Downtown Boulder User Survey 2018

January 9, 2019

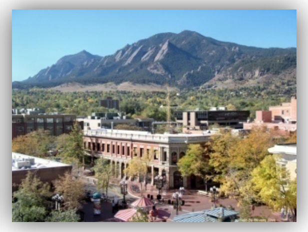
Presentation Overview

- Methodology
- Key Findings and Highlights
- Visitor Profile/User Type/Demographics
- Spending Patters
- Reason for Coming Downtown
- Transportation & Parking
- Transient/Panhandler Activity
- Marketing & Media
- Satisfaction
- Special Events
- Suggestions for Improvement

METHODOLOGY

RRC ASSOCIATES

- 714 completed interviews collected between mid-July and late September 2018
- Random intercept surveys conducted between the 1000 and 1600 blocks of Pearl Street
- Surveys conducted between 9:30am and 7:30pm, all 7 days of the week
- Similar methodology to past years, allows for comparison over time

BOULDER colorado•usa BOULDER CONVENTION AND VISITORS BUREAU

CITY OF BOULDER

DOWNTOWN BOULDER PARTNERSHIP

Key Findings and Highlights

- User type proportions shifted, with a greater share of out-of-state visitors compared to 2016, followed by City of Boulder residents and Colorado residents outside Boulder County
- High levels of satisfaction with most aspect of the experience, on par with strong ratings in 2016
- Three-quarters say that the overall experience has been improving or staying the same
- The spending penetration rate was up but average spending amount down slightly

KEY FINDINGS AND HIGHLIGHTS

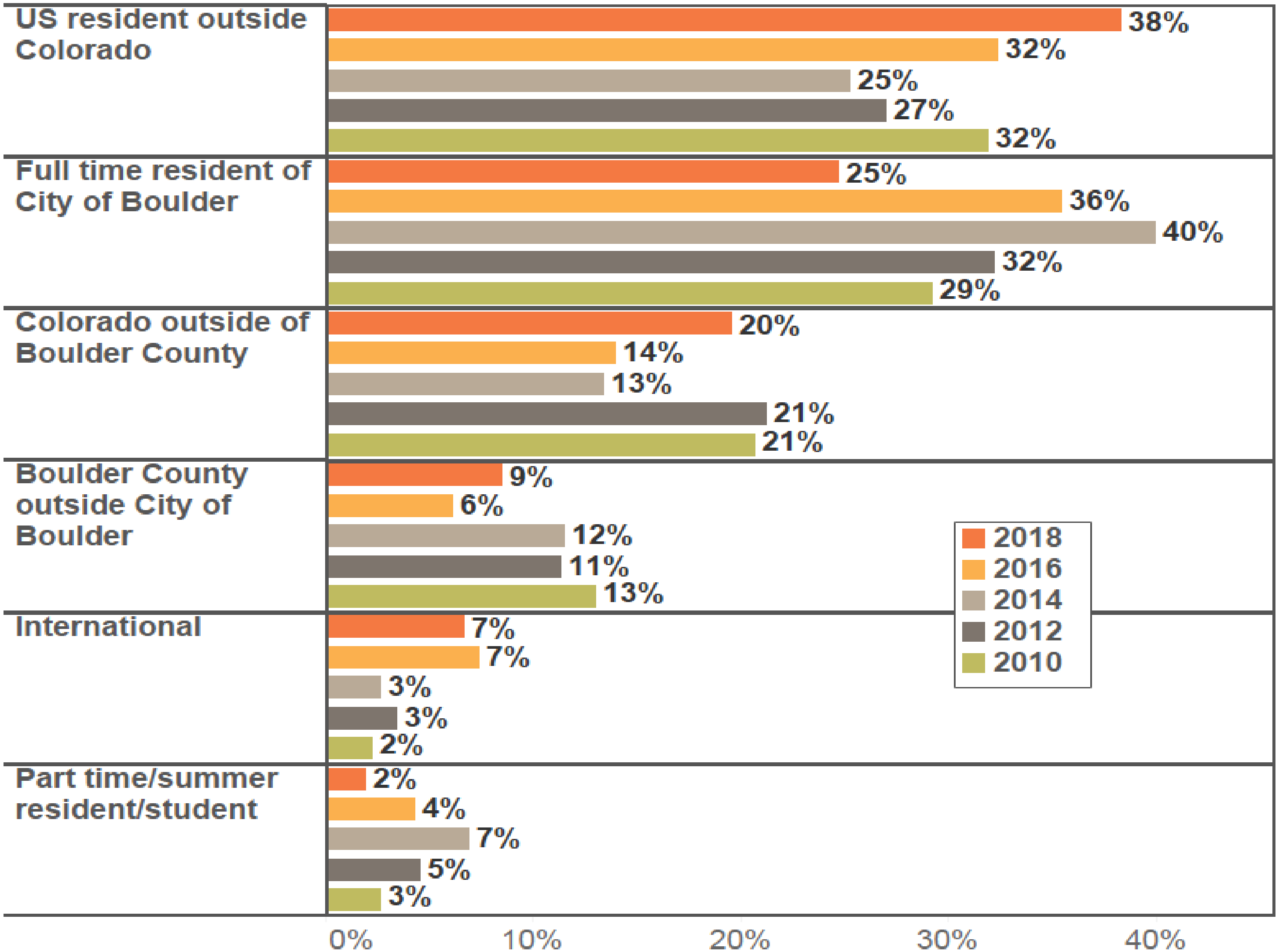
- Research shows a healthy and diverse mix of visitors relative to age, household status, income
- Demographic characteristics are relatively stable
- Special events continue to be a strong draw, with Farmers' Market, Band on the Bricks, Boulder Creek Festival, and Fall Fest most popular
- Overnight visitors an important component of the user mix
- Feedback on transients/panhandlers fairly stable

Visitor Profile/User Type

- Out-of-state visitors: 38%
- City of Boulder residents: 25%
  - Downtown Boulder: 35%
  - North Boulder: 21%
  - Central/West Boulder: 19%
  - South Boulder: 15%
  - East Boulder: 9%
  - Gunbarrel: 2%
- Colorado outside Boulder County: 20%
- Boulder County outside city of Boulder: 9%
- International: 7%
- Part-time/summer residents: 2%

