# DOWNTOWN BOULDER SURVEY 2004

## Summary of Results

*November 2004*

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*November 2004*

*Prepared for*

*Downtown Boulder, Inc.*
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### INTRODUCTION

This report summarizes the final results of the 2004 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 677 interviews were completed during the research period between July 19 and September 2, 2004.[1]

The purpose of the downtown user research program is to identify and monitor on an ongoing basis the characteristics and experiences of mall users. Key topics in this year's survey include the mall visitor mix (visitors and residents), spending patterns, the quality of the visitor experience, advertising awareness, mode of travel to the downtown area, awareness of the new parking reimbursement program, 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, and Downtown Boulder's strengths and weaknesses relative to those other areas. Out of town visitors were asked if they were spending the night, information sources they used to plan the trip, and the primary purpose of their trip to Boulder. New topics this summer included the spending patterns of overnight visitors, awareness and importance of the parking validation program, total spending in Boulder by overnight visitors, and attendance at Downtown Boulder events and festivals. Awareness of advertising was also probed, including the new DIA campaign and other Denver area placements.

The results of the research are intended to assist Downtown Boulder, Inc, the City Downtown Management Commission, the Downtown Business Improvement District, and the Convention & Visitors Bureau in better understanding the issues and concerns of downtown users and to help set priorities for improving the overall image and functioning of the downtown area. Several capital improvements have been completed over the past several years, in part influenced by the feedback from this survey program. Some of these projects include additional parking structures in the downtown area, the interactive pop-jet fountain in the Courthouse block of Pearl Street, additional flowers and plantings, new rocks and kids play areas, and others.

#### *Methodology*

Interviews were conducted at various times throughout the day, between 11:30 a.m. and 8:30 p.m. along Pearl Street from 10th Street to 16th Streets. The summer of 2004 was relatively rainy, and an

[1] For the total sample size of 677 interviews, the standard margin of error is +/-3.77 percent (calculated for the 95 percent confidence interval). Note that the margin of error can be different for every single question on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various populations, therefore, should take into consideration these factors. As a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages.

above average number of interviewing days were rained out (since the surveys are done outside, interviewing is cancelled during periods of rainy or unusually cool weather). Similar to the research conducted in 2003 and prior years, the surveys were concentrated on the pedestrian area of the Pearl Street Mall, though a portion of the research was done both east and west of the mall proper. Again this year, the off-mall surveys were limited to one block east of the mall and one block west of the mall. 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 2004 survey is the twelfth downtown mall survey RRC Associates has conducted for Downtown Boulder, Inc., the City of Boulder, and the Boulder Convention & Visitors Bureau. In this report, the 2004 results are compared to results for prior years, particularly the most recent results, to assist in identifying trends over the recent past. Many of the questions on the survey are the same as in previous surveys, allowing for a monitoring of trends over time; several new questions were added this year to address current topics of interest. Prior surveys, which utilized a similar survey form and research methodology, were administered in each summer of the years 1996 through 2003; Spring 1995; Christmas 1994/95; and Fall 1994.

### *A Note on Terminology*

Regarding terminology used in the report, unless otherwise noted, references to Boulder County residents *do not include* residents of the City of Boulder. Two of the general classifications of downtown users in this report are City residents and Boulder County (non-City) residents. These groups are generally discussed and profiled as mutually exclusive segments. From time to time, all residents of Boulder County, including City residents, are referenced as Boulder City/County residents.

Again this year, the interviewing area included one block to both the East and West of the Mall Proper to broaden the scope of the research effort. Nevertheless, when referring to the collective survey sample, terms such as “mall visitors” are utilized. It should not be assumed that using such terminology means only those interviewed on the mall proper; rather, the words serve as a proxy for the entire sample of those interviewed this summer in the Downtown Boulder area. Other terms used to describe the entire sample include “downtown visitors” and “downtown users.”

A final clarification of terminology used in the report refers to the usage of the terms “local resident” and “visitor.” Local residents are considered to be mall users who live within Boulder County, including City of Boulder residents. Those mall users who reside outside of Boulder County are considered to be visitors. Some of the comments presented in the report are segregated using the local resident/visitor criteria.

