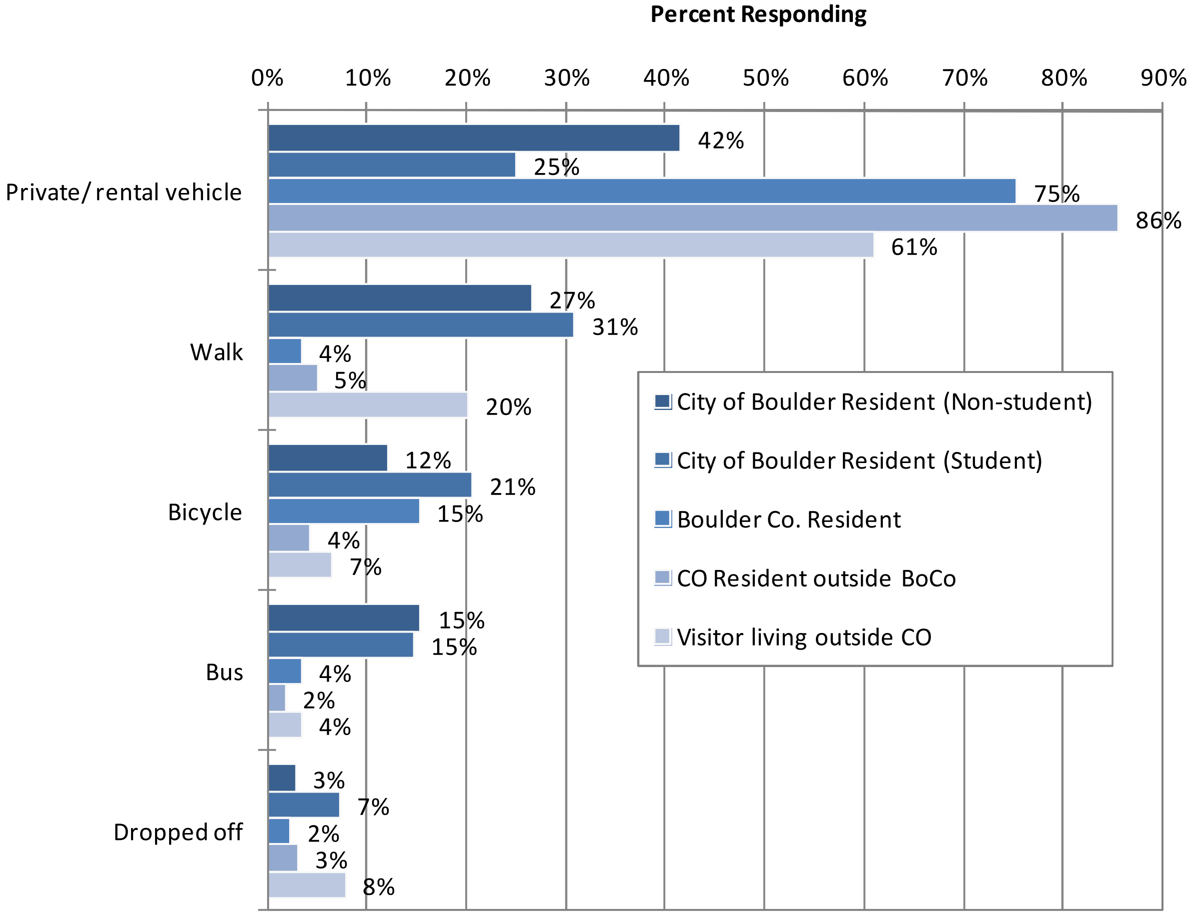
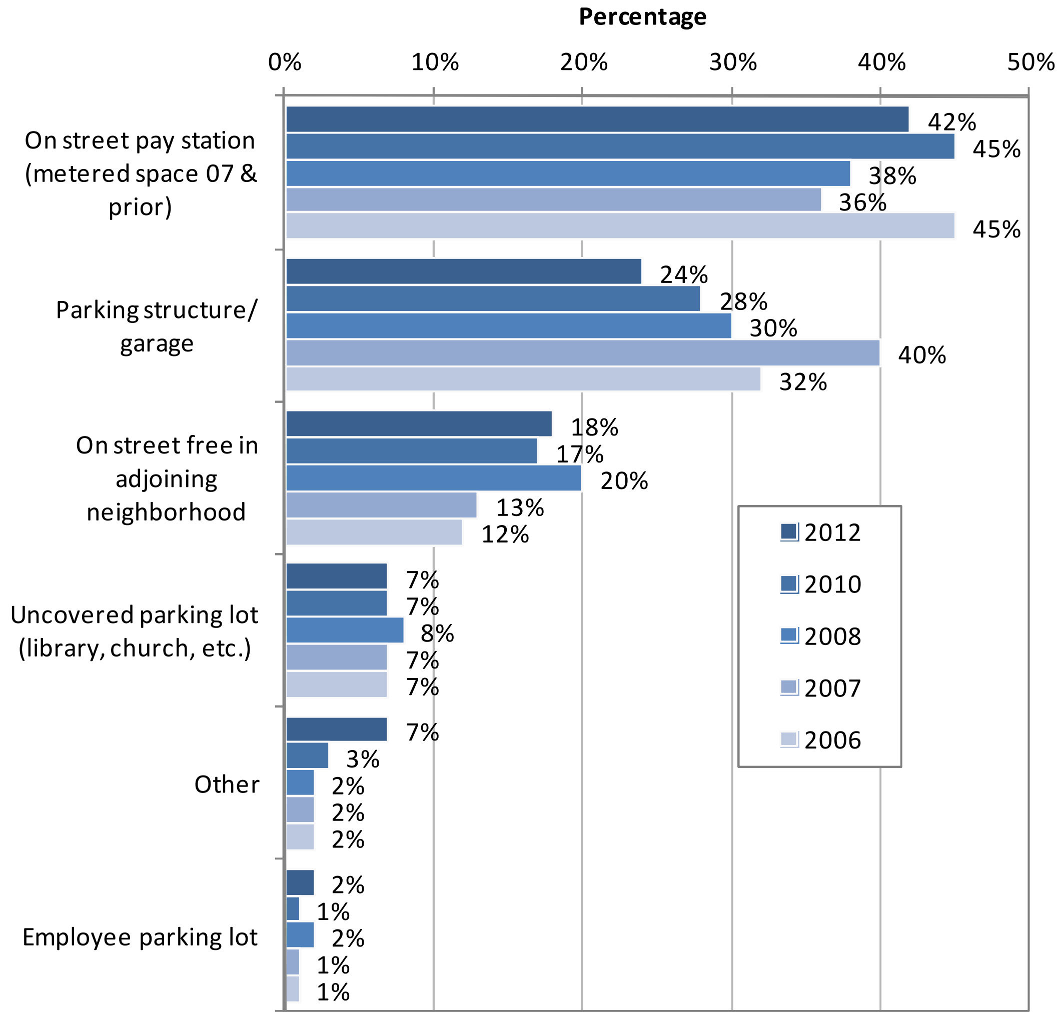


