Downtown Boulder User Survey Summer 2010

Summer 2010

Final Report

Prepared for:

Downtown Boulder Inc.

Boulder Convention & Visitors Bureau

City of Boulder Downtown Management Commission

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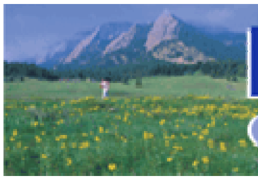


USER SURVEY SUMMARY **SUMMER 2010**

Introduction

This report summarizes the results of the 2010 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 822 interviews were completed during the research period between mid-July 2010 and late August 2010.

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, for the past 12 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, 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 11:30 a.m. and 8:00 p.m. along Pearl Street from 10th Street to 16th Street. Similar to the research conducted in 2007 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 2010 survey is the sixteenth Downtown Boulder User Survey RRC Associates has conducted for Downtown Boulder, Inc., the City of Boulder, and the Boulder Convention & Visitors Bureau. In this report, the 2010 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:

- <u>Visitors/user</u>: All survey respondents.
- <u>Local</u>: 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.
- <u>Boulder County resident</u>: Living in Boulder County, outside the City of Boulder.
- <u>Colorado resident</u>: Colorado visitors residing outside Boulder County.
- <u>Visitor residing outside Colorado</u>: 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.
- <u>Overnight visitor</u>: 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 higher proportion of out-of-state visitors than in the past (32 percent of the total visitor mix, up from a historic 25 to 27 percent), and a commensurate decline in residents of the city of Boulder (29 percent, down from a traditional range of 35 to 37 percent).
- Spending Penetration and Amounts. The percentage of respondents spending money was very high (89 percent), consistent with historical results. Despite the high spending penetration and the higher proportion of out-of-state visitors (who spend more on average), the overall average spending amount was down slightly, to $52.12 per person, down from $55.53 in 2008.
- General Satisfaction. Levels of satisfaction were very high, and improved for some attributes that were traditionally rated somewhat moderately: customer service in retail stores, directory information & signs, and the Downtown Information Center. Most highly rated were the feeling of security/safety, the overall cleanliness & maintenance, and family orientation/kids play areas.
- Special Events. A new question was added to the survey this year to gauge users' perceptions and behaviors related to special events, free concerts and fairs/festivals. Quite interestingly, the responses were normally distributed between the three response options given. About one-quarter (24 percent) said that "special events are very important motivators for me to come downtown; I would visit less often if they were not offered." The identical percentage were on the opposite end, characterizing their opinion as, "Special events have little or no influence on my decisions to visit downtown." Most (52 percent) chose the middle of the road option, "I will occasionally come downtown for a special event, but usually come for other reasons."

  Among the various specific events, Farmer's Market, Boulder Creek Festival, Bands on the Bricks, and Art Fair proved to be the most popular.
- Transients. The question about the behavior of transients was modified this summer, to read, "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?" Most (65 percent) said it has no impact (3 on a one to five scale). Twenty-five percent said it has a negative impact, while 10 percent said it has a positive impact.
- Parking Satisfaction. Satisfaction with parking was very good overall. It is particularly high among out of state visitors but relatively low among city residents. Most highly rated overall was sense of safety in parking garages (4.7 out of five). Boulder residents

(non-students) were particularly negative about the overall ease of finding a space (3.8), which appears to be the primary detractor for satisfaction with overall parking (3.7).

- Demographics. The demographic results show a healthy and diverse mix of different ages, incomes, and household status among downtown users. The gender split is about 50-50.

- Primary Motivations for Visiting. The number one reason for visiting downtown Boulder is "enjoying the setting/ people watching/ hanging out," as 41 percent overall cited it as the primary reason for coming downtown. Visitors from out of state are particularly apt to mention this reason (52 percent). Other primary reasons for visiting downtown include shopping (15 percent), a meal (12 percent), or employment reasons (9 percent). Shopping is a greater draw among out-of-state and out-of-county users than it is for city or county residents.

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.

- US visitors residing outside Colorado. The largest group of Downtown users this summer was out of state US residents (32 percent, up from a historical 25 to 27 percent). This important group shows the overall broad appeal of the downtown area and the importance of out of state tourism to Boulder.
- Full-time City of Boulder residents. The proportion of survey respondents who live in Boulder was 29 percent, down from a traditional range of about 35 to 37 percent historically.
    - Residence within Boulder. Of those living in the City, 30 percent reside in North Boulder, 21 percent live in the immediate Downtown core area (within a five-minute walk of Downtown), 20 percent live in South Boulder, and 16 percent live in Central/West Boulder (beyond the 5-minute walking radius). This distribution suggests that the Downtown area has a broad appeal, beyond just those who live in the immediate vicinity. Over the last several years, North Boulder has grown in proportion, while East Boulder has diminished. Central/West and Downtown Core Area residents remain as the greatest contributors to downtown visitation.
- Colorado residents outside Boulder County. The third largest group of Downtown users is Colorado residents outside Boulder County (21 percent this year, generally trending upwards over the past six summers). 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 13 percent of the total user mix downtown, very consistent with historical results.
- International visitors and part-time/summer residents. As in previous years, these segments combined account for less than 5 percent of the overall mix (3 percent international, 2 percent part-time/summer residents of Boulder). While small overall, they contribute to the overall mix of visitors to the downtown area.

Figure 1A
Visitor Residency
By Year

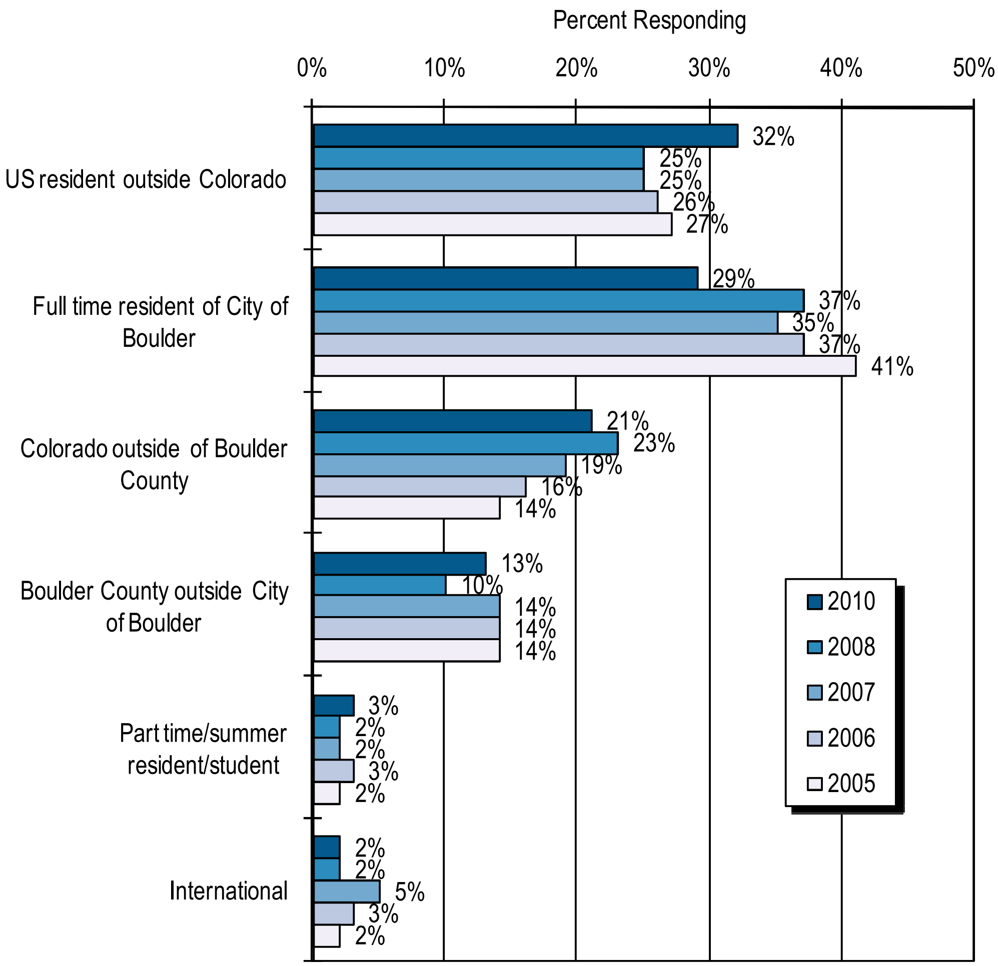
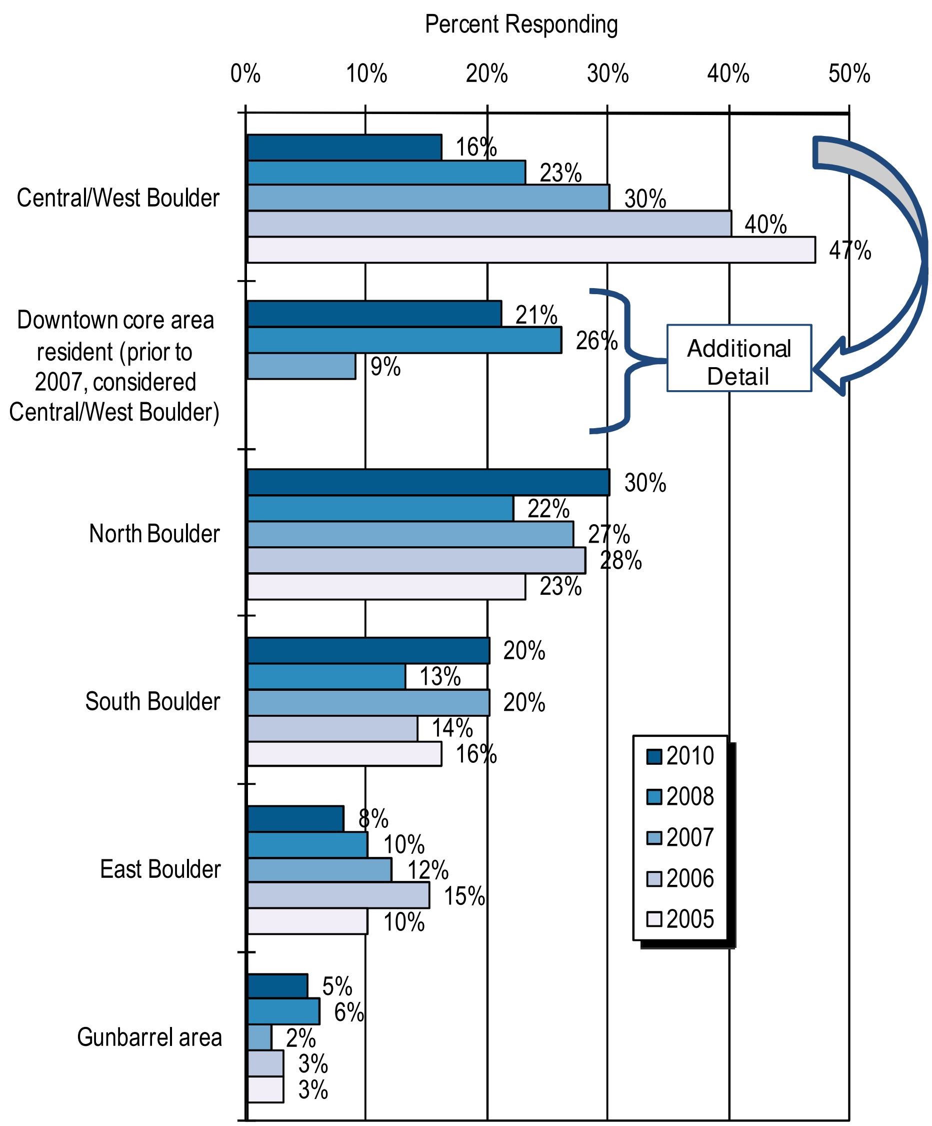


Figure 1B
In What Part of the City of Boulder do You Live?
By Year



Overnight Visitors

Among those who live outside Boulder County, 44 percent were spending the night in the Boulder area, and the other 56 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, 48 percent were staying with family or friends, and 52 percent were staying in commercial lodging, including 41 percent in commercial lodging in the city of Boulder and 11 percent in commercial lodging outside the city but in the Boulder area.
- Length of Stay. The average length of stay in Boulder is 4.4 nights, with a median of 4 nights. These results show a relatively lengthy visit to the area.
- Size of Travel Party. The average size of the travel party is 2.7 people, with a median of two people. These figures have been very consistent over the past six summer surveys.
- 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 ($286 per party), Shopping ($215), Dining/Entertainment ($212), and Other Spending ($32). The total amount spent in Boulder on the trip averaged $717 per travel party, with a median of $455 per travel party. This total figure is up from an average of $684 in 2008 and within the historical range of $703 to $768 from 2005 to 2007.
- Purpose of Trip. General recreation/ vacation (37 percent) and visiting family or friends (33 percent) are the top two reasons for visiting Boulder among overnight visitors. Business represents 13 percent of overnight trips, while visiting for college reasons (6 percent) or a special event/fair/festival (5 percent) were also important motivators for visitors.
- Attractions on Visit. Among a list of attractions, the University of Colorado was the most popular, with 38 percent of overnight visitors indicating they planned to visit CU during their stay. Also popular were Chatauqua Park/Dining Hall (22 percent) and Dushanbe Teahouse (19 percent). A Boulder Library Theater or Art Exhibit attracted 11 percent of overnight visitors, while 10 percent went on the Celestial Seasonings tour and 8 percent visited the Boulder Museum of Contemporary Art.
- Information Sources Used. Word of mouth and the Internet were the top two sources that visitors used to plan their trip to Boulder, with 52 percent and 41 percent, respectively, citing those sources. Nineteen percent said they used the experience of a prior visit, while 6 percent used a brochure and 3 percent leveraged the Downtown Boulder Guide.