## EXECUTIVE SUMMARY

### *Overall Findings/ Spending Patterns*

- The visitor mix of downtown users evolved slightly this summer, as ***full time City residents rebounded to 39 percent of all users***, up from a low of 37 percent in 2003. This segment represents the largest user group, followed by US residents outside Colorado (27 percent). Colorado residents outside Boulder County (15 percent) and Boulder County residents (14 percent) account for most of the rest of the downtown user population. Summer/part time City residents (3 percent) and International visitors (2 percent) make up the balance of those interviewed this summer. When grouped together, all Colorado residents make up about 70 percent of downtown users, while out of state visitors represent about 30 percent.
- Overall, the ***proportion making a purchase declined*** and the ***average amount spent per capita was also down***, almost entirely attributable to a decline in retail spending. The ***average amount shoppers and diners spent this summer declined by 14 percent, to $38.33, from $44.58 last year***. This figure is the lowest recorded in the past six years of surveys, and is about 5 percent less than the prior low of $40.51 in 2002. Total spending was down across all visitor types this summer.
- The ***decline in the average amount spent was almost exclusively due to a decline in retail shopping***. Average restaurant/bar spending was basically stable in comparison to last year at about $17, while ***retail spending declined 21 percent*** to $18.80 per person. Notably, shopping also declined as a primary reason for coming downtown, a finding consistent with the decline in retail spending.
- In terms of the primary reason for coming to Downtown Boulder, three motivations continue to be quite important: ***shopping, hanging out/enjoying the ambiance/people watching, and eating a meal***. However, following a year of stability, some substantial shifts were seen this year. Specifically, ***hanging out was up in popularity and shopping declined in popularity*** as the primary reason for coming to Downtown Boulder. Overall, 27 percent said they came primarily for hanging out, 21 percent for dining, and 15 percent for shopping. Coupled with the finding above about the decline in the amount spent in retail stores, the decline in shopping as the primary reason for coming downtown suggests a potentially serious weakness in the retail sector of Downtown Boulder.

### *Free Parking Awareness and Parking Re-Imbursement*

- Over ***80 percent of both City and County residents said they were aware that parking is free*** in the garages/ structures all weekend. Nearly 90 percent of each group was aware that meters are free after 6pm Monday through Saturday and all day Sunday. This high level of awareness is impressive, though the finding might be tempered by the fact that those responding to the survey were already downtown; in an earlier phone survey of those who use the downtown area infrequently, confusion over the various inconsistent parking policies was apparent.
- About ***40 percent of both City and County residents were aware of the parking re-imbursement program*** recently underway in Downtown Boulder. Most learned about it from a store or restaurant – either from a sign or sticker in the establishment, or from employees telling the respondent about the program. Awareness should continue to increase as the program gains traction and word of mouth spreads. Continuing to promote the program to infrequent users will be important as well.

- The ***parking re-imbursement program was most important to Boulder County residents***, 43 percent of whom said it is "Important" or "Very Important" in encouraging them to come to Downtown Boulder more frequently. Similarly, among City and County residents who drove downtown this trip, 40 percent indicated that the parking re-imbursement program is "Important" or "Very Important." The overall importance scores tended to be weighed down by those who rode the bus or walked downtown, who largely said that the re-imbursement program was not important in encouraging them to come downtown more frequently. Clearly, the downtown business community is on the right track with the re-imbursement program.

### *User Demographics*

- The ***average age of visitors downtown rose*** again this summer, to 39.1 years from 37.1 years last summer and 35.6 years in 2002. Singles without children continue to be the largest household status segment in downtown Boulder, accounting for about 43 percent of downtown users.
- ***Visitors living outside Colorado*** exhibit the oldest age profile in the study, with an average age of 43.0 years. As well, they have the highest household incomes, with 36 percent earning over $100,000 and 14 percent earning over $200,000 annually.
- The table below illustrates some of the demographics of the various user groups. The table separates university students from other City residents, providing a profile of these groups separately, instead of collectively as has been done in the past. Not surprisingly, university students are the youngest user group and have the lowest household income.