Figure 21
Mode of Transportation Downtown
By 2012 Visitor Type



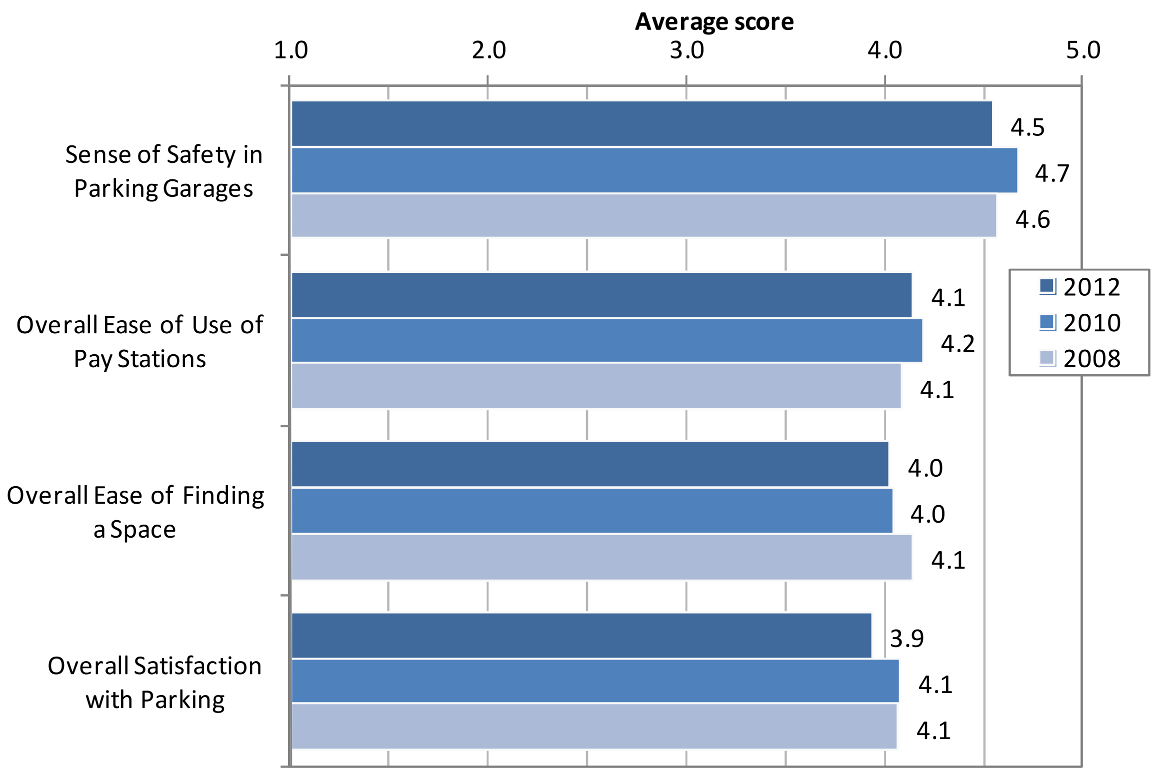
On-street parking at pay stations (42 percent) and parking garages (24 percent) are most popular with drivers. It appears that the percentage of drivers parking in the parking garages/structures has been declining over the past several summers. As well, 18 percent parked free on the street in adjoining neighborhoods.

Figure 22
Location of Parked Vehicle
By Year



Satisfaction with parking was good overall though down slightly from 2010. It is particularly high among out of state visitors but relatively low among city residents. The aspects of the parking experience that survey respondents rated included the sense of safety in parking garages (average of 4.5 out of five, down from 4.7), the overall use of pay stations (4.1, down from 4.2), the overall ease of finding a space (4.0, stable), and the overall satisfaction with parking in downtown (3.9, down from 4.1). It is notable that city of Boulder residents (non-students) exhibit the lowest satisfaction with the ease use of pay stations (3.8), even though they would presumably be the most familiar with the pay stations.

Figure 23
Ratings of Parking Experience



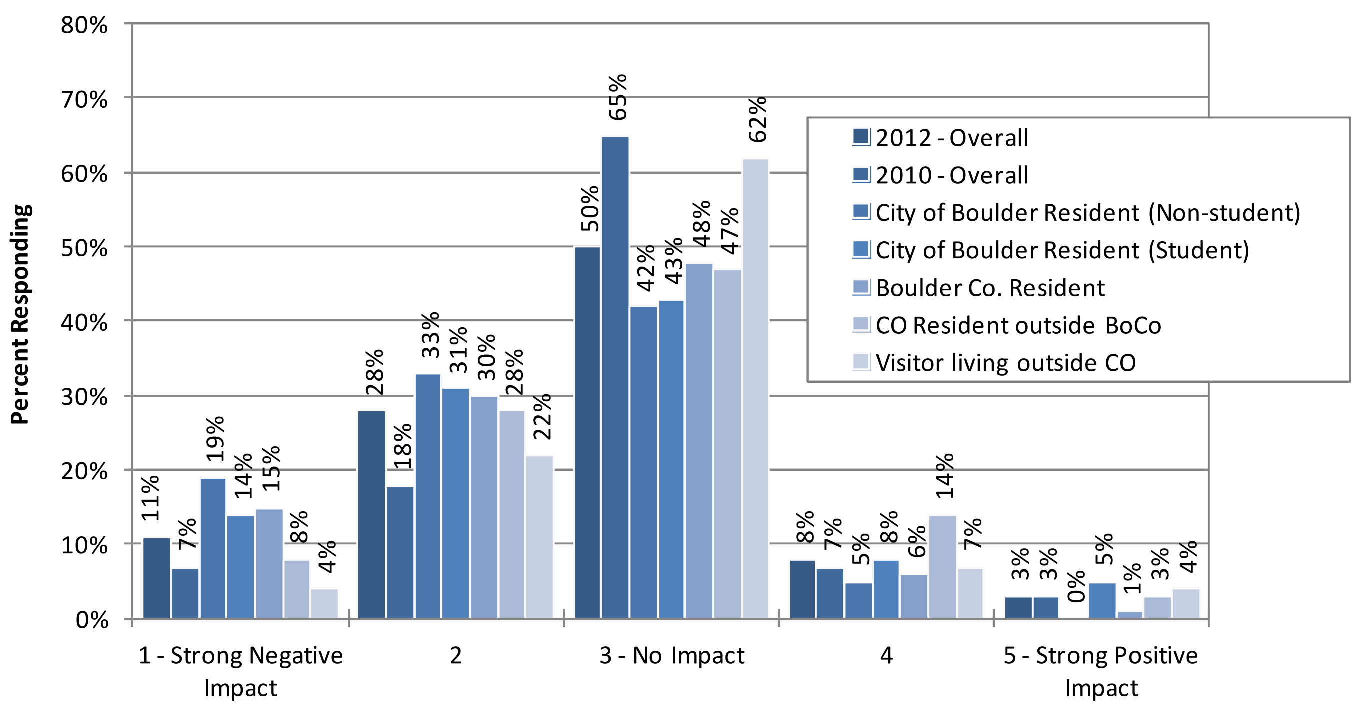
Transient Issues

A question that asks about panhandlers and transients was modified on the survey this year. The question was phrased, “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 a more negative impact on the experience this summer compared to 2010.

Half (50 percent) said it has no impact (3 on a one to five scale). Thirty-nine percent said it has a negative impact (up from 25 percent), while 11 percent said it has a positive impact (up slightly from 10 percent). Clearly, the overall opinion is a more negative impact on the experience than in 2010.

Looking at the results in greater detail shows that city of Boulder residents (non-students) are most likely to say that the behaviors have a negative impact on their enjoyment (52 percent) than a positive impact (5 percent). A similar, though less stark, result is observed for county residents (45 percent negative versus 7 percent positive). Out of state visitors are much more likely to say the behaviors have no impact on their experience (62 percent), probably due to the lower level of familiarity with the area in general and the behavior of panhandlers/transients in particular.