Figure 2
Out-of-County User Questions
By Year

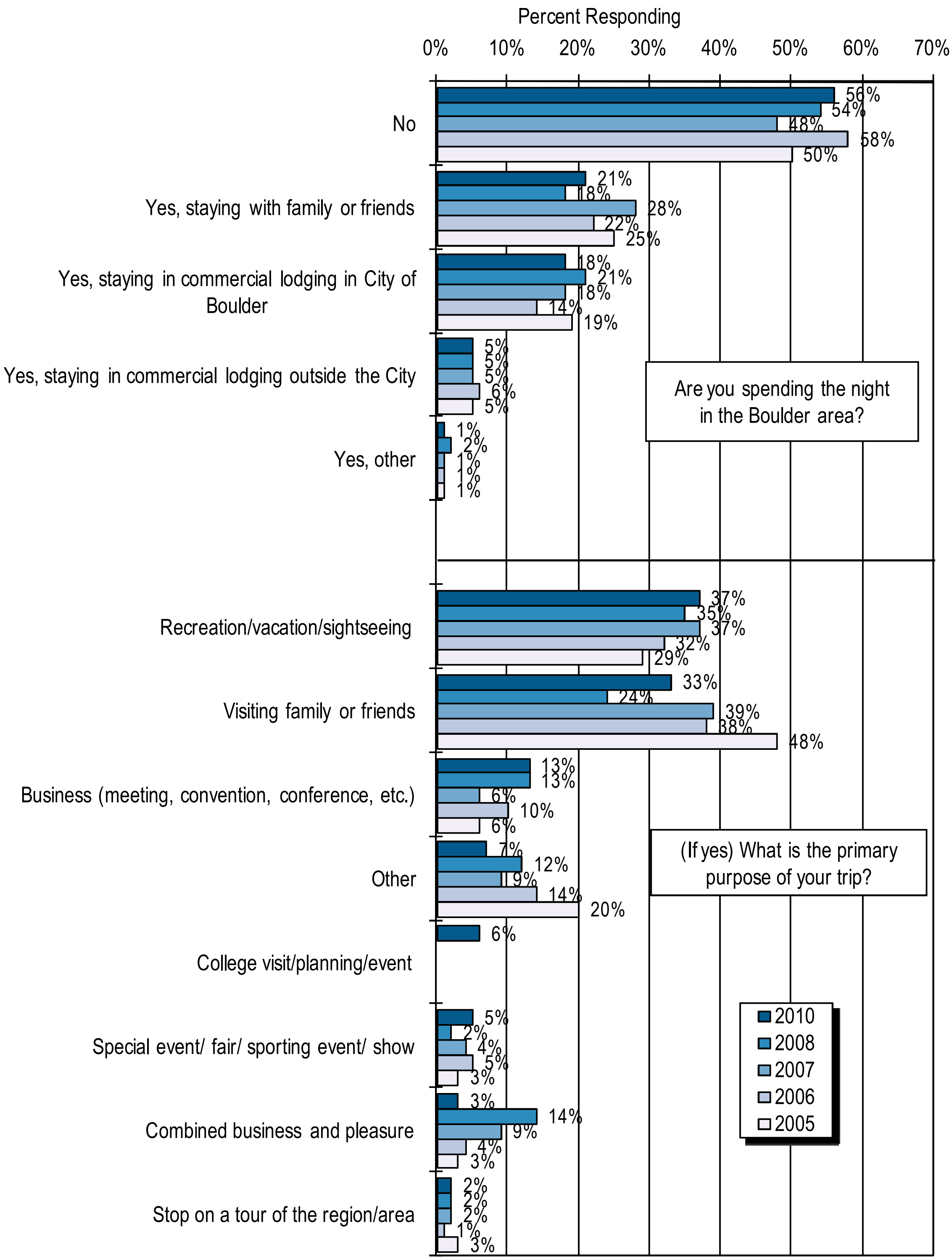
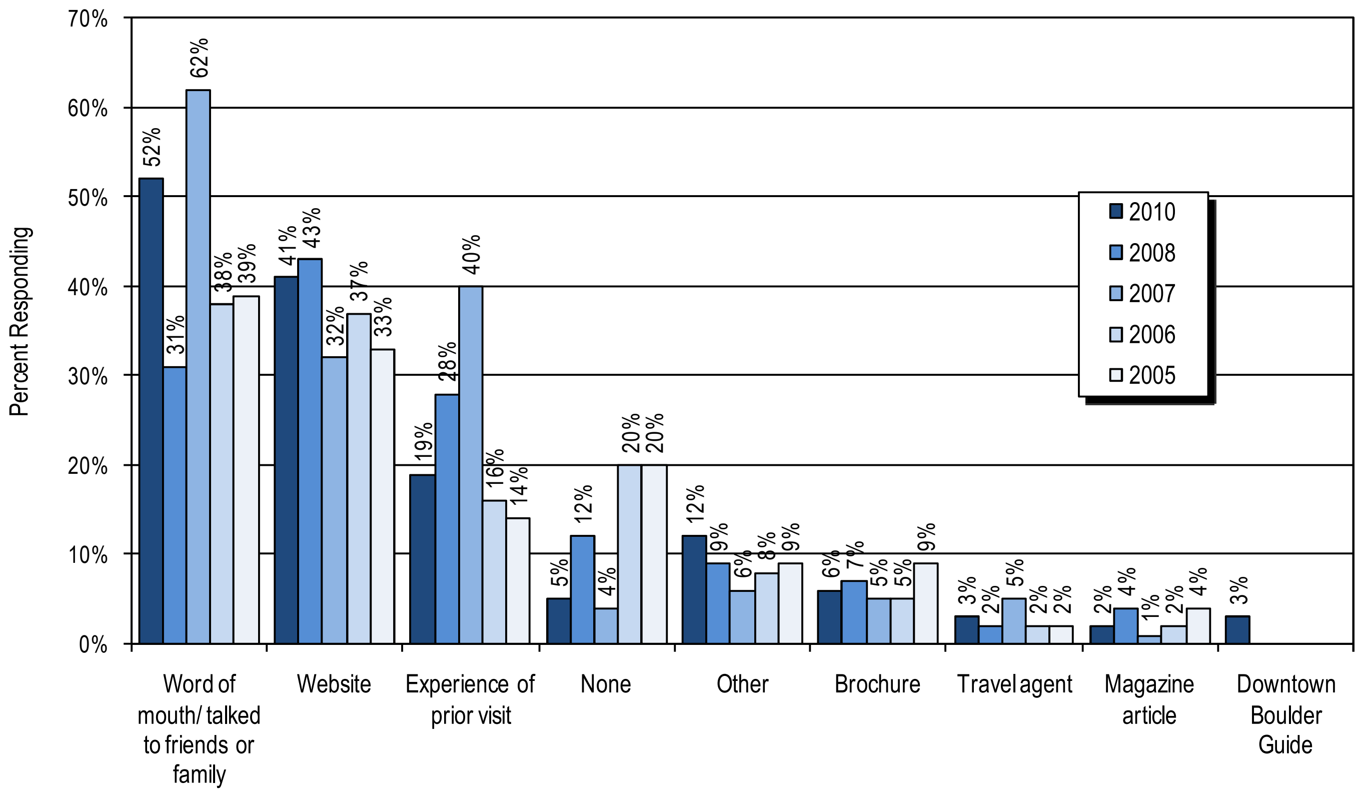


Figure 3
Information Sources Used In Trip Planning
Visitors from Outside Boulder County Only, By Year



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 41.6 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) tend to be concentrated in the 25 to 44 year old age range (average age 41.5), while county residents tend to be somewhat older (average age 42.2), and out of state visitors older still (average age 44.7).
- 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 modest overall. Sixteen percent indicated earning less than $15,000 (primarily students), 22 percent earn between $15,000 and $49,999, 16 percent earn $50,000 to $74,999, 15 percent are in the $75,000 to $99,999 bracket, 22 percent report between $100,000 and $199,999, while finally 8 percent are in the $200,000 or more category.
- Gender. The gender split is almost even, with 51 percent male and 49 percent female, consistent with historical averages.

The table on the following page outlines some of the demographic characteristics of users documented in this year's survey, with comparisons to prior years and 2010 results segmented by various visitor types. The subsequent graphs also illustrate the

Table 1
Selected User Demographics

		2010 User Type				
Demographics	2010 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	51%	53%	43%	60%	48%	50%
Female	49%	47%	57%	40%	52%	50%
HOUSEHOLD INCOME						
$0 - $14,999	16%	12%	67%	13%	14%	12%
$15,000 - $24,999	7%	11%	15%	7%	5%	3%
$25,000 - $49,999	15%	18%	6%	16%	15%	16%
$50,000 - $74,999	16%	18%	4%	15%	16%	17%
$75,000 - $99,999	15%	12%	4%	18%	16%	17%
$100,000 - $199,999	22%	20%	2%	30%	28%	22%
$200,000 or more	8%	8%	2%	1%	6%	13%
AGE						
14 - 17	2%	3%	0%	3%	1%	1%
18 - 20	6%	1%	29%	8%	4%	4%
21 - 24	13%	10%	48%	9%	9%	9%
25 - 34	20%	24%	14%	15%	22%	21%
35 - 44	18%	23%	6%	20%	22%	13%
45 - 54	18%	18%	0%	19%	19%	20%
55 to 64	17%	17%	3%	22%	13%	22%
65 or older	8%	5%	0%	5%	9%	11%
AVERAGE AGE	41.6	41.5	24.7	42.2	42.2	44.7
HOUSEHOLD STATUS						
Single, no children	34%	41%	52%	33%	29%	28%
Couple, no children	17%	19%	11%	14%	17%	19%
Household with children at home	28%	28%	5%	34%	35%	26%
Empty Nester	16%	11%	0%	15%	17%	24%
University Student	4%	0%	32%	3%	2%	3%