USER TYPE

RRC ASSOCIATES



BOULDER colorado•usa BOULDER CONVENTION AND VISITORS BUREAU

CITY OF BOULDER

DOWNTOWN BOULDER PARTNERSHIP

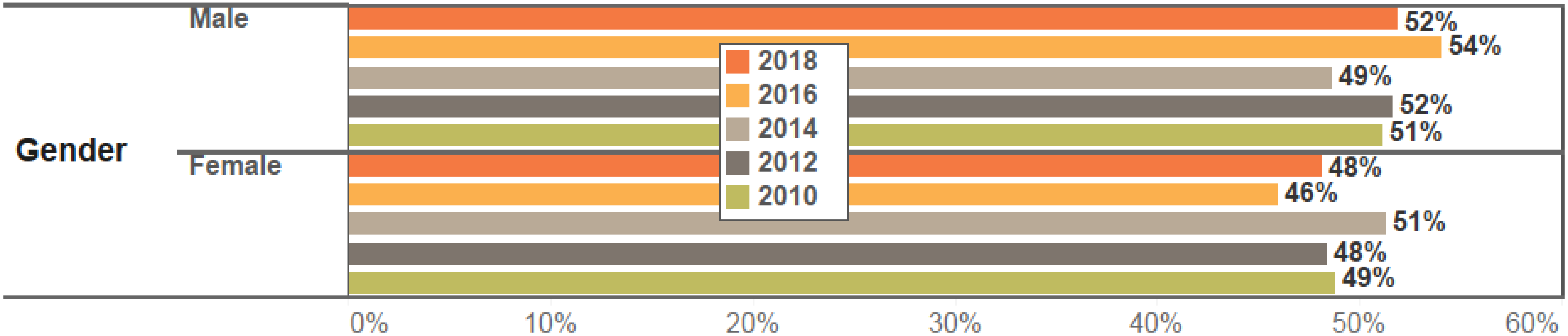
Overnight Visitors

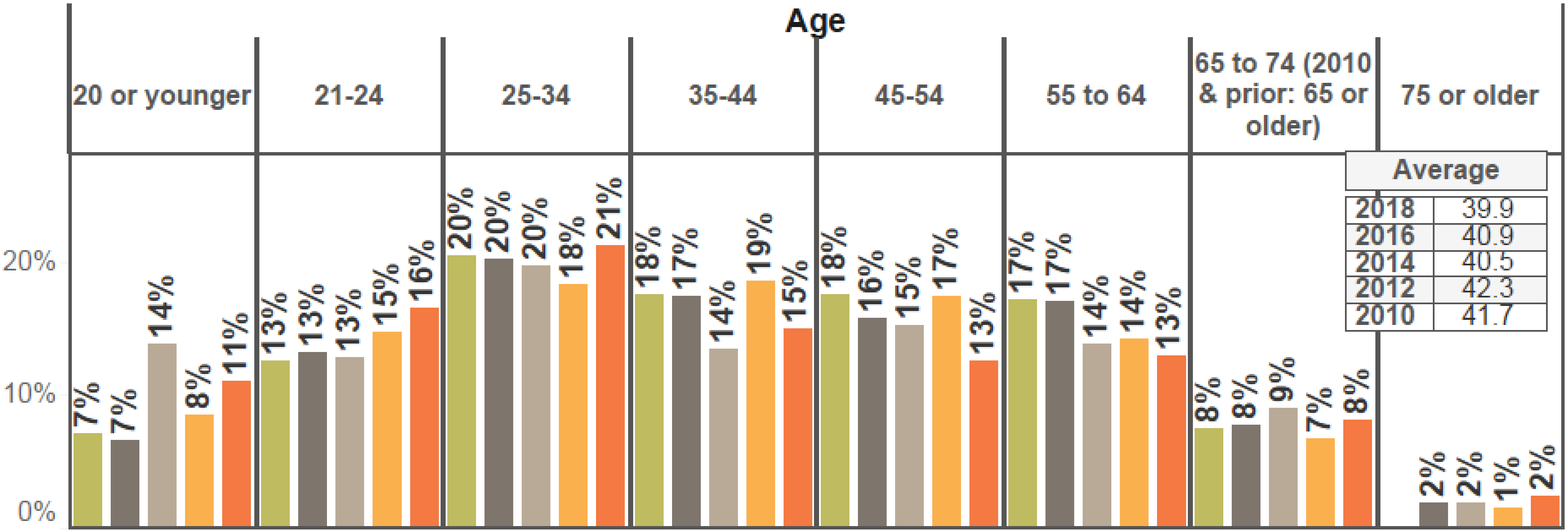
- Users from outside Boulder County (65% of total users)
  - 44% were spending the night, 56% were day visitors
- Overnight Visitors only
  - 44% staying with family/ friends, 35% staying in commercial lodging, 16% in Airbnb/VRBO
  - Trip length of 3.9 nights, 2.6 people in travel party
  - General recreation, visiting family/friends are the top reasons for trip, followed by business, college-related, and special event
  - Average spending is $823 per party
  - Word of mouth, websites, experience of a prior visit, and social media are important pre-trip information sources for overnight visitors

User Demographics

- Average age: 39.9 years
- Family/household types
  - Single no children (40%)
  - Household with children at home (23%)
  - Empty Nester (20%)
  - Couple no children (16%)
- 52% male, 48% female
- Range of household income:
  - 40% <$50,000
  - 28% between $50,000 and $100,000
  - 31% >$100,000
- 21% are university students, 41% are employees