Figure 24
Do the Activities/Behaviors of Panhandlers Impact Your Enjoyment?
Overall and By 2012 Visitor Type



Satisfaction

An important module on the survey questionnaire asked respondents to rate their satisfaction with a variety of general attributes related to the experience downtown. The satisfaction ratings were strong this year, if slightly down from exceptionally high levels seen in 2010. See Figure 25.

Results show that the highest rated aspects of the experience were the feeling of security/ safety (average of 4.5 out of five, 63 percent rating a 5 out of 5), overall cleanliness and maintenance (4.4, 54 percent), family orientation/ kids play areas (4.4, 54 percent), the Downtown Information Center (4.3, 50 percent), special events/festivals (4.2, 43 percent), the variety of restaurants (4.4, 57 percent), customer service in retail stores (4.3, 42 percent), directory information & signs (4.2, 40 percent), and the variety of retail stores/art galleries (4.2, 40 percent).

Of note, while most of the satisfaction levels were down slightly, continued strength was noted for the variety of restaurants.

Out of state users consistently rate all aspects of the experience higher than do other user groups. See Figure 26.

Figure 25
General Ratings of the Downtown Experience
By Year

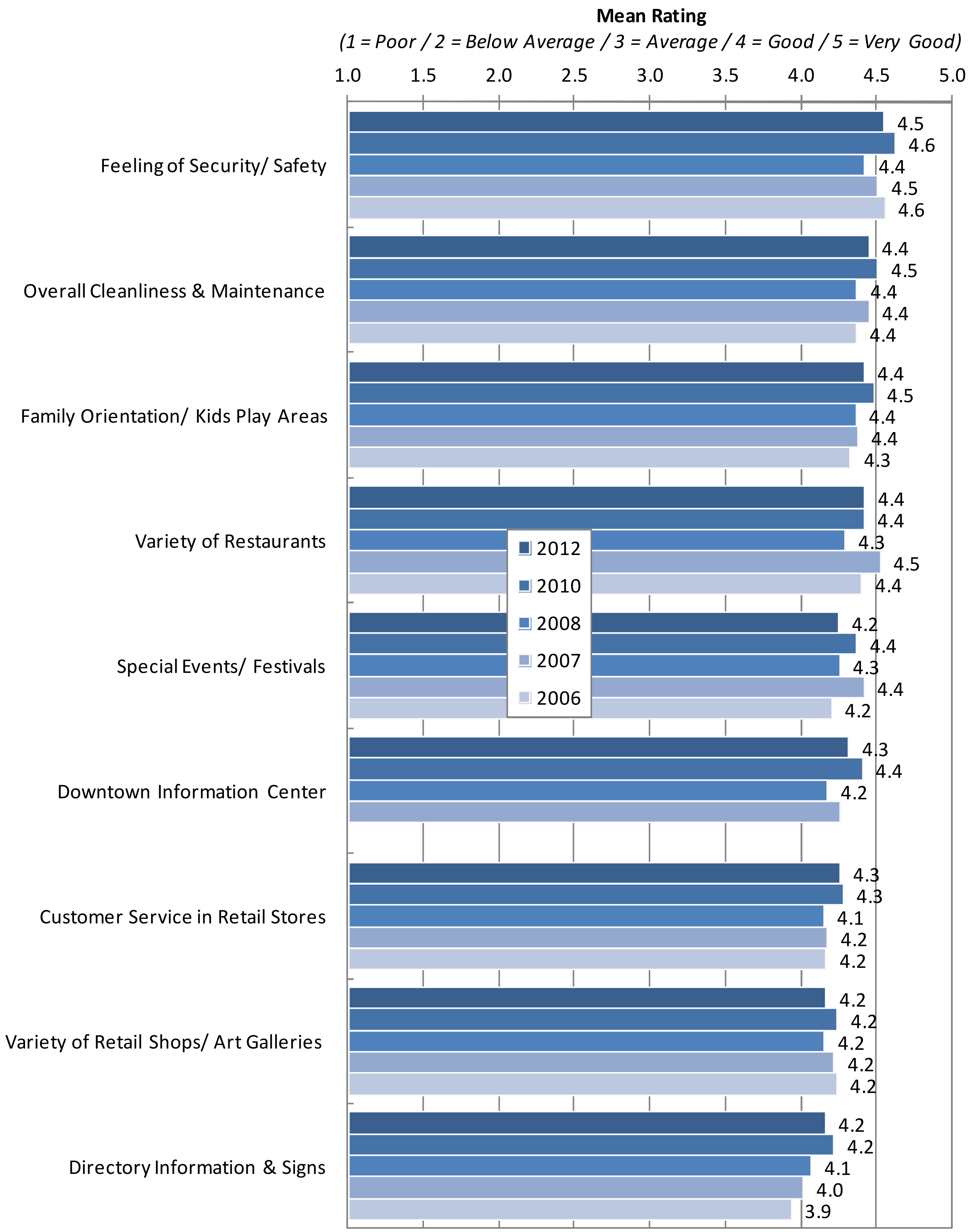


Figure 26
General Ratings of the Downtown Experience
By 2012 Visitor Type

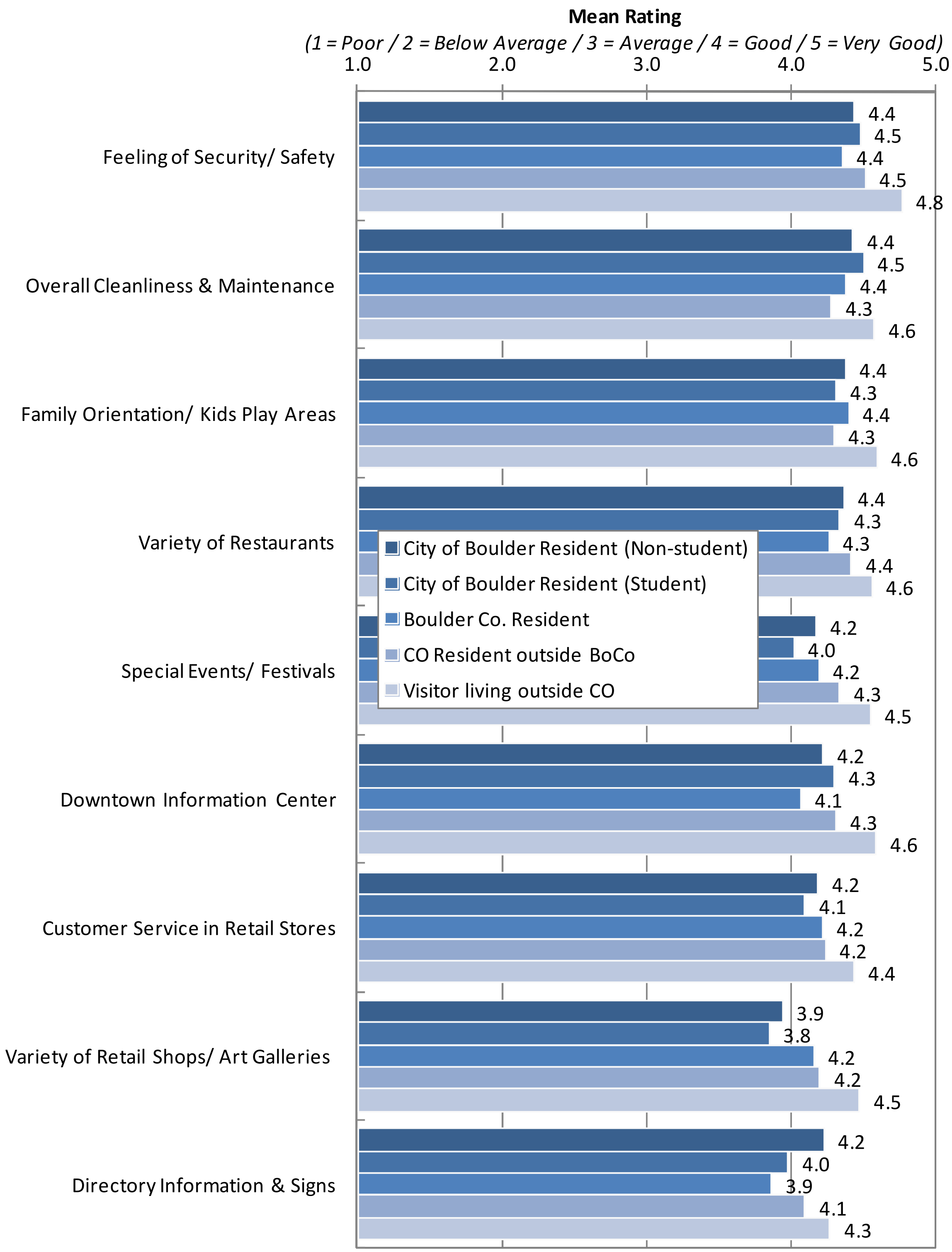
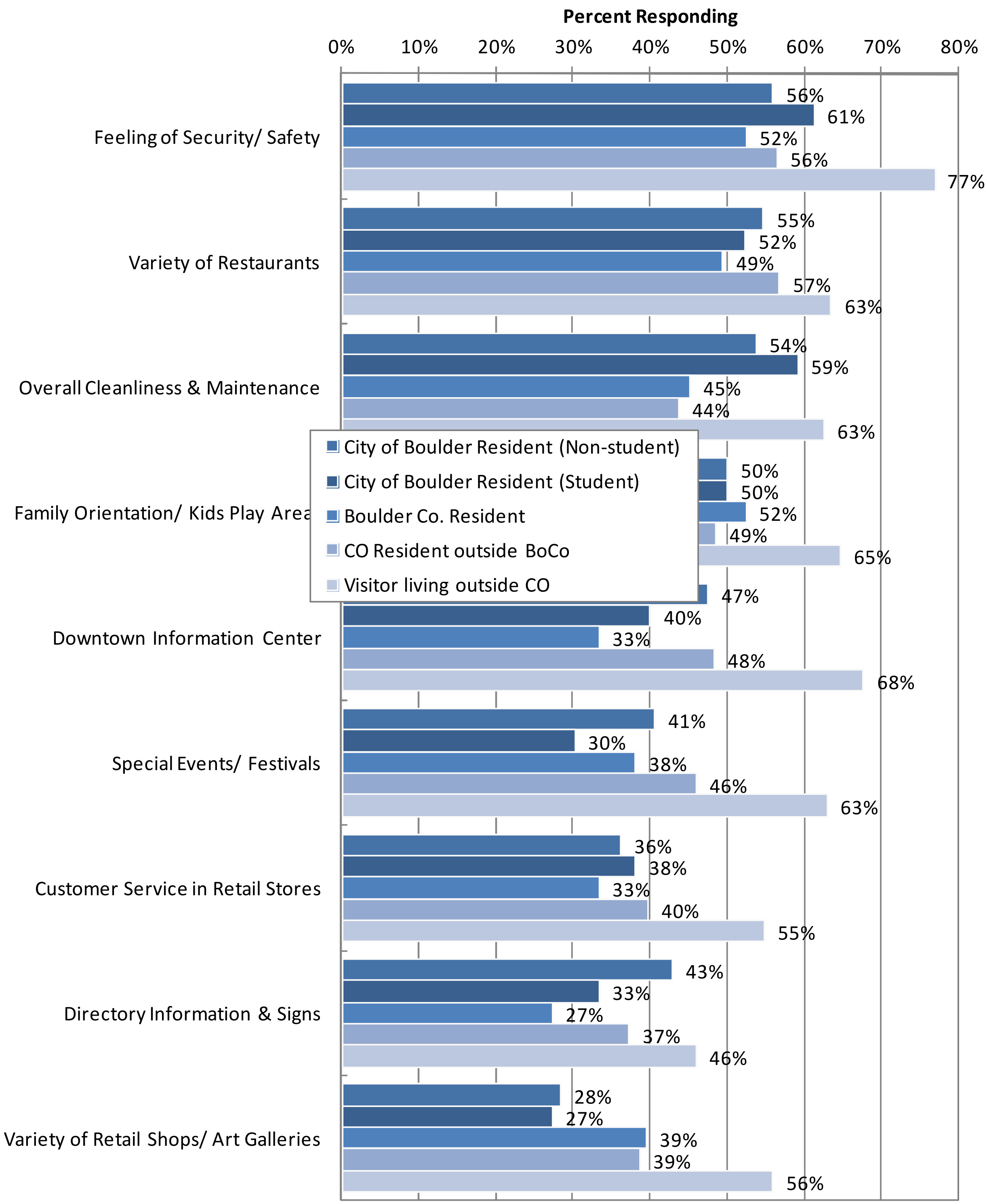


Figure 27
"Very Good" Ratings of the Downtown Experience
By 2010 Visitor Type



Comments

Several open-ended questions were asked on the survey this year 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 are summarized here, with a full listing of the comments in the appendix section of this report.

Suggestions for Improving the Downtown Area (Residents)