Figure 4A
Visitor Demographics - Gender/Age
By Year

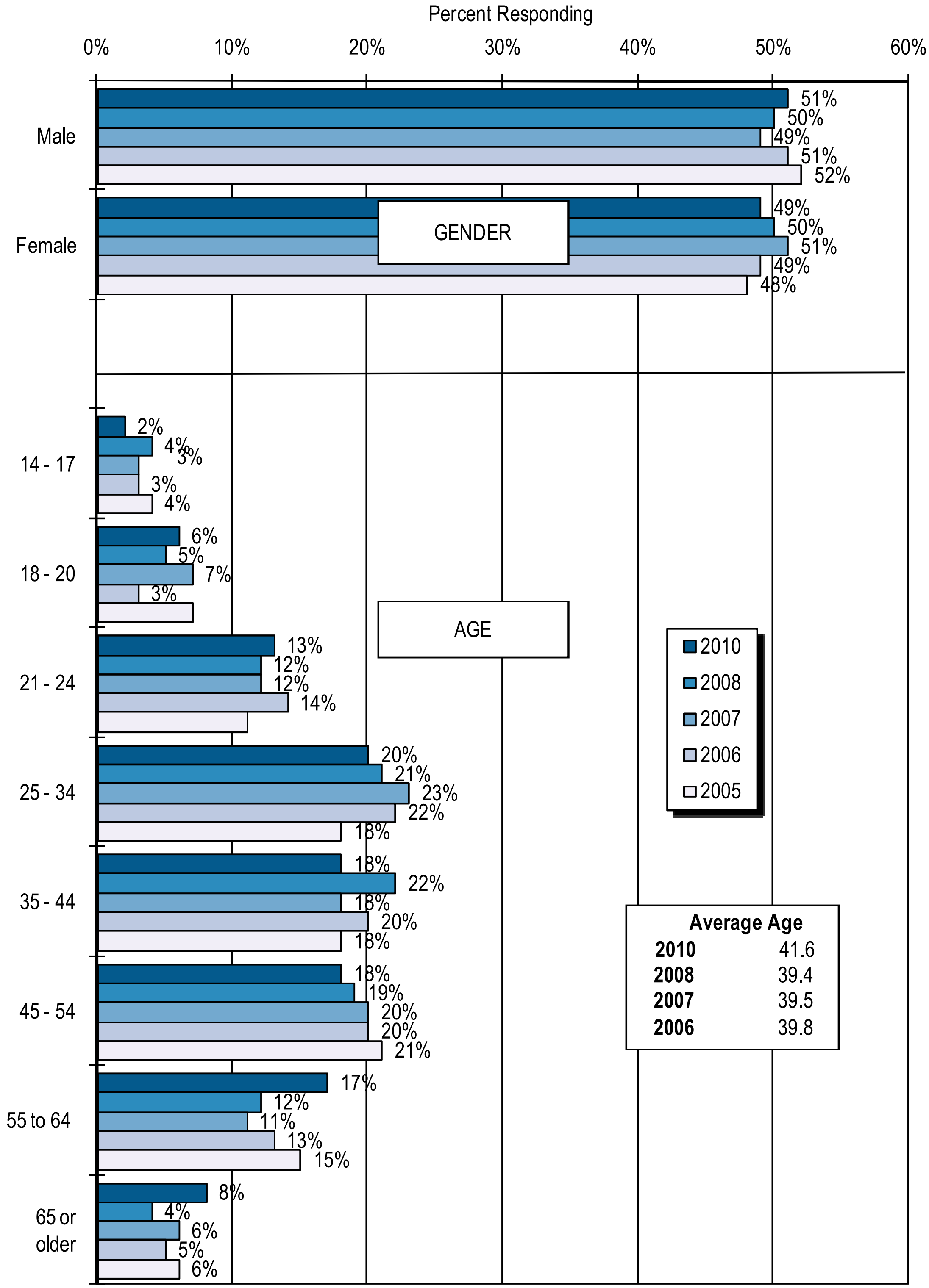


Figure 4B
Visitor Demographics - Gender/Age
By 2010 Visitor Type

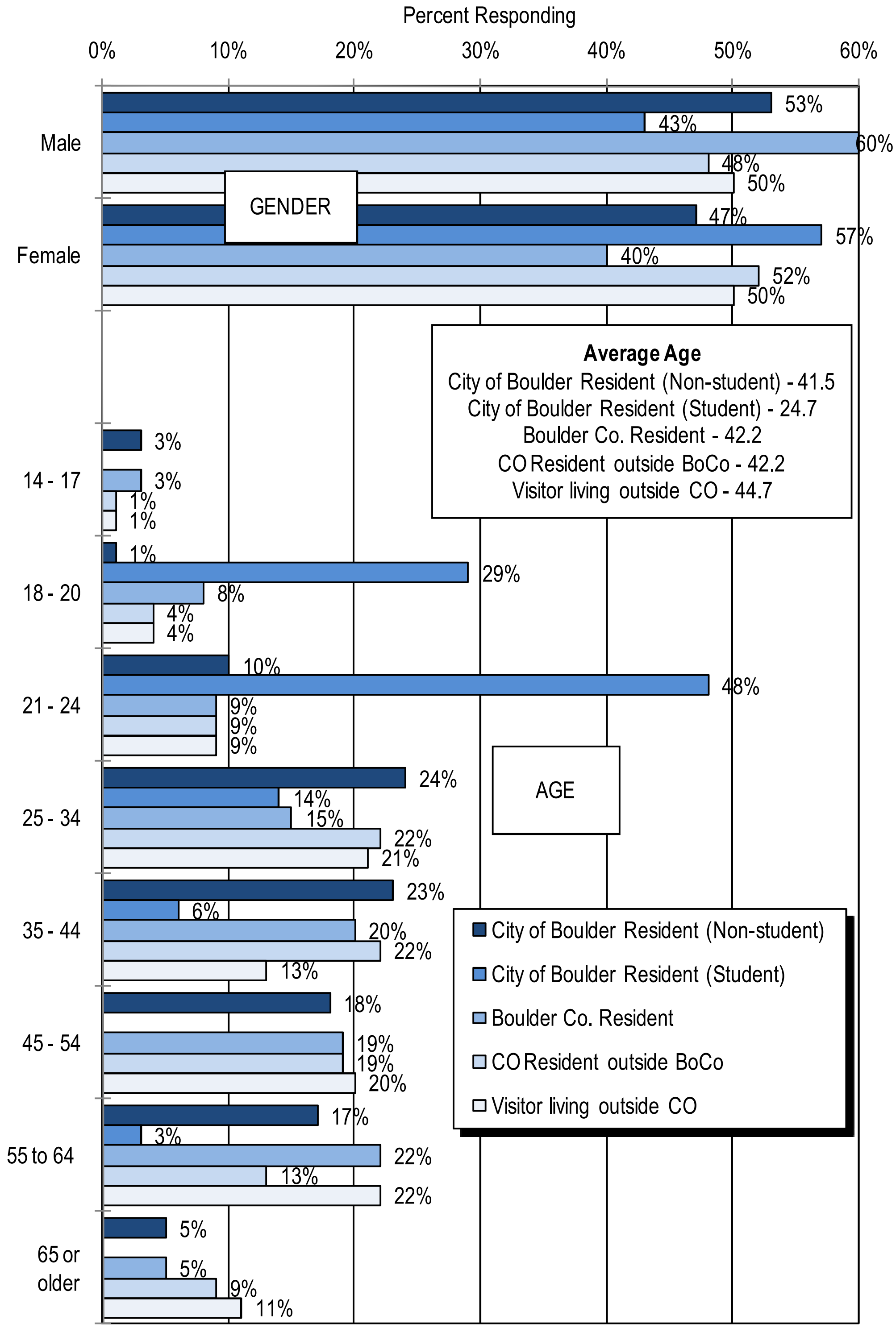


Figure 4c
Visitor Demographics – Household Status/Household Income
By Year

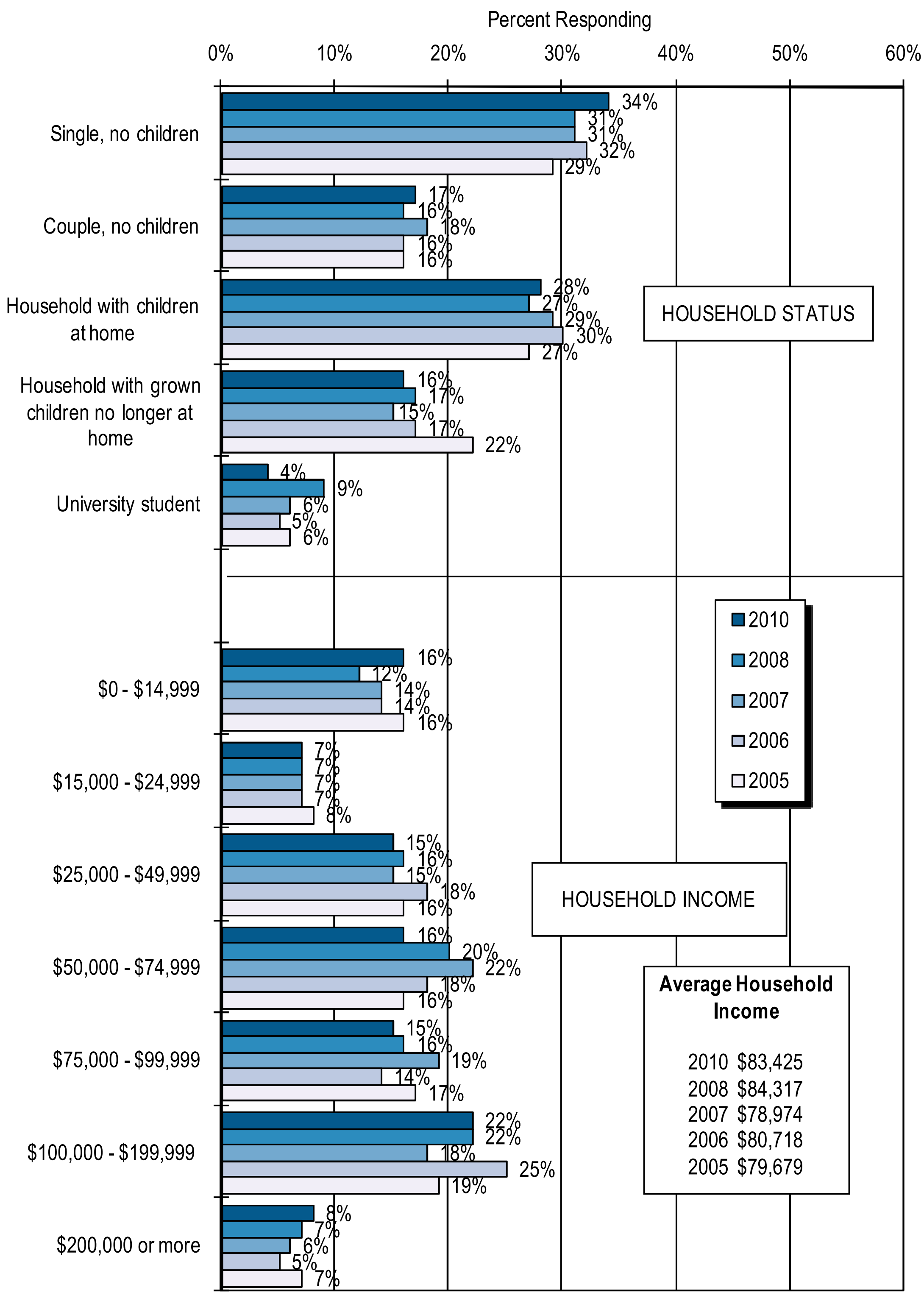
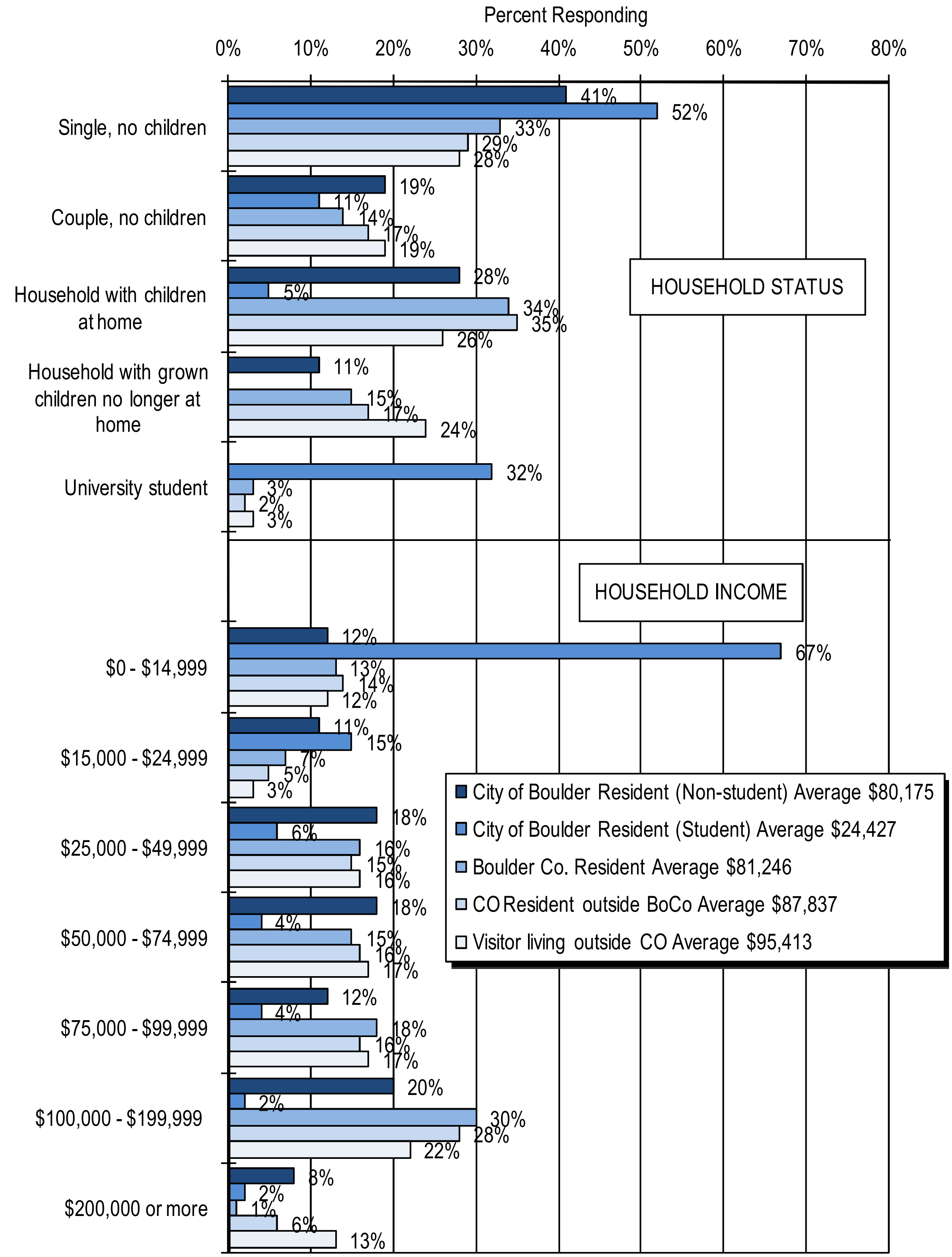


Figure 4D
Visitor Demographics - Household Status/Household Income
By 2010 Visitor Type



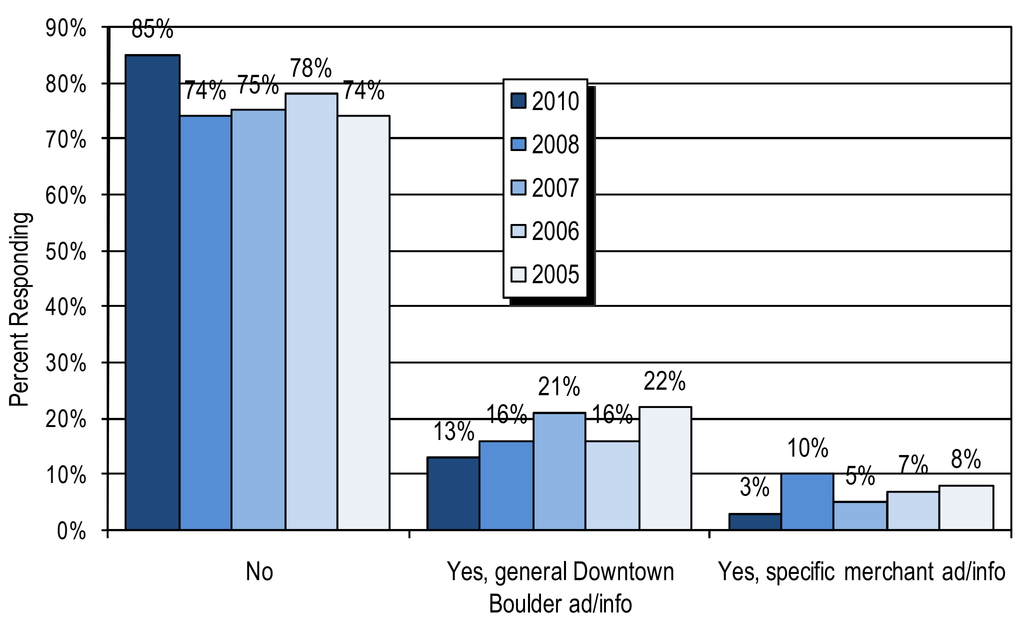
Marketing and Media

Interest exists in understanding the media consumption habits and patterns of downtown users, particularly in the fast changing environment with social media and constant status updates. Only 15 percent indicated that they were aware of advertising or other information sources prior to their visit, down from about 25 percent historically. The somewhat higher proportion of visitors from out of state recorded in this summer's research likely contributed to this decline; out of state visitors are less likely to be aware of advertising/information sources (10 percent) than are city or county residents (each 25 percent aware).

Of those who said they were aware of Downtown Boulder advertising, 41 percent said they saw it in a newspaper, 14 percent in a brochure, 11 percent on boulderdowntown.com, and 10 percent on the radio. Additionally, 8 percent mentioned a general article or feature article as the source of the information, and 8 percent said an RTD bus advertisement. Five percent cited 5280 magazine, and 3 percent selected Facebook or Twitter.

In a new question, only 2 percent of survey respondents said they had visited the Downtown Boulder mobile website on their smartphone.

Figure 5
Advertising Awareness
By Year



An open-ended question asked survey respondents for the websites they visit most frequently. Some of the more common responses are listed below. Many people listed several websites.

Which Websites do you visit on a regular basis?

- Google
- Gmail, work email, NY Times
- Google, Facebook, Flickr, Tripadvisor
- Google, Hotmail, Yahoo, Facebook
- ESPN, NY Times, Denver Post
- CNN, ESPN, Denver Post, Washington Post
- Facebook, Google, Space Collective
- Google, craigslist, facebook, hotmail
- huffingtonpost.com, informed comment, firedog lake
- Weather Channel, Trip Advisor
- Yahoo, Google, Real Estate Development sites
- Youtube, Bing, Facebook
- Weather sites, CU sports
- MSNBC, CNN
- NY Times, Wall Street Journal
- Facebook, Yahoo, weather.com, rockymtnsports

Primary Reason for Visiting Downtown

The number one reason for visiting downtown Boulder is "enjoying the setting/ people watching/ hanging out," as 41 percent overall cited it as the primary reason for coming downtown. Visitors from out of state are particularly apt to mention this reason (52 percent).

Other primary reasons for visiting downtown include shopping (15 percent), a meal (12 percent), or employment reasons (9 percent). Shopping is a greater draw among out-of-state and out-of-county users than it is for city or county residents.

Fewer cited other factors as the primary reason, including a special event (5 percent), coffee/ice cream/snack (3 percent), watching street entertainment (2 percent), or personal 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 (52 percent), followed by hanging out (35 percent), coffee/ ice cream/ snack (36 percent), shopping (37 percent), and watching street entertainment (27 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 (72 percent), followed by eating a meal (59 percent), shopping (48 percent), coffee/ice cream/snack (36 percent), and watching street entertainment (26 percent). 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.

Figure 6A
Primary Reason for Coming to Downtown Boulder Today
By Year

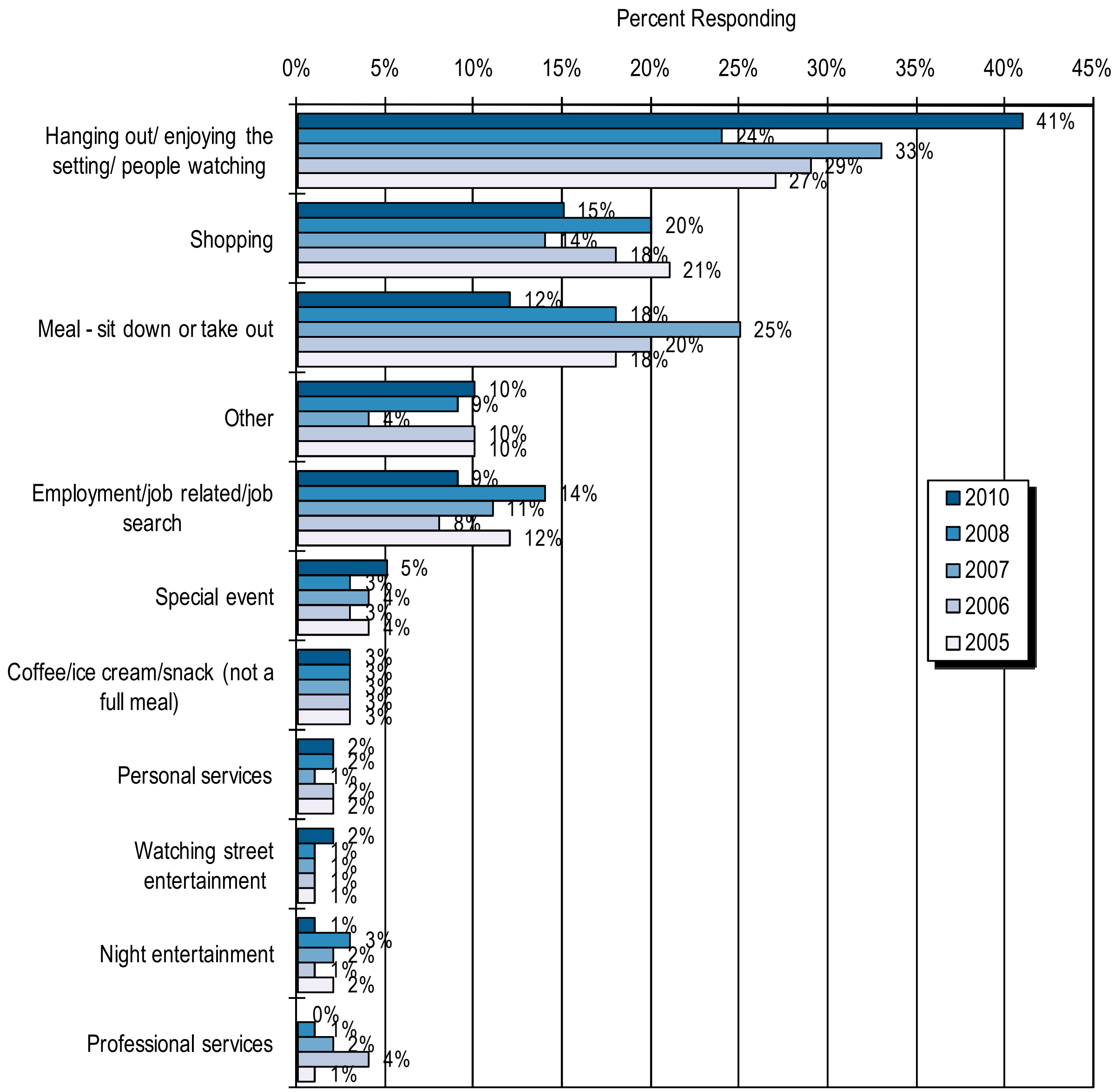


Figure 6B
Primary Reason for Coming to Downtown Boulder Today
By 2010 Visitor Type

