# Downtown Boulder User Survey

## Summer 2014

## Final Report

Prepared for:

*Downtown Boulder Inc.*

*Boulder Convention & Visitors Bureau*

*City of Boulder Downtown Management Commission*

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# TABLE *of* CONTENTS

**USER SURVEY SUMMARY** **SUMMER 2014**

## Introduction

This report summarizes the results of the 2014 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 June 2014 and late August 2014.

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, originally conducted annually, is now undertaken every other summer, with data going back to 1993. 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 the pay-by-phone system, panhandlers’ behavior, suggestions for improvements, and other important issues. Additionally, City of Boulder 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 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.

New this summer was the introductions of electronic tablets, replacing the paper surveys that were used in the past. The tablets streamlined the data collection process and increased the cooperation rate among potential survey respondents.

The 2014 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 2014 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 residents); as a result, only the segment to which the question was posed is discussed. Within this report, segments only with notable changes may be discussed in an effort to highlight findings of particular interest.

## 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; 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 U.S. 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 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 generally similar mix of visitors to historic results. However, 2014 did see an elevated share of full-time Boulder residents represented within the overall visitor mix, as well as part-time Boulder residents and students. Meanwhile, Colorado residents outside of Boulder County comprised a proportionately smaller share of visitors to the Downtown area. Relative to City of Boulder residents, this past summer had an increased share of visitors from Central/West Boulder and East Boulder, and proportionately smaller share of North Boulder residents.
- Spending Penetration and Amounts. The percentage of respondents spending money declined somewhat (75 percent, down from a historical average of 85 percent). However, the average spending amount was generally similar to 2012 and higher than the historical average. In particular, average retail spending was up this past summer compared to prior summers of the survey program. Similar to historical findings, out-of-state residents were particularly likely to make purchases (81 percent) and spent the most on average among all visitor segments ($80.28).
- General Satisfaction. Levels of satisfaction were generally very high, rebounding in most cases from across-the-board declines in 2012, and matching or surpassing the high average ratings of 2010. Most highly rated were the feeling of security/safety, the overall cleanliness & maintenance, family orientation/kids play areas, and customer service in retail stores. Two areas of the visitor experience did earn lower averages this past summer, however: Downtown Information Center and directory information/signs may be areas for improvement moving forward.
- Downtown Experience. An important question asked respondents to indicate whether the overall Downtown experience has improved, declined, or stayed the same. Nearly a third of all respondents noted the experience has stayed the same, and slightly more respondents noted the experience improved as compared to those who noted it declined. An open-ended follow-up invited respondents to explain their answers, which prompted rich and varied responses. The full set of comments can be found as an appendix to this report, but some common themes included desires for additional amenities, parking, construction, transients, and visitor information among other topics.
- Demographics. The demographic results show a healthy and diverse mix of different ages, incomes, and household status among Downtown users. The average age is 40.5 years, with a gender split of about 50-50.
- Special Events. Special events continue to be a strong draw to Downtown visitation. Of note, this past summer saw the Farmers' Market play a significantly larger role in attracting residents Downtown.

# Draft Report Findings

## Visitor Mix

This survey defines visitors by residency in broad terms (city, county, state, and out-of-state). 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 (40 percent). Full-time residents were more represented in the visitor mix this past summer than what has been reported historically (35 to 37 percent range).
    - Residence within Boulder. Among full-time Boulder residents, the largest share of respondents live in Central/West Boulder (33 percent), followed by 25 percent who live in the Downtown core area, 15 percent who reside in North Boulder, 14 percent in East Boulder, and 12 percent from South Boulder. Results suggest that the Pearl Street Mall area attracts a wide variety of residents, and not just those within close proximity to Downtown. Year-over-year trends worth noting include an increase in representation among Central/West Boulder respondents as compared to the last several years, as well as a gradual increase in residents from East Boulder.
- U.S. visitors residing outside Colorado. The second largest group of Downtown users this summer was out of state U.S. residents (25 percent, slightly down from last summer but within the typical historical range of 25 to 27 percent). The most common origins of out-of-state visitors included California, Texas, and Massachusetts, among other states across the U.S. This group of visitors demonstrates the importance of out-of-state tourism to Boulder.
- Colorado residents outside Boulder County. The third largest group of Downtown users was Colorado residents outside Boulder County (13, down from the historical range of 21 to 23 percent). This group is generally from the Denver metro area outside of Boulder County (including residents of Denver, Broomfield, Arvada, and Aurora).
- Boulder County residents outside the City of Boulder. This group, primarily residents of Longmont, Louisville, and Lafayette, represents 12 percent of the total user mix Downtown and has remained relatively stable over the last several summers.
- Part-time/summer residents/students. This segment accounts for 7 percent of the overall visitor mix. A year-over-year analysis shows that this segment of visitors, while small, has been gradually increasing over the past several summers.
- International visitors. Similar to historical results, international visitors account for roughly 3 percent of the overall visitor mix. While a small portion of overall respondents, results suggest that Downtown attracts a diverse and vibrant mix of visitors.

**Figure 1**
**User Profile**
**By Year**

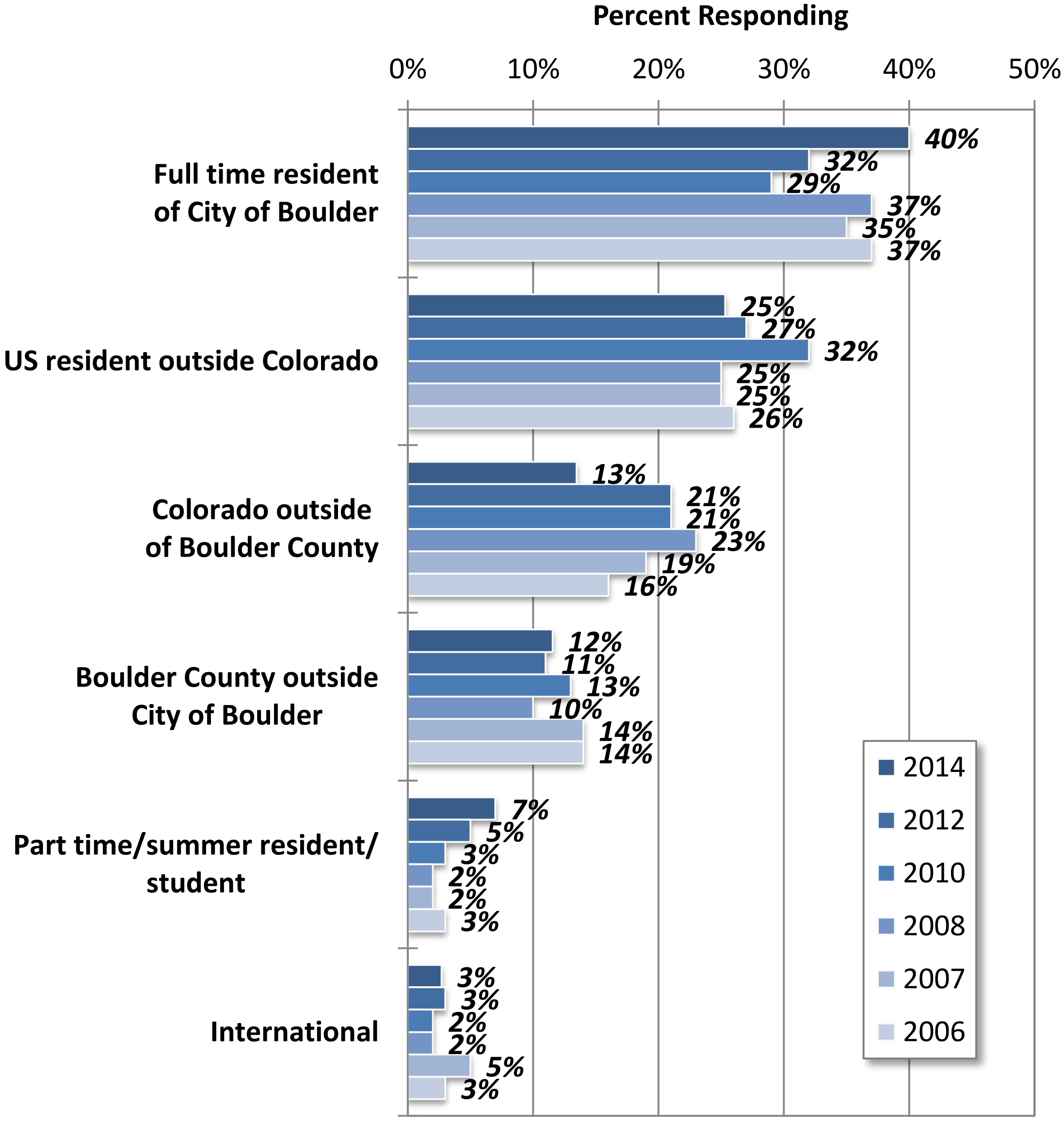
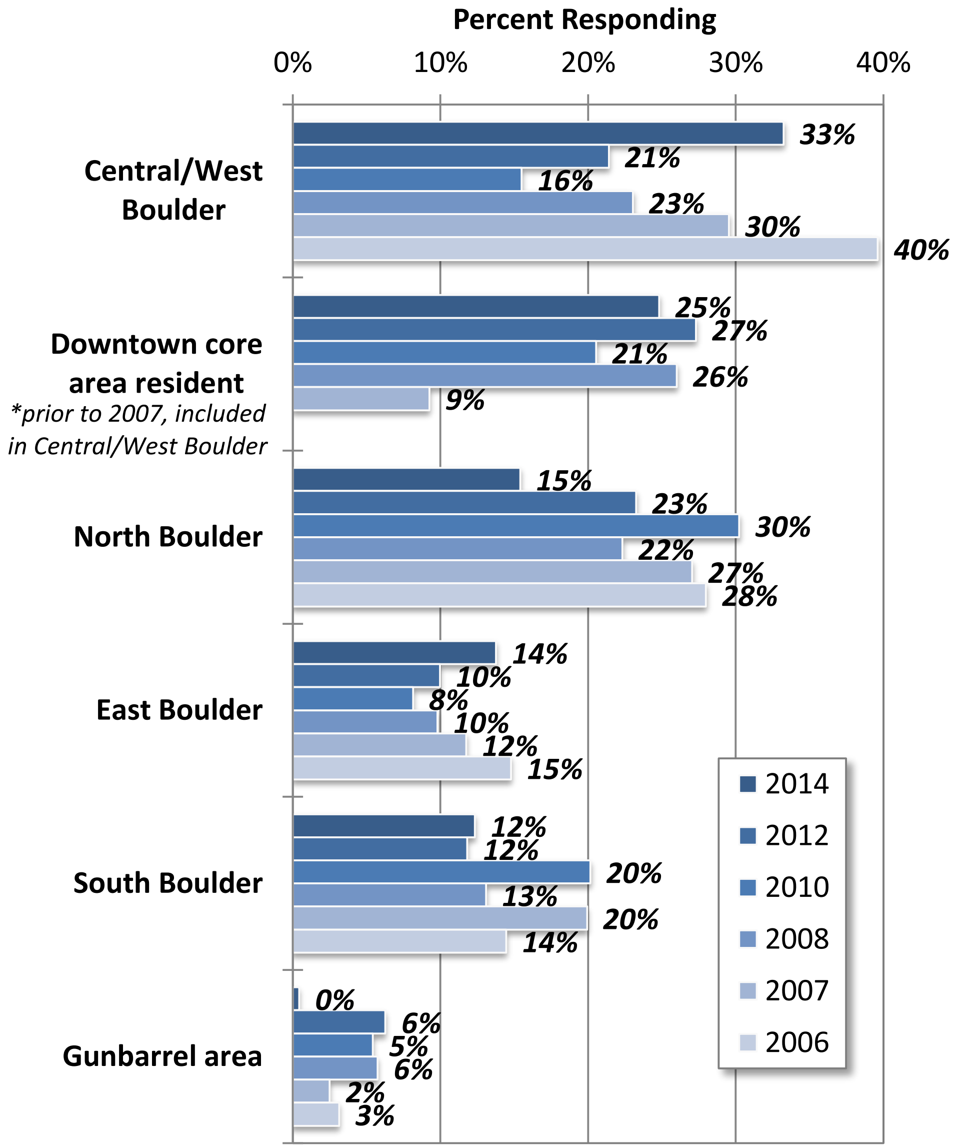


**Figure 2**
**In What Part of the City of Boulder do you Live?**
**By Year**



## Overnight Visitors

Among those who live outside Boulder County (48 percent of all users), 60 percent were spending the night in the Boulder area, and the other 40 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, 43 percent were staying with family or friends, and 50 percent were staying in commercial lodging, including 37 percent in commercial lodging in the City of Boulder and 13 percent in commercial lodging outside the City but in the Boulder area. The remaining 7 percent were staying in other locations. As compared to historical data, there was a slightly elevated share of overnight visitors staying outside of the City.
- Length of Stay. The average length of stay in Boulder was 4.8 nights, with a median of 4 nights. This is similar to 2012, but generally higher than historical results (4.2 to 4.4 range).
- Size of Travel Party. The average travel party size was 2.6 people, with a median of two people. The average party size was within range of results from prior survey years (2.4 to 2.8 person range). This year saw a decline in the share of one-person parties, and proportionate increases in 3-, 4, and 5-person parties.
- Purpose of Trip. Out-of-County visitors were asked to identify the primary purpose of their trip to Boulder. Over one-third of respondents were visiting friends or family (37 percent), followed by 22 percent who were visiting for recreation/general vacation/sightseeing. Smaller shares of respondents noted visiting for a college-related visit (11 percent), special event (8 percent), business (8 percent), a stop on a tour of the region/area (6 percent), or a combined business and pleasure trip (4 percent). Results demonstrate that regardless of a wide variety of reasons for visiting, Downtown is a key part of a trip to Boulder.
- Information Sources Used. Word of mouth played a large role in information planning this summer, with 66 percent of respondents noting it as at least one of the sources they relied on for trip planning information. Websites (40 percent), experience of a prior visit (34 percent), Downtown Boulder Visitor Guide (13 percent), and social media (11 percent) were also largely utilized.
- 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 generally higher than historical spending (likely because of inflation and post-recessionary economic health), with the exception of “other” spending: Lodging ($436 per party), Shopping ($314), Dining/Entertainment ($388), and Other Spending ($2). The total amount spent in Boulder on the trip averaged $1,140 per travel party, with a median of $900 per travel party. This is up from 2012, which had previously been the highest spending year ($876 average and $417 median).
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**Figure 3**
**Overnight User Questions**
**By Year**

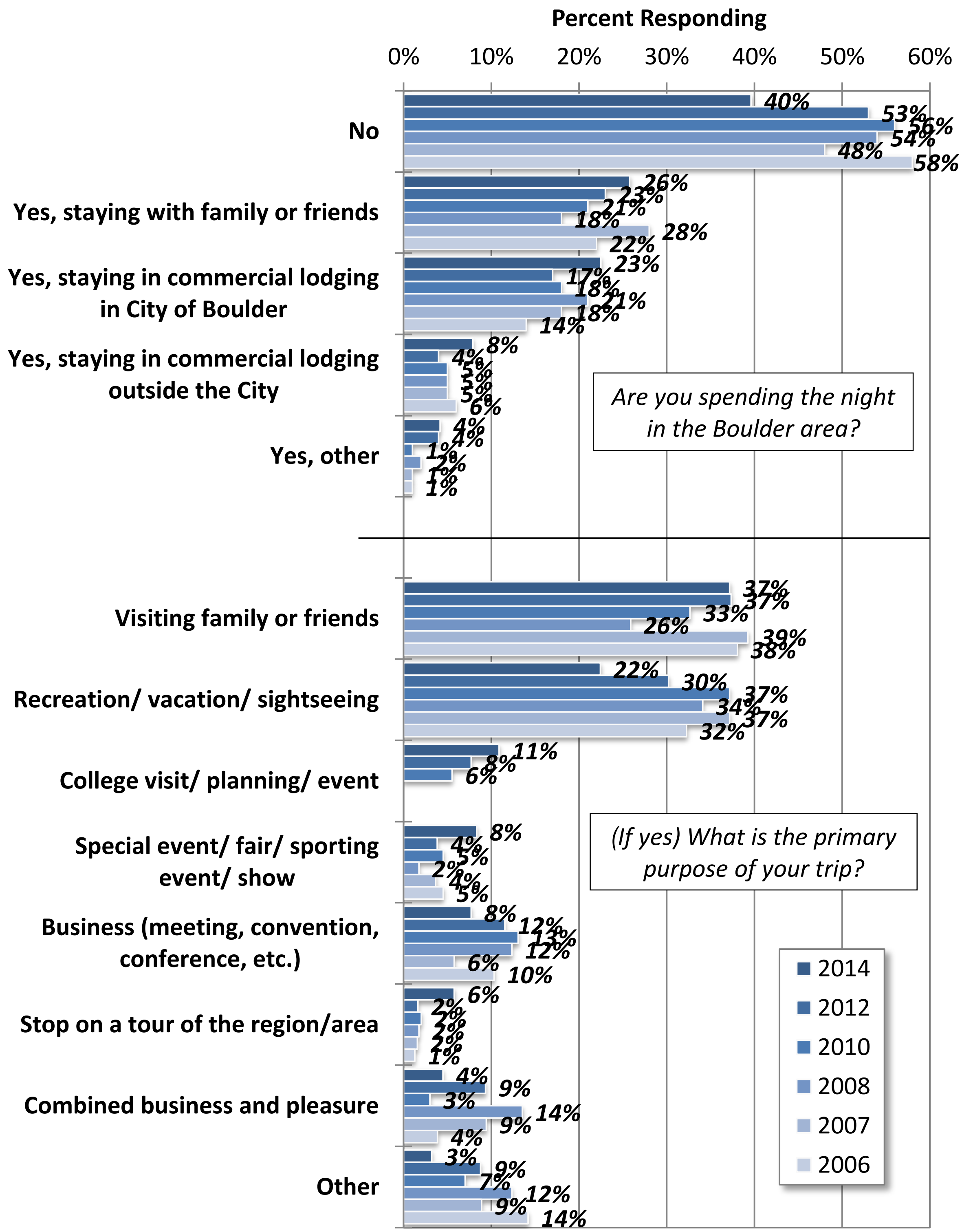
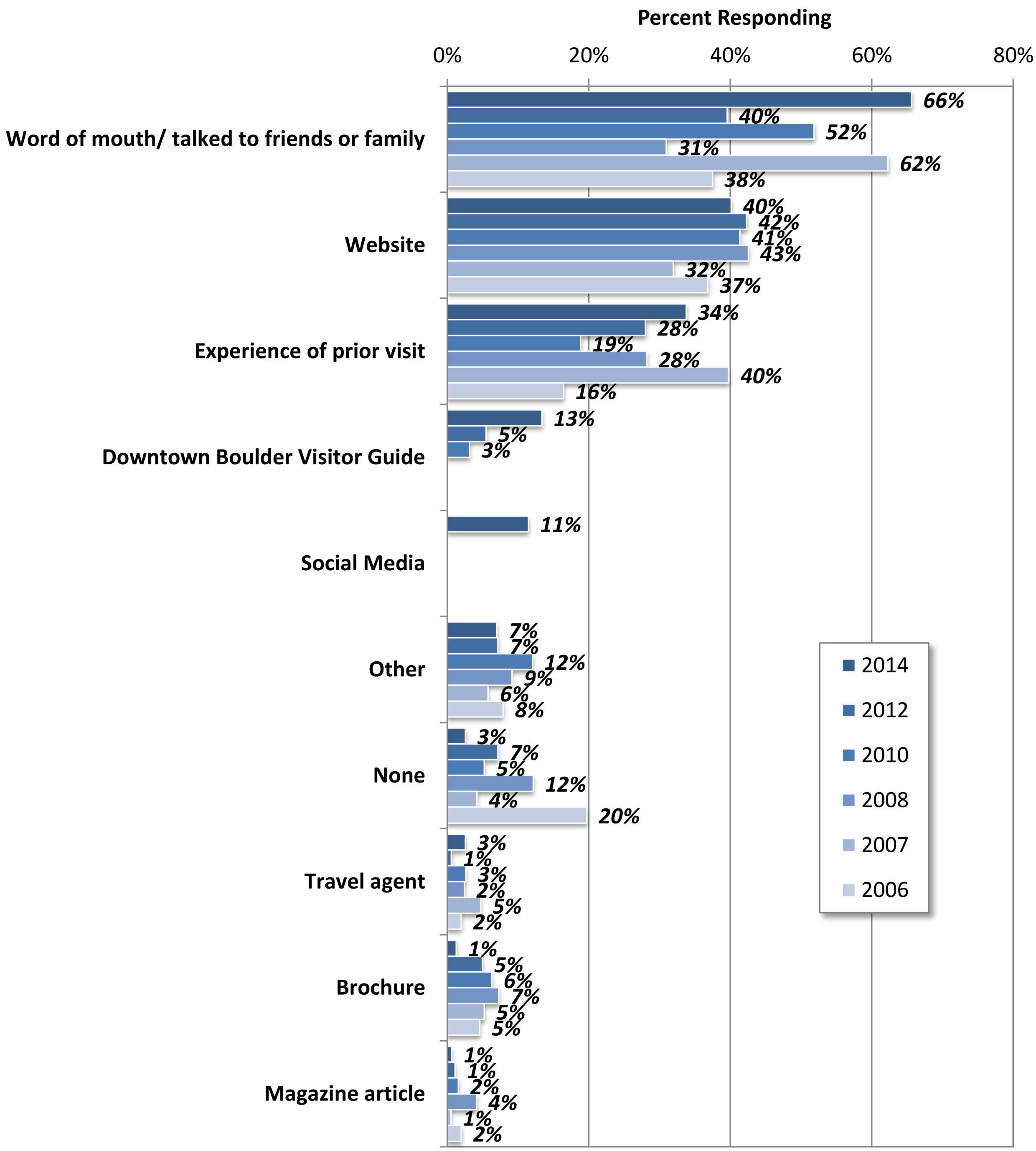