- *The meters aren't clear and won't take credit cards or they will keep your change and not give you a print out. Walking back to the car and finding a ticket is annoying. Panhandlers aren't supposed to approach you but they do. I think Boulder encourages them to be here.*
- *Add more signs- because of the traffic it is difficult to navigate and find things*
- *Anything you can do to discourage smoking*
- *Bands on the Bricks is not as good as Friday Night Louisville event. Don't like the "clip boarders" e.g. Environment Colorado, etc. Too annoying, too many.*
- *Can't have a dog? You can walk naked (they claim) but you can't have a well-behaved dog on a leash? Would like to be able to.*
- *Don't "lose control" of the downtown mall e.g. letting the homeless takeover. That drives the public away and kills the merchants*
- *I wish they would put concerts in the band shell. Do something about the encampment of homeless downtown and on the bike path. I can't ride at night anymore!*
- *Improve parking (had a previous problem with machine on street)*
- *It's gotten too upscale and expensive. There are not a lot of moderately priced places to go.*
- *Like the buskers, but there seems to be a large number of transients especially by the library lawn*
- *More diverse restaurants are needed such as late night food and food carts*
- *My experience has been very positive. A bit more signage and a few maps around the city offering general directions and place of interest.*
- *Open container law would be nice to be able to carry beer on the street*
- *Reduce traffic, get some bump-outs. There is too much accommodation for vehicles and more bike lanes.*
- *Street entertainers, healthier food for kids and adults*
- *Try to have people be more courteous - manners with general visitors - "snobs"*
- *You're doing a great job*
- *The restaurants are the best. I just accidentally hit "max" at lot by 8th and got 10 hours and paid $12 where "max" is 3 hours by courthouse. So I'm pretty bummed.*