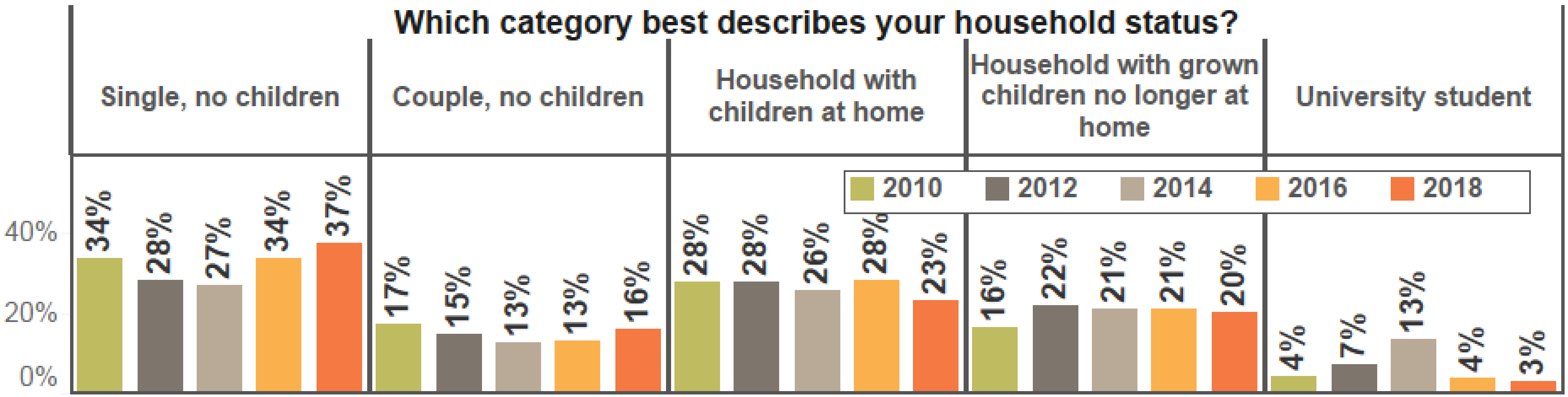
User Demographics

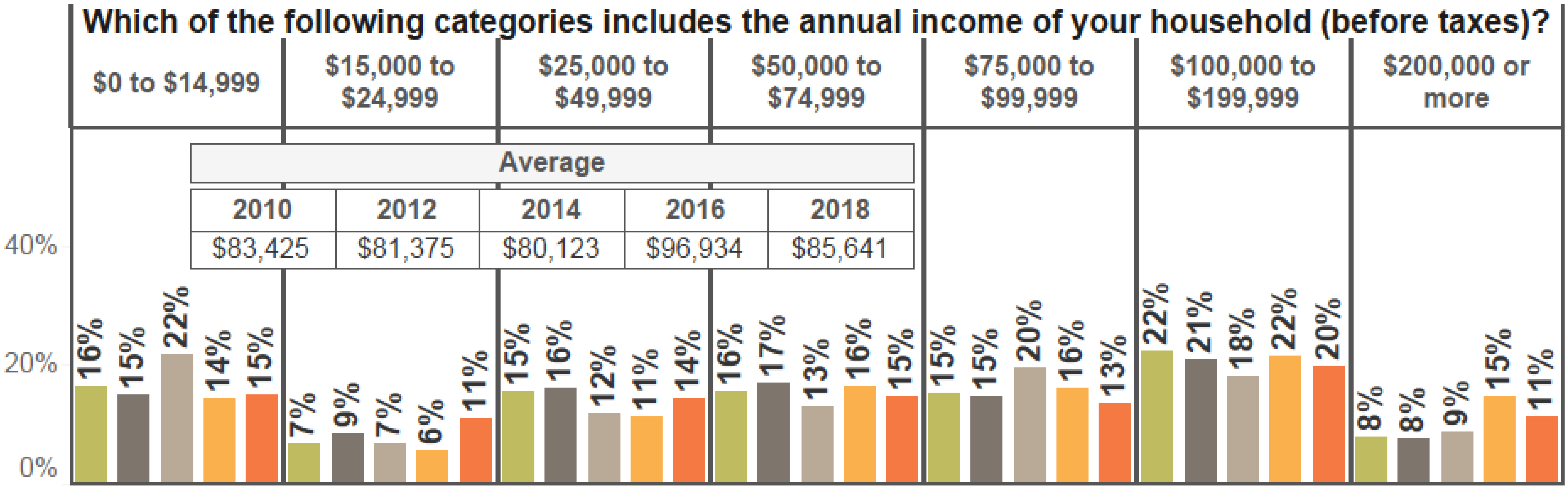




Average	
2018	39.9
2016	40.9
2014	40.5
2012	42.3
2010	41.7

USER DEMOGRAPHICS





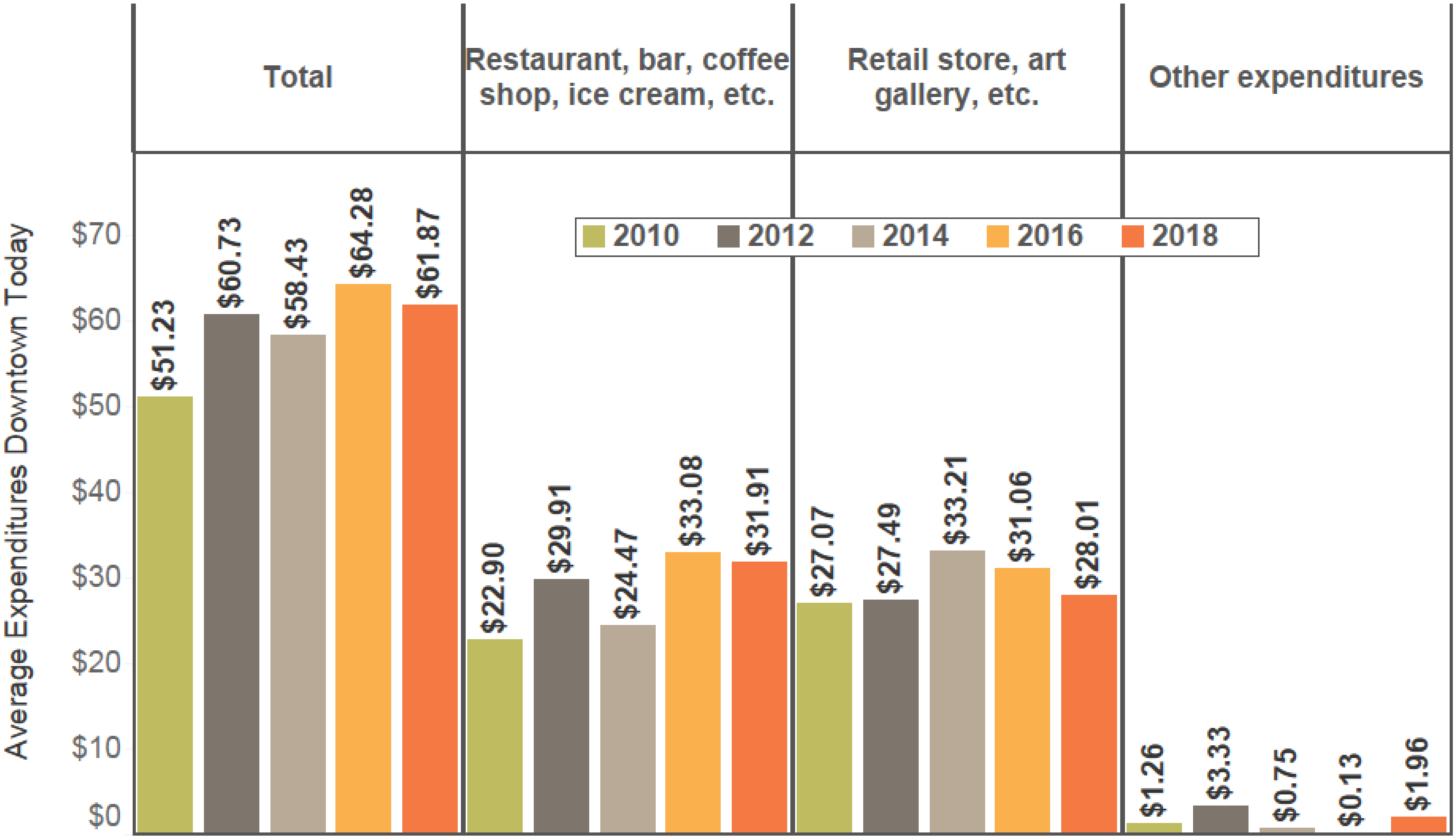
Average				
2010	2012	2014	2016	2018
$83,425	$81,375	$80,123	$96,934	$85,641

SPENDING PATTERNS

- 80% have or will make a purchase (up from 74%)
- Average spending is $61.87 per person (down 3.7% from 2016)
  - Restaurant/bar: $31.91 (down 3.5%)
  - Retail store/art gallery: $28.01 (down 9.8%)
  - Other spending: $1.96 (up 100%+)