**Figure 4**
**Information Sources Used In Trip Planning**
**Overnight Visitors Only, By Year**



## User Demographics

The demographics of Downtown users are worthwhile to pay attention to, as it has implications for visitor perceptions, interests, and behaviors. Overall, the results show a mix of users, including students, families, empty-nesters, and singles.

- Age. The average age of users is 40.5 years, somewhat lower than the past two survey years (42.3 in 2012 and 41.6 in 2010), but generally within range of historical results. Most respondents fall within the 25 to 64-year-old age range (62 percent). Age varies by visitor type, with Boulder residents who are students averaging 21 years on the low end and Boulder County residents on the high end, with an average age of 47.1.
- Household Status. The profile shows a healthy mix of household types, with near equal shares of singles without children (27 percent) and households with children at home (26 percent). Empty-nesters made up 21 percent of the visitor profile, followed by couples without children and university students (13 percent each, respectively). This year saw an elevated share of university students, from a historic range of about 7 percent to 13 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. Twenty-two percent indicated earning less than $15,000 (primarily students), 19 percent earn between $15,000 and $49,999, 13 percent earn $50,000 to $74,999, 20 percent are in the $75,000 to $99,999 bracket, 18 percent report between $100,000 and $199,999, while 9 percent are in the $200,000 or more category. Out-of-state users have the highest household income profile, with 48 percent earning over $100,000 annually (up from 38 percent in 2012).
- Gender. The gender split is almost even, with 49 percent male and 51 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 2014 results segmented by various visitor types. The subsequent graphs also illustrate demographic patterns by survey year and by 2014 user type.

## Table 1
## Selected User Demographics

| | | 2014 User Type | | | | |
|---|---|---|---|---|---|---|
| *Demographics* | 2014 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** | 49% | 49% | 44% | 59% | 42% | 50% |
| **Female** | 51% | 51% | 56% | 41% | 58% | 50% |
| | | | | | | |
| HOUSEHOLD INCOME | | | | | | |
| **$0 - $14,999** | 22% | 6% | 86% | 13% | 12% | 12% |
| **$15,000 - $24,999** | 7% | 6% | 11% | 6% | 12% | 3% |
| **$25,000 - $49,999** | 12% | 22% | 2% | 9% | 12% | 8% |
| **$50,000 - $74,999** | 13% | 22% | 1% | 18% | 12% | 8% |
| **$75,000 - $99,999** | 20% | 21% | 0% | 28% | 28% | 21% |
| **$100,000 - $199,999** | 18% | 17% | 1% | 16% | 21% | 27% |
| **$200,000 or more** | 9% | 5% | 0% | 9% | 3% | 21% |
| | | | | | | |
| AGE | | | | | | |
| **20 or younger** | 14% | 10% | 47% | 5% | 2% | 9% |
| **21 - 24** | 13% | 7% | 48% | 14% | 7% | 3% |
| **25 - 34** | 20% | 30% | 5% | 15% | 22% | 16% |
| **35 - 44** | 14% | 16% | 0% | 7% | 19% | 18% |
| **45 - 54** | 15% | 11% | 0% | 15% | 21% | 26% |
| **55 to 64** | 14% | 11% | 0% | 26% | 22% | 16% |
| **65 to 74 (2010 & prior: 65 or older)** | 9% | 11% | 0% | 16% | 5% | 10% |
| **75 or older** | 2% | 4% | 0% | 1% | 1% | 2% |
| AVERAGE AGE | 40.5 | 41.6 | 21.0 | 47.1 | 44.5 | 45.4 |
| | | | | | | |
| HOUSEHOLD STATUS | | | | | | |
| **Single, no children** | 27% | 37% | 19% | 30% | 30% | 17% |
| **Couple, no children** | 13% | 15% | 4% | 12% | 17% | 14% |
| **Household with children at home** | 26% | 29% | 0% | 18% | 31% | 37% |
| **Empty Nester** | 21% | 19% | 0% | 40% | 23% | 27% |
| **University Student** | 13% | 0% | 77% | 0% | 0% | 6% |

**Figure 5**
**Visitor Demographics - Gender/Age**
**By Year**

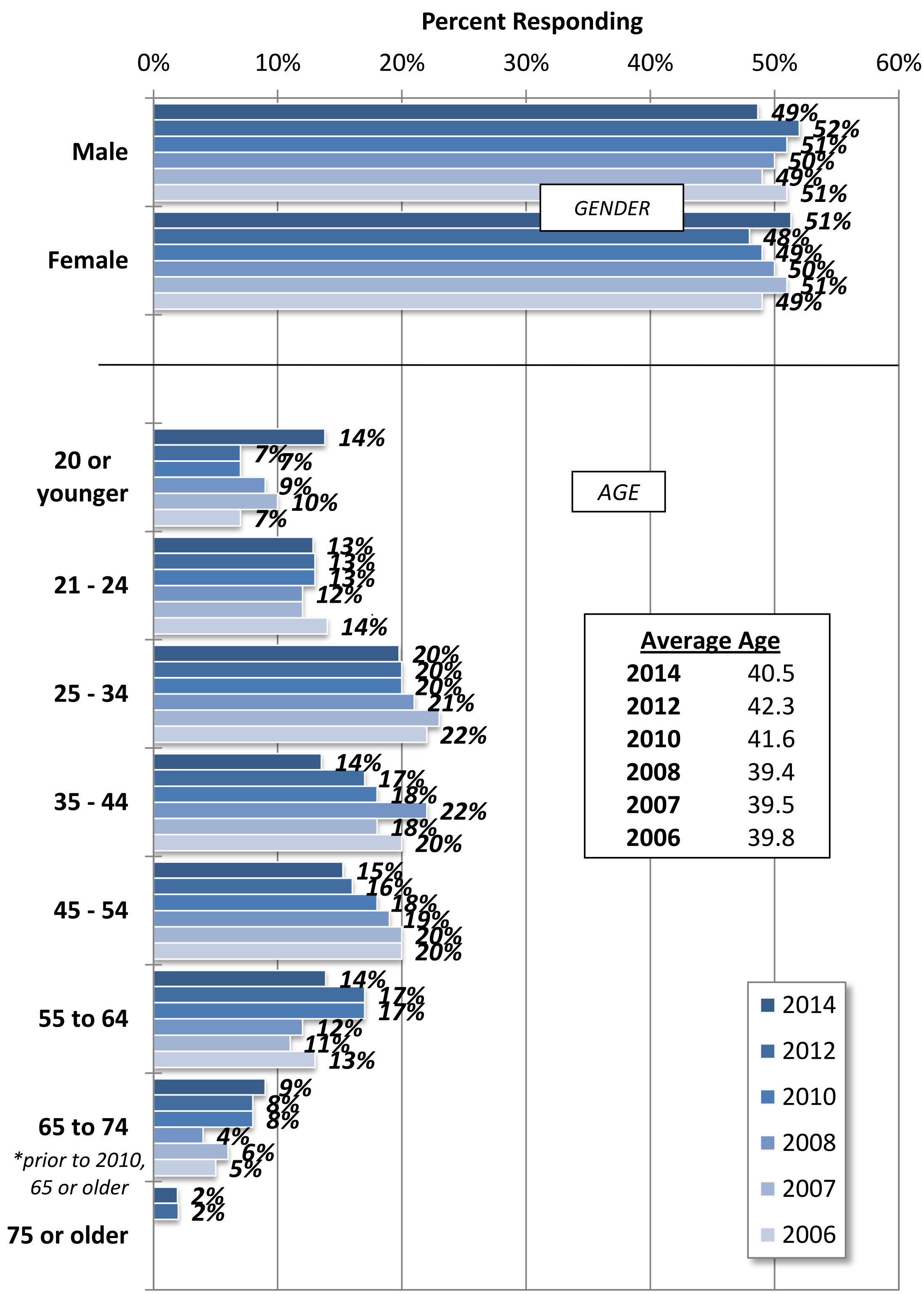


Figure 6
Visitor Demographics - Gender/Age
By 2014 Visitor Type

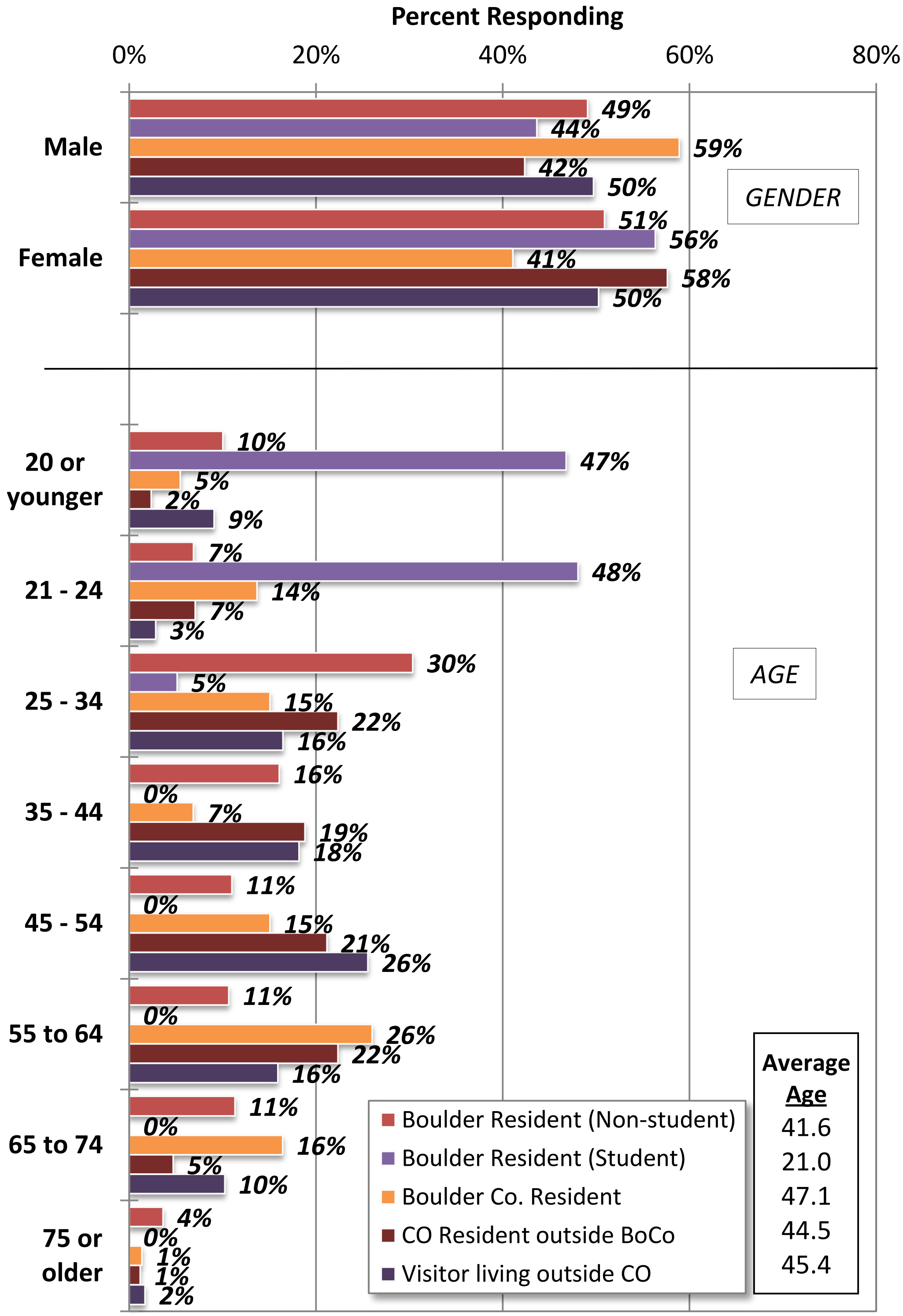


**Figure 7**
**Visitor Demographics – Household Status/Household Income**
**By Year**

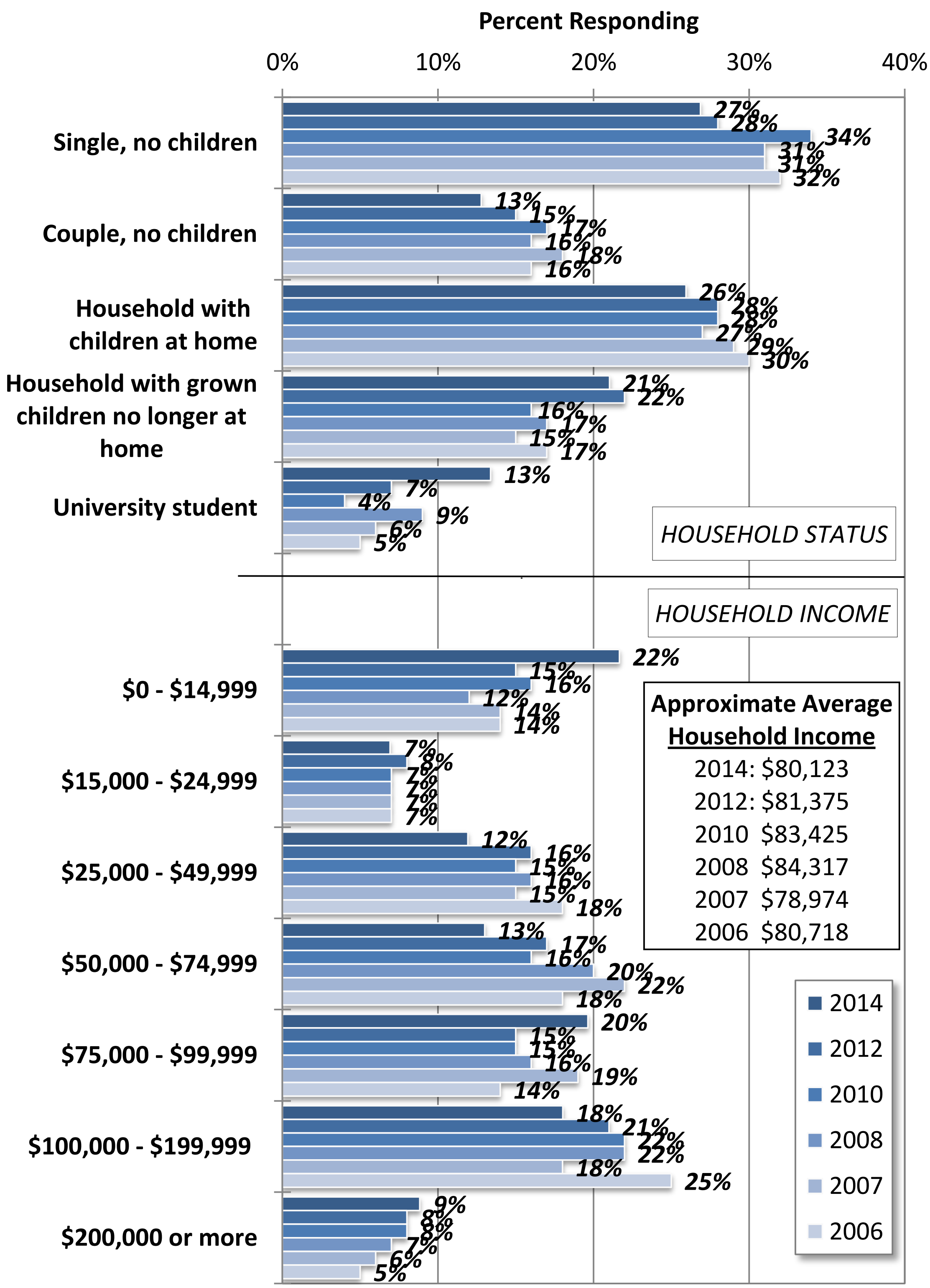
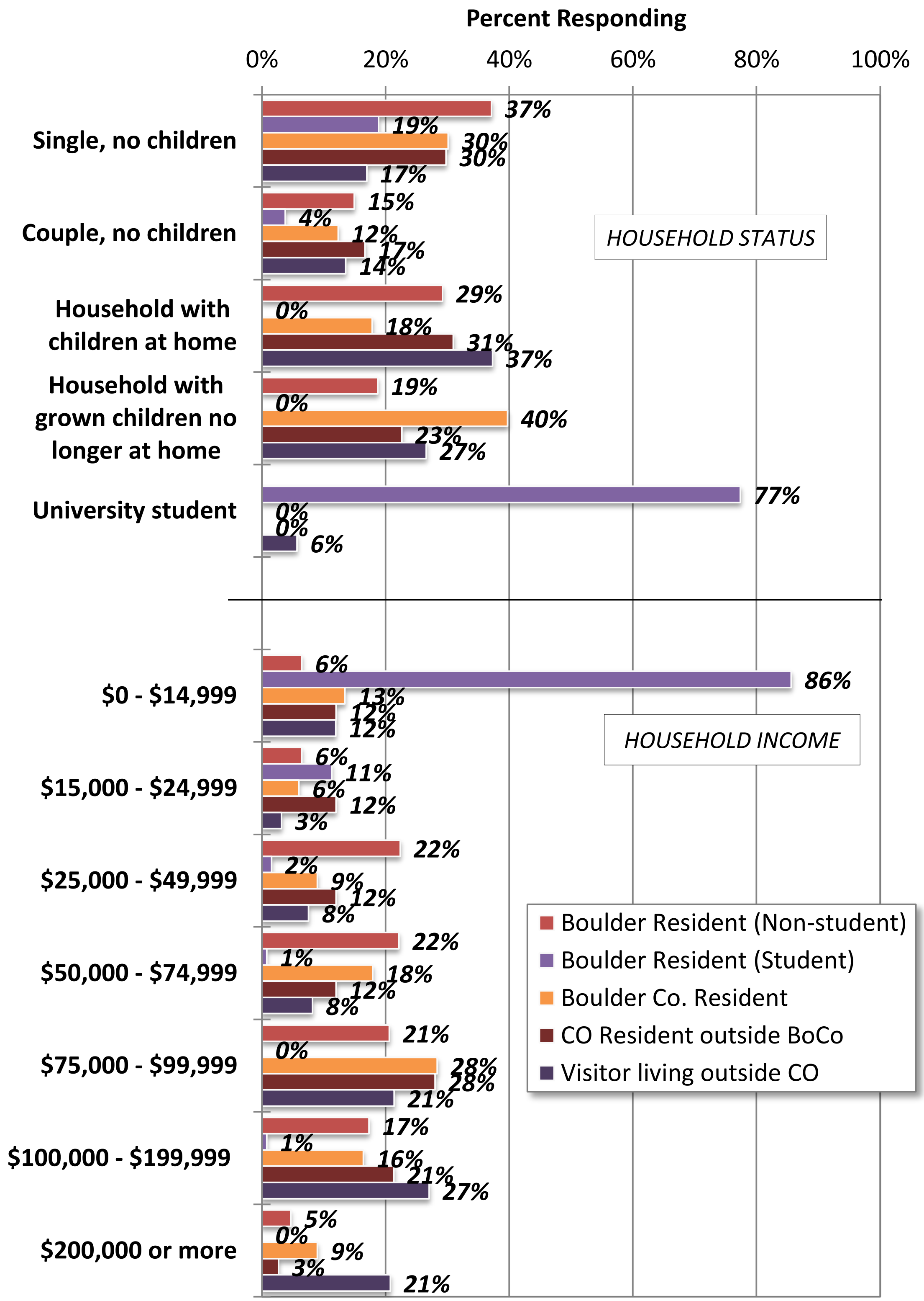