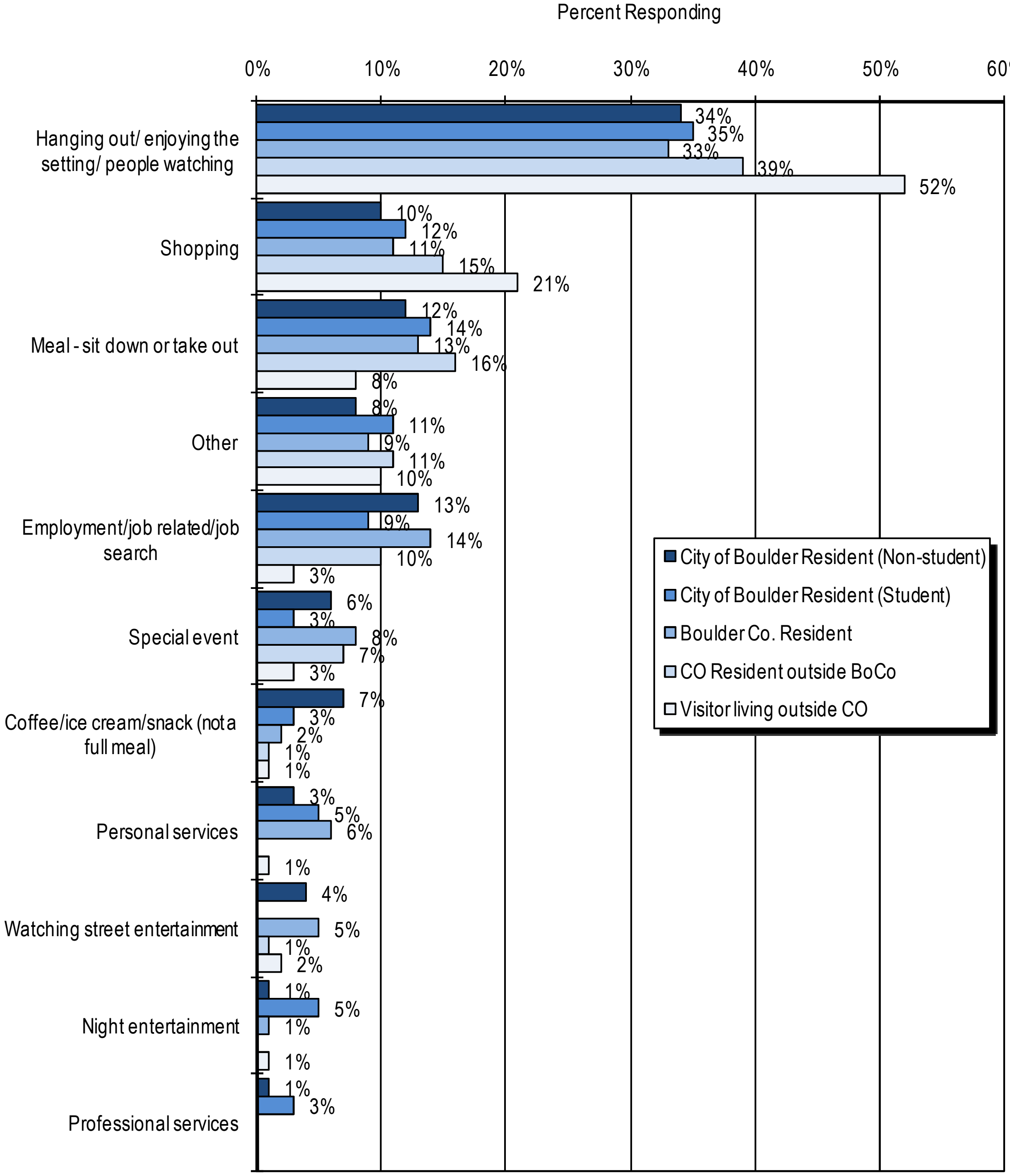


Figure 7A
All Activities This Visit (Primary Activity plus Other Activities)
By Year

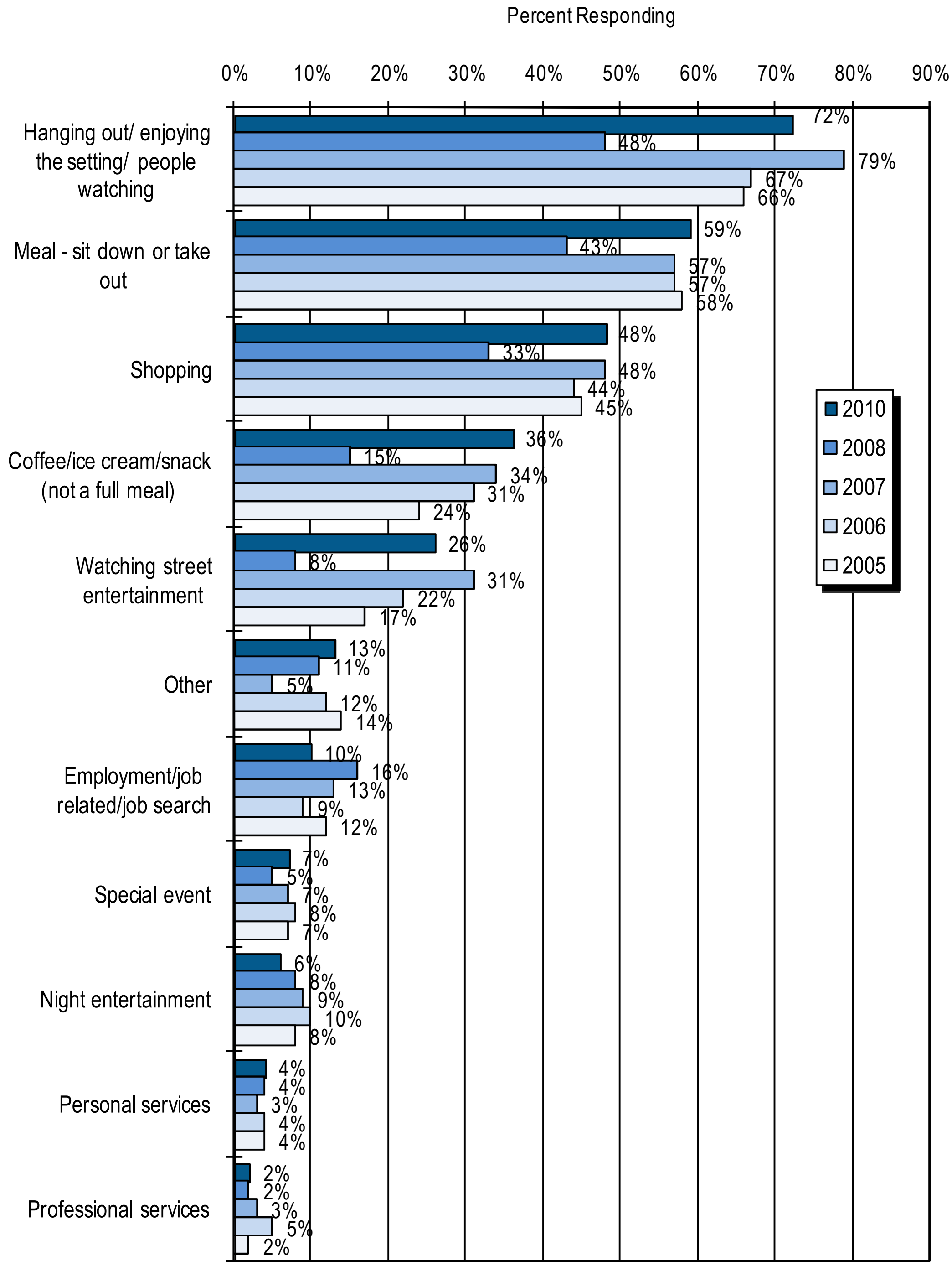
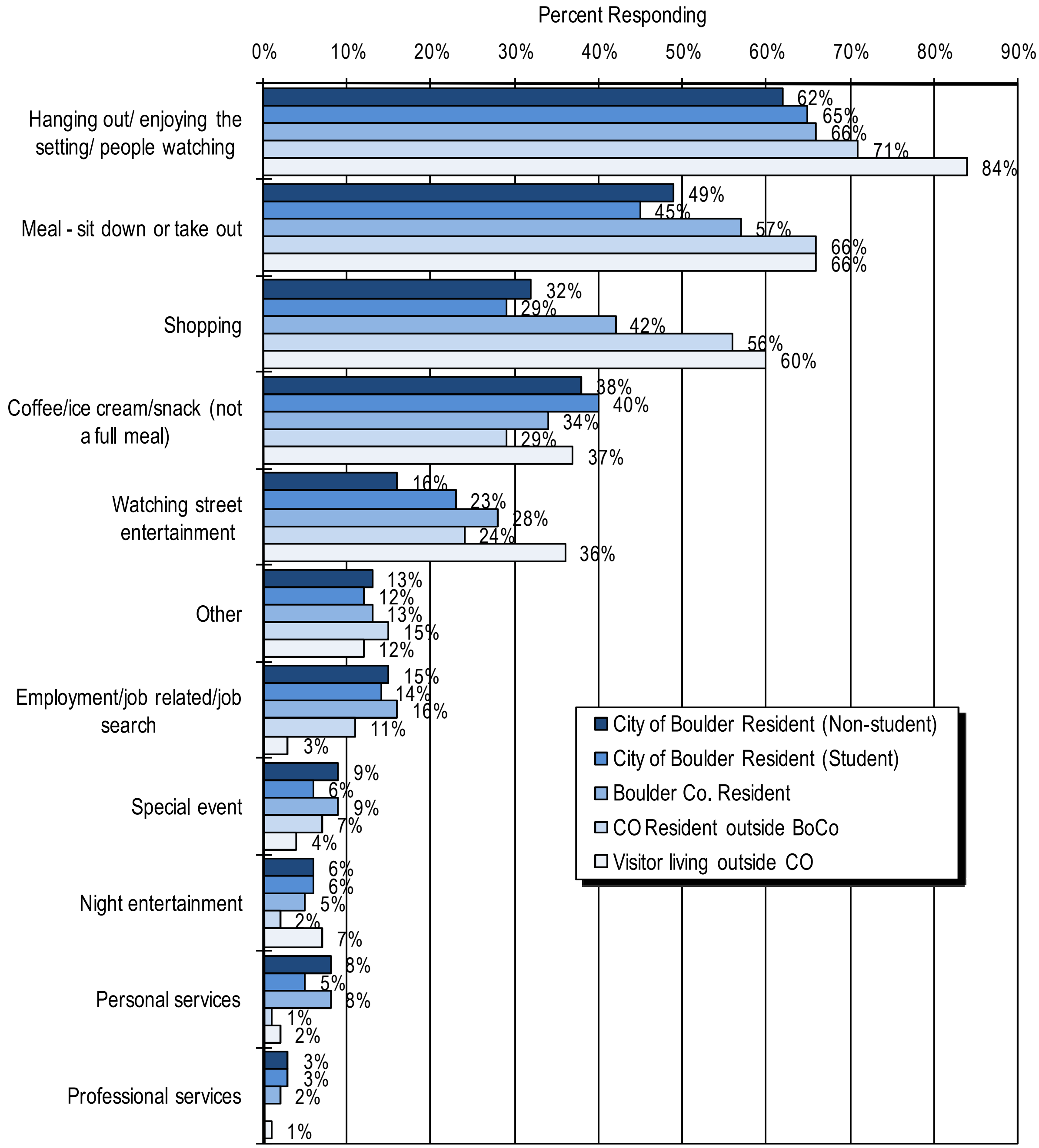


Figure 7B
All Activities This Visit (Primary Activity plus Other Activities)
By 2010 Visitor Type



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 $52.

- Purchase Frequency. Overall, 89 percent said they would make a purchase of some kind, similar to historical figures. While some variations were observed depending on the visitor type (93 percent of out of state visitors planned to make a purchase, while 83 percent of students and of Boulder County residents planned to do the same), the general pattern is of similarly high spending frequency among all groups and all segments in the survey.

- Average Amount Spent. The average amount spent per person totaled $52.12, with $28.59 spent at retail stores/art galleries, $22.23 spent at restaurants/bars, and $1.41 spent in other purchases. These figures are nearly identical to those from the 2007 survey, but somewhat lower than the 2008 survey.

- Segmentation of Spending. Some variation is seen in the spending figures between different visitor segments. Most spenders made a food purchase (about 93 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 (67 percent did) and averaged the highest amount on retail spending ($40.76), while only 37 percent of (non-student) residents of the city made a retail purchase, for an average of $16.75. The table below illustrates some of the spending patterns documented in this and historical surveys.

Table 2A
Spending Penetration and Average Spending
2004 to 2010

	Year of Survey					
Spending Patterns	**2004**	**2005**	**2006**	**2007**	**2008**	**2010**
Percent making a purchase today	87%	89%	88%	89%	84%	89%
Restaurant/Bar	$17.69	$19.46	$24.62	$21.88	$27.82	$22.13
Retail store/Art gallery	$19.33	$27.54	$25.84	$28.38	$26.55	$28.59
Other	$1.18	$1.67	$0.80	$1.32	$1.16	$1.41
Total	$38.20	$48.67	$51.26	$51.58	$55.53	$52.12

- 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 $70.32 per person (including $40.76 on retail spending), Colorado out-of-county residents spent $55.44 on average per person (including $29.76 on retail). Boulder County residents (non-city) also spent more on average ($44.28) than did city residents $34.61 for non-student city residents and $24.76 for students). It should be noted that city residents spend less per visit but make more frequent visits than other segments.

Table 2B
Spending Penetration and Average Spending
2010 User Type

	2010 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	86%	83%	83%	90%	93%
Restaurant/Bar	$17.56	$12.22	$19.93	$23.62	$27.19
Retail store/Art gallery	$16.75	$12.44	$23.92	$29.76	$40.76
Other	$0.30	$0.09	$0.43	$2.07	$2.37
Total	$34.61	$24.76	$44.28	$55.44	$70.32

Figure 8A
Are You Spending Money Today?
By Year

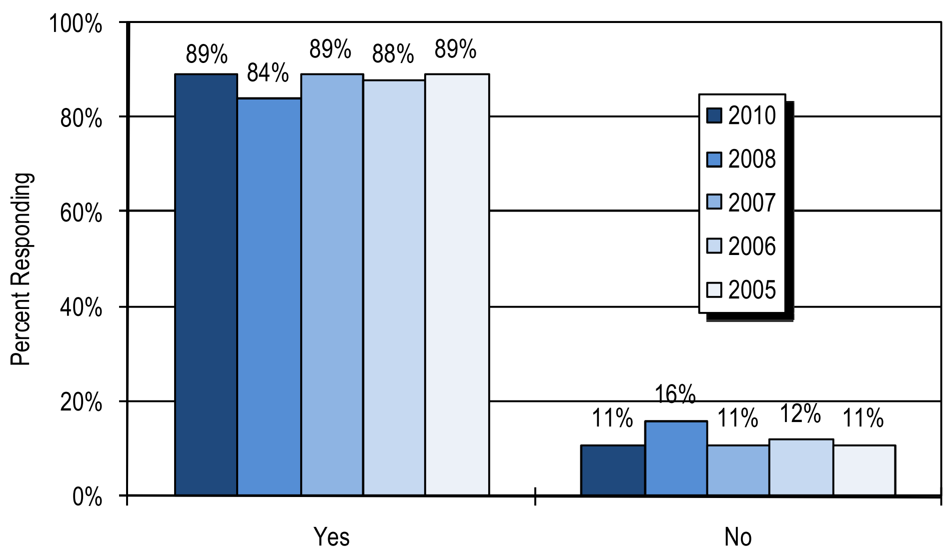


Figure 8B
Are You Spending Money Today?
By 2010 Visitor Type

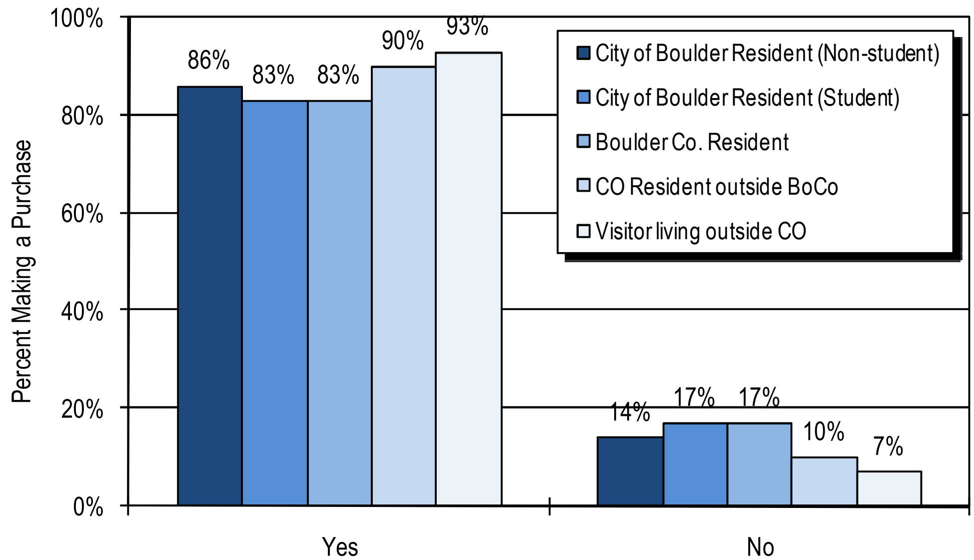


Figure 8C
Average Total Spending (Not Including Non-Spenders)
By Spending Category, By Year