SPENDING PATTERNS

RRC ASSOCIATES

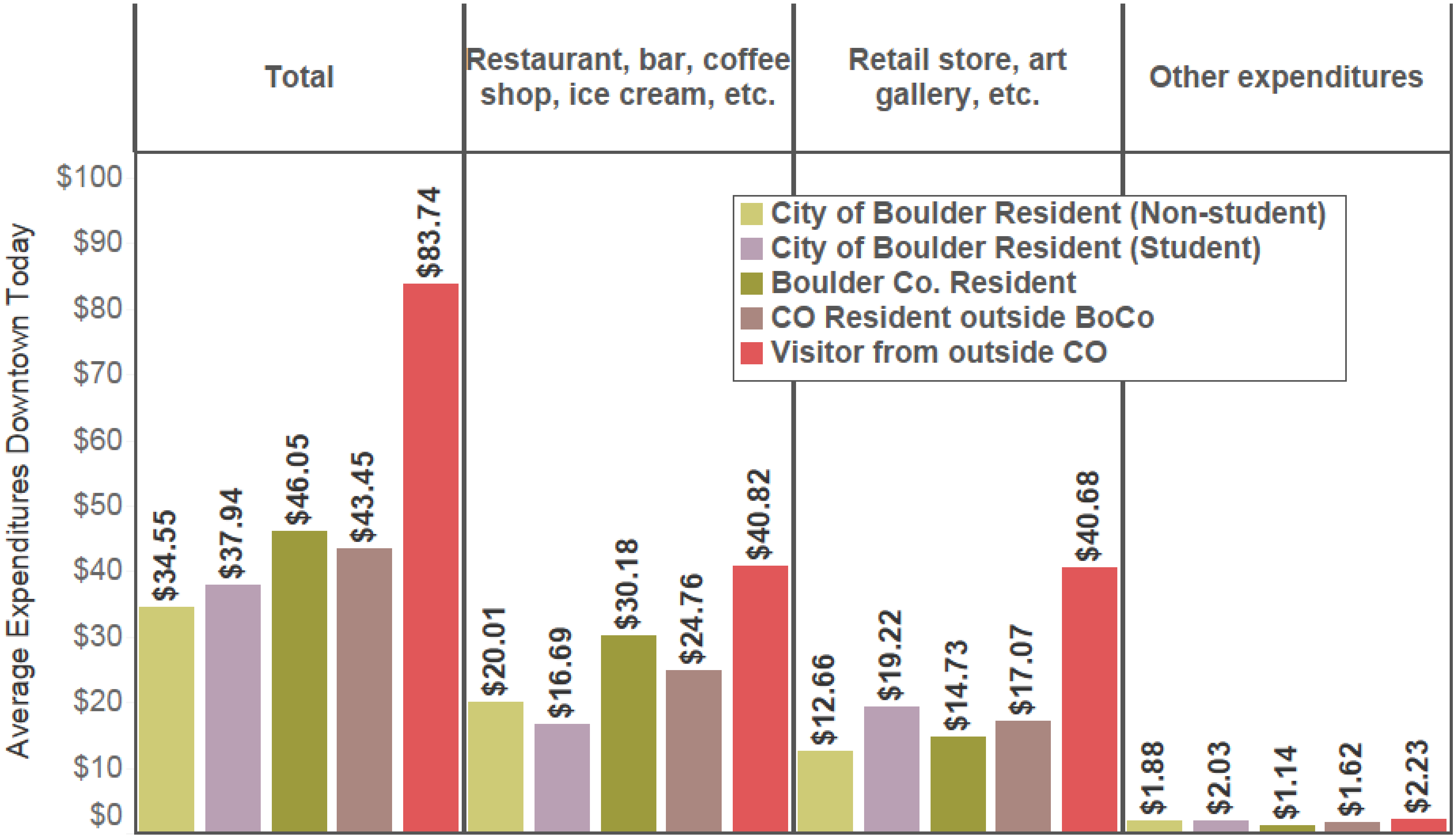


BOULDER colorado•usa BOULDER CONVENTION AND VISITORS BUREAU

CITY OF BOULDER

DOWNTOWN BOULDER PARTNERSHIP

Spending Patterns



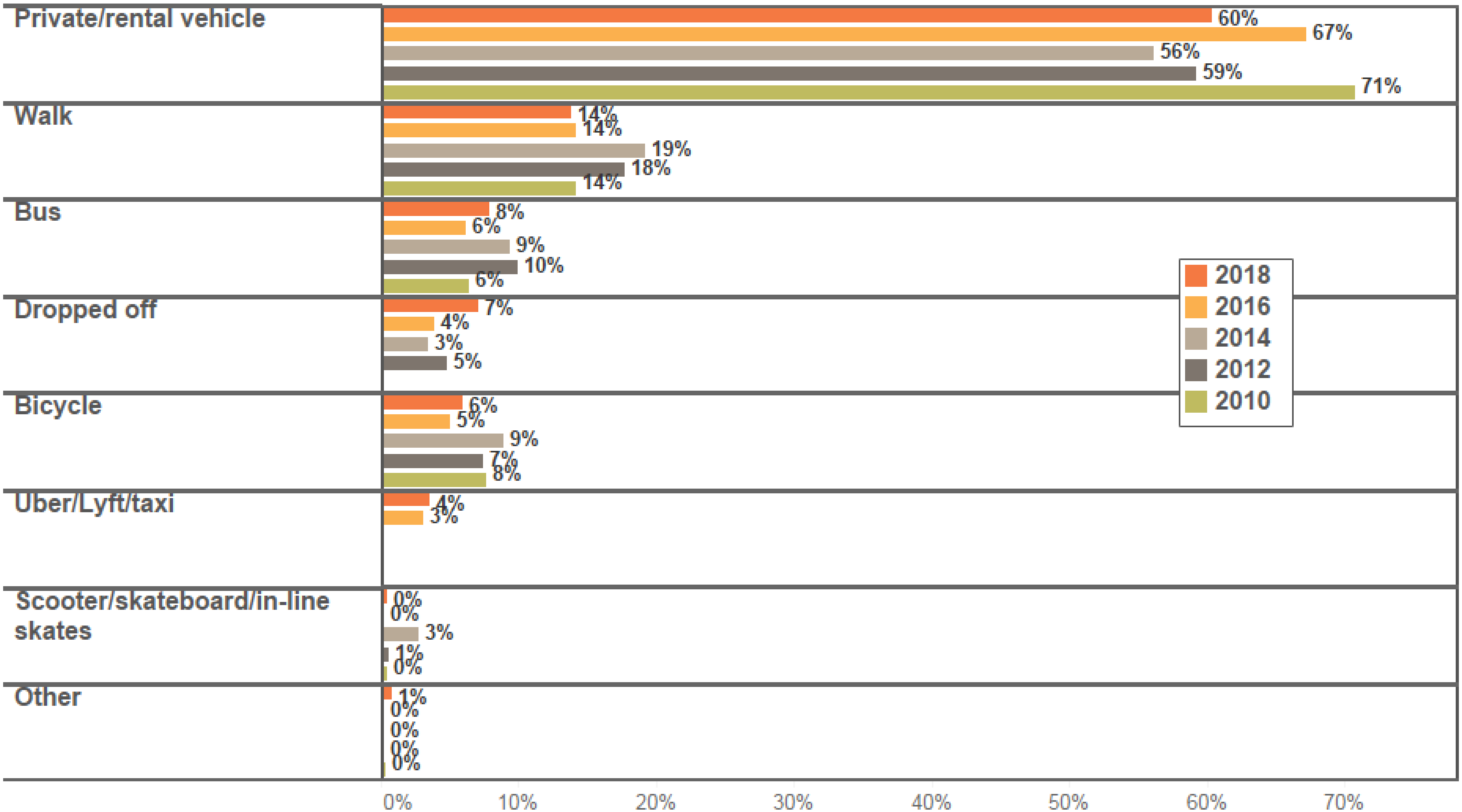
Reason for Visiting

- One primary reason for coming downtown
  - Hanging out/enjoying the setting/people watching (35%)
  - Employment-related (17%)
  - Eating a meal (15%)
  - Shopping (9%)
- Additional activities engaged in during visit
  - Hanging out (54%)
  - Eating a meal (51%)
  - Shopping (37%)
  - Coffee/ice cream/snack (41%)
  - Watching street entertainment (18%)
  - Employment-related (11%)