**Figure 8**
**Visitor Demographics - Household Status/Household Income**
**By 2014 Visitor Type**

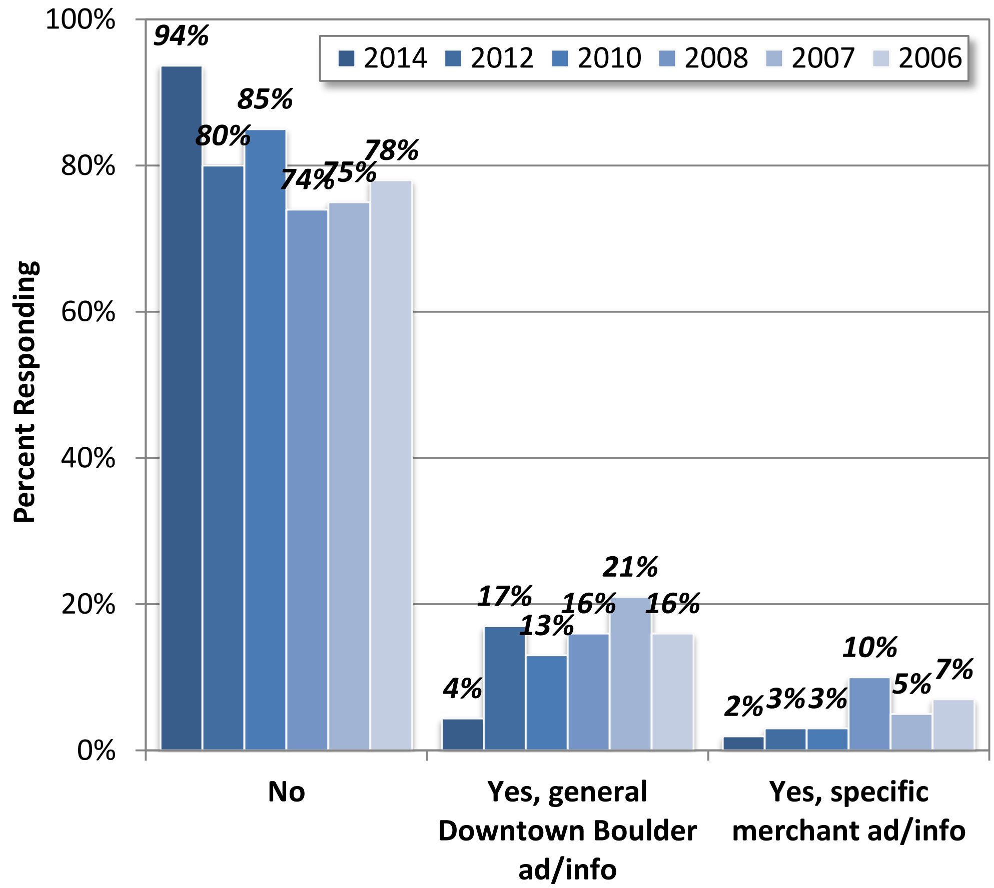


## Marketing and Media

Interest exists in understanding awareness of advertisements among Downtown users. Given a fast-paced media environment, in which social media plays a particularly large role, it is worthwhile to evaluate what vehicles of marketing messages "stick" the most. All visitors were asked if they were aware of any advertising or information sources prior to their visit. Results indicate that a majority were not aware (94 percent), the highest reported since the question was introduced (historically within the range of 71 to 85 percent).

Of the slim 4 percent who said they were aware of Downtown Boulder advertising, 25 percent read the Downtown Boulder Visitor Guide, 18 percent saw a general or feature article, 13 percent visited BoulderDowntown.com, 11 percent noted they saw it in a newspaper, 10 percent from an "other" web page, 7 percent via social media such as Facebook or Twitter, and percent through direct mail. An additional 23 percent of these respondents noted an "other" source for Downtown Boulder information and 17 percent did not remember where they encountered the advertising.

**Figure 9**
**Advertising Awareness**
**By Year**



## Primary Reason for Visiting Downtown

All visitors were asked their primary reason for coming to Downtown Boulder that day. The number one reason for visiting Downtown Boulder was enjoying the setting/ people watching/ hanging out, cited by 34 percent of visitors. This has historically been the first or second most reported answer since the survey program began asking this question. Visitors from out of state are particularly apt to mention this reason (52 percent). See Figure 10.

Other primary reasons for visiting Downtown include a meal (22 percent), shopping (14 percent), and employment/job related/job search (11 percent). Employment is a much more common reason among students who live in Boulder (25 percent) than other visitor segments. Meanwhile, Boulder County residents are more likely to come Downtown for a meal (27 percent) than other visitor segments (20 to 22 percent).

## Secondary Reasons for Visiting Downtown

In addition to the primary purpose of their Downtown visit, survey respondents were also asked about other activities they were doing while Downtown. The top secondary reason is hanging out/enjoying the setting/people watching (52 percent), followed by shopping (42 percent), coffee/ice cream/snack (38 percent), eating a meal (36 percent), and watching street entertainment (35 percent).

## All Activities Participated in Downtown

The total results in a measure of all activities visitors participated in while Downtown. Overall, enjoying the setting/ people watching/ hanging out is most popular (done by 81 percent of all respondents), followed by eating a meal (55 percent), shopping (52 percent), coffee/ice cream/snack (38 percent), and watching street entertainment (33 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 most all of the top activities compared to Boulder City and County residents. See Figure 13.