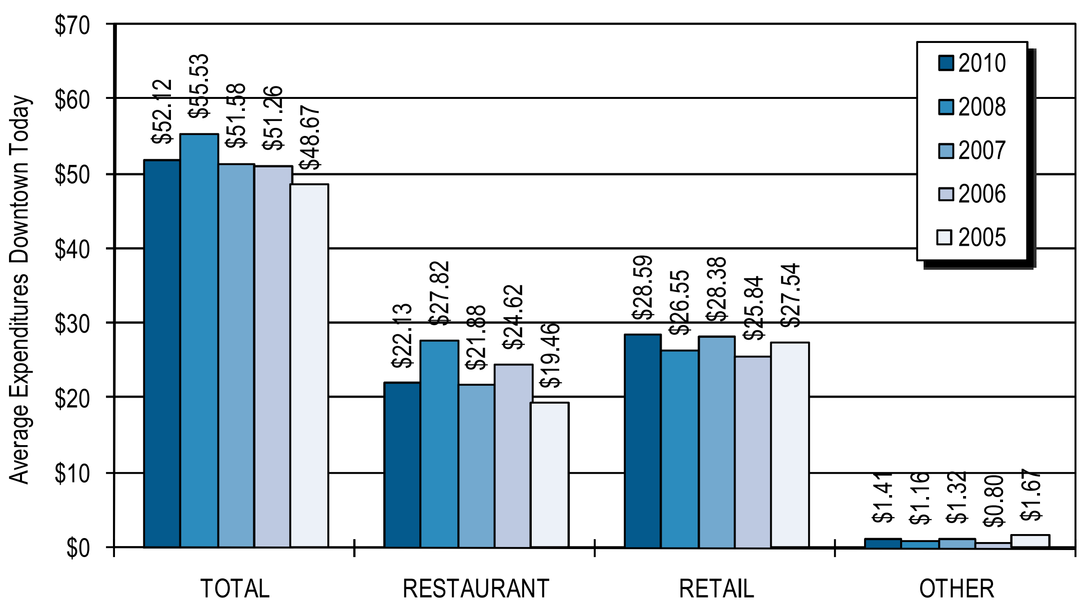


Figure 8D
Average Total Spending (Not Including Non-Spenders)
By 2010 Visitor Type

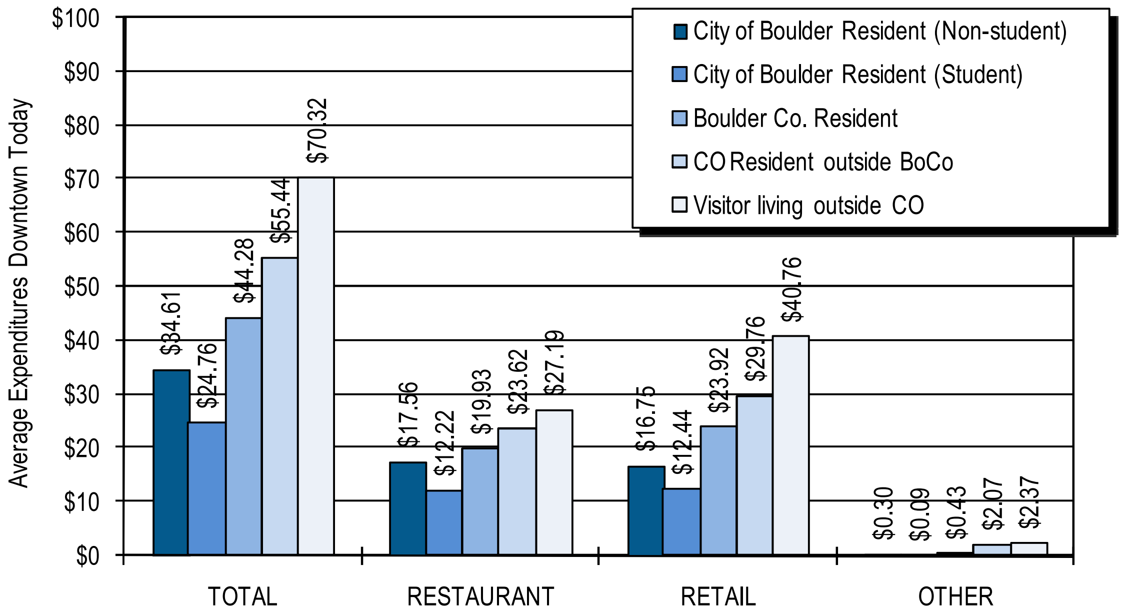
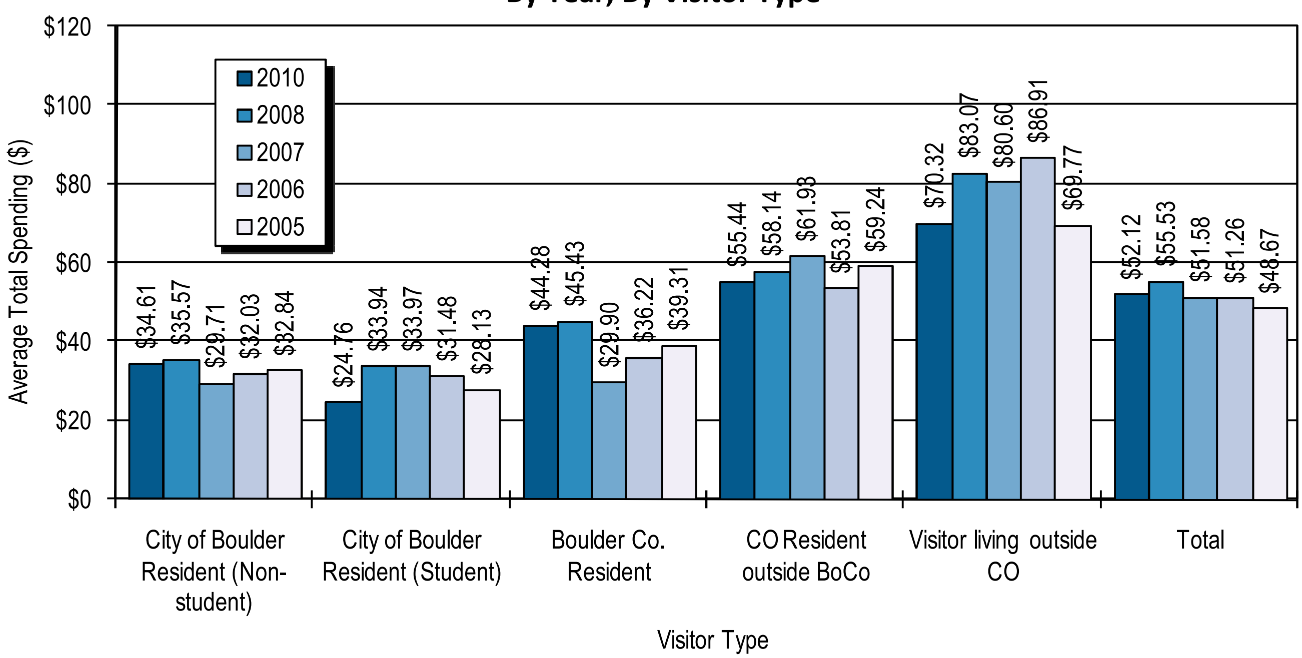


Figure 8E
Average Total Spending (Not Including Non-Spenders)
By Year, By Visitor Type



Transportation and Parking

The transportation patterns of downtown users are relatively stable, with 71 percent driving, 14 percent walking, 8 percent riding a bike, and 6 percent riding a bus. Most of those utilizing alternate modes are students (69 percent) and non-student residents of Boulder (51 percent).

Figure 9A
Mode of Transportation Downtown
By Year

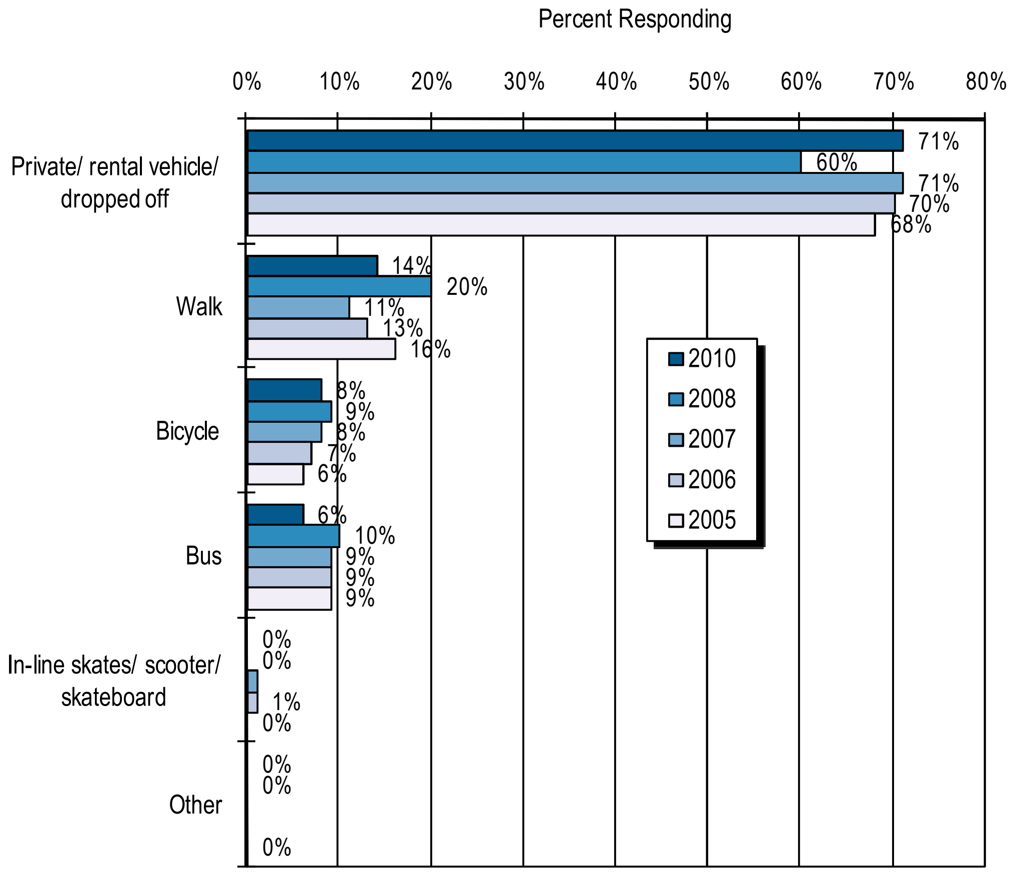
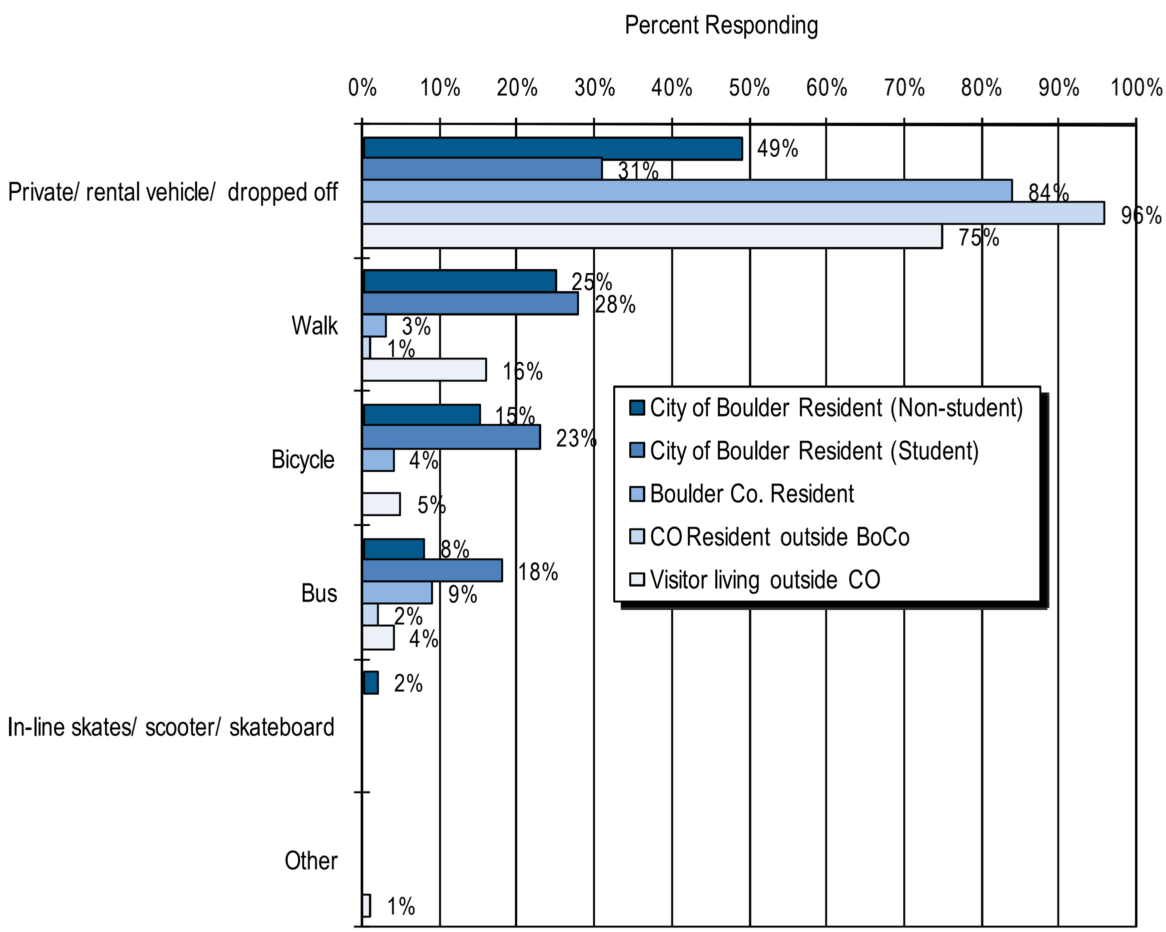
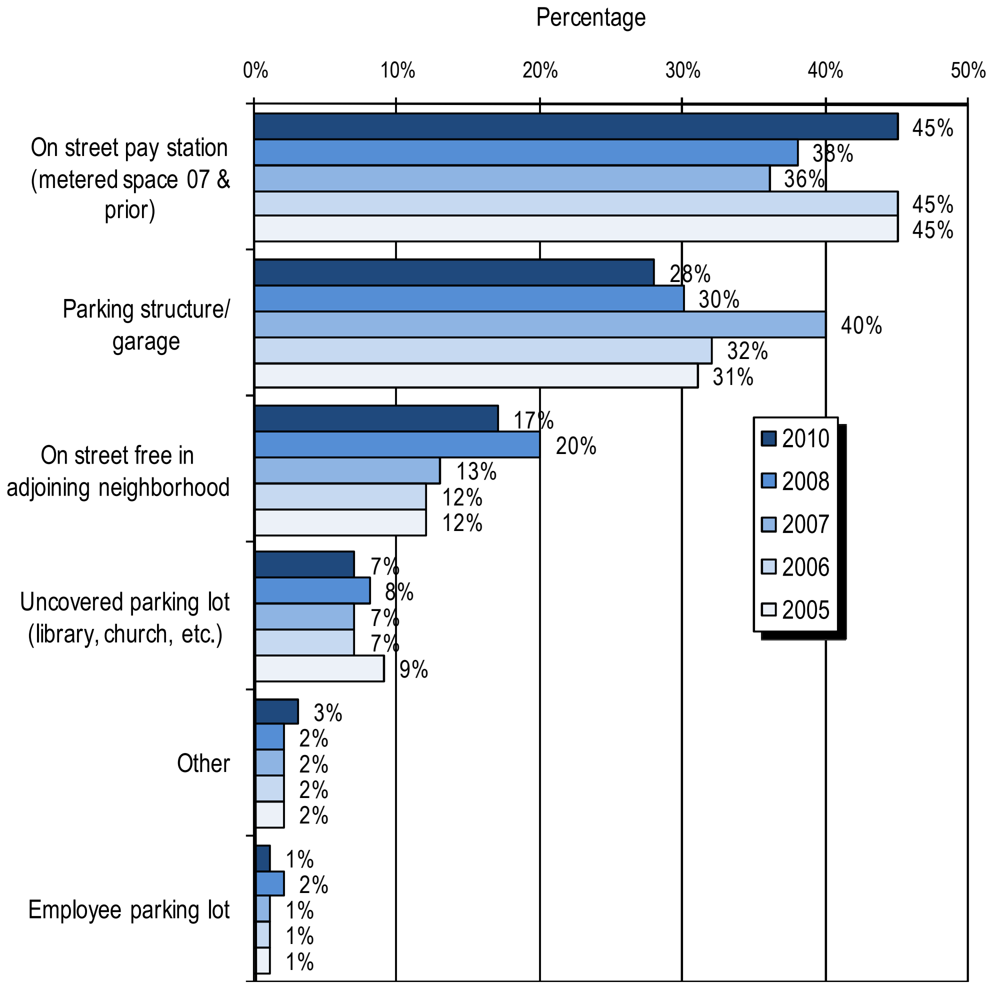