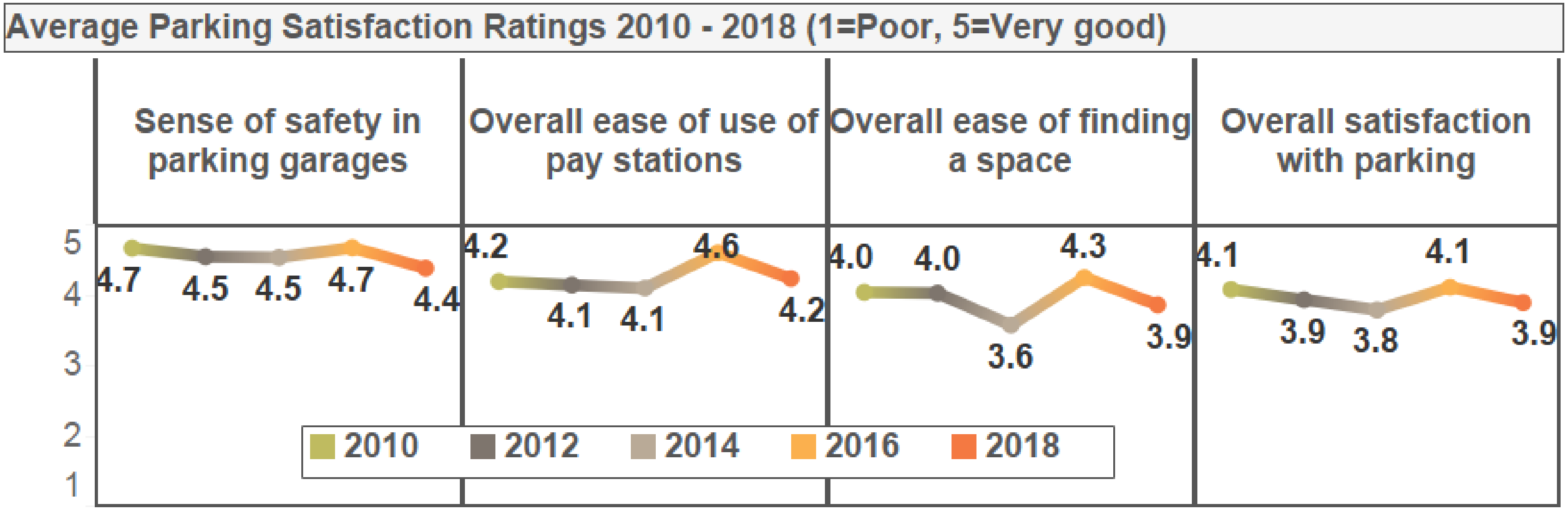
Transportation and Parking

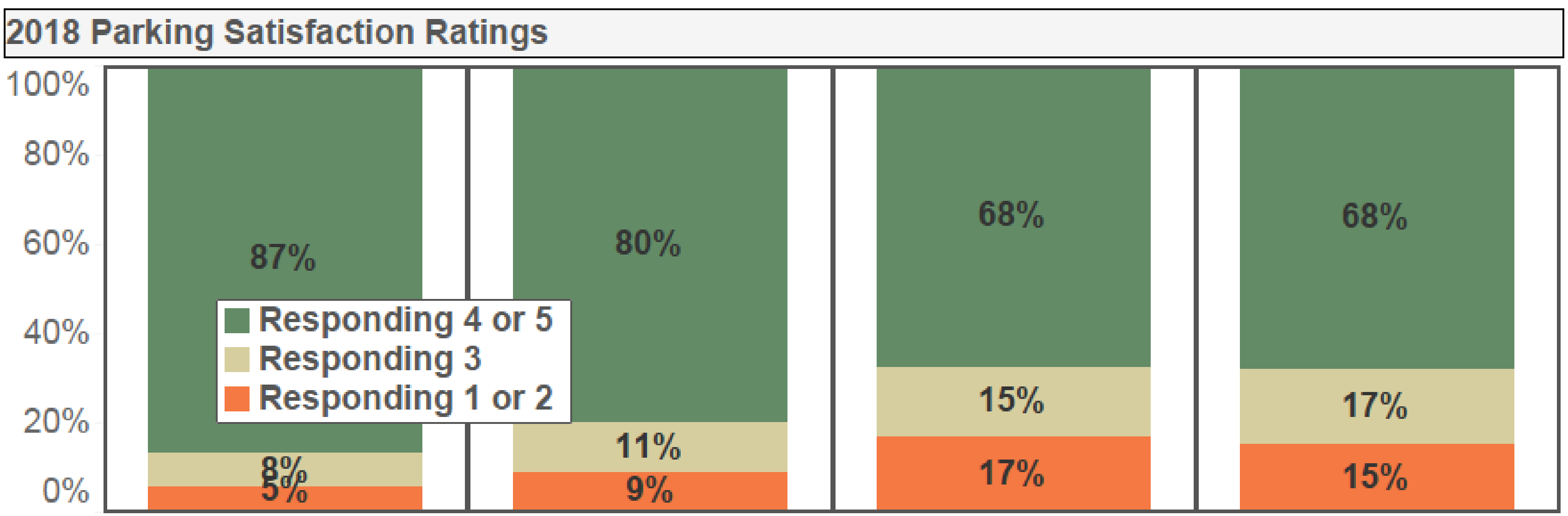
- 60% drove to reach downtown, while 14% walked, 8% rode the bus, 7% were dropped off, 6% rode a bike, and 4% took Uber/Lyft/zTrip
- Students and non-student Boulder residents are most likely to use alternate modes (each about 64%), followed by visitors from outside Colorado (40%)
- 46% parked at a pay station, 24% in a parking structure, 22% free in adjoining neighborhood
- Parking satisfaction generally down from 2016, up from 2014
- Ease of using alternate modes of transportation to access downtown Boulder are quite high