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

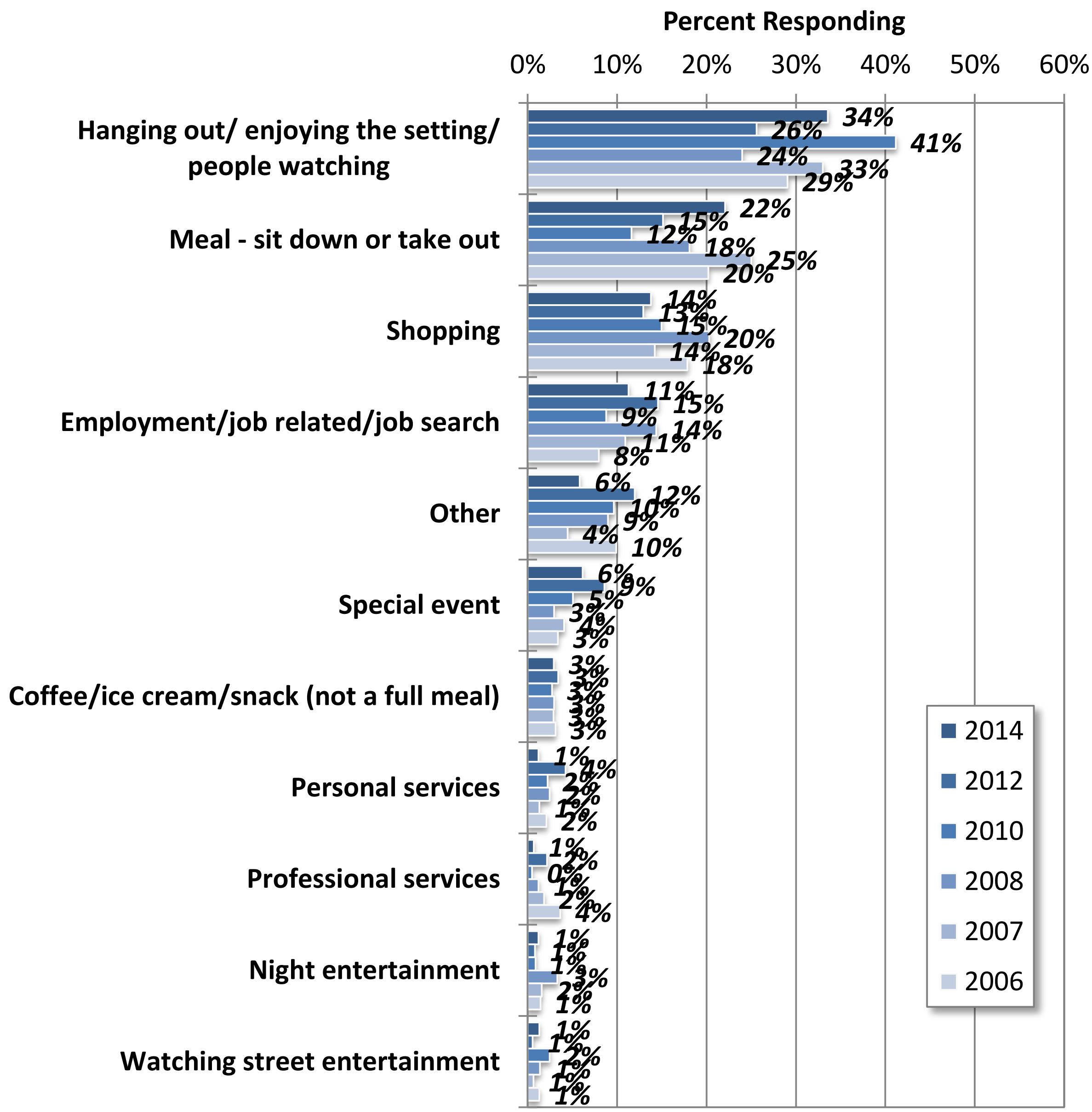


**Figure 11**
**Primary Reason for Coming to Downtown Boulder Today**
**By 2014 Visitor Type**

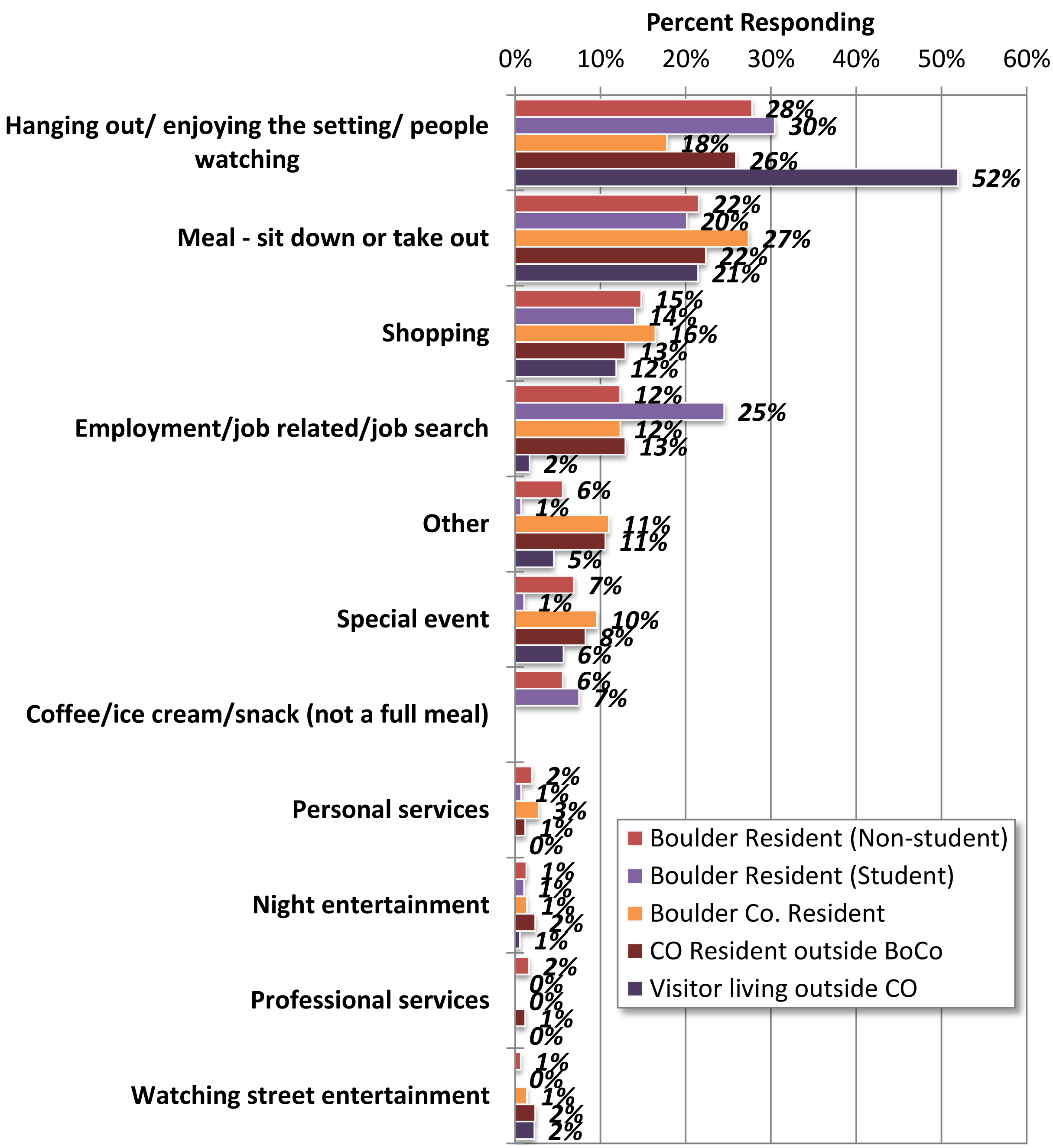


**Figure 12**
**All Activities This Visit (Primary Activity plus Other Activities)**
**By Year**

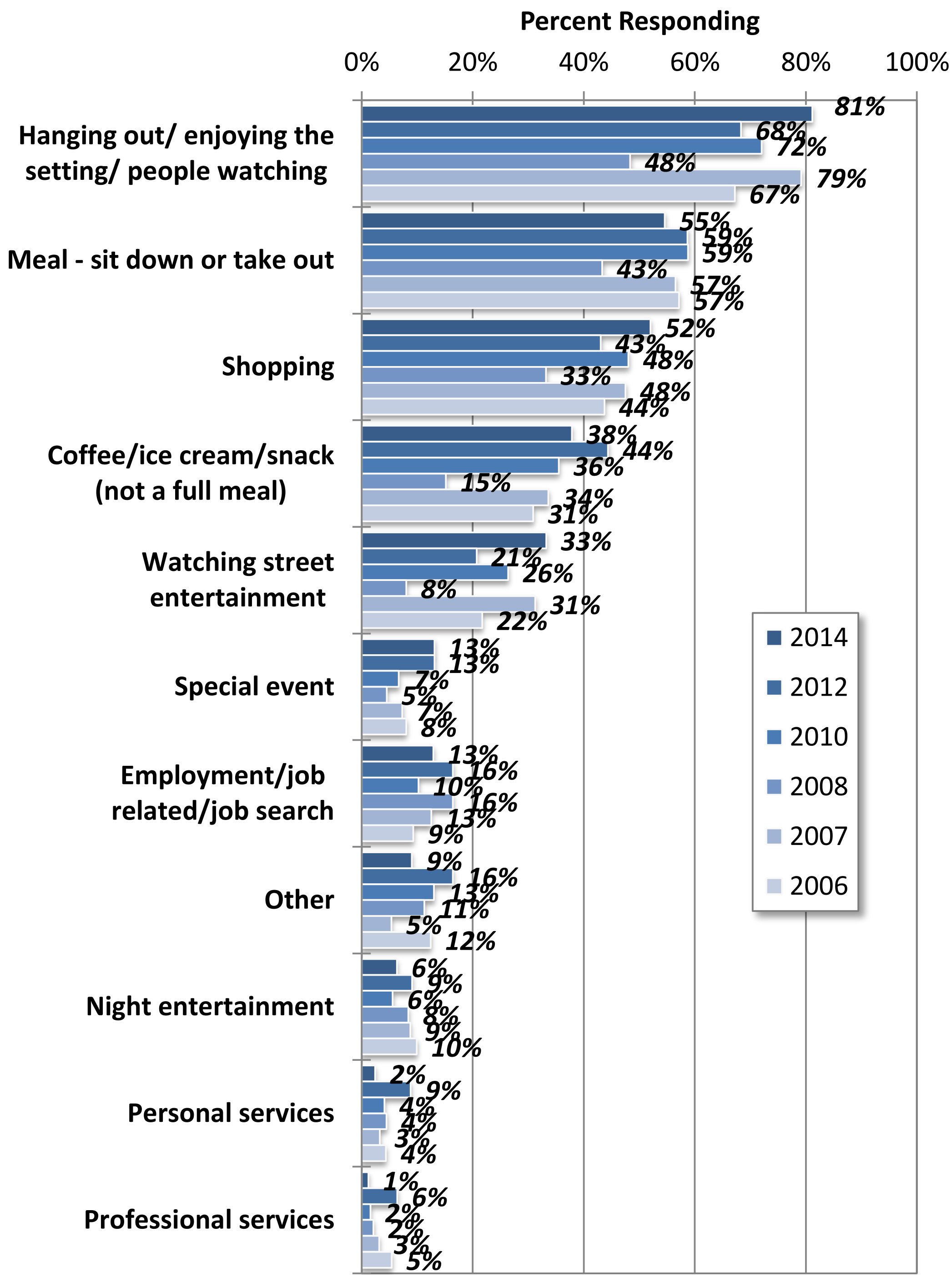
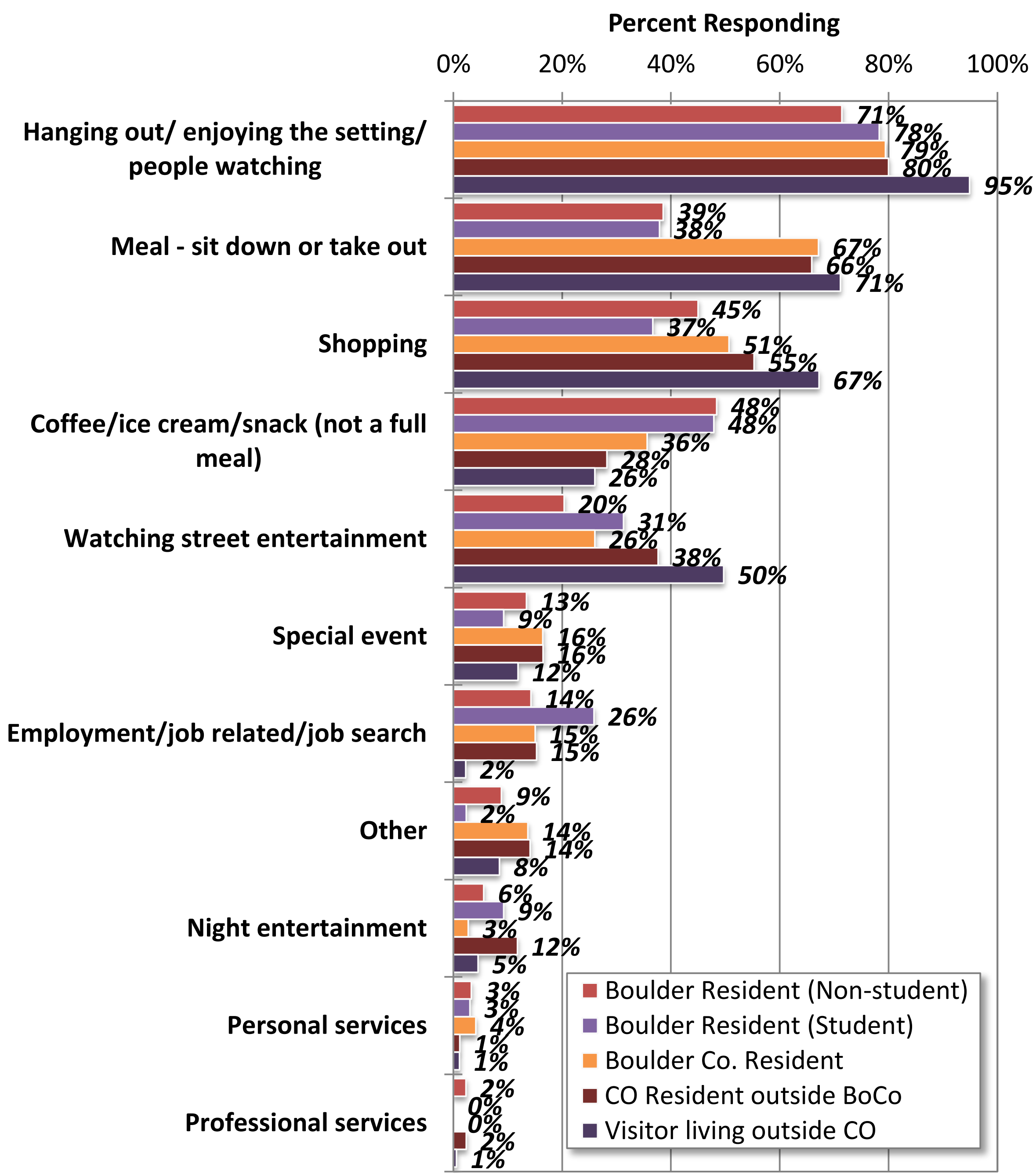


**Figure 13**
**All Activities This Visit (Primary Activity plus Other Activities)**
**By 2014 Visitor Type**



## Spending Patterns

An important metric developed out of the research is the average amount of money Downtown users spend on various purchases (restaurant/bar, shopping, retail, and "other"), as well as total spending by person. The results show that a majority of those surveyed indicated that they planned to spend some amount of money in the Downtown area on the day they were surveyed (75 percent), and the average amount per person was about $58 (similar to last year and generally slightly higher than the historical range).

Purchase Frequency. Overall, three-quarters of respondents said they would make a purchase of some kind. This is the lowest share of respondents indicating they would make a purchase in the history of the survey program (historically in the 85 percent range). A further analysis of results indicates that this decline in share of spending is influenced by the higher share of university students represented in the 2014 data.

Average Amount Spent. Though spending penetration was down, the average amount spent per person was similar to 2012 and higher than previous summers, averaging $58.43. The distribution of this amount was $24.47 spent at retail stores/art galleries, $33.21 spent at restaurants/bars (up from the historical range), and $0.75 spent on other purchases. The table below illustrates some of the spending patterns documented in historical surveys.

**Table 2A**
**Spending Penetration and Average Spending**
**2005 to 2014**

| | Year of Survey | | | | | |
|---|---|---|---|---|---|---|
| ***Spending Patterns*** | **2006** | **2007** | **2008** | **2010** | **2012** | **2014** |
| **Percent making a purchase today** | 88% | 89% | 84% | 89% | 84% | 75% |
| **Restaurant/Bar** | $24.62 | $21.88 | $27.82 | $22.13 | $27.69 | $24.47 |
| **Retail store/Art gallery** | $25.84 | $28.38 | $26.55 | $28.59 | $28.90 | $33.21 |
| **Other** | $0.80 | $1.32 | $1.16 | $1.41 | $3.64 | $0.75 |
| **Total** | $51.26 | $51.58 | $55.53 | $52.12 | $60.23 | $58.43 |

Segmentation of Spending. Some variation is seen in the spending figures between different visitor segments. Most spenders made a food purchase (about 90 percent overall). However, Colorado residents living outside of Boulder were the least likely to make a food purchase (78 percent). Meanwhile, 59 percent of all respondents made some sort of retail purchase, with varying levels of purchasing frequency by visitor type. Visitors from outside of Colorado were most likely to make a retail purchase (73 percent), followed by Colorado residents from outside of Boulder County (62 percent), and Boulder County residents (58 percent). Roughly half of Boulder residents made a retail purchase, including non-students (50 percent) and students (47 percent). Visitors from outside of Colorado spend the most, on average, on food/drink ($36) and retail ($43).

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 $80.23 per person and Boulder County residents spent $62.33 on average. Colorado out-of-County residents spent $64.74 on average per person. City non-student users spend an average of $44.16, while student users spent the least on average, at $32.90.

**Table 2B**
**Spending Penetration and Average Spending**
**2014 User Type**

| | 2014 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% | 59% | 75% | 68% | 81% |
| Restaurant/Bar | $16.70 | $15.24 | $25.84 | $24.53 | $36.18 |
| Retail store/Art gallery | $14.20 | $19.75 | $13.75 | $32.34 | $45.89 |
| Other | $.32 | $1.37 | $0.00 | $.14 | $1.51 |
| Total | $44.16 | $32.90 | $62.33 | $64.74 | $80.28 |

**Figure 14**
**Are You Spending Money Today?**
**By Year**

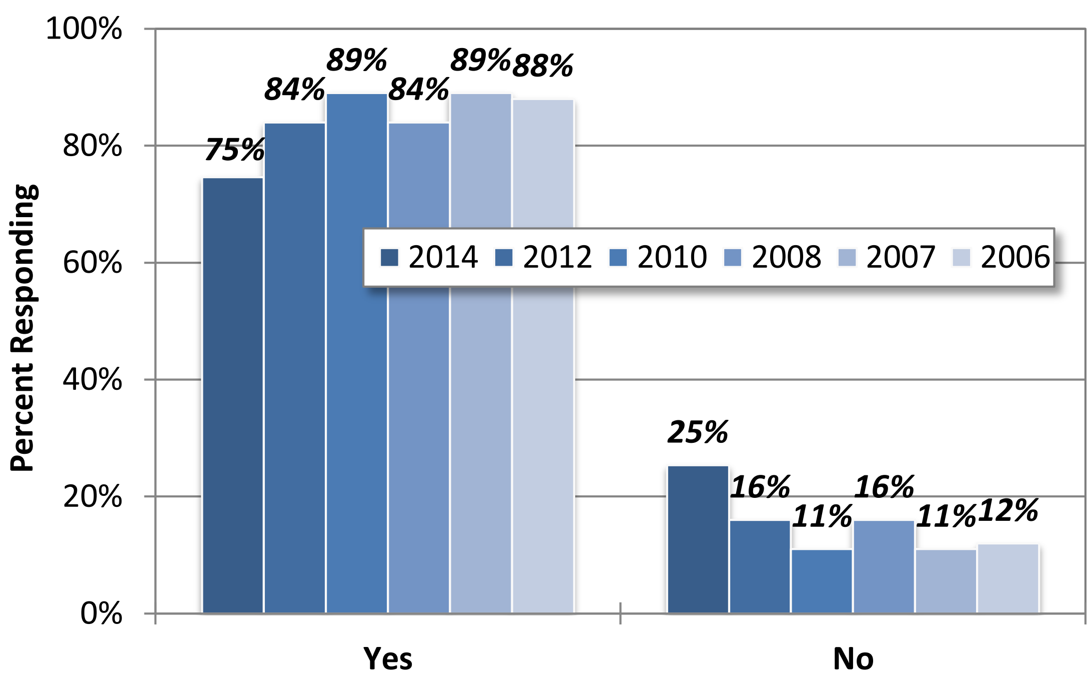


**Figure 15**
**Are You Spending Money Today?**
**By 2014 Visitor Type**

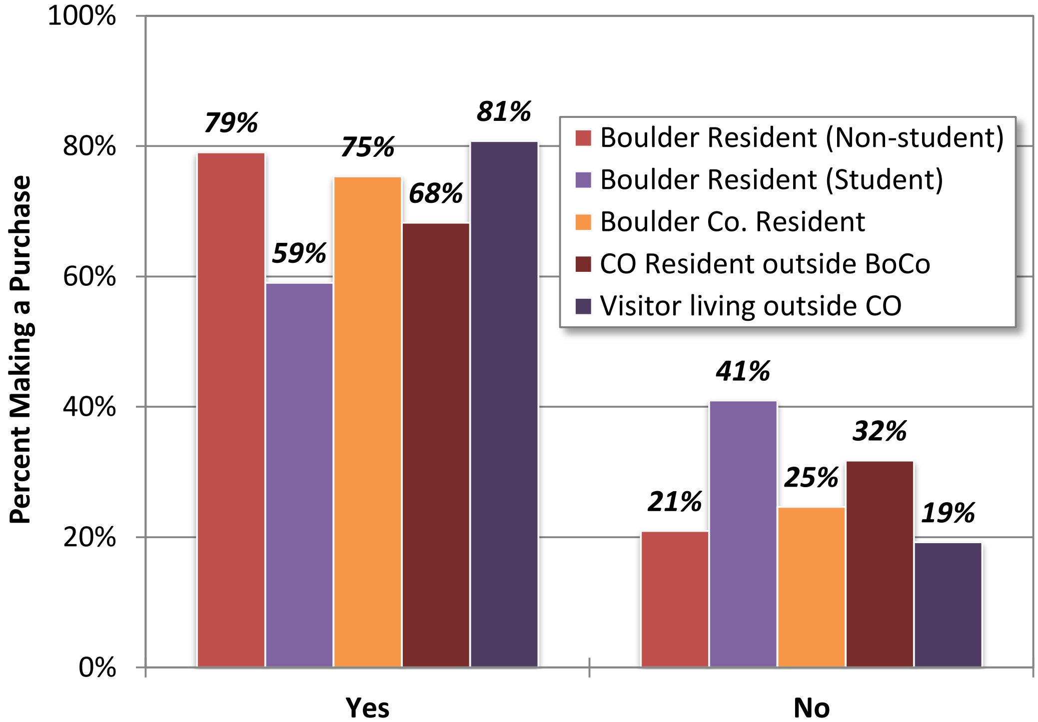



**Figure 16**
**Average Total Spending (Not Including Non-Spenders)**
**By Spending Category, By Year**

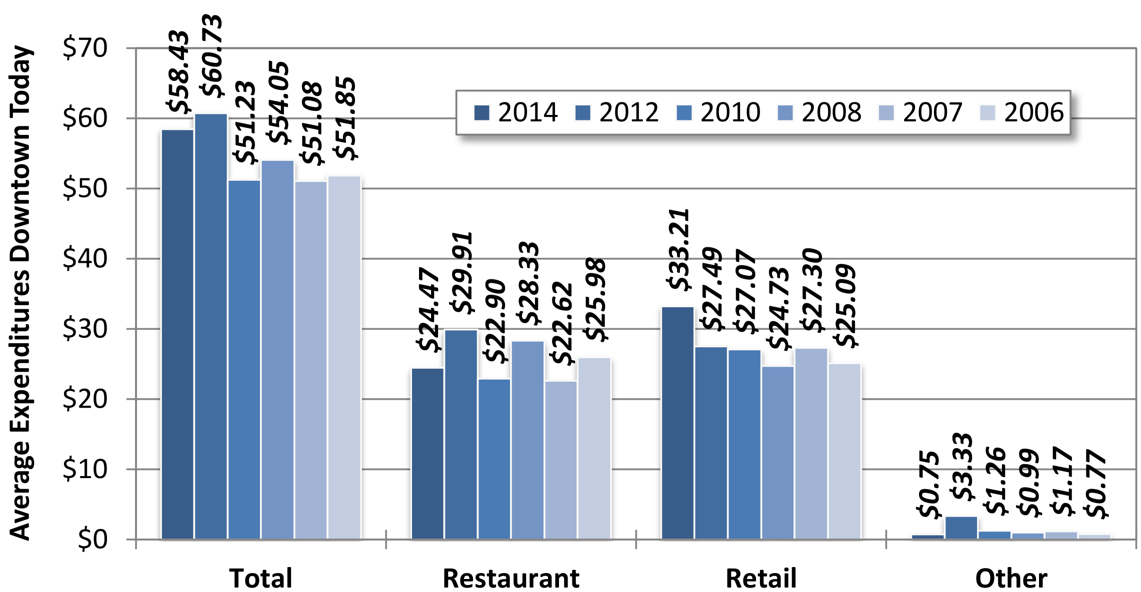


**Figure 17**
**Average Total Spending (Not Including Non-Spenders)**
**By 2014 Visitor Type**

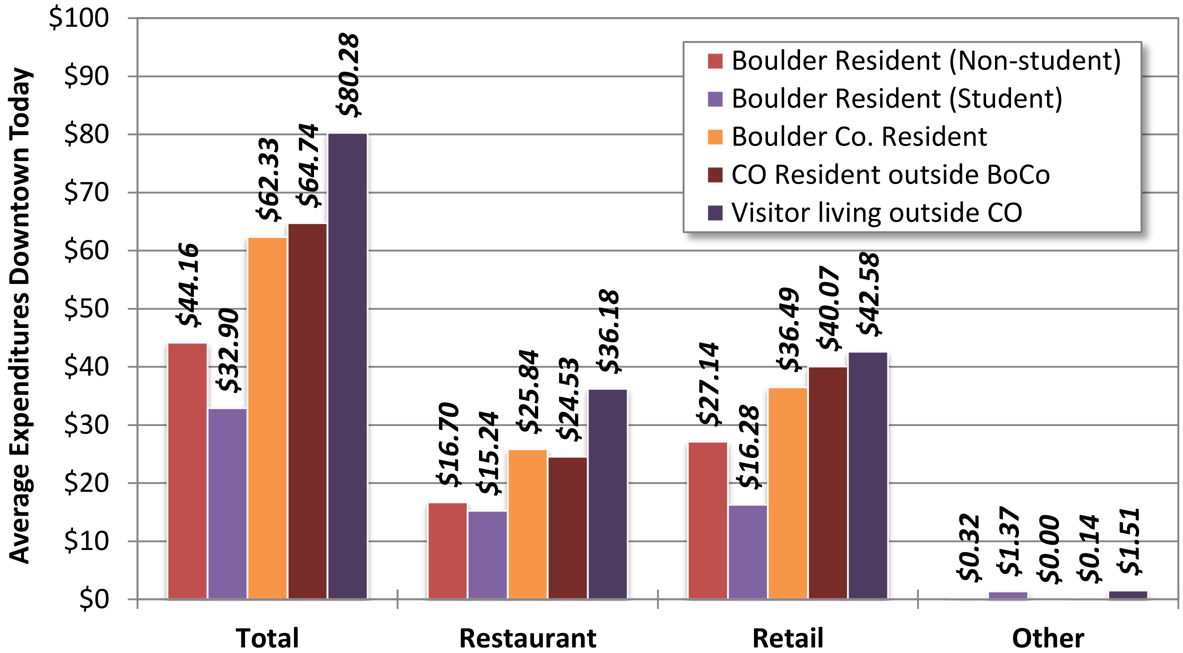
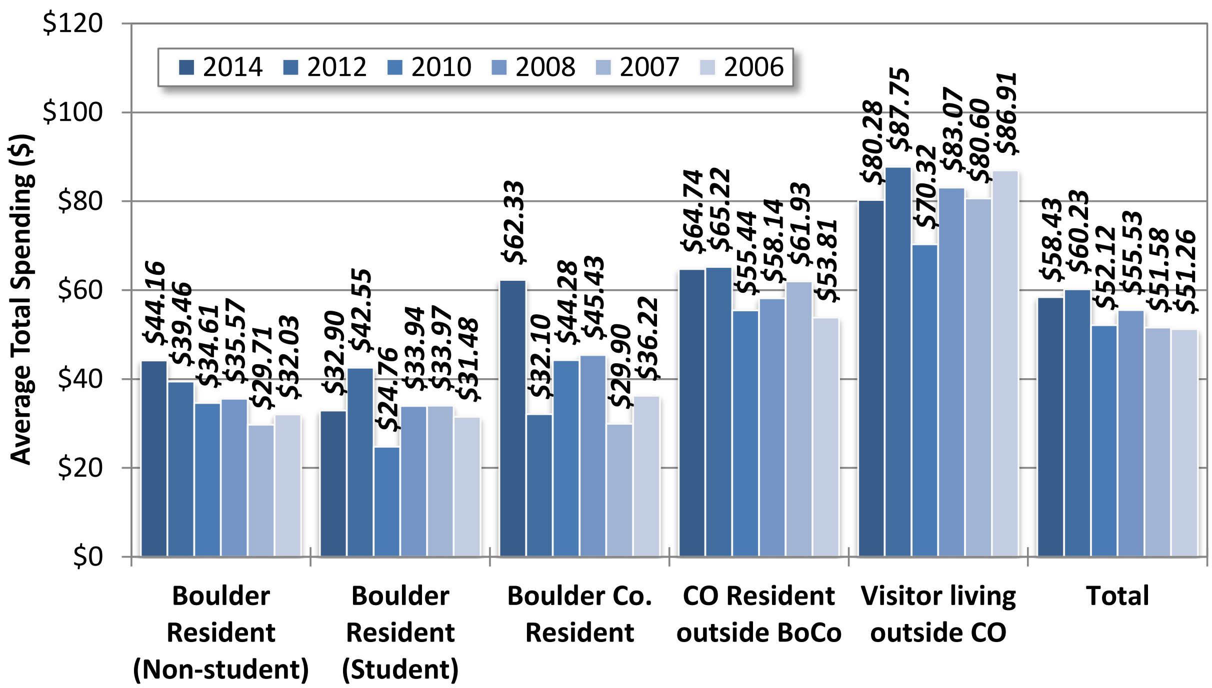