Figure 9B
Mode of Transportation Downtown
By 2010 Visitor Type



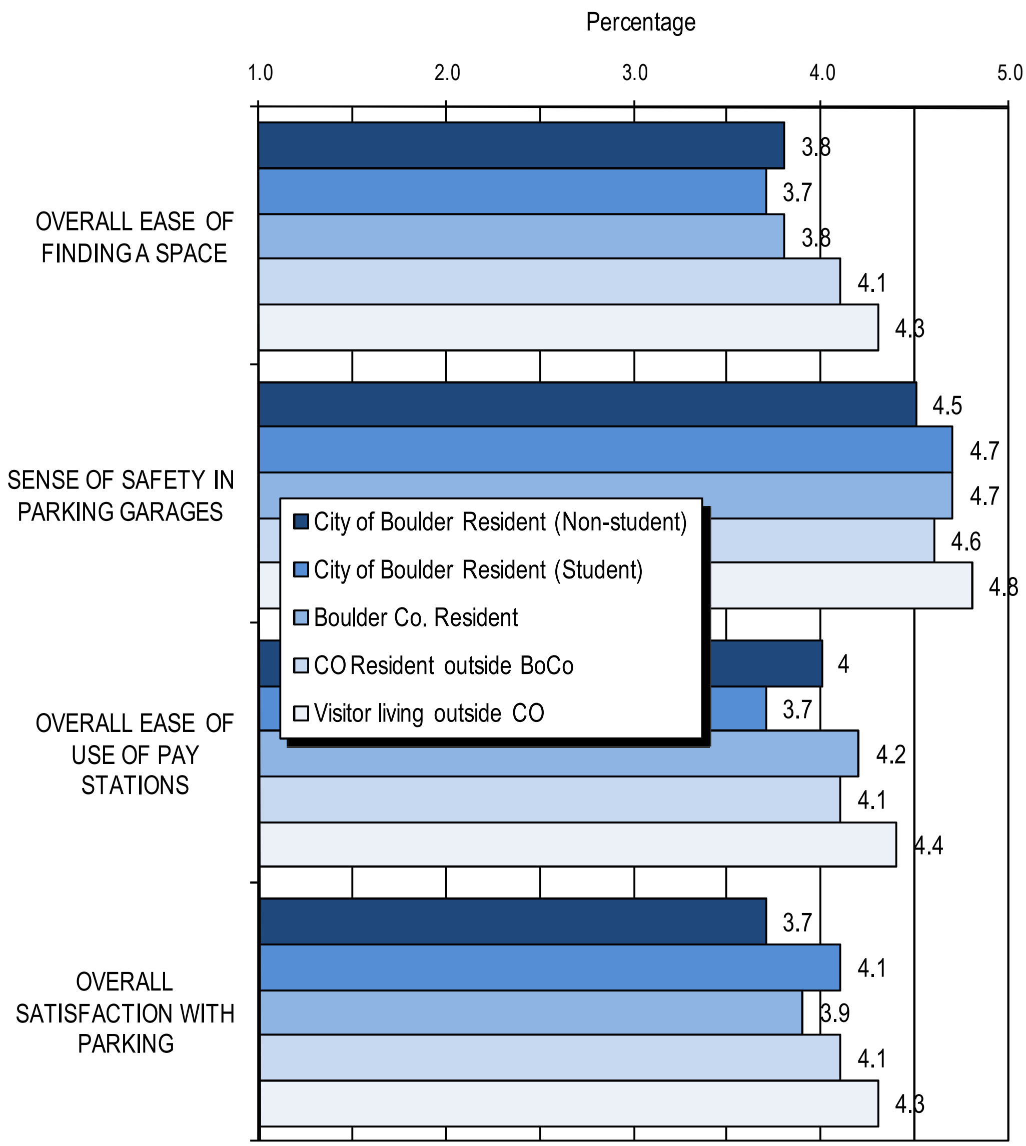
On-street parking at pay stations (45 percent) and parking garages (28 percent) are most popular with drivers. As well, 17 percent parked free on the street in adjoining neighborhoods.

Figure 10
Location of Parked Vehicle
By Year



Satisfaction with parking was very good overall. 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 4.7 out of five), the overall use of pay stations (4.2), the overall ease of finding a space (4.0), and the overall satisfaction with parking in downtown (4.1). Boulder residents (non-students) were particularly negative about the overall ease of finding a space (3.8), which appears to be the primary detractor for satisfaction with overall parking (3.7).

Figure 11
Ratings of Parking Experience
By 2010 Visitor Type

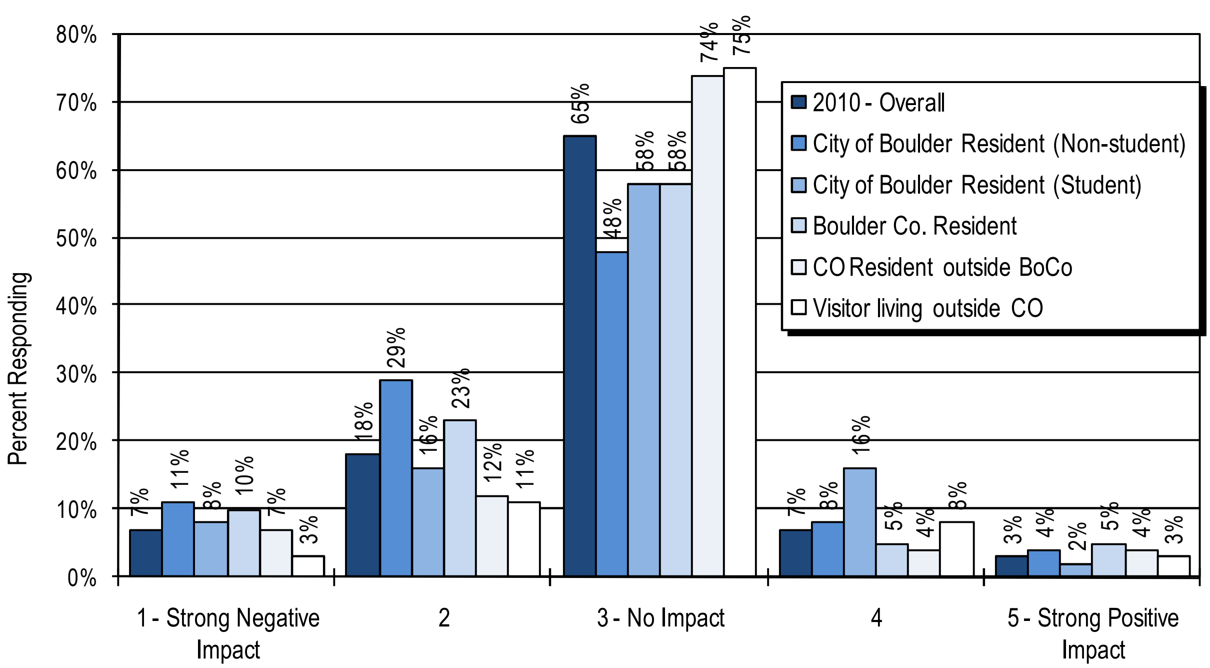


Transient Issues

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?" Most (65 percent) said it has no impact (3 on a one to five scale). Twenty-five percent said it has a negative impact, while 10 percent said it has a positive impact. Clearly, the overall opinion is split, with slightly more indicating a negative impact than a positive impact.

Looking at the results in greater detail shows that city of Boulder residents (non-students) are much more likely to say that the behaviors have a negative impact on their enjoyment (40 percent) than a positive impact (12 percent). A similar, though less stark, result is observed for county residents (33 percent negative versus 10 percent positive). Colorado residents outside Boulder County and out of state visitors are much more likely to say the behaviors have no impact on their experience (74 to 75 percent), probably due to the lower level of familiarity with the area in general and the behavior of panhandlers/transients in particular.

Figure 12
Do the Activities/Behaviors of Panhandlers Impact Your Enjoyment?
Overall and By 2010 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 exceptionally strong this year, with the percent giving a 5 out of 5 increasing on every question, and most average ratings improving as well.

Results show that the highest rated aspects of the experience were the feeling of security/ safety (average of 4.6 out of five, 68 percent rating a 5 out of 5), overall cleanliness and maintenance (4.5, 58 percent), family orientation/ kids play areas (4.5, 60 percent), the Downtown Information Center (4.4, 57 percent), special events/festivals (4.4, 52 percent), the variety of restaurants (4.4, 56 percent), customer service in retail stores (4.3, 45 percent), directory information & signs (4.2, 48 percent), and the variety of retail stores/art galleries (4.2, 45 percent).

Of note, particular improvements were observed for customer service in retail stores (up 0.2 points on average, up 8 percentage points for those rating it a five out of five), feeling of safety/ security (up 0.2 points, up 13 percentage points for fives), and the Downtown Information Center (up 0.2 points, up 17 percentage points).

Figure 13A
General Ratings of the Downtown Experience
By Year

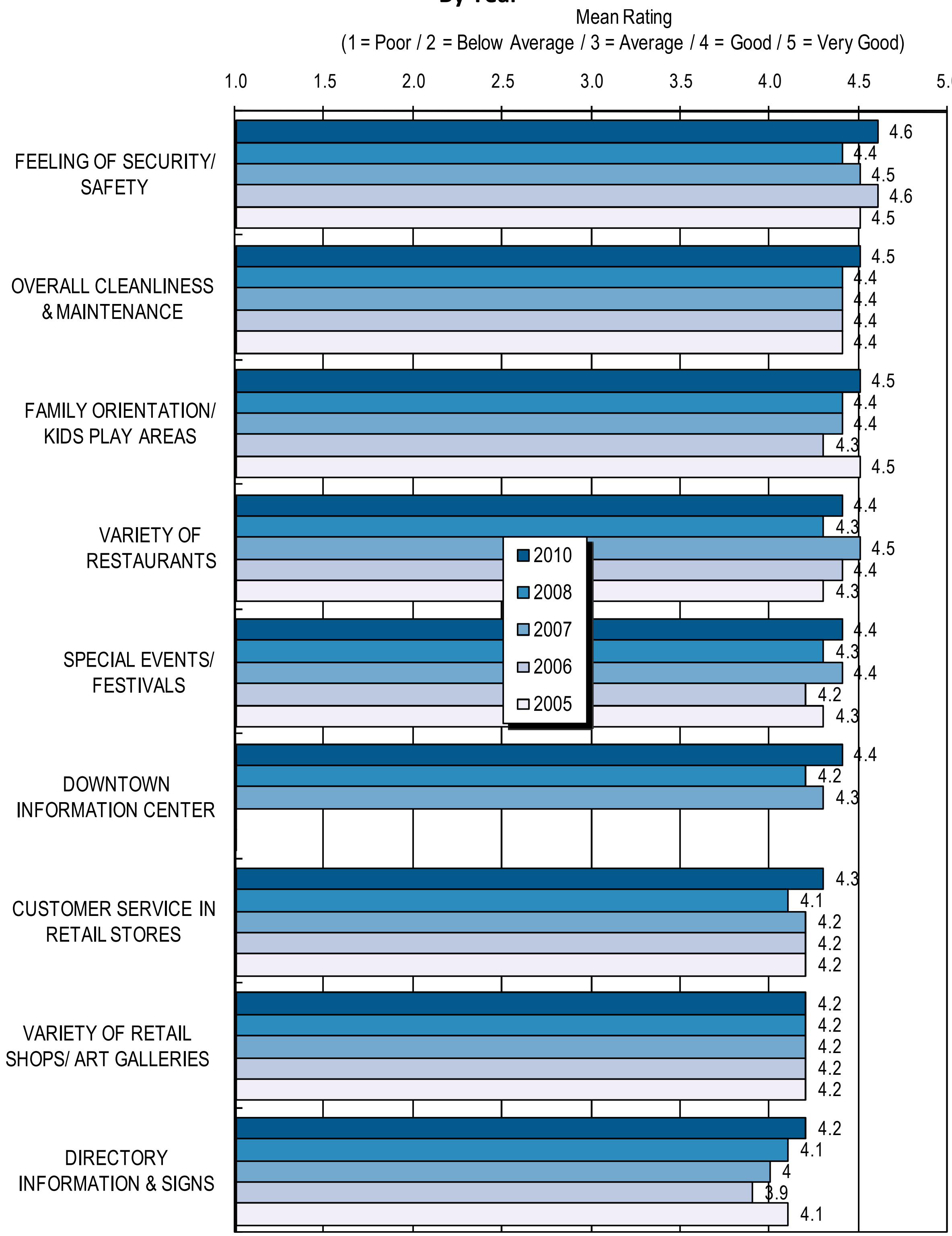


Figure 13B
General Ratings of the Downtown Experience
By 2010 Visitor Type

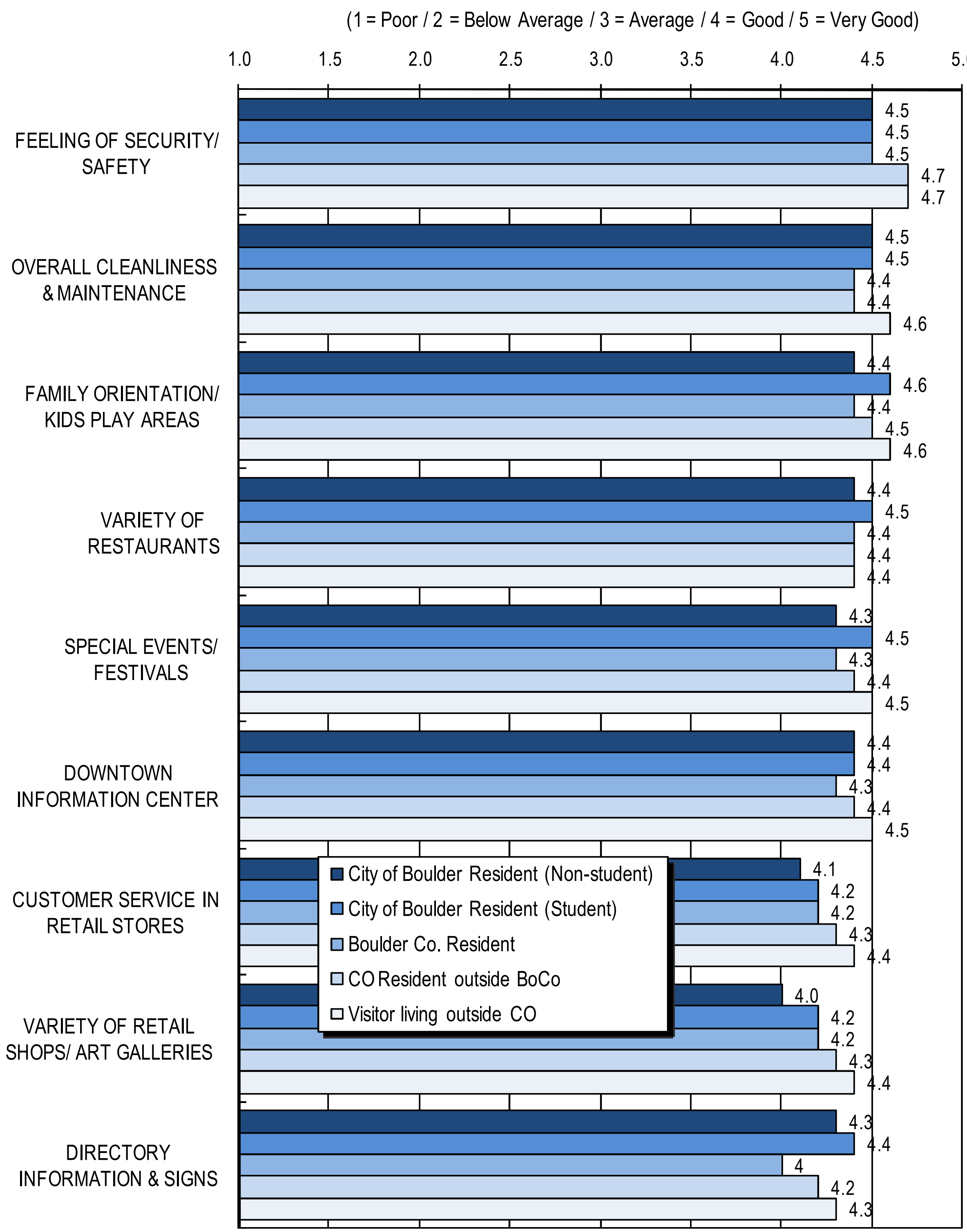
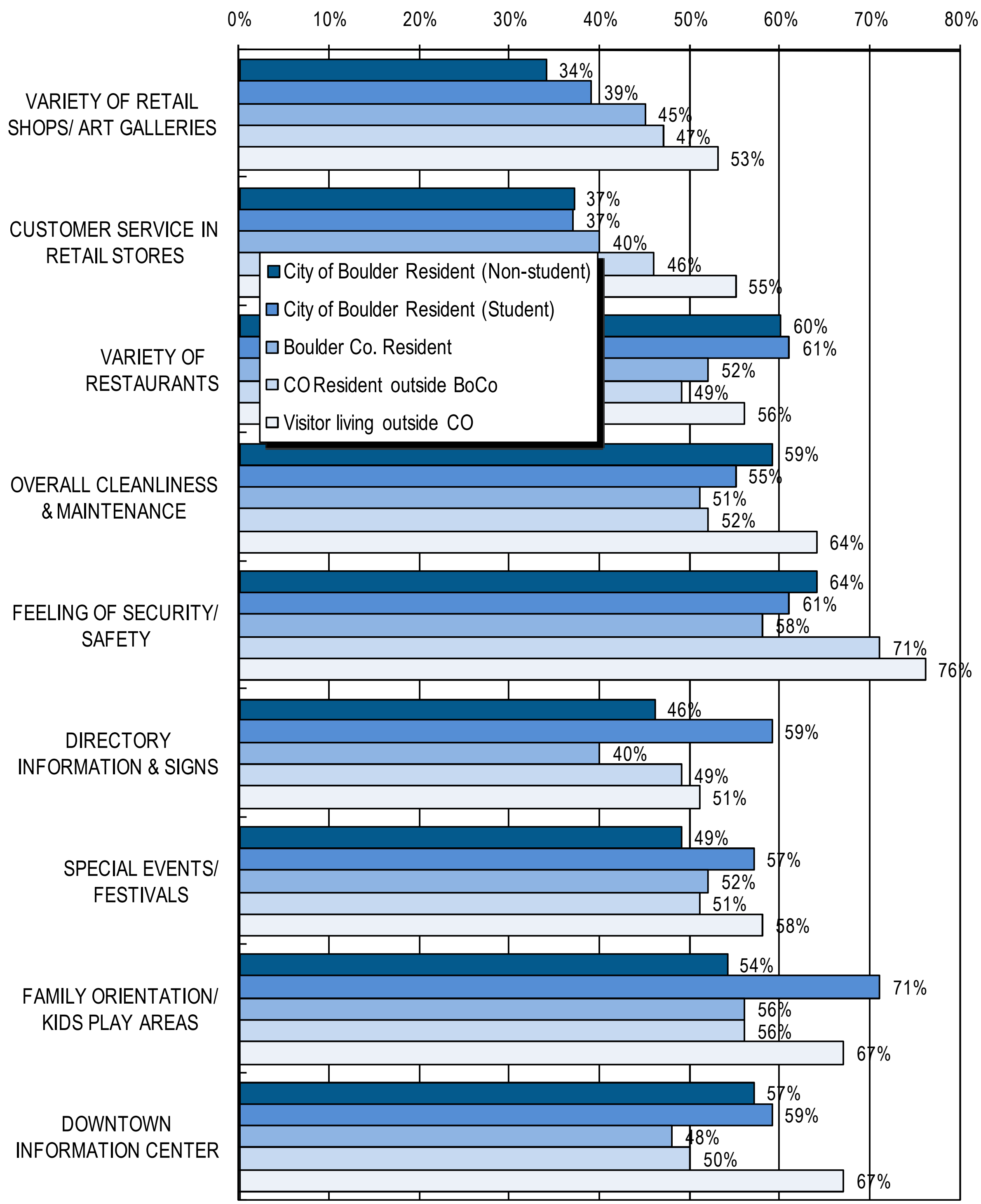