Transportation and Parking



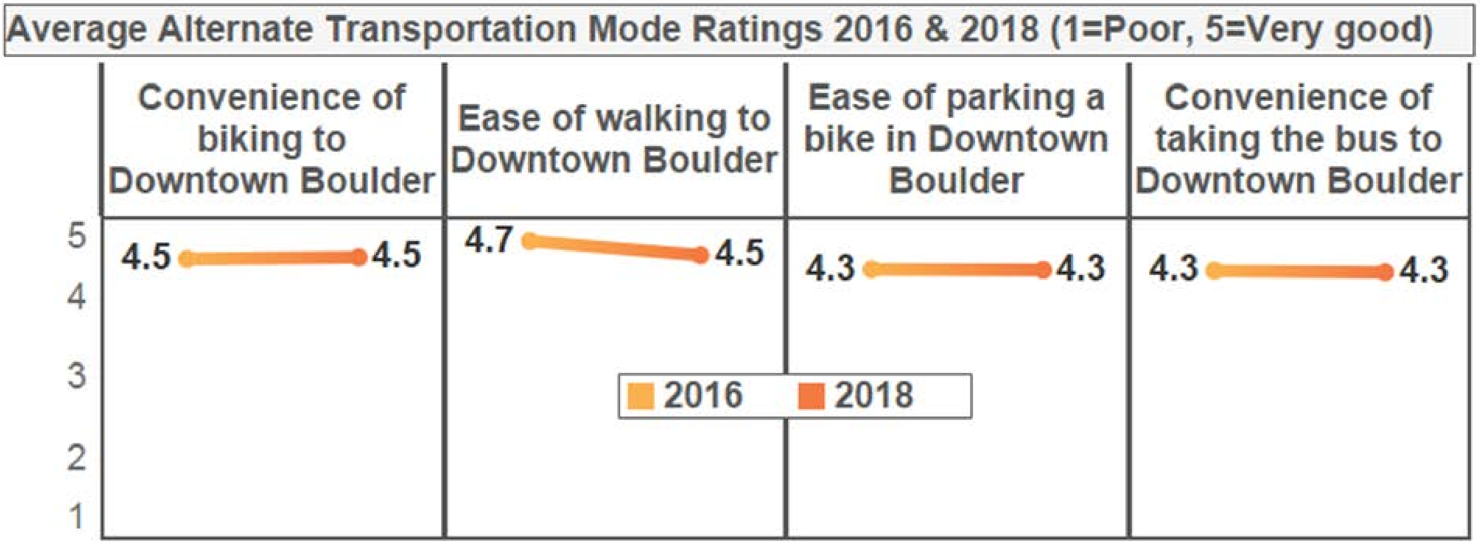
Satisfaction with Parking

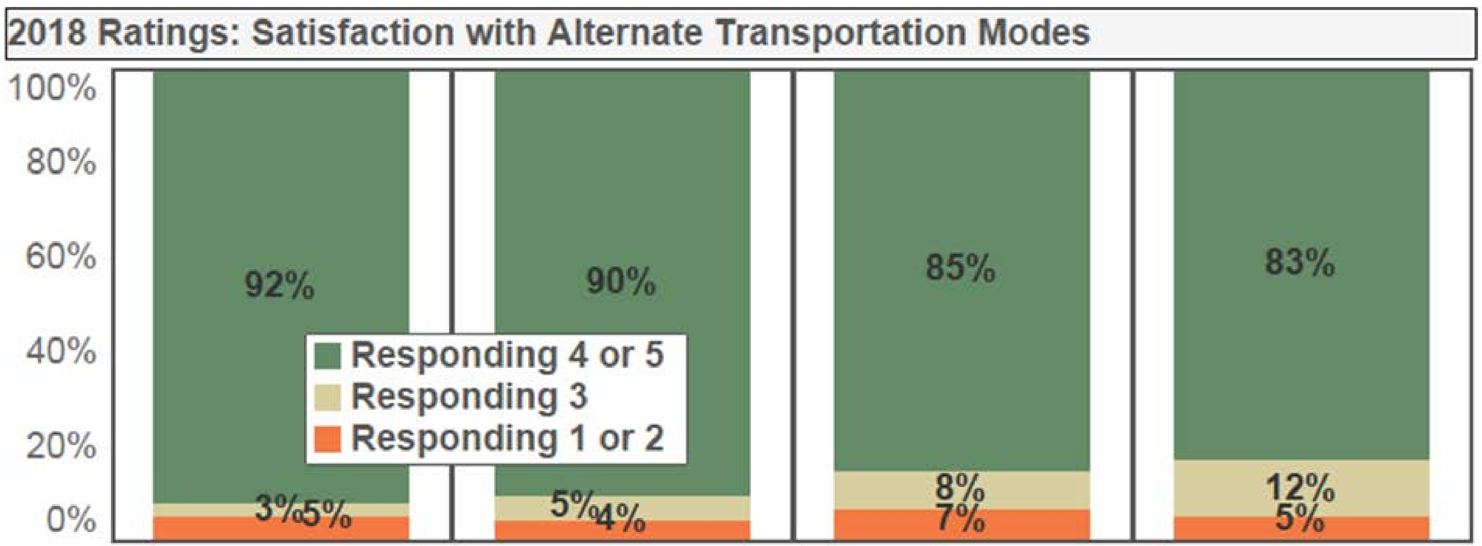




ALTERNATE TRANSPORTATION

RRC ASSOCIATES





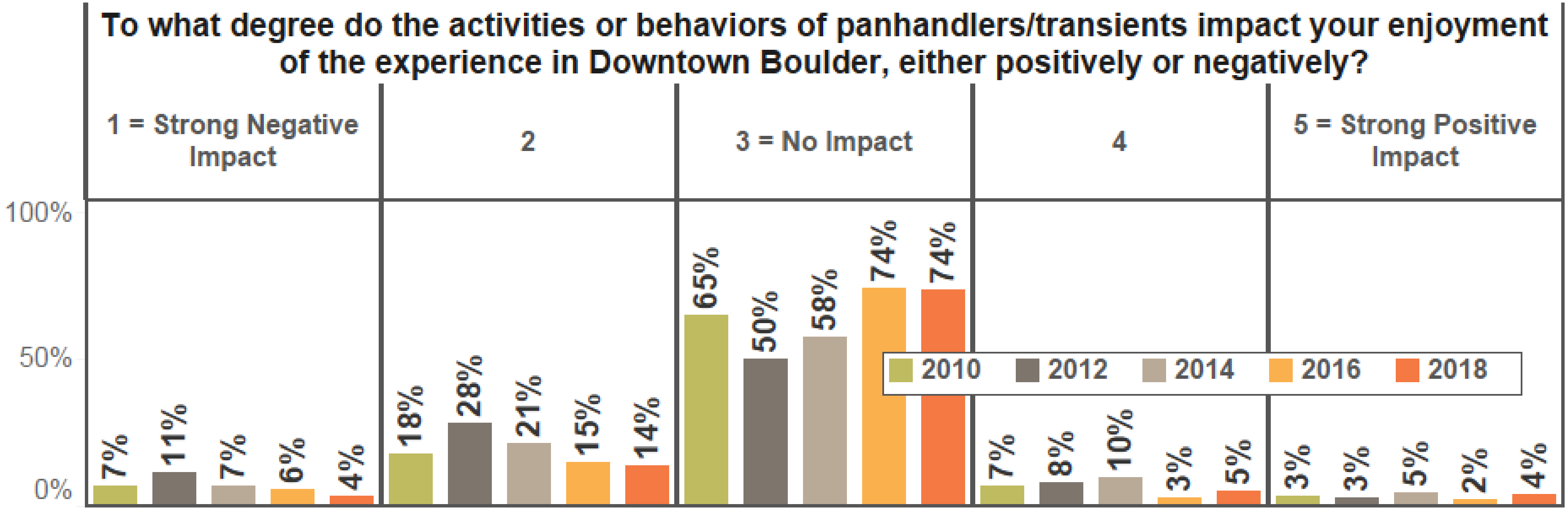
BOULDER colorado • usa
BOULDER CONVENTION AND VISITORS BUREAU
CITY OF BOULDER
DOWNTOWN BOULDER PARTNERSHIP