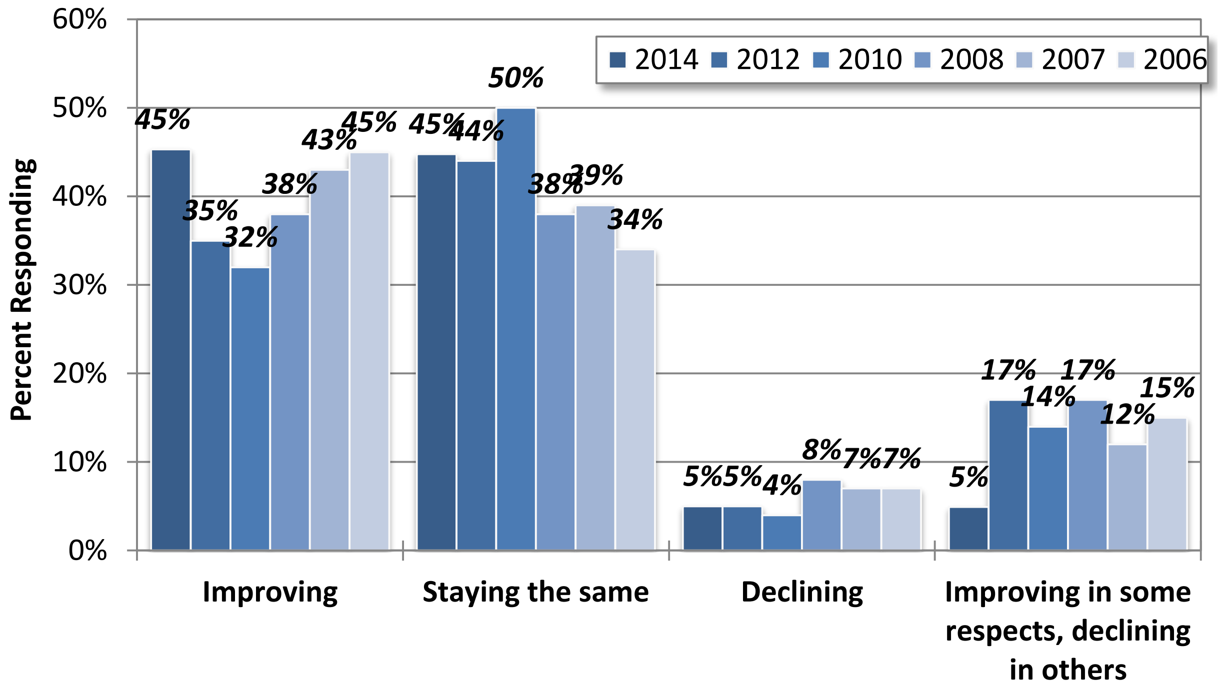

**Figure 18**
**Average Total Spending (Not Including Non-Spenders)**
**By Year, By Visitor Type**



## 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 (45 percent) or staying the same (45 percent). Very few thought it was declining (5 percent) or a combination of improving in some respects and declining in others (5 percent). This year saw an increased share of respondents noting that Downtown was improving (highest since 2006), and a proportionately smaller share of respondents noting that Downtown was improving in some areas and declining in others.

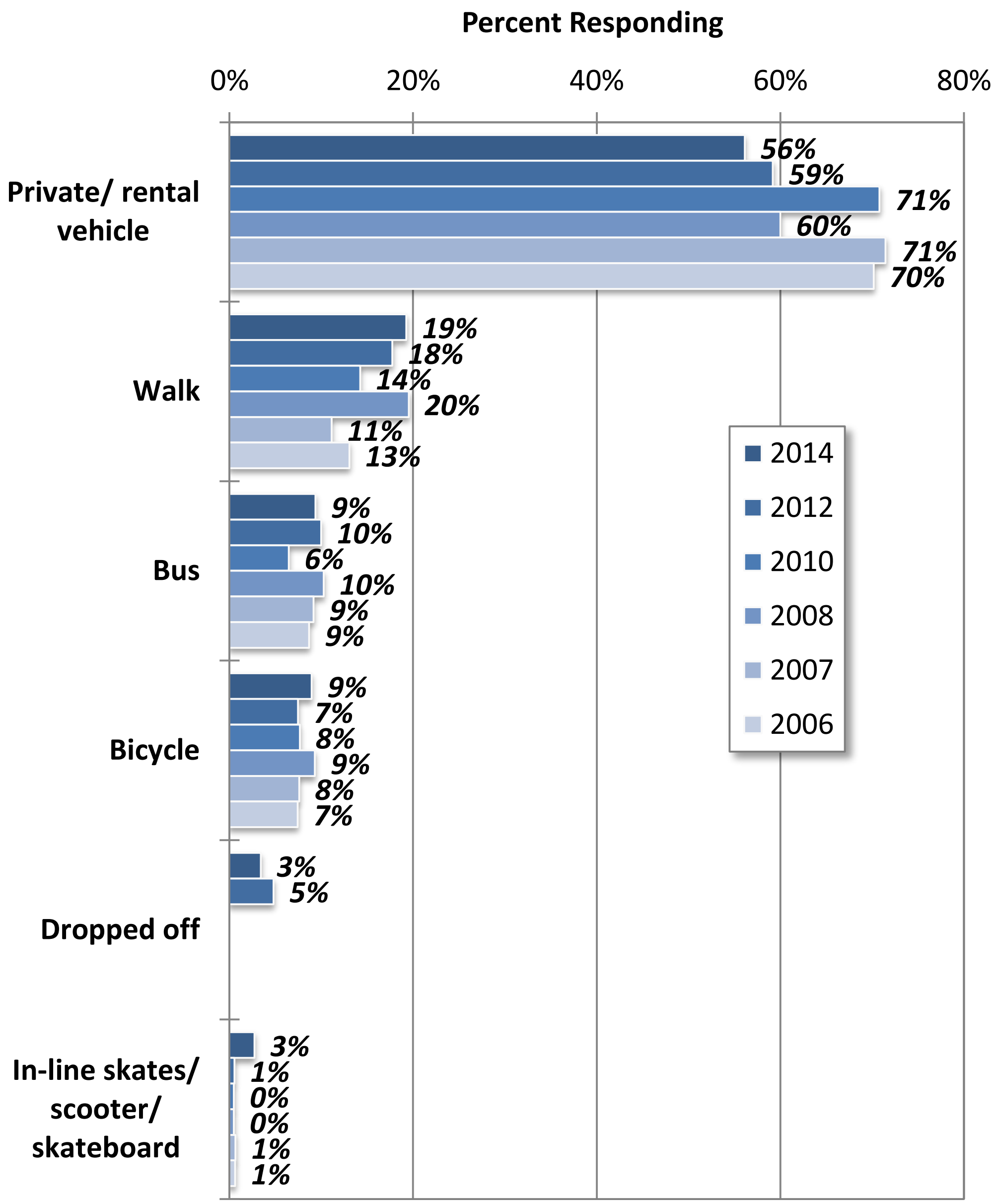
**Figure 19**
**Downtown Experience Improving or Declining over Past Few Years**
**By Year**



## Transportation and Parking

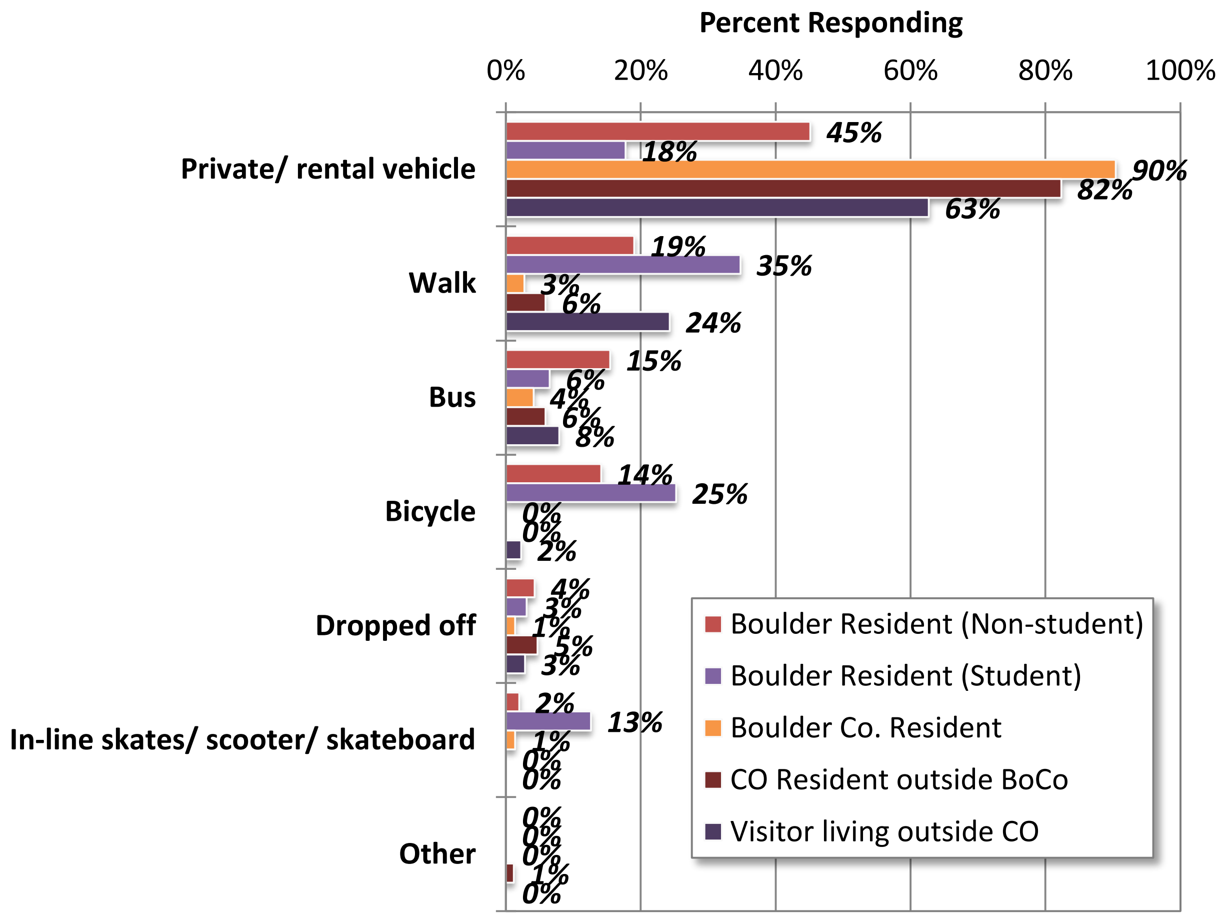
While most respondents take a private or rental vehicle as their transportation method to Downtown (56 percent), this is a smaller share than what has been recorded historically. The next most common method of transportation is walking (19 percent), followed by bus (9 percent), biking (9 percent), getting dropped off (3 percent), and in-line/ skates/ scooter/ skateboard (3 percent). Most of those utilizing alternate modes are students (75 percent) and non-student residents of Boulder (58 percent).

**Figure 20**
**Mode of Transportation Downtown**
**By Year**



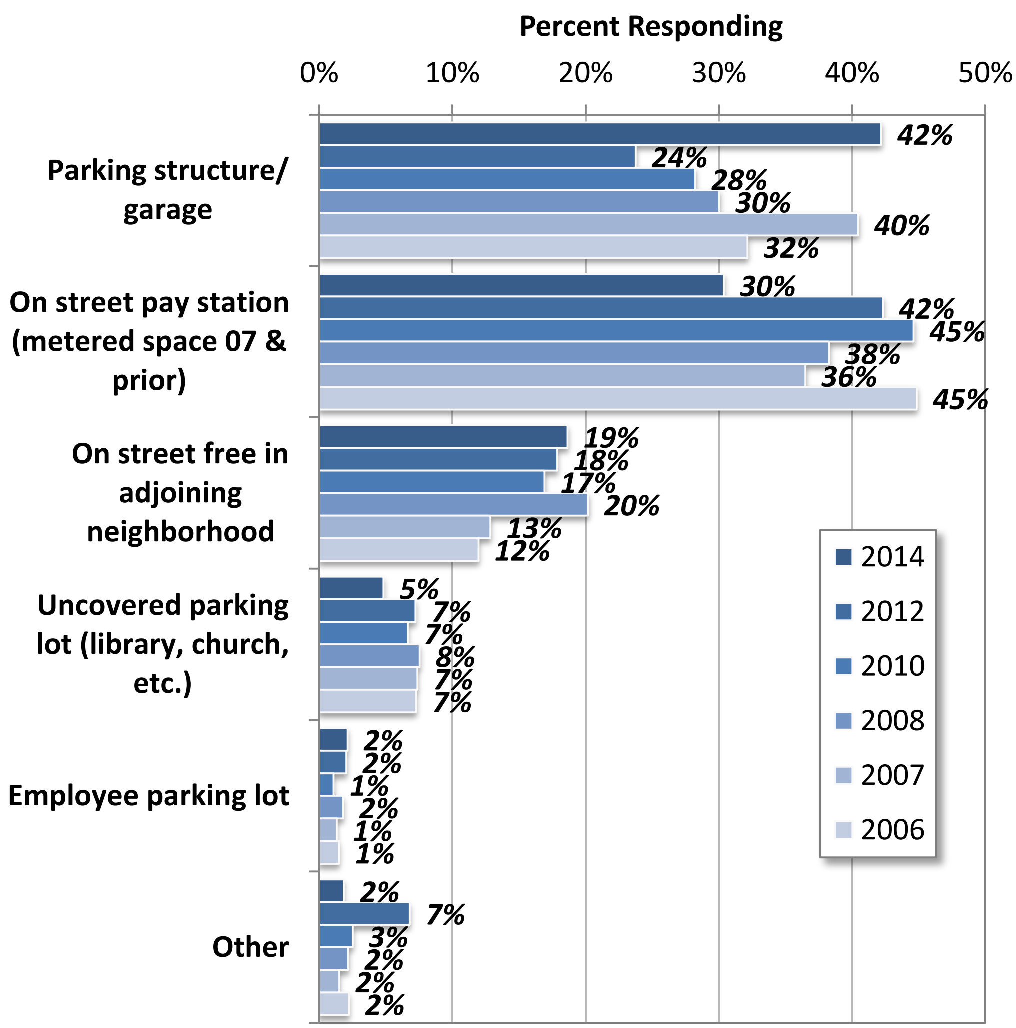
When transportation modes are evaluated by visitor type, some variations are observed. For example, Boulder County residents are most likely to drive to Downtown (90 percent), followed by Colorado residents outside of Boulder County (82 percent). Students are the least likely to drive (18 percent), instead relying on methods such as walking (35 percent), biking (25 percent), or in-line skates/scooter/skateboard (13 percent).