Figure 13c
"Very Good" Ratings of the Downtown Experience
By 2010 Visitor Type



Comments

Several new open-ended questions were added to 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)

- Better bathrooms - cleaner
- Better parking, don't like new parking meter
- Can be frustrating to park
- Would shop here if there were more local shops
- More variety of shops
- More police presence/security, parking limits constrict people
- Less penal approach to parking - encouragement, support of buskers
- Indoor playground for winter
- Good as is
- Easier for alternative stores to rent
- Cheaper rent and parking
- Bring down rent - get more local stores
- Better street signs

Suggestions for Improving the Downtown Area (Visitors)

- Should keep bathrooms clean, but love music
- On signs, clearly include bus routes
- Pretty great, super clean
- More trash cans/recycle; keep doing what you are doing
- More shade/trees
- Great area
- Appreciate police and the job they do
- Better mix of restaurant class low to high
- Cheaper parking, more public restrooms
- Crack down on dogs, too many bums around courthouse
- Hard to make it better
- Keep stores as local as possible
- Lovely the way it is
- More directories and restrooms
- Make meters take dollars

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

- Zolo, Laudisio
- The Orchid Pavilion, Indian food
- Real Mexican food
- Restaurants are already a strength
- Noodles and Company

- In & Out Burger
- Already a good variety
- Chinese food
- Favorite places already here
- Pretty much already covered
- PF Chang's

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

- A lot of diversity already
- BD's Mongolian BBQ, Japanese steak house hibachi style
- Continental food, unique/non-chain
- Good as is
- Indian food
- Thai food
- More microbreweries
- Like uniqueness, no chains

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

- Apple store
- Convenience store
- Forever 21
- The Gap
- Walgreens, hardware store
- REI
- More midlevel retailers
- More bookstores
- Like local stuff. 10000 Villages.
- More designer clothes

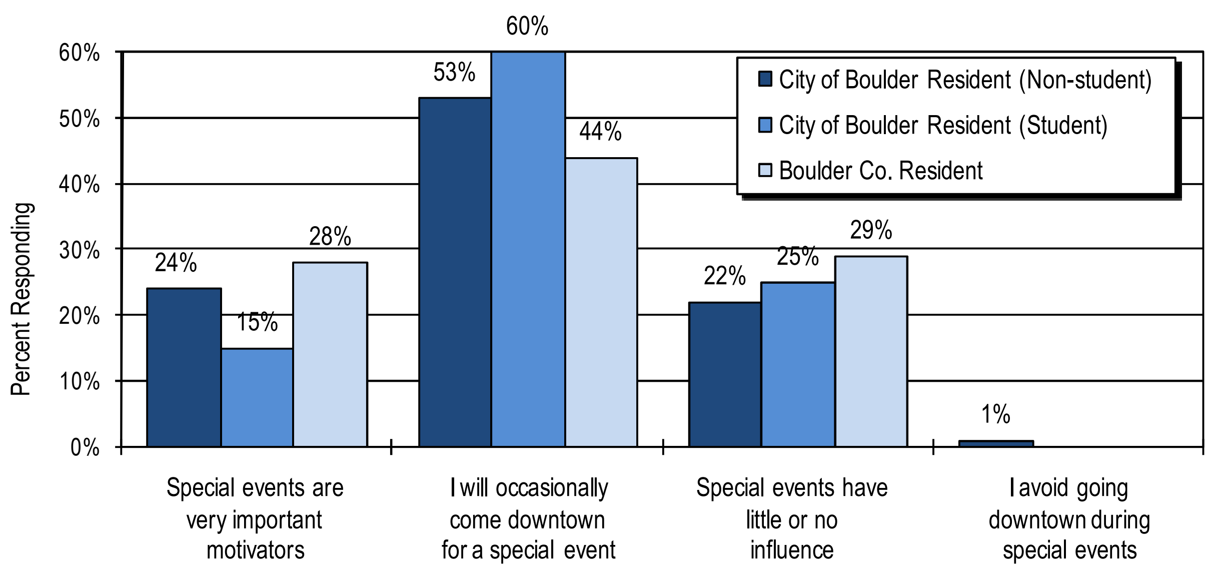
Retailer you have visited elsewhere that you would like to see in Downtown Boulder (Visitors)

- Barnes and Noble
- Crate and Barrel; get rid of so many Himalayan stores
- Good as is, likes unique stores
- Happy with what is here
- Like little boutiques
- No chains
- REI
- Store geared to Boulder only
- More variety, more boutiques
- Local vintage clothing shop

Special Events

A new question was added to assess downtown users' attitudes and behaviors related to special events, concerts, and fairs/festivals in downtown Boulder. Quite interestingly, the responses were normally distributed between the three response options given. About one-quarter (24 percent) said that "special events are very important motivators for me to come downtown; I would visit less often if they were not offered." The identical percentage were on the opposite end, characterizing their opinion as, "Special events have little or no influence on my decisions to visit downtown." Most (52 percent) chose the middle of the road option, "I will occasionally come downtown for a special event, but usually come for other reasons." The cumulative impact of these responses support the importance of these special events in drawing visitors and adding vitality to the downtown experience, as 76 percent of the respondents indicated substantial or moderate influence on their decision to come downtown.

Figure 14
Which Best Describes the Role of Special Events?
Boulder City/County Residents Only, By 2010 Visitor Type

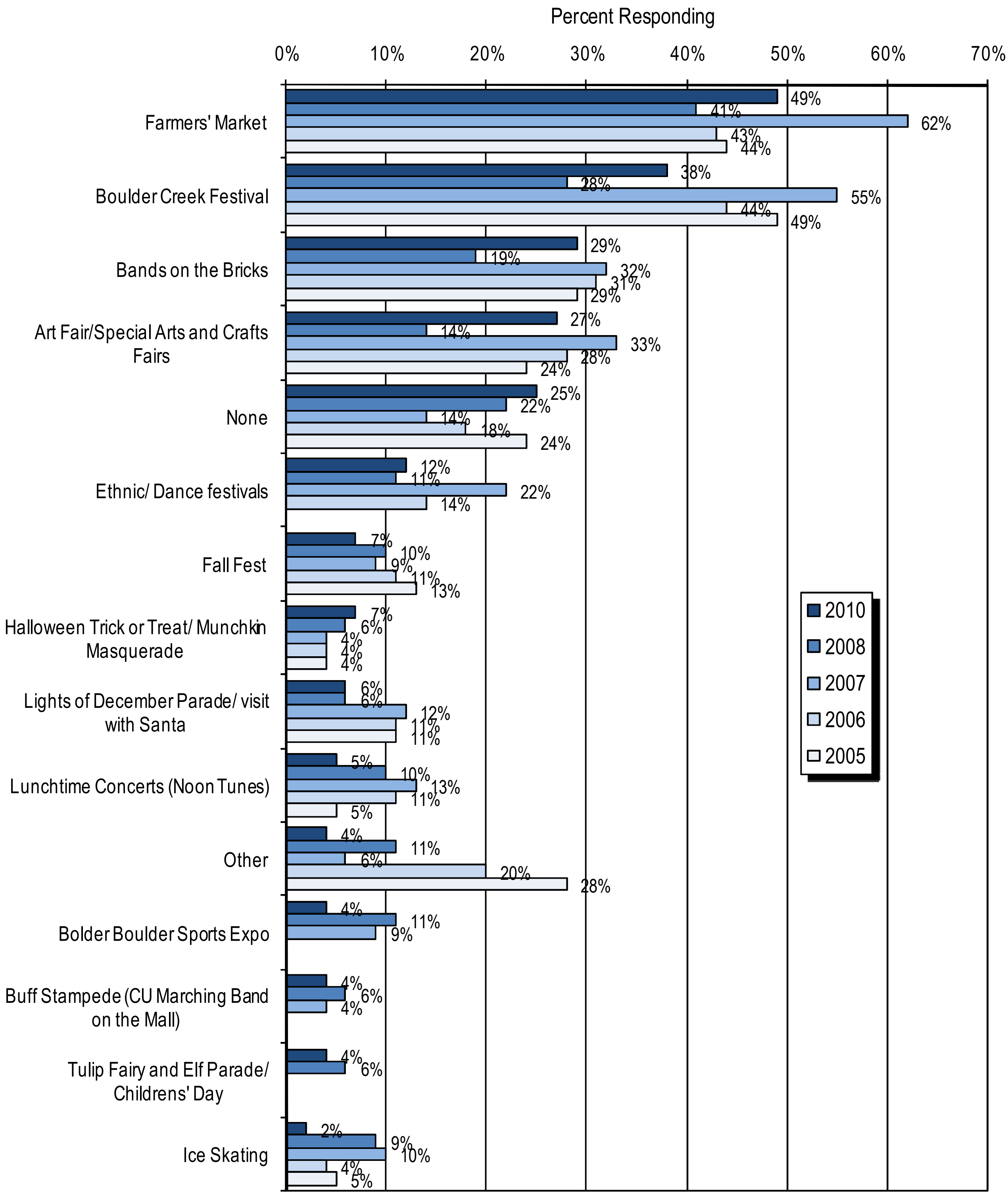


In terms of actual attendance at special events in downtown Boulder in the past 12 months, the two most popular by far were the Farmers Market (49 percent of Boulder city/county residents have attended in past 12 months) and the Boulder Creek Festival (38 percent). Also popular were Bands on the Bricks (29 percent) and Art Fair/special arts and crafts fairs (28 percent). These percentages are similar to past survey results.

City of Boulder residents (non-students) are more likely to have attended all four of these special events as compared to County residents, particularly so for the Farmers Market and Art Fair/special arts and crafts fairs. One-quarter (25 percent) had not attended any special events in downtown Boulder in the past year.

Two-thirds of survey respondents had not attended special events, free concerts, fairs, or festivals in other surrounding communities. Only a few have done so in downtown Denver (10 percent), Twenty-Ninth Street (8 percent), Louisville (5 percent), and Longmont (4 percent). While these results suggest that few downtown Boulder users are “leaking” to other communities, it could be the case that residents of Boulder who do not visit downtown Boulder do visit these other communities for free entertainment and festivals.

Figure 15
Which Activities, Special Events, etc have you Attended this Past Year?
Boulder City/County Residents Only, By Year

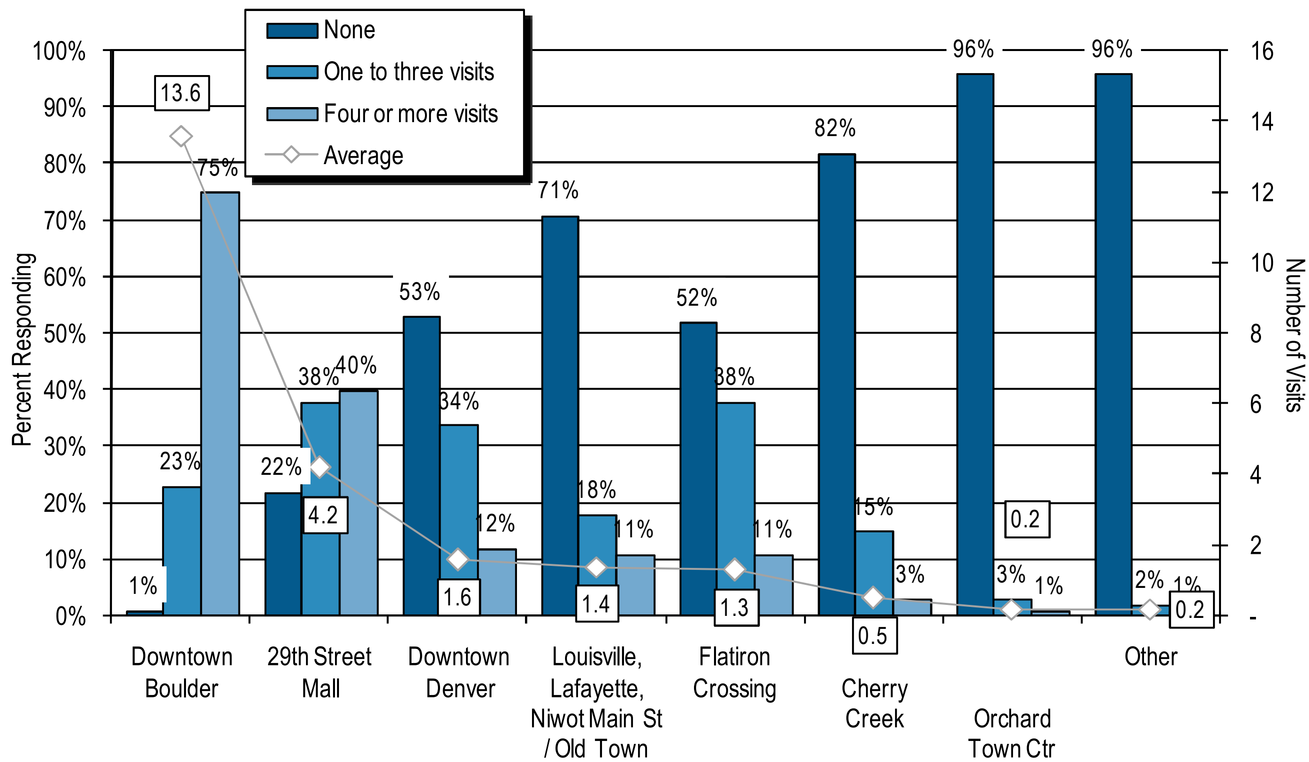


Competition

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 13.6 times during the prior two months. Also popular was the 29th Street Mall, with 78 percent visiting at least once for an average of 4.2 times in the past two months. Downtown Denver was also relatively popular for being somewhat distant, with 1.6 visits on average and 47 percent making at least one visit in the prior two months. Less popular were Louisville, Lafayette, or Niwot, Flatiron Crossing, Cherry Creek, or Orchard Town Center.