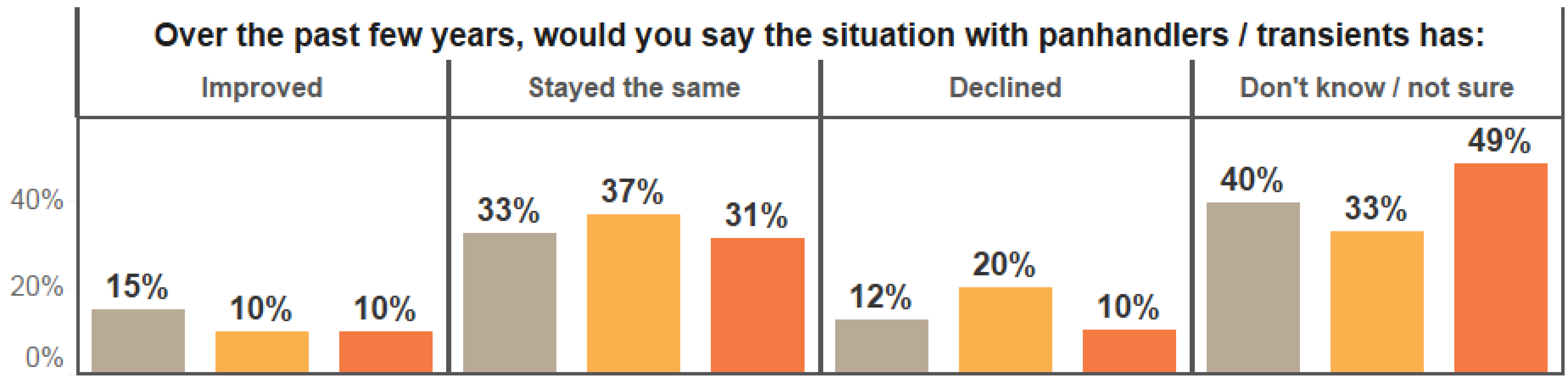
TRANSIENT/PANHANDLER ACTIVITY

- 74% said that the activities or behaviors of panhandlers/ transients had no impact on their enjoyment of the experience in Downtown Boulder (stable from 2016).
- 18% said panhandler behavior had a negative impact (down from 21%), while 9% said it had a positive impact (up from 5%).
- Fewer say that the situation with panhandlers/ transients has gotten worse over the past several years (10%, down from 20%), the same percentage say that it has improved (10%), and fewer think it has stayed the same (31%, down from 37%). 49% don't know or don't have an opinion (up from 33%).

TRANSIENT/PANHANDLER ACTIVITY

RRC ASSOCIATES





BOULDER colorado • usa BOULDER CONVENTION AND VISITORS BUREAU

CITY OF BOULDER

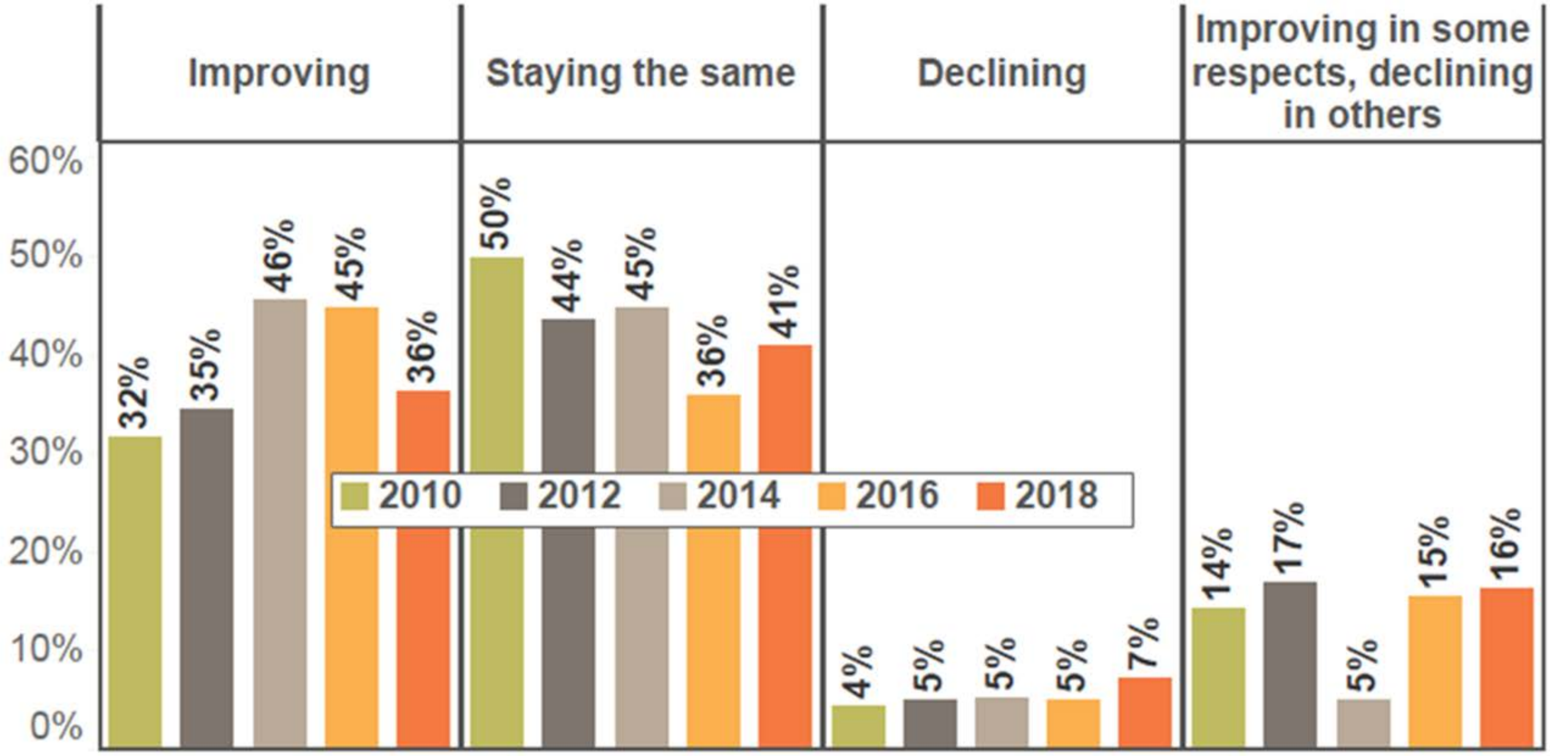
DOWNTOWN BOULDER PARTNERSHIP

Marketing and Media

- 13% of users were aware of some type of advertising – either for a specific merchant or for Downtown Boulder in general – prior to visiting
  - 30% social media (Facebook, Instagram, Twitter, Pinterest)
  - 12% BoulderColoradoUSA.com
  - 10% newspaper
  - 9% Downtown Boulder Visitor Guide
  - 9% BoulderDowntown.com
  - 45% mentioned an “other” source
    - United Airlines magazine