**Figure 21**
**Mode of Transportation Downtown**
**By 2014 Visitor Type**



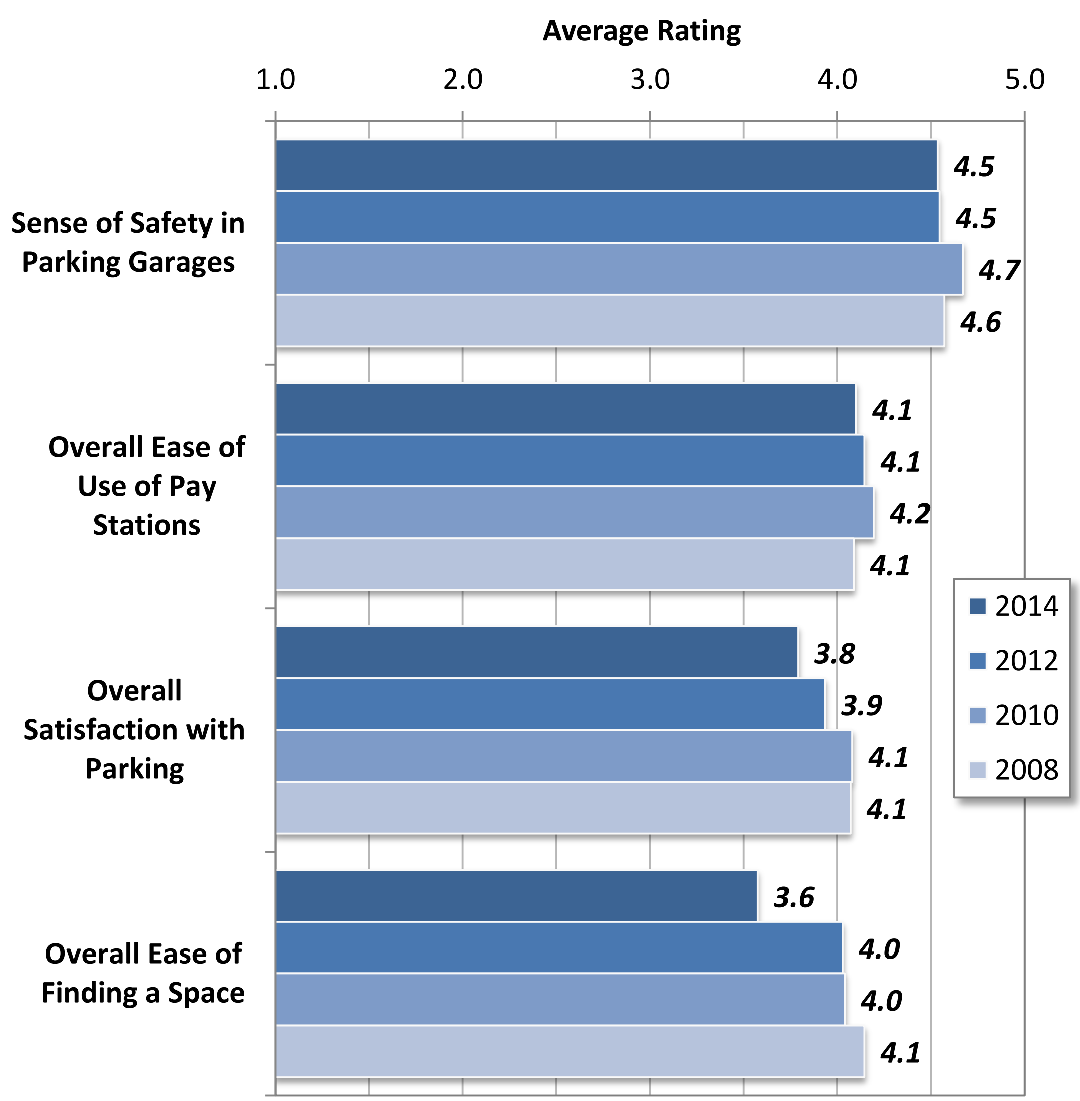
Those who took a private or rental vehicle Downtown were asked where they parked their car. Parking behaviors changed somewhat this past summer as compared to summers past. While the on-street pay station had typically been the most common parking method (around 43 percent), in 2014 less than one-third of survey respondents used on-street pay stations. Instead, using a parking structure/garage was much more common among visitors, with 42 percent of respondents citing this as the location of their parked vehicle. Other parking locations have remained stable over time. The overall shift toward parking structure/garages potentially indicates a higher level of awareness of the garages as a parking option, particularly the availability of free parking on weekends in garages Downtown.

**Figure 22**
**Location of Parked Vehicle**
**By Year**



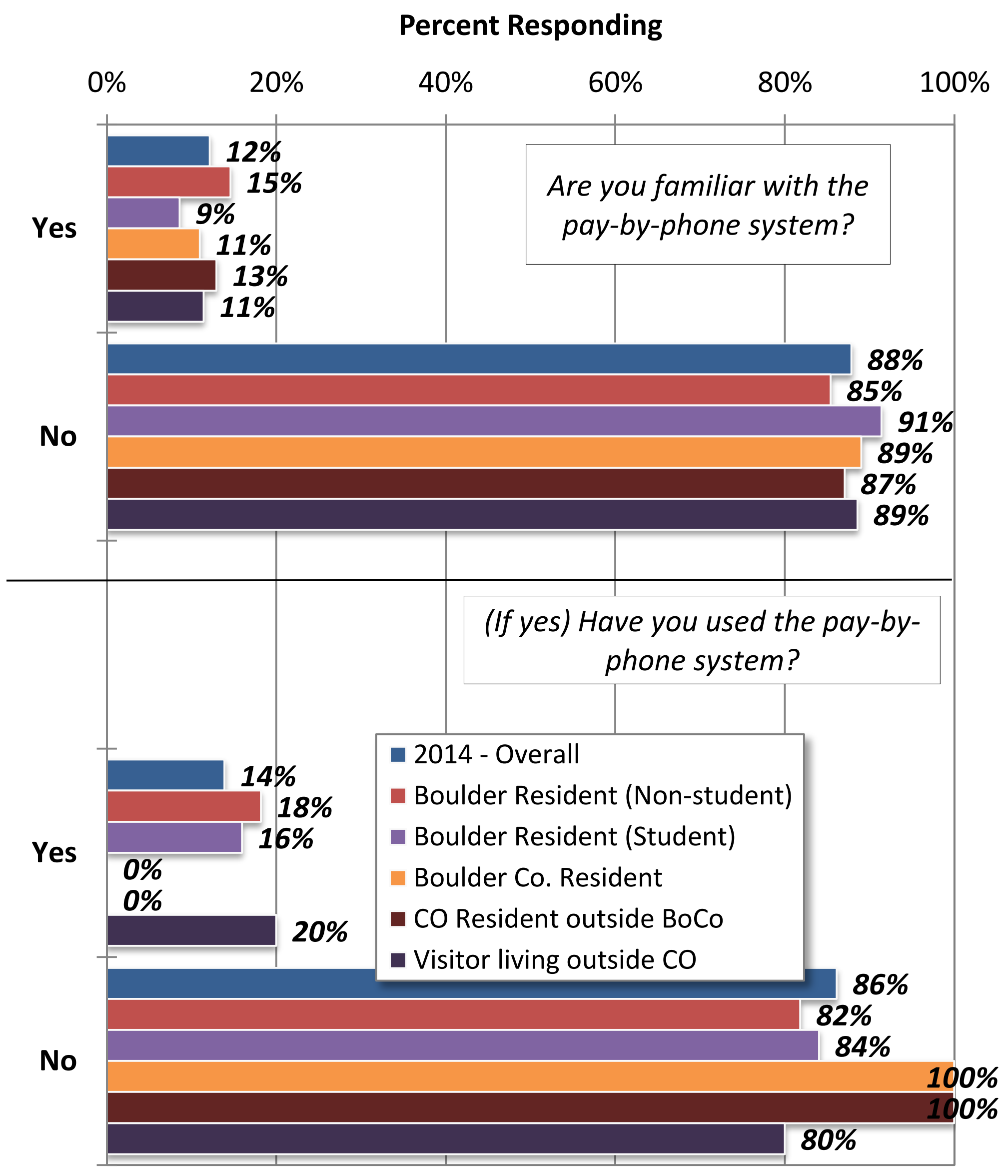
Using a scale of 1 to 5 where 1 was "poor" and 5 "very good," respondents who drove Downtown were asked to rate aspects of their parking experience. Overall, ratings were generally high. Sense of safety (4.5) and overall ease of use of pay station (4.1) were rated within similar range of historical results. However, two areas—overall satisfaction with parking (3.8) and overall ease of finding a space (3.6)—have experienced gradual declines in ratings since 2008. It may be worth exploring aspects of the parking experience further in order to manage perceptions as they relate to satisfaction and ease of finding parking. However, these areas of satisfaction mostly suggest that Downtown is busy, which ultimately is a positive finding.

**Figure 23**
**Ratings of Parking Experience**



A new question asked respondents whether they were familiar with the pay-by-phone system, and if so, have they used the pay-by-phone system? Overall, 12 percent of all respondents were familiar with this new system, and of those that were familiar, 14 percent have used it. Interestingly, awareness and use of the pay-by-phone system did not vary too dramatically by visitor segment. However, Boulder County residents and Colorado residents living outside of Boulder County, unanimously had not used the system previously.

**Figure 24**
**Awareness and Use of the Pay-by-Phone System**

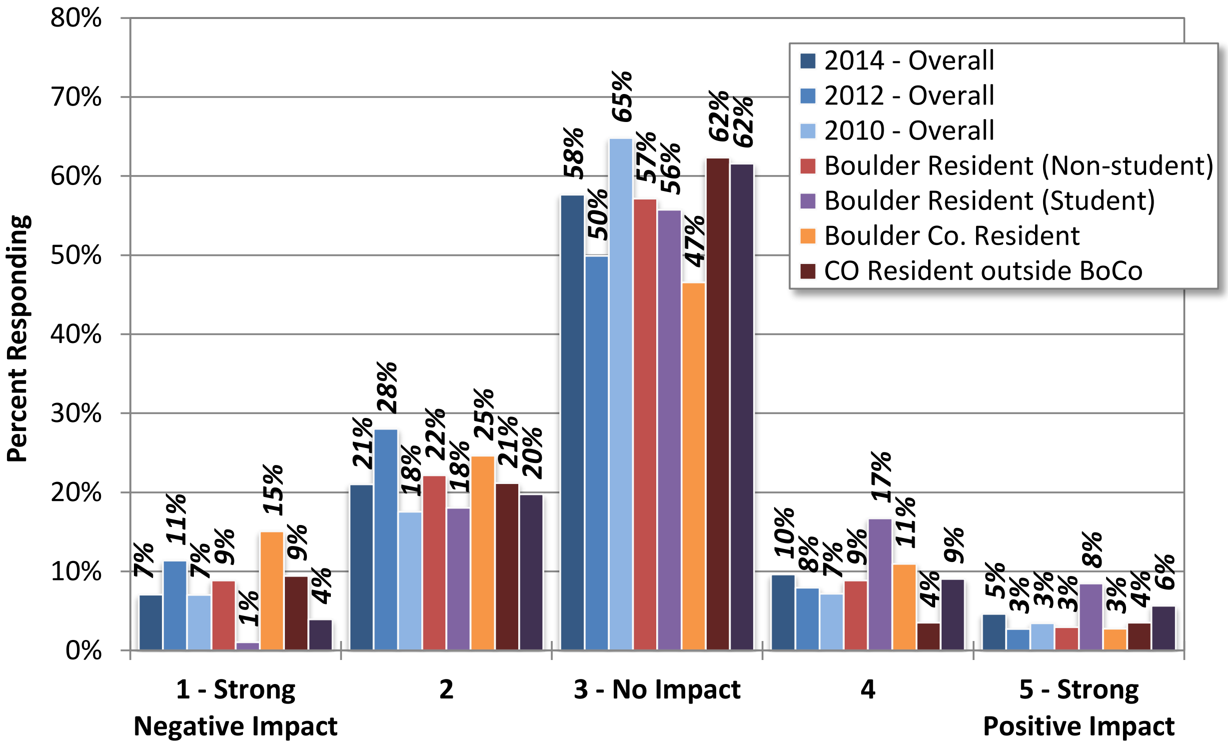


## Transient Issues

A question on the survey, asked since 2010, was "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 less of a negative impact this summer as compared to last summer, and similar ratings to 2010. In 2014, 28 percent of respondents noted that panhandlers had a strong or moderate negative impact, compared to 39 percent in 2012, and 25 percent in 2010.

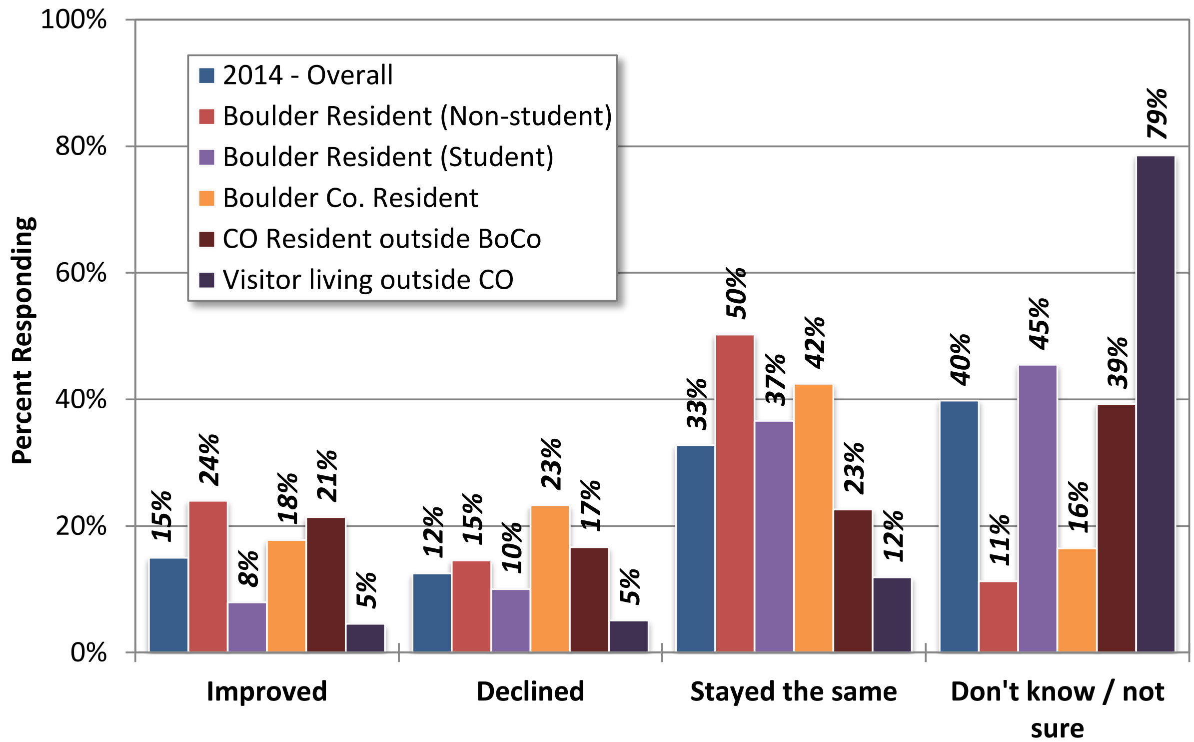
Looking at the results in greater detail shows that Boulder County residents were most negatively impacted by panhandlers (40 percent), followed by City of Boulder residents (non-students), and Colorado residents outside of Boulder County (31 percent each, respectively). Meanwhile, visitors living outside of Colorado (24 percent) and students (19 percent) were not as negatively impacted by the activities and behaviors of panhandlers.

**Figure 25**
**Do the Activities/Behaviors of Panhandlers Impact Your Enjoyment?**
**Overall and By 2014 Visitor Type**



A new but related survey question asked whether the situation with panhandlers/transients has improved, declined, or stayed the same. Overall,15 percent noted the situation has improved, 33 percent noted it stayed the same, 12 percent indicated it declined, and a notable 40 percent of respondents said they did not know or were not sure. Students and Colorado residents living outside of Boulder County were particularly likely to note the situation has improved, Boulder residents (non-students) were most likely to say the situation has stayed the same, and Boulder County residents were more likely than other visitor segments to indicate the situation has declined. Not surprisingly, a majority of visitors living outside of Colorado reported they were unsure.

**Figure 26**
**Would you say the situation with panhandlers/transients has:**
**Overall and By 2014 Visitor Type**



## Satisfaction

An important section of 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, matching or surpassing the high experience ratings of 2010 in most categories. It is worth noting that ratings generally rebounded from the slight declines recorded in 2012 for most categories 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, 70 percent rating a 5 out of 5), overall cleanliness and maintenance (4.5, 60 percent), family orientation/ kids play areas (4.5, 56 percent), customer service in retail stores (4.5, 56 percent), variety of restaurants (4.4, 54 percent), special events/festivals (4.4, 51 percent), and variety of retail shops/art galleries (4.2, 37 percent).

Two areas of the experience earned relatively low ratings, showing notable declines from the range of prior years. Downtown Information Center earned an average of 4.0 this past summer, with 21 percent of respondents giving a rating of 5 out of 5 (down from a stable average of about 4.3 from prior years of the survey program). Meanwhile, directory information and signs earned a 3.7 average, with just 16 percent of respondents giving a rating of 5 out of 5. Results suggest that while all areas of the visitor experience remain strong, that information tailored toward visitors could use improvement.

When satisfaction ratings are evaluated by visitor type, results indicate generally similar ratings of experience among all visitor segments. However, out-of-state visitors tend to give slightly higher average ratings than do other groups for most categories (with the exception of the information-related aspects of the experience and special events). See Figure 28.