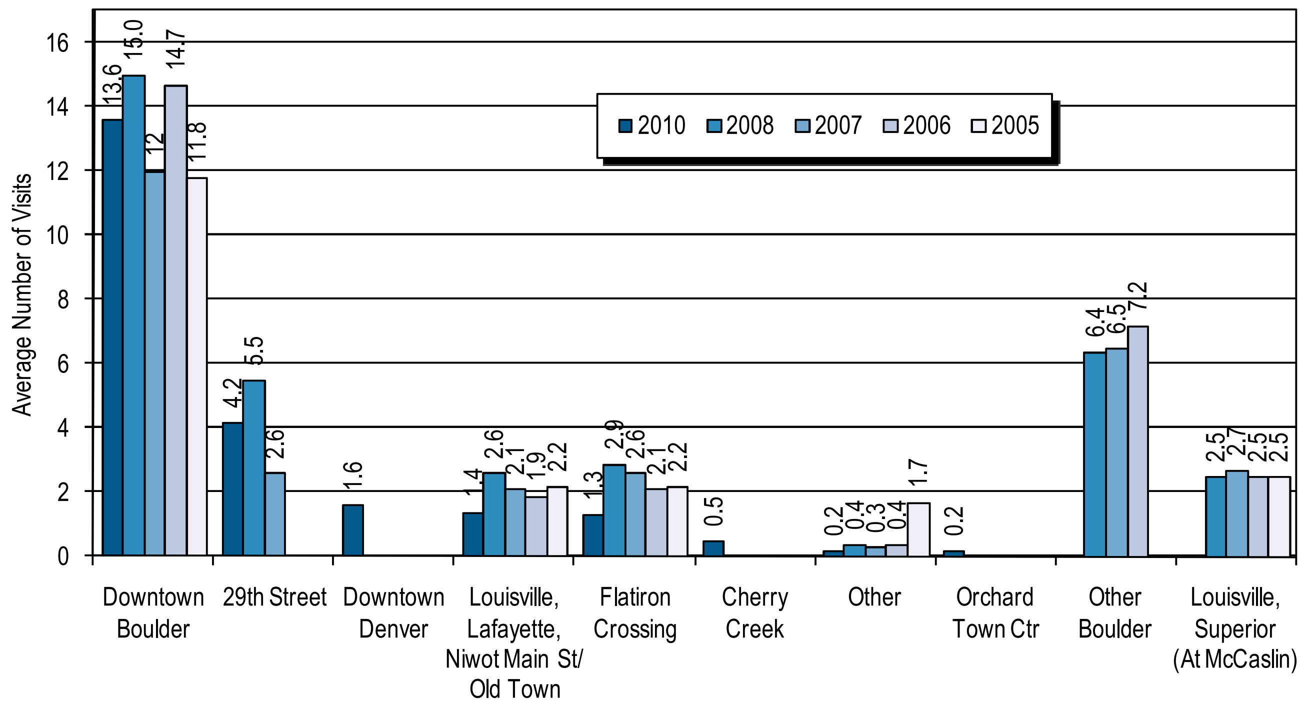
Figure 16
Visits to Downtown Boulder and Other Regional Shopping Areas in the Past 2 Months
Boulder City/County Residents Only



Those who visit 29th Street Mall and Flatiron Crossing say that they visit primarily for shopping and errands (and less so for dining, entertainment, or meeting friends). Downtown Denver has the most diverse appeal, with respondents about equally likely to visit Denver for shopping, dining, entertainment, and meeting friends.

Most of the figures in the graph above are aligned with historic ranges. The graph below illustrates the average number of times visiting over the past five years. Average visits to downtown Boulder tend to be within a range of 12 to 15 visits.

Figure 17
Visits to Downtown Boulder and Other Regional Shopping Areas in the Past 2 Months
Boulder City/County Residents Only, By Year



Geographic Residence

The following graphs illustrate the geographic residence of the downtown user. Most are from Colorado, though as mentioned earlier, more out-of-state visitors were captured in the research this summer. Still, no other single state accounts for more than 4 percent of total users, with the top states being California (3.6 percent), New York (2.4 percent), Illinois (2.2 percent), Texas (1.7 percent), Kansas (1.6 percent), and Minnesota (1.5 percent)

Figure 18A
Visitors' County of Residence
Colorado Residents Only, By Year

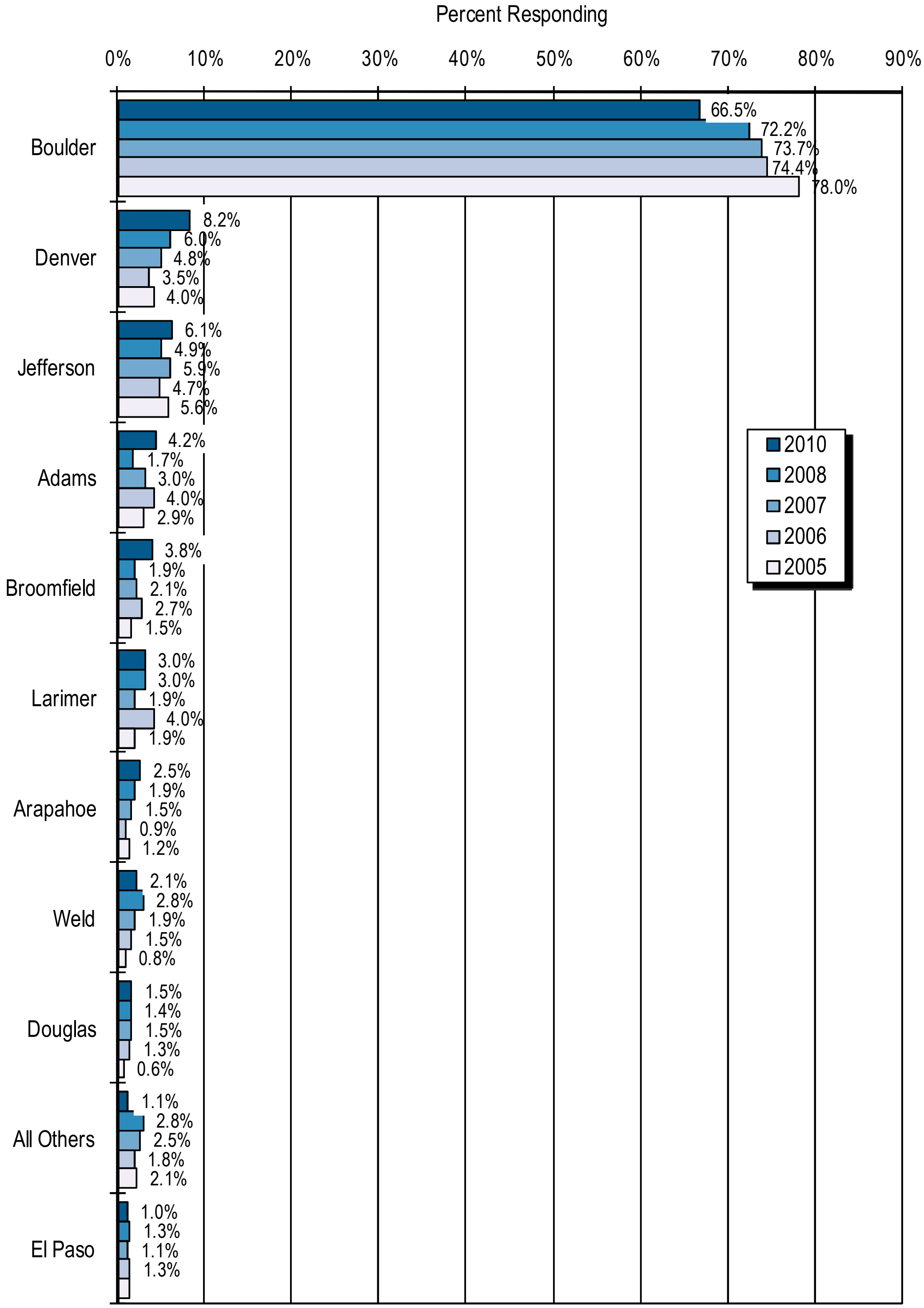


Figure 18B
Visitors' State of Residence
By Year

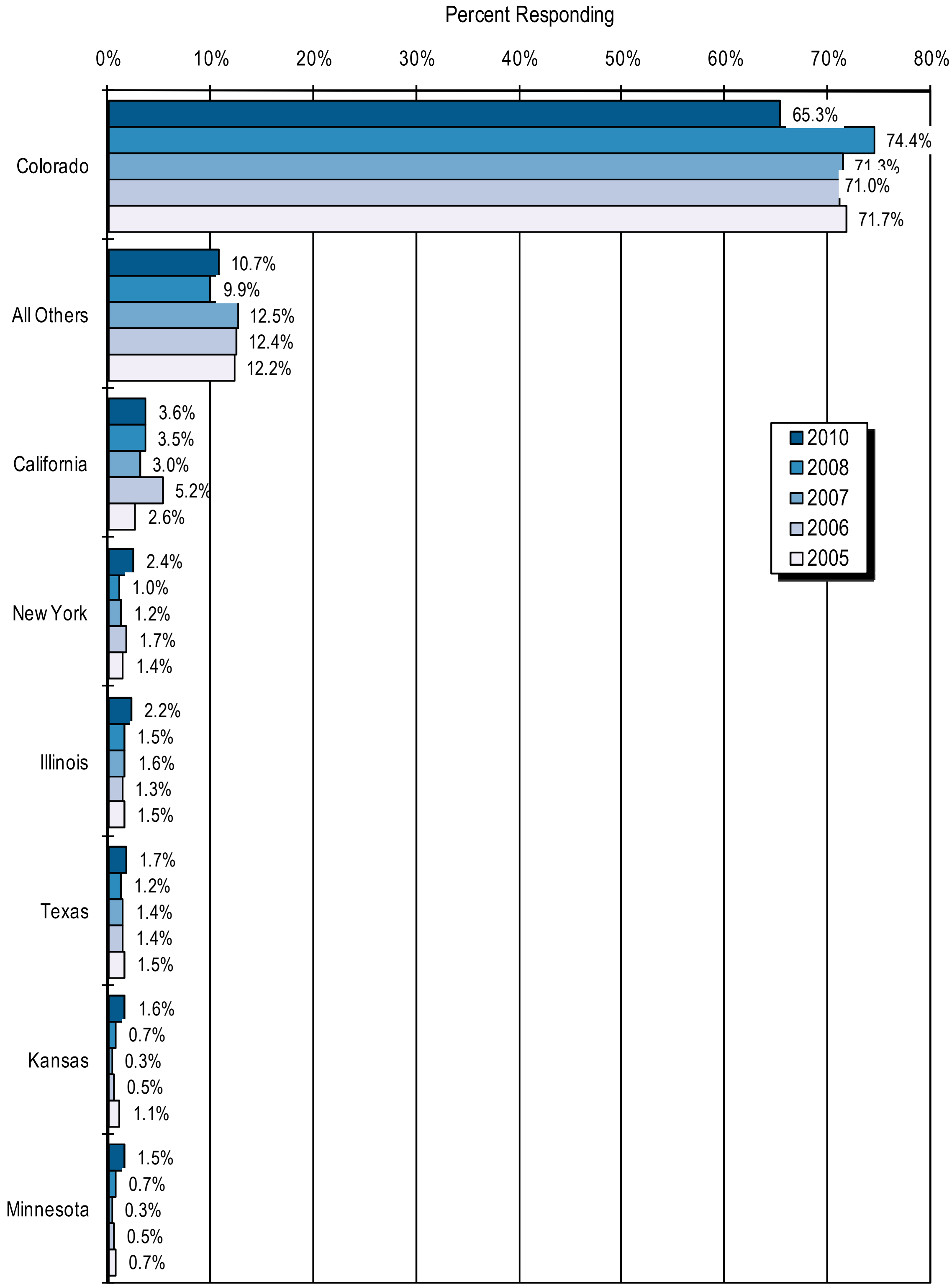
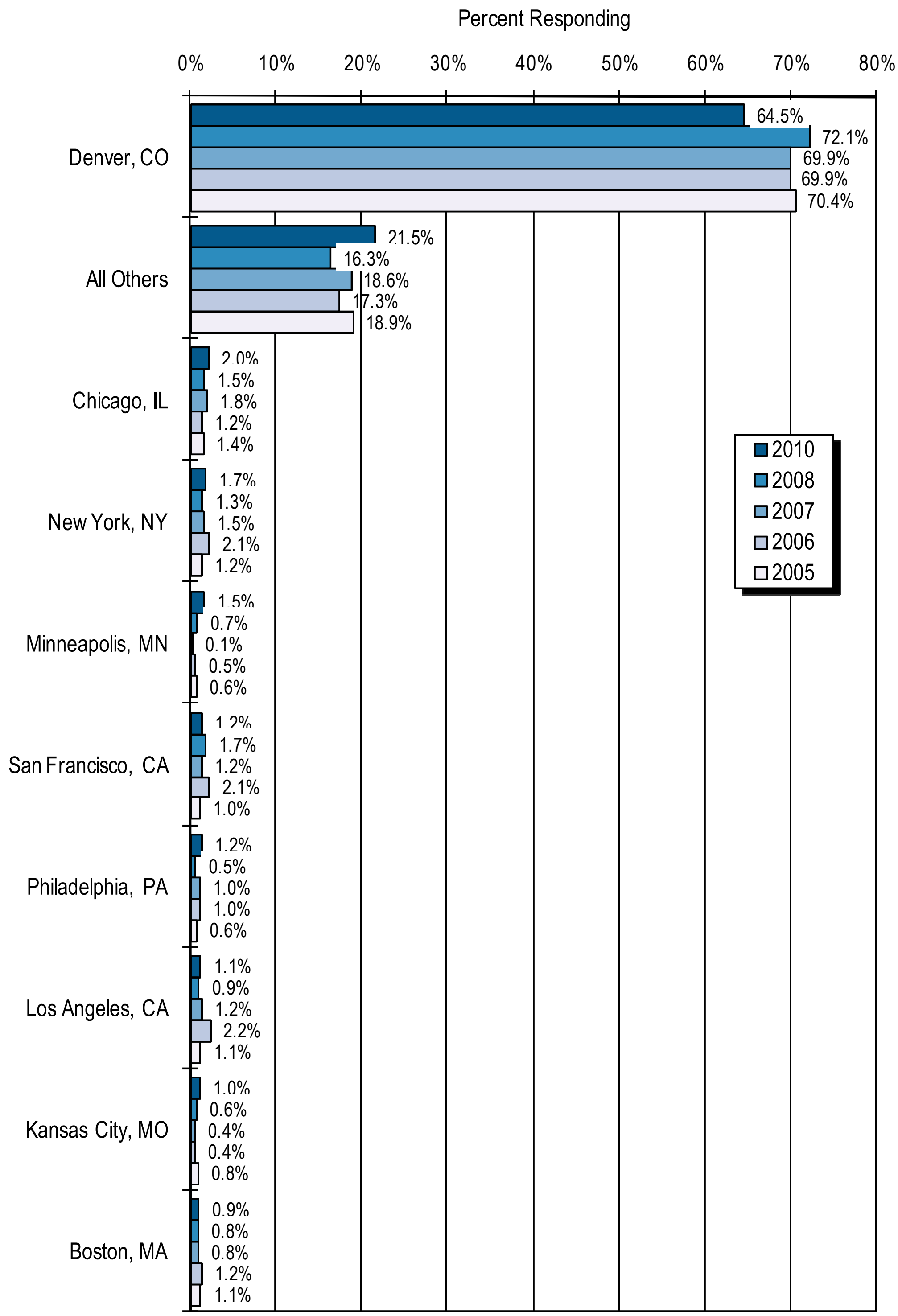


Figure 18c
Visitors' Market of Dominant Influence
By Year



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. Continuing to monitor the opinions of users through research will provide critical information for the downtown area maintaining its place in Boulder's competitive marketplace.