Restaurants you have visited elsewhere that you would like to see in Downtown Boulder

- *"Noodles", pizza place, "Mad Greens"*
- *Authentic Mexican not Tex-Mex*
- *Brewery - Avery, Upslope, Oskar Blues*
- *Greek restaurant, a real Latino/Caribbean restaurant*
- *Sushi Den, Spenelli's Market, Park Hill*

- *Woody's Pizzeria*
- *Rusty's Pizza (Santa Barbara)*
- *Pizza place in Louisville Lucky Pie*
- *None- like local owned*
- *None- like the uniqueness of the restaurants*
- *Le Boca (New Orleans)*
- *Don't want chains*
- *BB's Mongolian BBQ*

Retailer you have visited elsewhere that you would like to see in Downtown Boulder

- *Another bookstore, Apple store*
- *Banana Republic*
- *Don't want to see chains*
- *H&M*
- *J Crew*
- *Hot Topic*
- *Non-franchise*
- *Trader Joe's*
- *Thrift store*
- *Pottery Barn*
- *Nordstrom's Rack*
- *Like the local, small business*

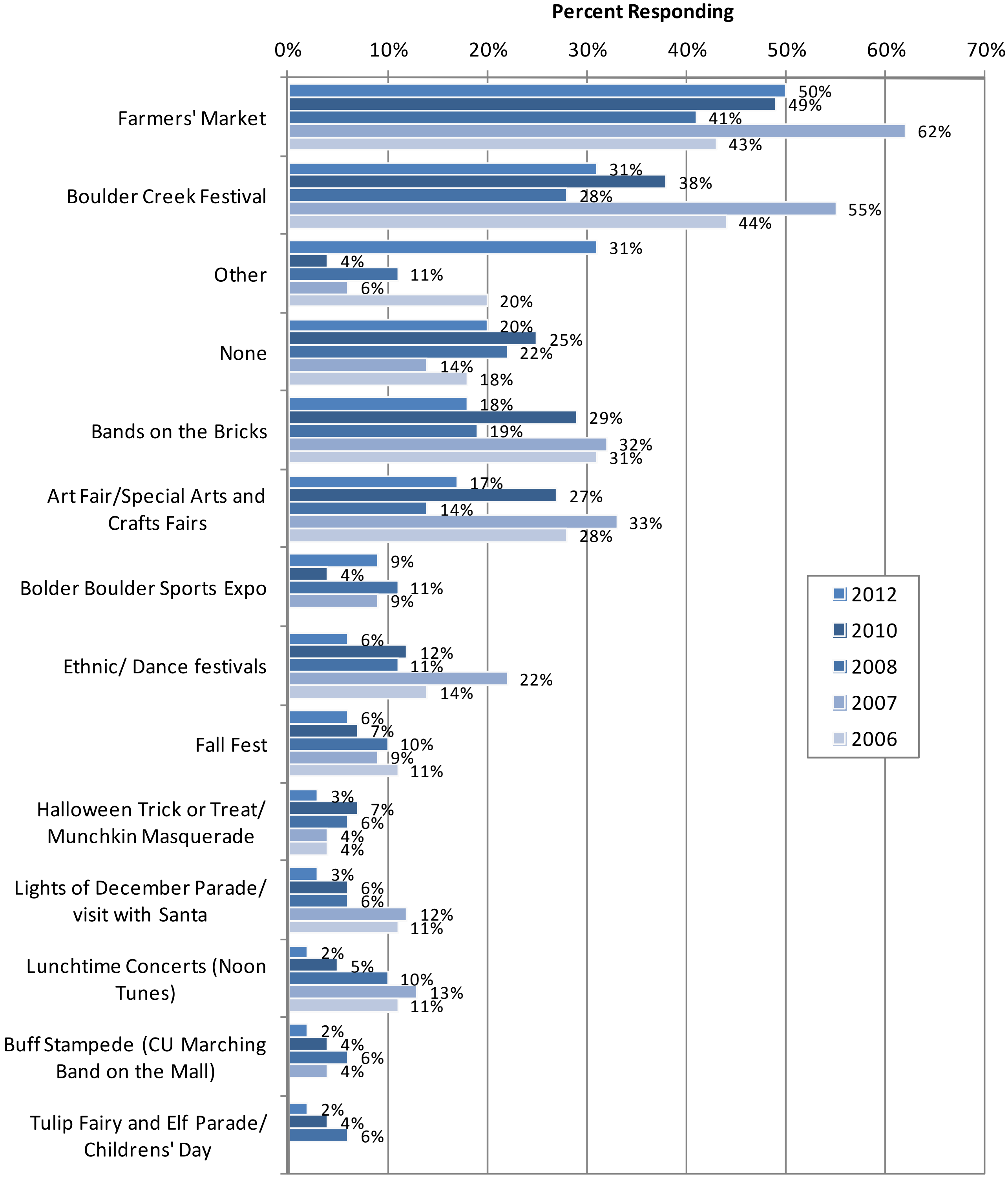
Special Events

In terms of actual attendance at special events in downtown Boulder in the past 12 months, the two most popular by far were the Farmers Market (50 percent of Boulder city/county residents have attended in past 12 months) and the Boulder Creek Festival (31 percent). Also popular were Bands on the Bricks (18 percent) and Art Fair/special arts and crafts fairs (17 percent). These percentages are similar to, albeit slightly lower than, past survey results. See Figure 28.

City of Boulder residents (non-students) are more likely to have attended all four of these primary special events as compared to County residents, particularly for the Farmer's Market and Bands on the Bricks. On the other hand, 14 percent of city residents had not attended any special events in downtown Boulder in the past year.

An increasing percentage has attended free concerts, events, festivals in other surrounding communities (54 percent this summer, up from 33 percent in 2010). About one in five has attended such events in downtown Denver (20 percent), followed by Twenty-Ninth Street (10 percent), Louisville (10 percent), Niwot (7 percent), and Longmont (6 percent). Flatiron Crossing, Lafayette, and Cherry Creek North do not appear to be popular among the downtown Boulder user group. These results suggest that some downtown Boulder users are "leaking" to other communities, with the potential that Boulder residents not interviewed in downtown Boulder have a higher likelihood of attending these other events.

Figure 28
Which Activities, Special Events, etc have you Attended this Past Year?
Boulder City/County Residents Only, By Year



Competition

Significant interest exists in understanding the patterns of Boulder City/County 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, the average Boulder City/County survey respondent indicated that they have visited downtown Boulder 15.4 times during the prior two months, up somewhat from 2010 but within historic ranges for this question. Also popular was the 29th Street Mall, with 77 percent visiting at least once for an average of 4.8 times in the past two months. Downtown Denver was also relatively popular for being somewhat distant, with 1.8 visits on average and 49 percent making at least one visit in the prior two months. Louisville, Lafayette, or Niwot downtowns were somewhat popular, with an average of 2.3 visits in the past two months (43 percent visited), along with Flatiron Crossing (1.5 visits, 46 percent visited). Less popular were Cherry Creek and Orchard Town Center.