**Figure 27**
**General Ratings of the Downtown Experience**
**By Year**

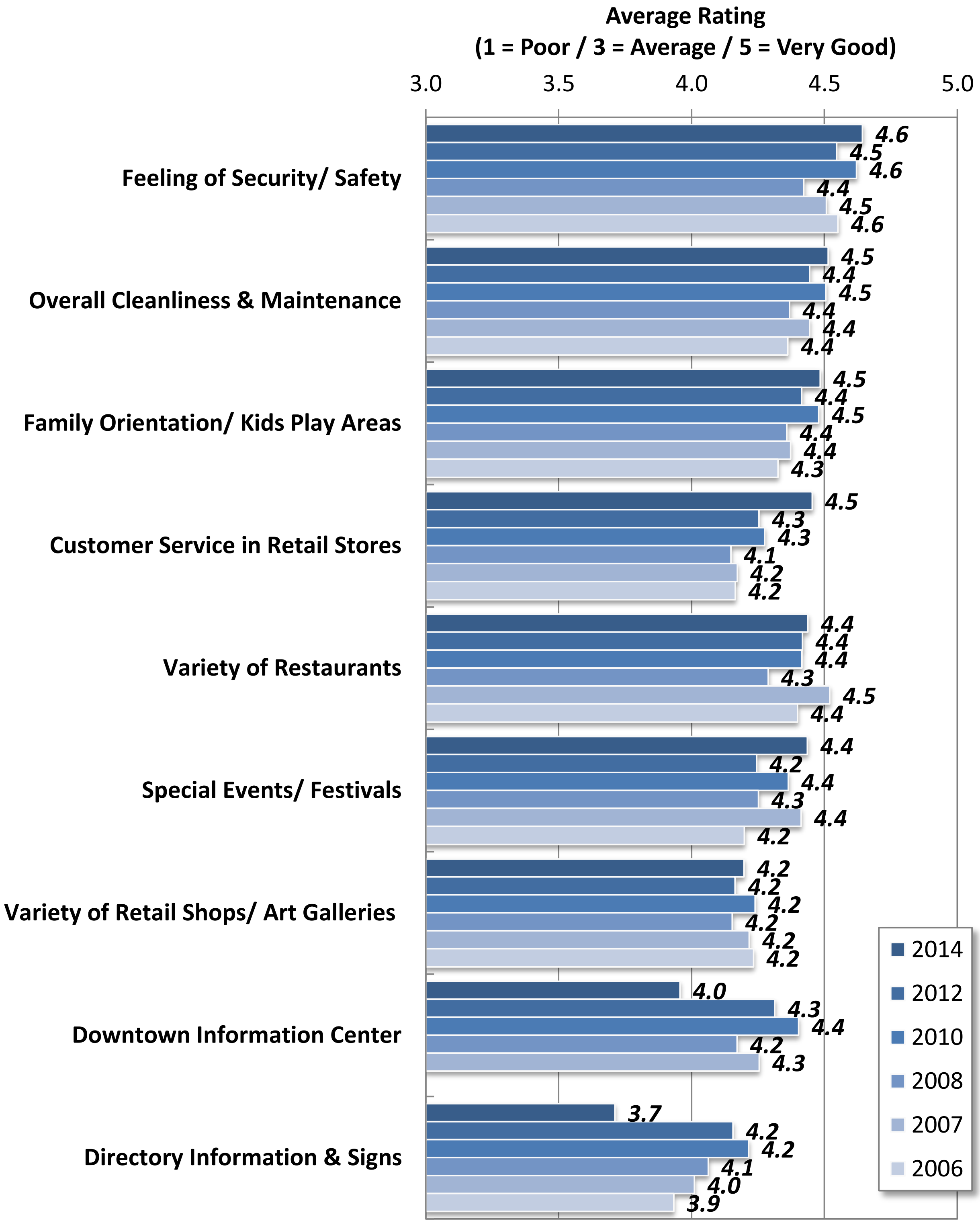


**Figure 28**
**General Ratings of the Downtown Experience**
**By 2014 Visitor Type**

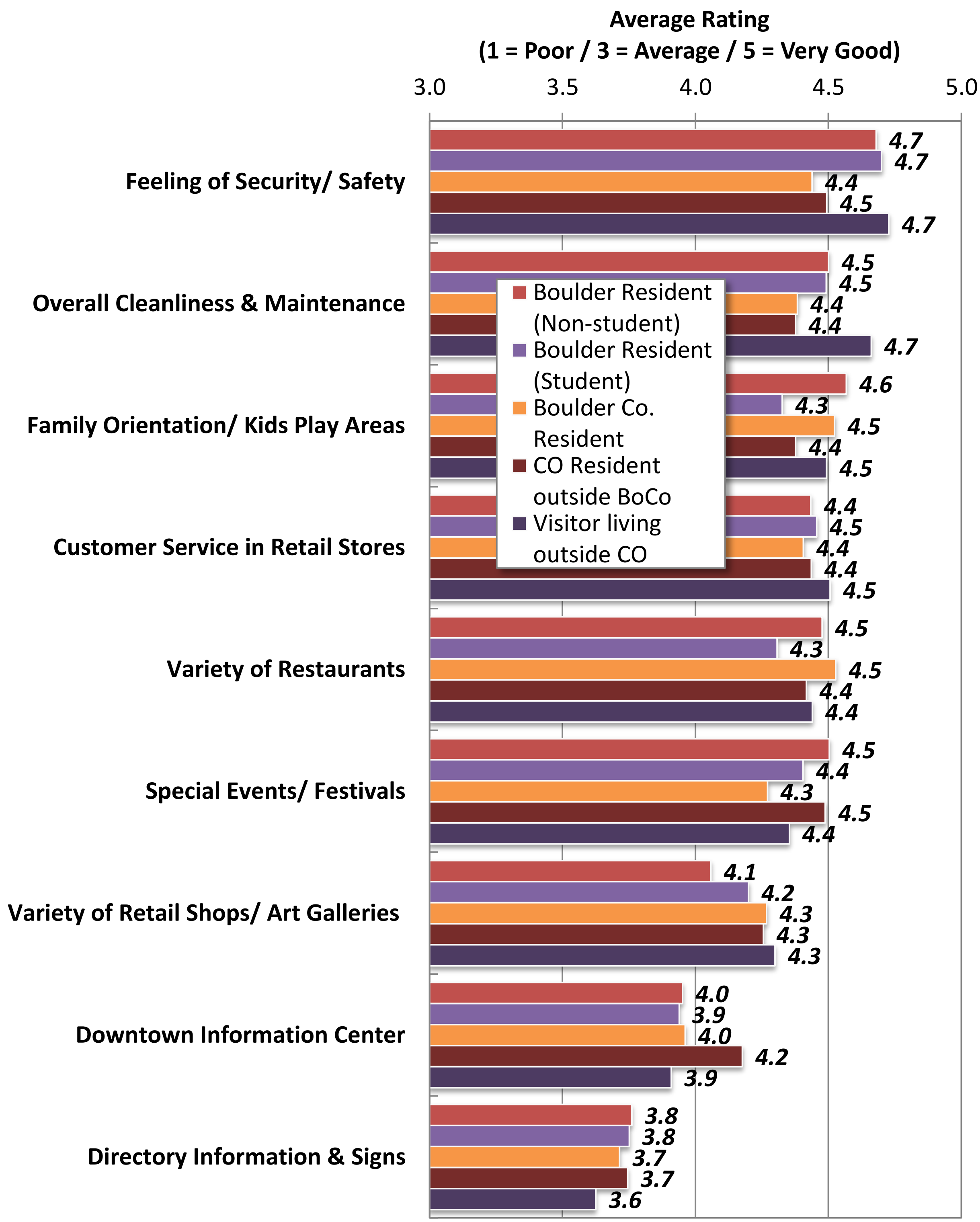
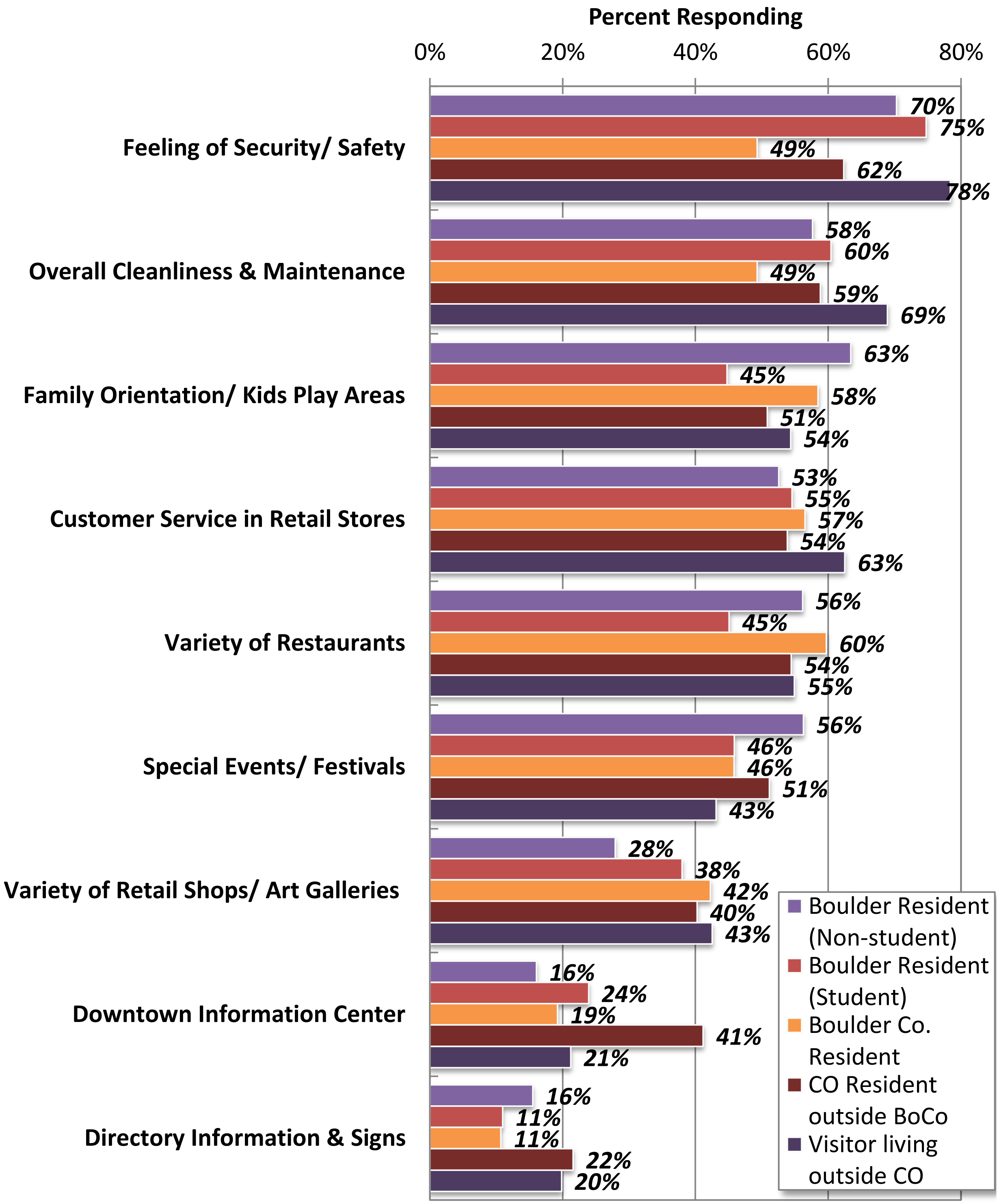
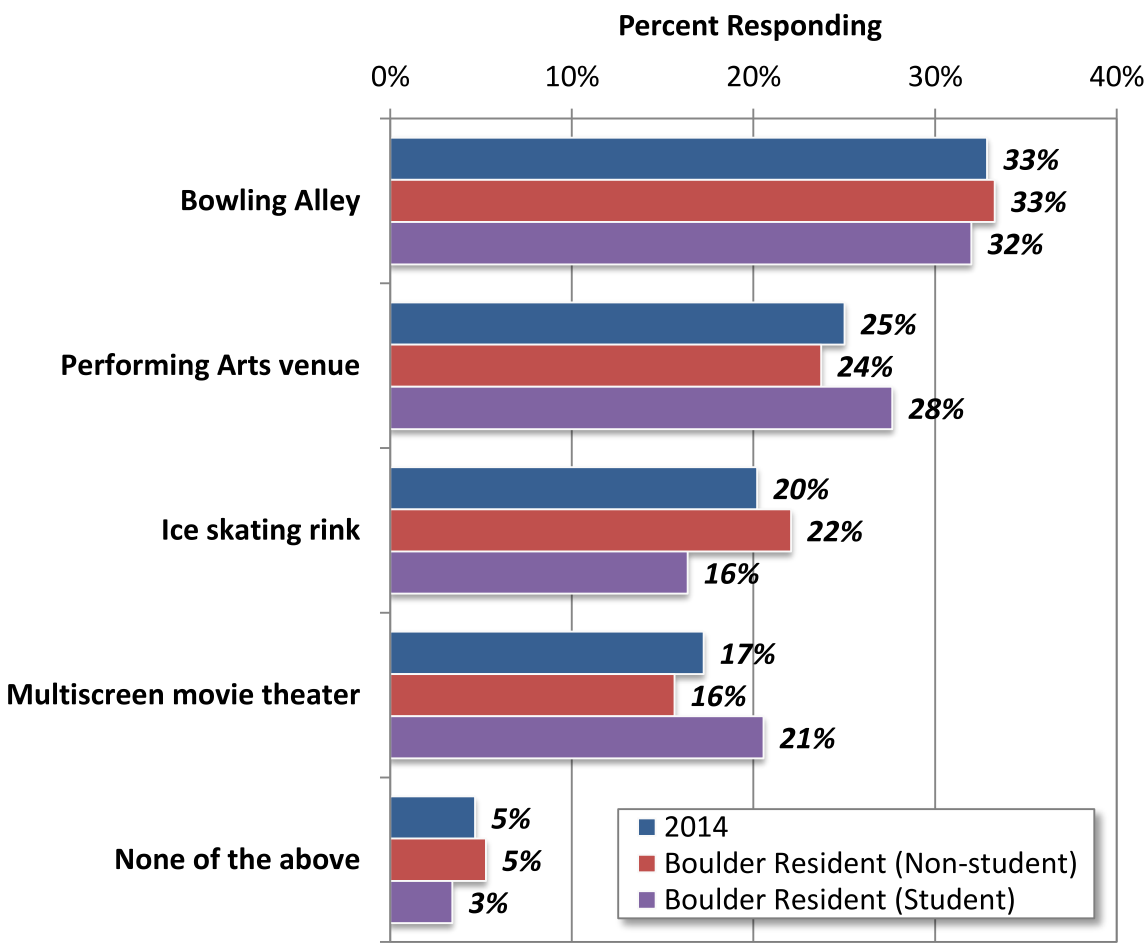


**Figure 29**
**"Very Good" Ratings of the Downtown Experience**
**By 2014 Visitor Type**



A new question introduced to the 2014 survey, asked City of Boulder residents which entertainment venues they would most likely to see added to Downtown Boulder. As shown in the graph to follow, a bowling alley was the most desired addition, with a third of all respondents choosing this venue. One in four respondents indicated wanting a performing arts venue, one in five wanted an ice skating rink, and 17 percent chose a multiscreen movie theater. Only 5 percent of respondents noted they did not want any of the choices listed, suggesting that interests mainly lie with the types of venues suggested. When assessed by whether the respondent was a non-student or student, results suggest that interests are largely similar between the two user groups. However, students were more likely to want a performing arts venue (28 percent) or multi-screen movie theater (21 percent), while non-students showed greater interest in an ice staking rink (22 percent).

**Figure 30**
**Which entertainment venues would you most like to see added?**
**By Overall and 2014 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.

*[Over the past few years, would you say the quality of the Downtown experience has been:] Why do you feel that way?*

- *Improving* — *Always new events going on and my kids always have a great time*
- *Improving* — *Ease of parking and getting around diversity of shops has improved*
- *Improving* — *Great that the west end is being re done, should be extended to 9th, lots of more pedestrian areas and flowers*
- *Improving* — *Just feels more like a community and there's always things to do*
- *Improving* — *Love the downtown boulder banners on the streetlights, Pearl feels more like a community*
- *Improving* — *More shops and events, there always seems to be things going on around Pearl*
- *Improving* — *So many new stores/restaurants with lots of window advertising, lots of sales, much more crowded, lots of tourists*
- *Improving* — *The town is more developed but still has a small town feel with the local businesses*
- *Staying the Same* — *Busier and more crowded too many street performers*
- *Staying the Same* — *Getting upscale which may not be good*
- *Staying the Same* — *More expensive but still locally owned businesses*
- *Staying the Same* — *Not happy with the construction*
- *Declining* — *I think the homelessness and panhandling problem has gotten worse*
- *Declining* — *More tourists diluting the local feel of Pearl street and making it note crowded and fueling the terrible street performers*
- *Declining* — *Much more commercial with the inconvenience of construction*
- *Declining* — *There is much more traffic then there was in past years, maybe because of disorganized road work*
- *Combination* — *Cooler stuff better quality, however too many chains that are too expensive*
- *Combination* — *It seems to be more organized, but the construction has caused for an increase in traffic*
- *Combination* — *Many new restaurants and stores but homeless population takes away from the experience*
- *Combination* — *Parking is still a pain but activities on pearl street seem to be constantly improving*
- *Combination* — *Very Lively but inconvenient construction with noise and traffic*

*What specific comments/suggestions do you have about [your ratings of the Downtown Boulder experience] that would help to improve the Downtown Boulder area?*

- *Community bulletin board to put up events going on around boulder county as Boulder and pearl street particularly seem like the heart of the county*
- *Covered areas for when it's raining*
- *Downtown Pearl street rewards program with a point system and stores participate and offer gifts/special discounts*
- *Drinking fountains that are easier to fill water bottles*
- *Hard to see street signs , fix and improve ground level pay stations*

- *Have designated area for street performers that do not get in the way of the flow of foot traffic*
- *It would be cool to have an open container law after a certain hour so you could walk from bar to bar with a drink*
- *Keep local businesses around and highlight their company and create a designation for locally owned and operated businesses to promote local atmosphere*
- *Make it more gear towards a younger crowd*
- *More bike racks*
- *No diversity in the population. promoting events for diversity like the world cup on pearl street*
- *Outdoor heaters in the winter*

## *What retailer(s), either local or chain, have you visited elsewhere that you wish was also located in Downtown Boulder?*

- *Buffalo Wild Wings*
- *Burger/sandwich shop or Jewish deli*
- *Cheap food trucks*
- *Children's clothes store*
- *Cupcake shop*
- *Donut/bagel/pastry shop*
- *Hardware/craft store*
- *Less chains*
- *More brunch places*
- *More diversity like incentives for ethnic bookstores and community centers or shared spaces*
- *More local restaurants*
- *More sports bars*
- *More vegetarian/vegan*
- *Salad shop like mod market and mad greens and dual piano upscale bar or speakeasy*
- *Seafood restaurant*
- *Steakhouse restaurant*
- *Whole Foods*

## Special Events

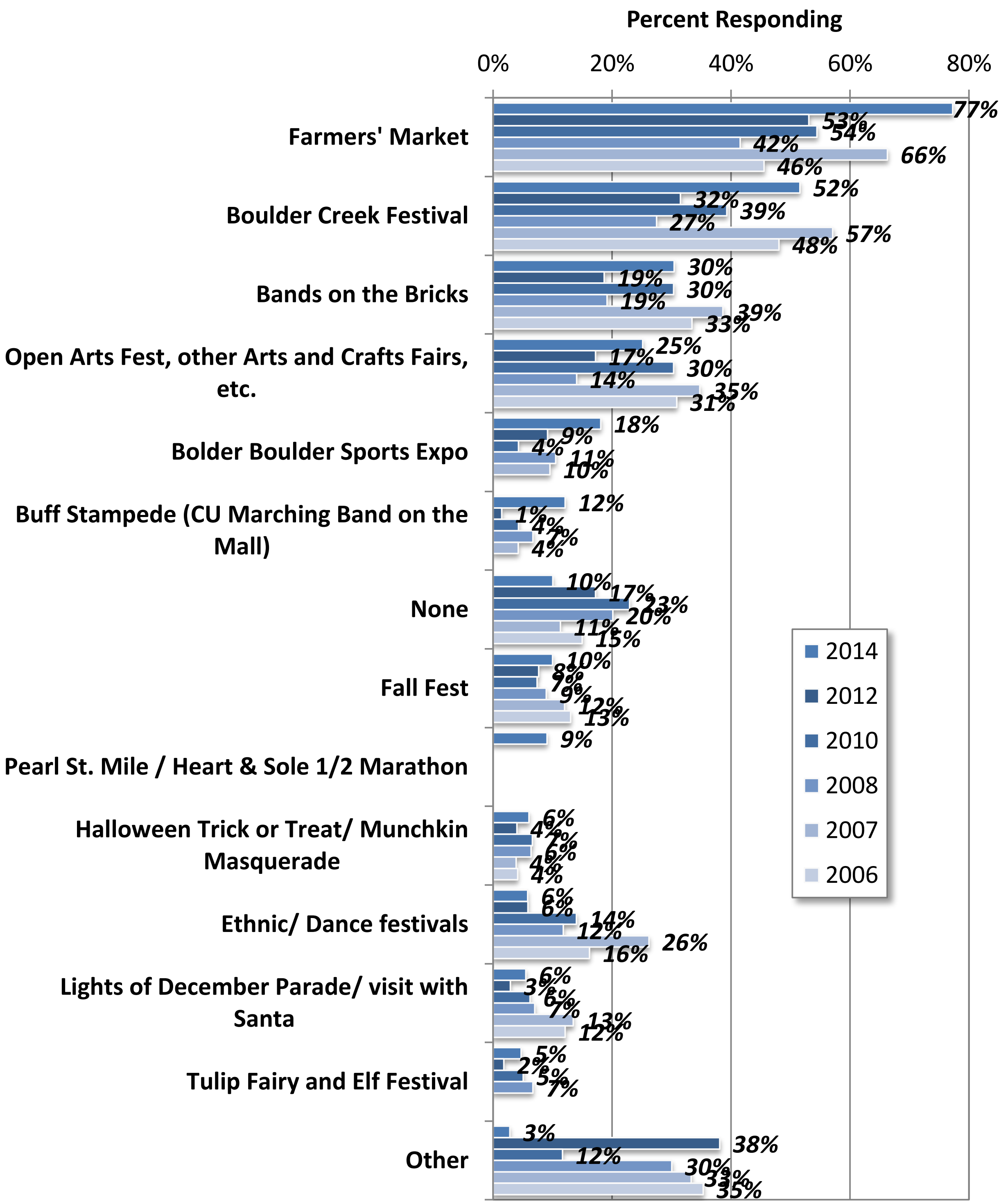
Several activities, concerts, special events, and festivals have motivated visitors who are residents of the City of Boulder to specifically make a trip to Downtown Boulder. The Farmers' Market has been a strong motivator in particular, with 77 percent of all visitors noting they specifically came Downtown to attend this event. This is a much higher share than what has been recorded historically, showing that the Market has increased in importance relative to attracting visitors Downtown.