SATISFACTION

- When asked about opinions on the general direction of the downtown experience, most respondents indicated it was staying the same (41%) or improving (36%)

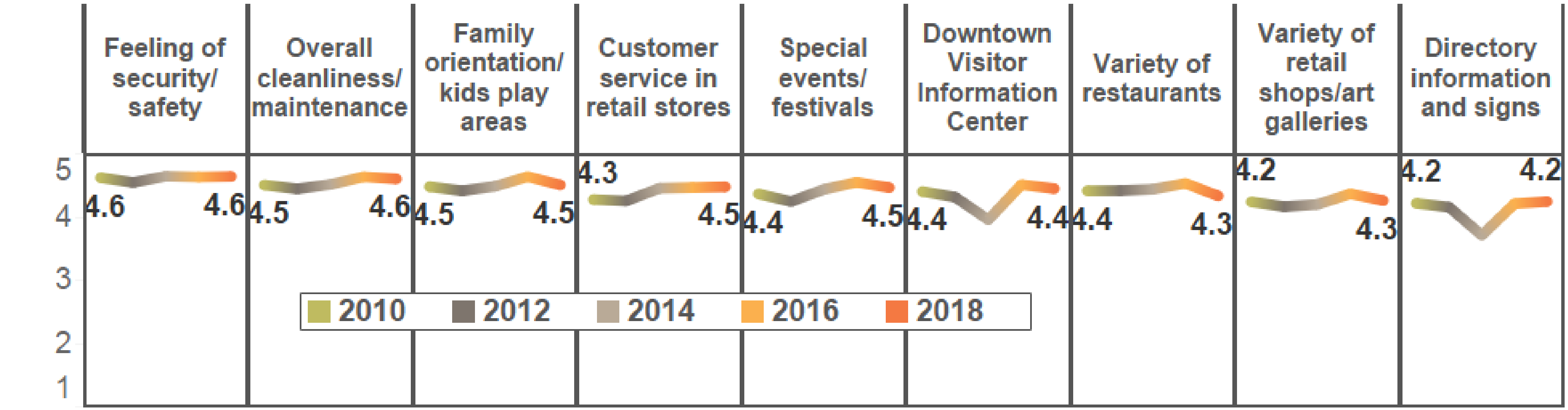


SATISFACTION

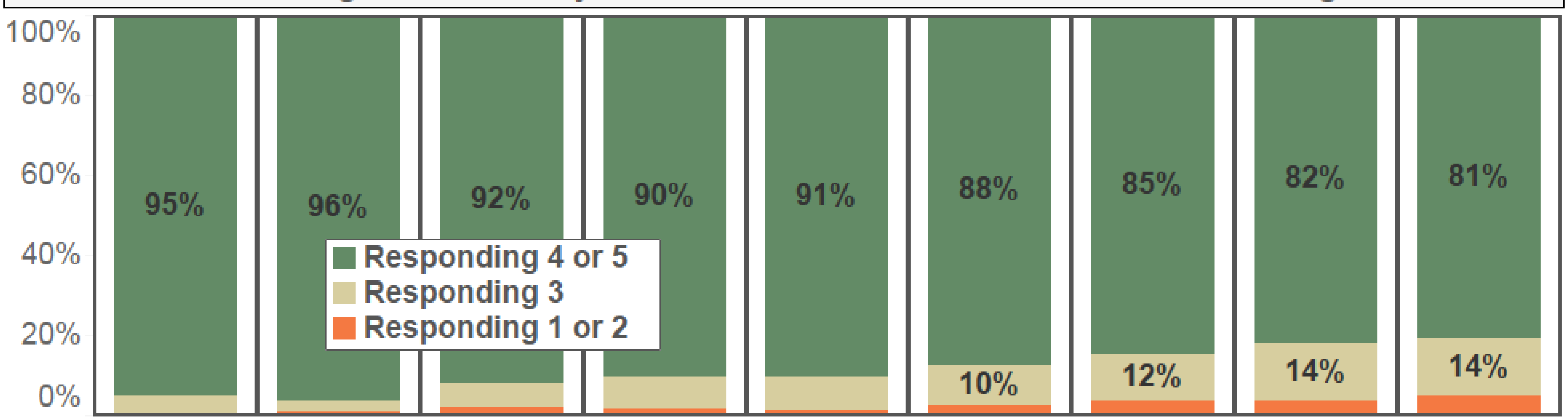
- Satisfaction with specific attributes is very high
- Highest rated aspects of the experience:
  - Feeling of security/safety (4.6 out of five)
  - Overall cleanliness and maintenance (4.6)
  - Family orientation/kids play areas (4.5)
  - Customer service in retail stores (4.5)
  - Special events/festivals (4.5)

SATISFACTION

Average Downtown Experience Satisfaction Ratings 2010 - 2018 (1=Poor, 5=Very good)



2018 Satisfaction Ratings: "How would you rate Downtown Boulder in terms of the following?"



SPECIAL EVENTS

RRC ASSOCIATES

- The Farmer's Market is a strong motivator to bring people downtown – 60% said they came specifically for that event in the past year (down from 69% in 2016)
  - Boulder Creek Festival (42% visited for this event in the past year)
  - Bands on the Bricks (29%)
  - Open Arts Fest/other arts fairs (23%)
  - Fall Fest (17%)
  - Ethnic/Dance festivals (15%)
  - Bolder Boulder Sports Expo (11%)
  - Munchkin Masquerade (10%)
  - Buff Stampede (19%)
- 29th Street Mall is the top competitor for other visits and other special events

BOULDER colorado • usa
BOULDER CONVENTION AND VISITORS BUREAU

SUGGESTIONS FOR IMPROVEMENTS

- ***"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"***
- ***"Longer parking options at pay stations. Makes me feel rushed."***
- ***"More bike parking"***
- ***"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 for compost and recycle more outside the mall. And the doors to them are scary dirty"***

Conclusions and Takeaways

- Very positive feedback related to the overall experience and with individual aspects of Downtown
- 40% use alternate transportation to access downtown Boulder
- Spending penetration up, but average spending down
- User demographics are relatively stable
- User mix is evolving, with a higher share of out-of-state visitors
- Special events draw visitors and add vitality
- A popular place for visitors to hang out and for locals to bring out-of-town family/friends

THANK YOU!

DAVIDB@RRCASSOCIATES.COM