Figure 29
Average Visits to Downtown Boulder / Other Regional Shopping Areas in Past 2 Months
Boulder City/County Residents Only

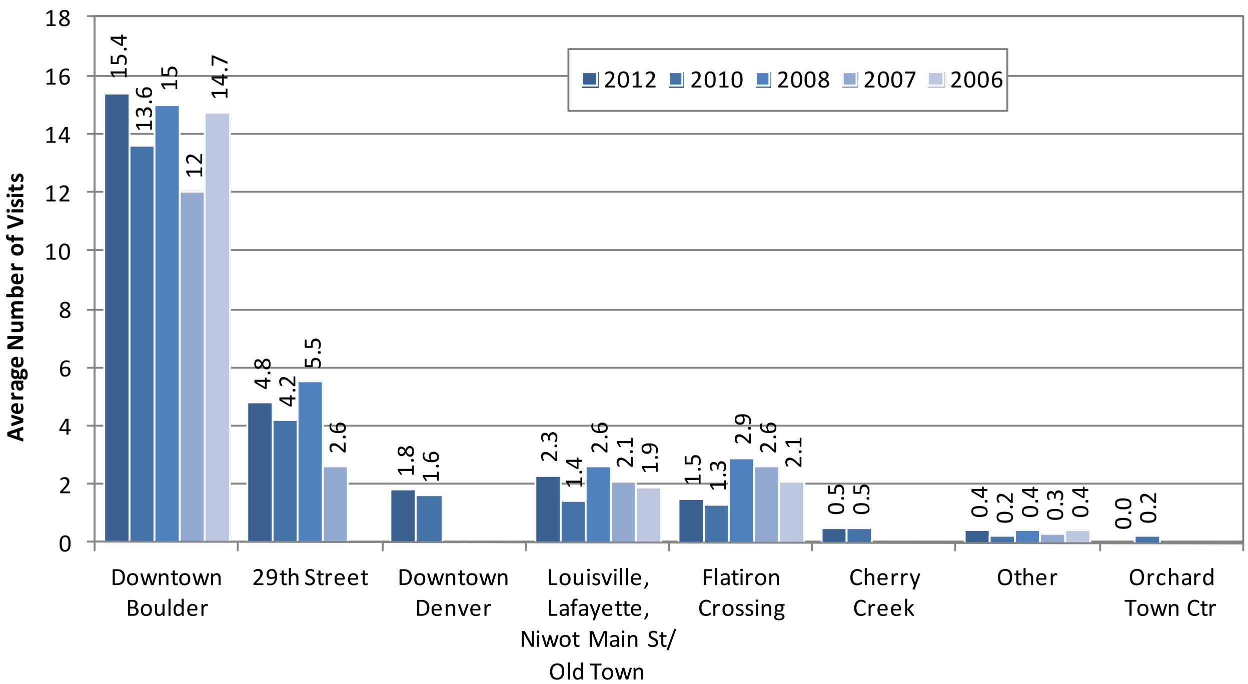
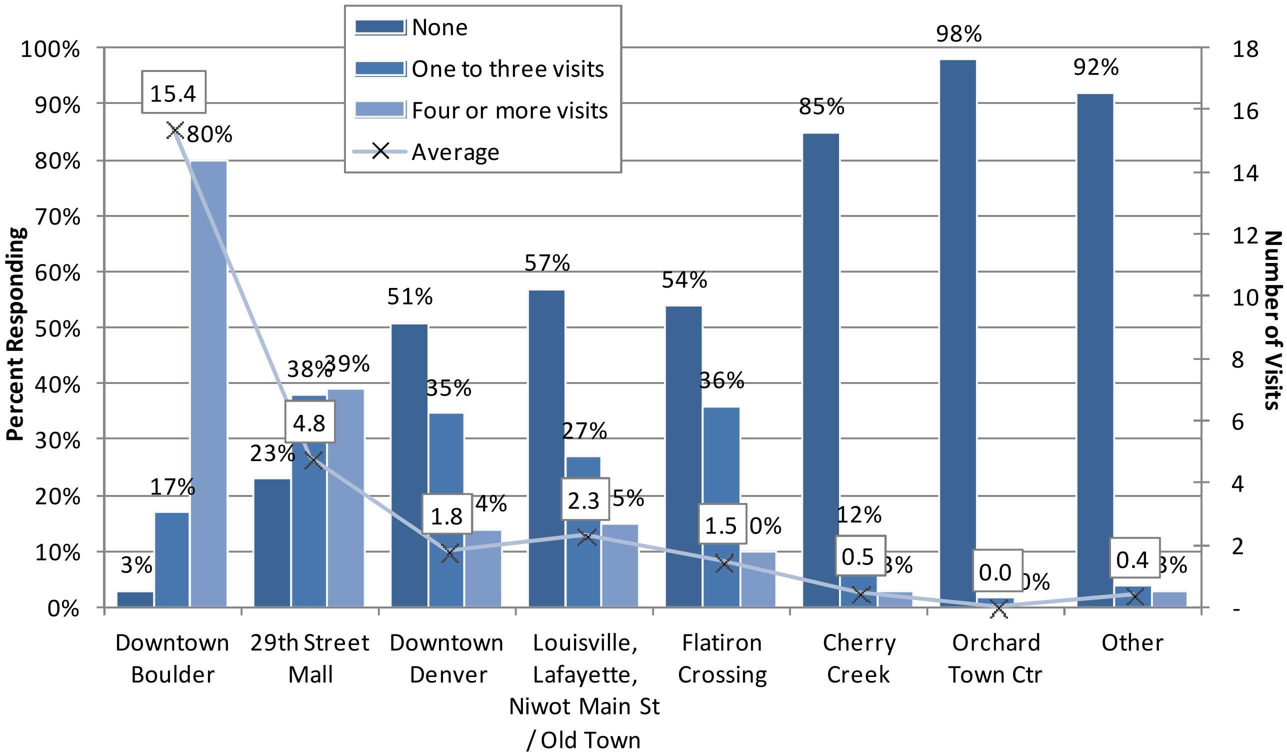


Figure 29 above shows the average number of visits over the past several summers. In Figure 30 to follow, average visits and percentages having visited are presented.

Figure 30
Visits to Downtown Boulder / Other Regional Shopping Areas in Past 2 Months
Boulder City/County Residents Only, 2012