Other events that had relatively high shares of respondents reporting they came Downtown specifically to attend, include the Boulder Creek Festival (52 percent), Bands on the Bricks (30 percent), Open Arts Fest and other arts and crafts fairs (25 percent), Bolder Boulder Sports Expo (18 percent), and Buff Stampede (12 percent).

Year-over-year trends worthy of note include the higher shares of respondents reporting that the Farmers' Market, Boulder Creek Festival, Bolder Boulder Sports Expo, and Buff Stampede motivated them to specifically come Downtown than had been the case in prior years. Conversely, Ethnic/Dance festivals and Lights of December Parade/visit with Santa have been gradually less of a draw over time. Meanwhile, the other events have remained relatively stable over time.

When assessed by whether the respondent is a non-student or student resident, results show that non-students were more likely to come Downtown specifically for a variety of events. Non-student residents were more likely than student residents to attend the Farmer's Market (80 percent), Bands on the Bricks (32 percent), Open Arts Fest (27 percent), Ethnic/Dance festivals (20 percent), Fall Fest (13 percent), Buff Stampede (13 percent), Pearl St. Mile/Heart & Sole Half Marathon (11 percent), Halloween Trick or Treat/Munchkin Masquerade (9 percent), Lights of December Parade (8 percent), and Tulip Fairy and Elf Festival (7 percent). Meanwhile, students were just slightly more likely to attend the Boulder Creek Festival (52 vs. 51 percent) and "other" events (4 percent vs. 2 percent).

**Figure 31**
**Which Activities, Special Events, etc. have you Attended this Past Year?**
**City of Boulder Residents, By Year**



## Competition

Significant interest exists in understanding the patterns of City of Boulder 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 City of Boulder survey respondent indicated that they have visited Downtown Boulder 11.2 times during the prior two months, down somewhat from historic ranges for this question. Also popular was the 29th Street Mall, with 79 percent visiting at least once for an average of 3.4 times in the past two months. Downtown Denver was also relatively popular for being somewhat distant, with 1.9 visits on average and 61 percent making at least one visit in the prior two months. Flatiron Crossing was down in popularity among respondents than has been the case historically, with an average of 0.6 visits and 32 percent visiting, along with Louisville, Lafayette, or Niwot Downtowns, with an average of 0.5 visits in the past two months (16 percent visited). Even less popular were Cherry Creek and Orchard Town Center.

**Figure 32**
**Average Visits to Downtown Boulder / Other Regional Shopping Areas in Past 2 Months**
**City of Boulder Residents Only**

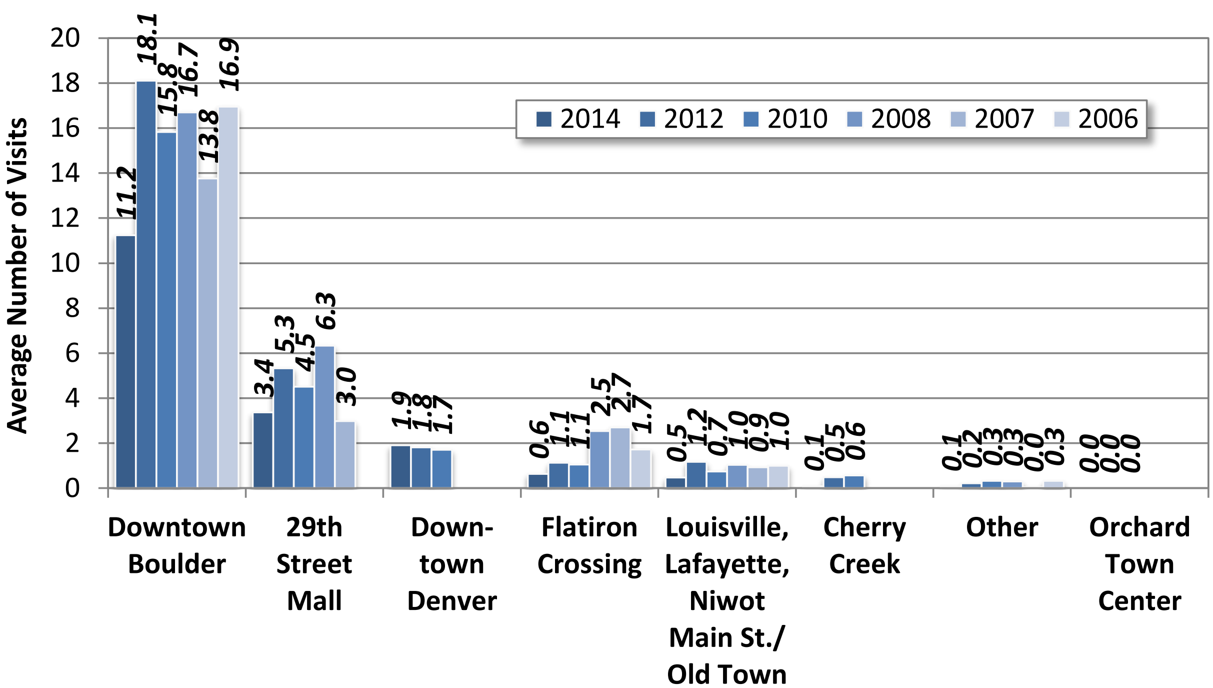
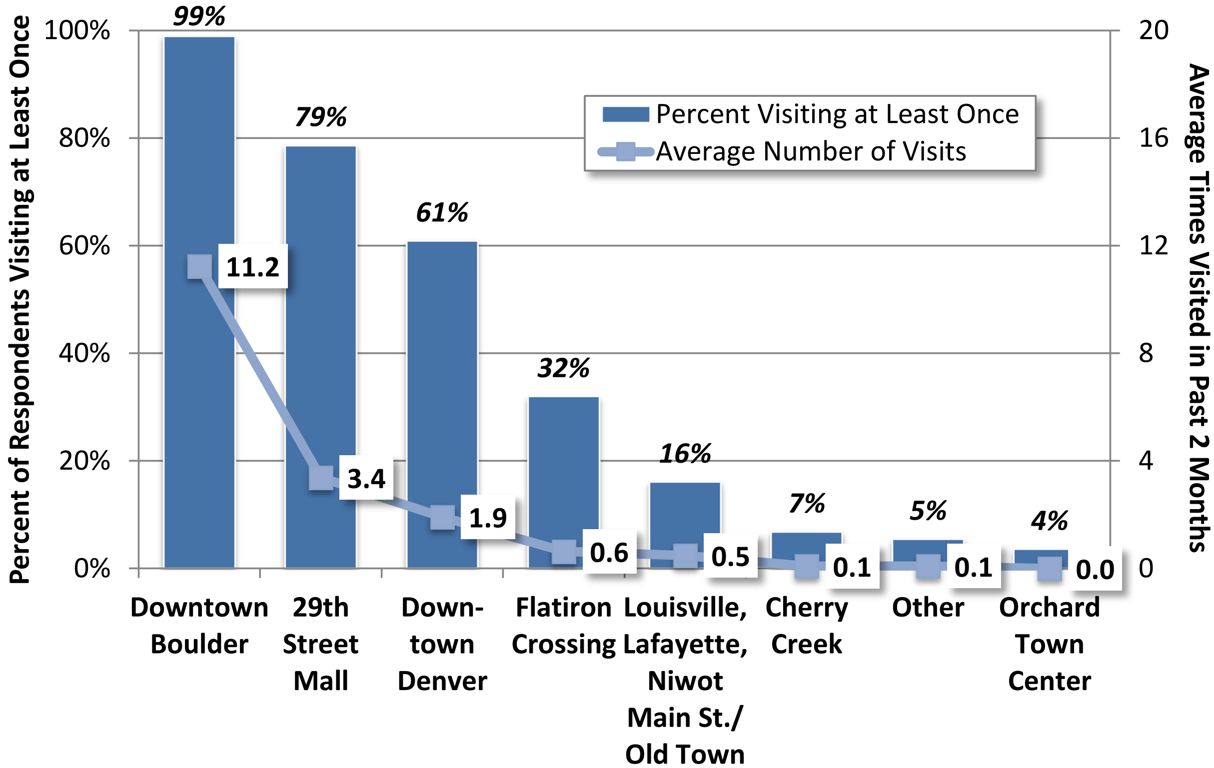



Figure 32 above shows the average number of visits over the past several summers. In Figure 33 to follow, average visits and percentages having visited are presented.

**Figure 33**
**Visits to Downtown Boulder / Other Regional Shopping Areas in Past 2 Months**
**City of Boulder Residents Only, 2014**



## Geographic Residence

The following graphs illustrate the geographic origins of Downtown users. A majority of visitors are from Colorado (73 percent), similar, if not just slightly higher, than historical results. The next most common out-of-stare origins this summer included California (3.1 percent), Texas (2.7 percent), Massachusetts (2.0 percent), Illinois (1.9 percent), New York (1.8 percent), Florida (1.6 percent), Missouri (1.2 percent), Wisconsin (1.1 percent), and Arizona (1.0 percent). All other locations comprised the remained 6.8 percent of visitors.

Among in-state visitors, the most popular counties of origin included Boulder (77.5 percent), Denver (4.5 percent), and Larimer (4.3 percent) Counties. In particular, Downtown Boulder drew notable shares of visitors from Louisville (5.2 percent), Broomfield (2.3 percent), and Aurora (1.6 percent).

**Figure 34**
**State of Residence**
**By Year**

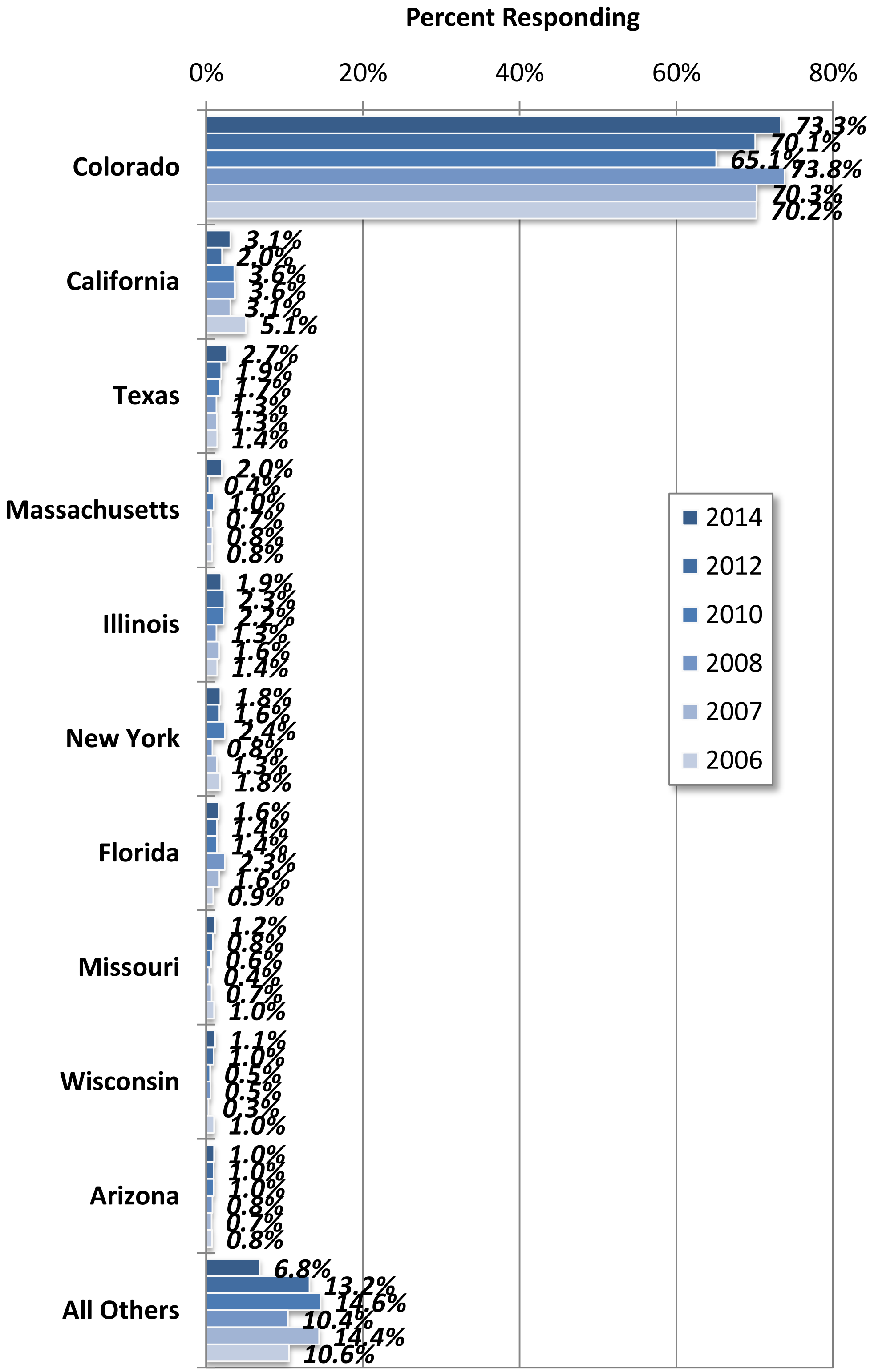


**Figure 35**
**County of Residence**
**Colorado Residents Only, By Year**

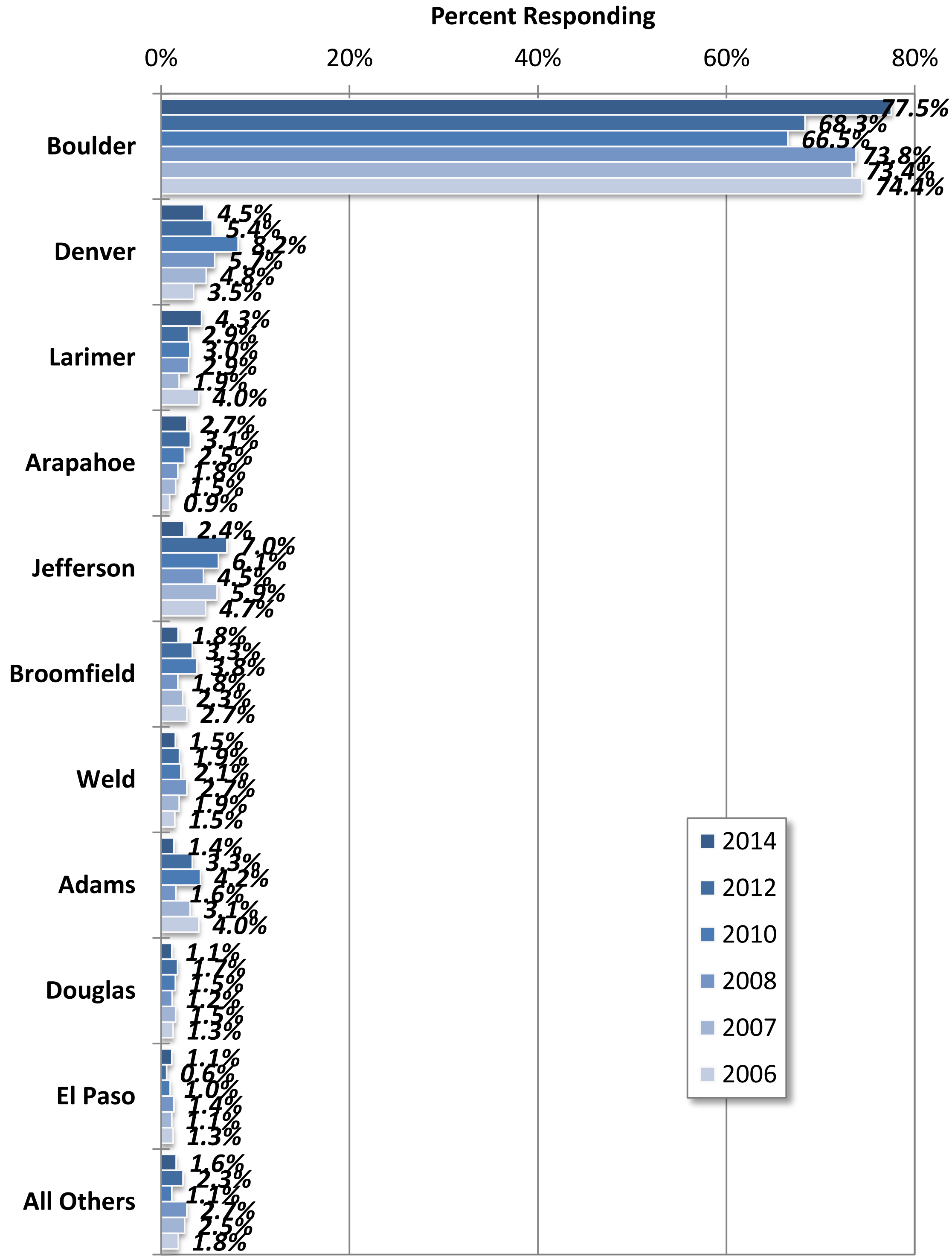


**Figure 36**
**Area of Dominant Influence**
**By Year**

## 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, potential entertainment areas of interest, parking, crowding, and other subjects of interest as they emerge.