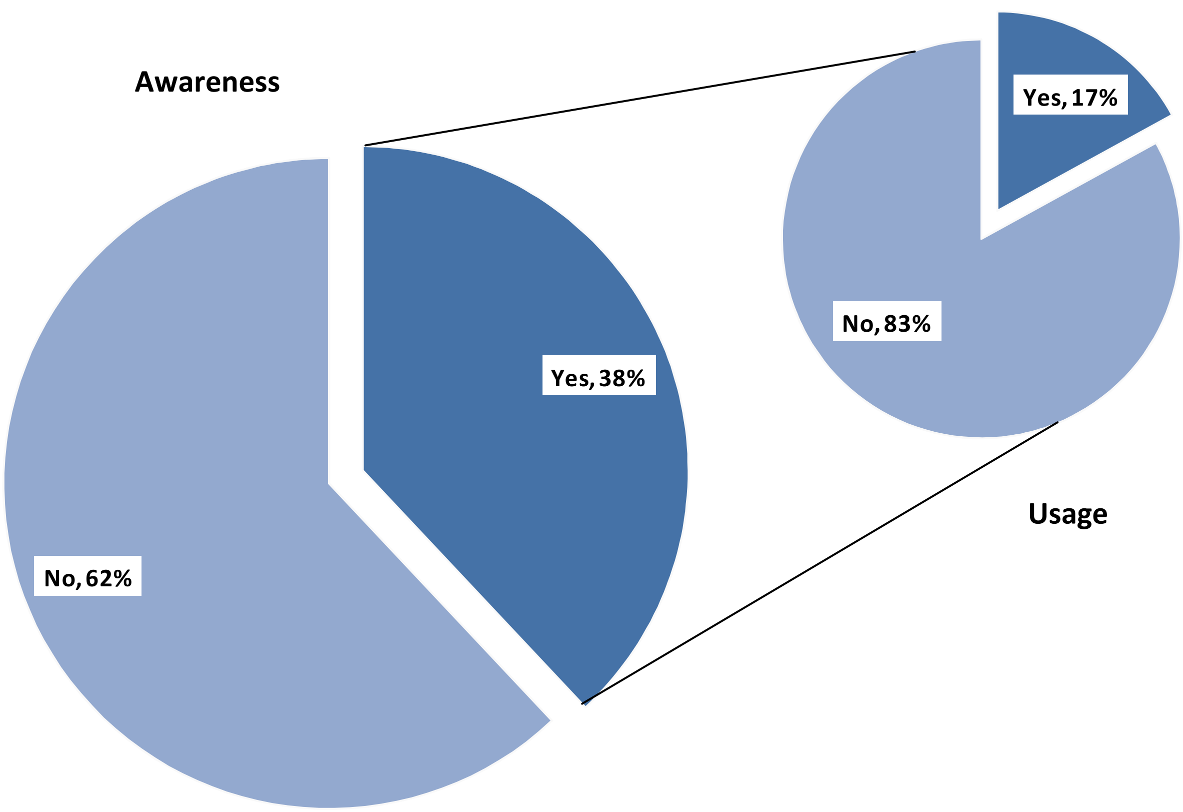


B-Cycle Awareness/Usage

A new question was added to the user survey this summer regarding awareness and usage of the B-Cycle program. Overall, 38 percent said they were familiar with the program (with city residents most aware at 60 percent, similar to the 57 percent recorded in the 2011 mailback survey).

Overall, 17 percent of those who were aware have actually used a B-Cycle bike (or about 6.5 percent of all respondents). Usage is highest among students (25 percent have used, despite only 36 percent being aware) and Colorado residents outside Boulder County (22 percent have used though only 38 percent were aware).

Figure 31
Are you Aware of the B-Cycle Program? If Yes, Have you used the B-Cycle Program?



Geographic Residence

The following graphs illustrate the geographic residence of the downtown user. Most are from Colorado. No other single state accounts for more than 3 percent of total users, with the top states being Illinois (2.3 percent), California (2.0 percent), Texas (1.9 percent), New York (1.6 percent), Florida, and Ohio (each 1.4 percent)

Figure 32
State of Residence
By Year

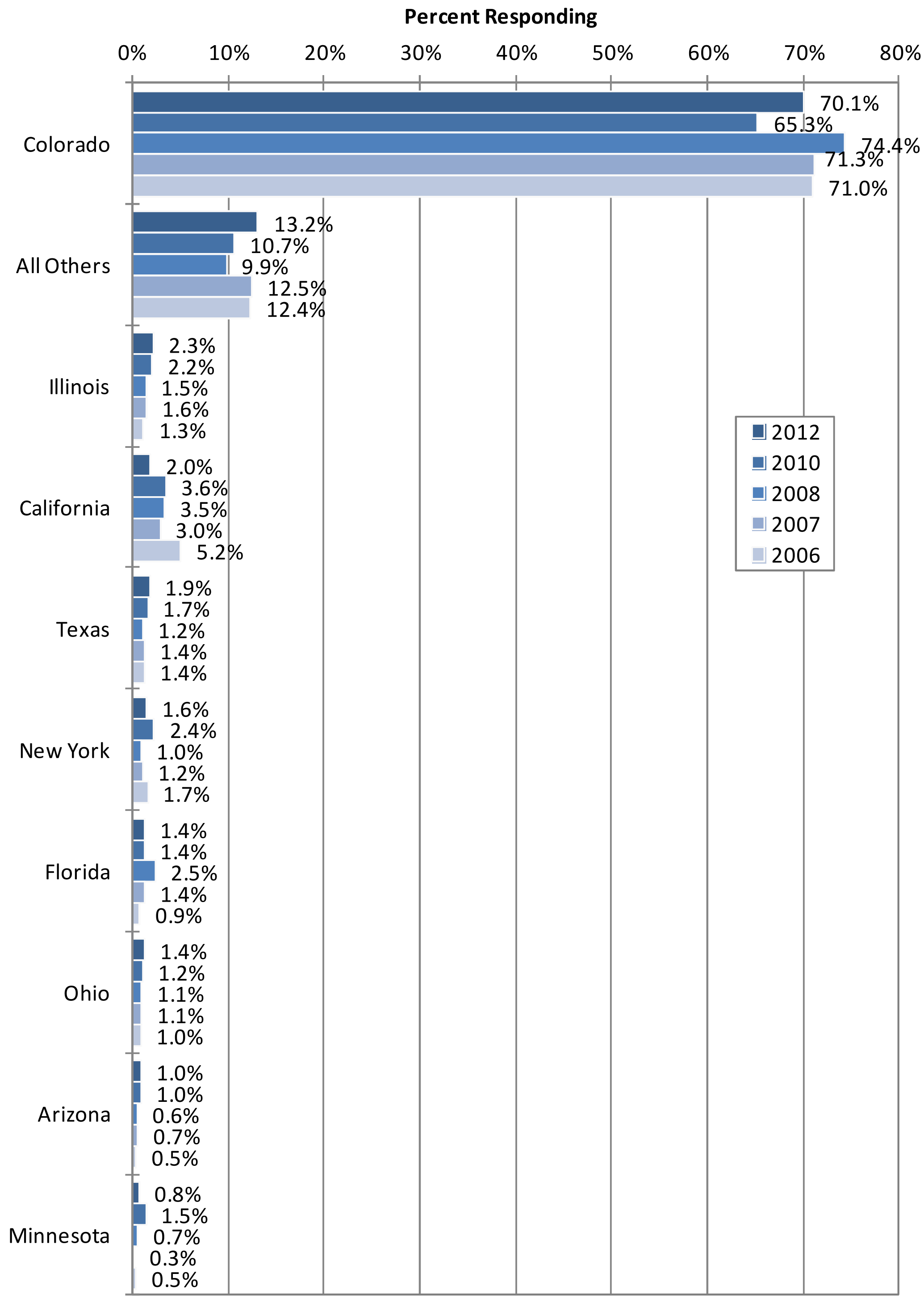


Figure 33
County of Residence
Colorado Residents Only, By Year

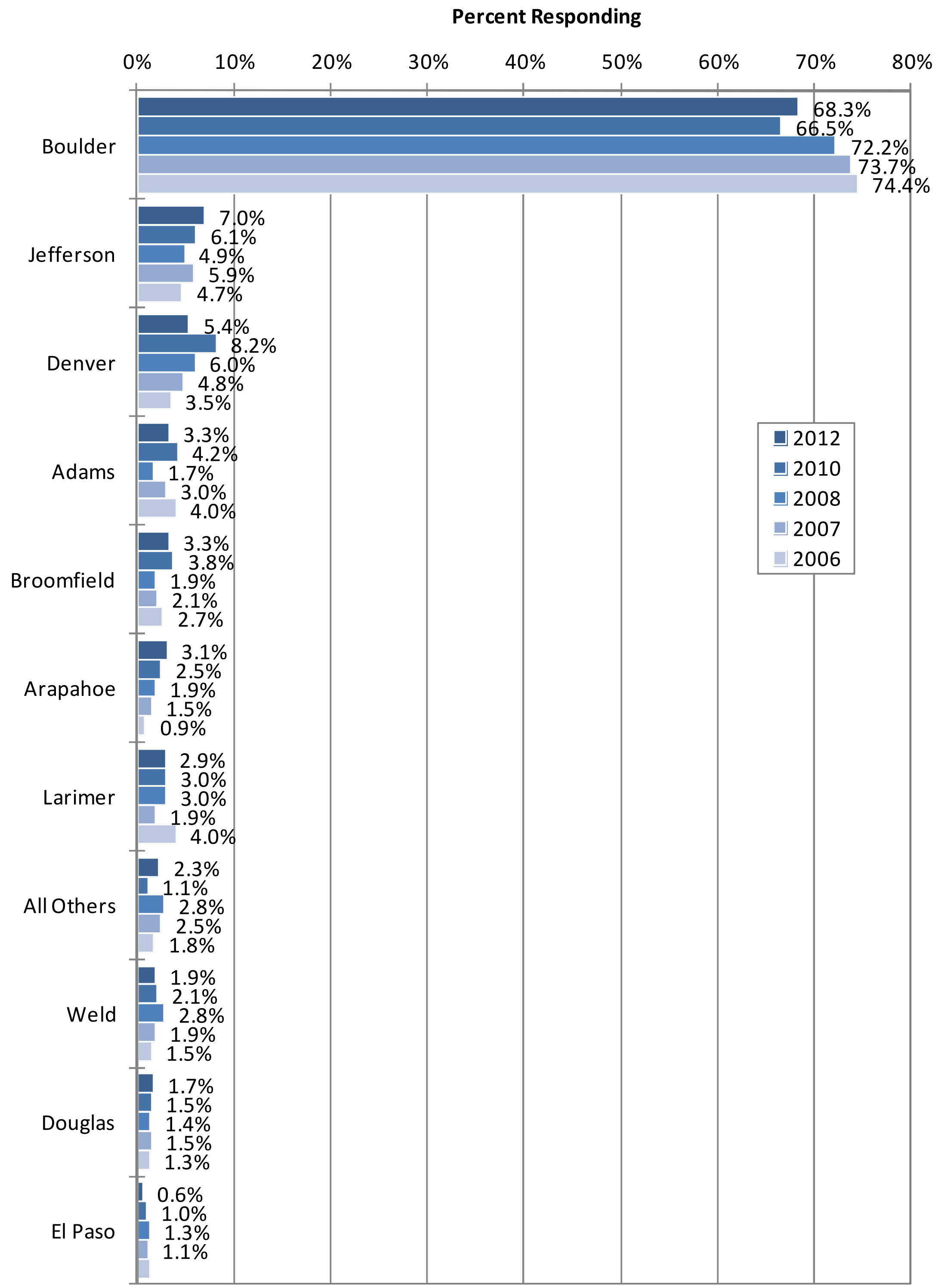
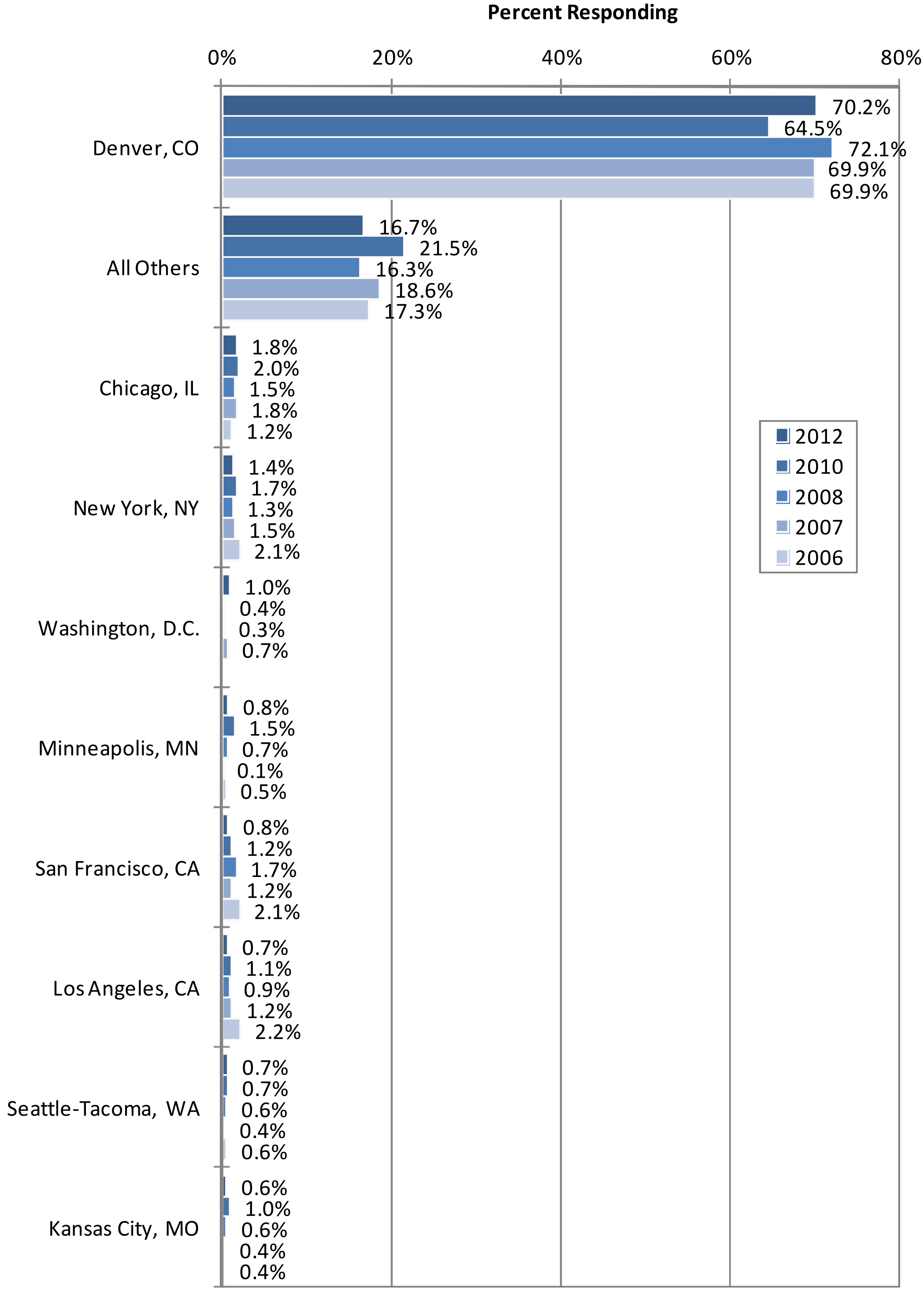


Figure 34
Area of Dominant Influence
By Year



Conclusion

The results of the user survey research program provide important information about and feedback from the users of the downtown Boulder area. The information contained within this report is intended to assist Downtown Boulder, Inc, 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. 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, the impact of panhandlers, and other subjects of interest as they emerge.