TABLE 1
RESPONDENT SUMMARY DEMOGRAPHIC CHARACTERISTICS BY VISITOR TYPE

| | *City of Boulder Resident – Non-student* | *City of Boulder Resident – University Student* | *Boulder Co. Resident* | *CO Resident outside BoCo* | *US Resident outside CO* |
|---|---|---|---|---|---|
| **GENDER** | | | | | |
| Male | 55% | 47% | 45% | 51% | 56% |
| Female | 45 | 53 | 55 | 49 | 44 |
| **HOUSEHOLD INCOME** | | | | | |
| $0 – 14,999 | 12% | 64% | 13% | 8% | 10% |
| $15 - 24,999 | 10 | 9 | 5 | 8 | 3 |
| $25 - 49,999 | 18 | 11 | 22 | 38 | 15 |
| $50 - 74,999 | 22 | 2 | 22 | 22 | 20 |
| $75 - 99,999 | 13 | 4 | 17 | 8 | 16 |
| $100,000 – 199,999 | 18 | 9 | 18 | 12 | 22 |
| $200,000 or more | 7 | 0 | 4 | 4 | 14 |
| **AGE** | | | | | |
| Average age | 40.9 | 20.7 | 37.5 | 37.3 | 43.0 |
| Median age | 39 | 19 | 36 | 34 | 42 |
| **HOUSEHOLD STATUS** | | | | | |
| Single, no children | 43% | | 33% | 41% | 28% |
| Couple, no children | 18 | | 14 | 16 | 18 |
| Household w/children at home | 25 | | 39 | 22 | 28 |
| Empty Nester | 14 | | 11 | 14 | 24 |
| University student | 0 | 100% | 3 | 6 | 2 |

### *Overnight Visitors*

- Visitors spending the night in the area were asked for the reasons for their trip to Boulder (as opposed to the downtown area specifically). ***Friends and family play a major role in the overnight visitor segment***, as 35 percent said the primary reason for their trip was visiting family/friends. Recreation/sightseeing is also quite important, as 30 percent of overnighters cited it as a purpose of their trip.
- In terms of accommodations, ***nearly half of all overnight visitors were spending the night with family or friends***. Forty percent were staying in commercial lodging in the City of Boulder, 13 percent were in commercial lodging outside the City, and the remaining 2 percent had "other" accommodations.
- A new series of questions was added this summer that asked for spending patterns of overnight visitors while in Boulder (not specifically the Pearl Street area, but the City as a whole). Overall, the ***average overnighter spent $130.21 per person per day (median of $95)***. Visitors staying in commercial lodging spend considerably more per person per day ($185.70 on average) than those staying with friends or family ($61.17 average). The differences are not only a function of expenditures on nightly accommodations, but those in commercial lodging also spend more on average for dining and shopping. A more detailed discussion is included in the main section of this report.
- Interest exists in understanding how important specifically the Pearl Street Mall area of Downtown Boulder was in overnighters' travel plans. Overall, the results show that it was important to some overnighters and not important to others, but on balance the ***Pearl Street Mall/Downtown Boulder area was more important than unimportant***. Twenty percent said it was "very important" (5 on a scale of 1 to 5), and another 29 percent rated the importance a four out of five; therefore, 49 percent said it was relatively important in their travel plans. Only 13 percent said that the Pearl Street Mall area of Boulder was "neither important nor unimportant" in the travel plans.

### *Satisfaction Ratings*

- The ratings in general remained quite positive again this year; in fact, ***most attributes exhibited stability or improvement over already-high 2003 scores*** (some did decline, however). Overall atmosphere and design quality, feeling of safety and security, and overall cleanliness and maintenance remained quite highly rated, and particular improvements were noted for family orientation/ kids activities, ease of getting here, and directory information/ signs.

### *Competition/Perceptions*

- The ***average number of non-work visits to the Downtown Boulder area was up slightly***: 12.8 visits in the past two months, up from 12.2 visits in the past two months recorded in both 2003 and 2002. The median number was stable at 8 visits. Not surprisingly, City residents exhibited higher visit figures (average of 14.1, median of 8) than County residents (average of 8.9, median of 5).
- Within the City, those who live in the ***Central/West Boulder area*** report an average of 16.9 visits (median of 10), and residents of ***North Boulder*** visit an average of 14.3 times (median 10). These results indicate that the downtown users from the City and County tend to be dedicated, repeat users, particularly those residents of the close-in neighborhoods. Much of

this segment is clearly the strongest customer base for the downtown area, with the high number of repeat visits.

- Other local and regional shopping areas continue to compete with Downtown Boulder. ***FlatIron Crossing*** draws residents of Broomfield, Louisville, Superior, Lafayette, and residents of Boulder (most particularly residents of South Boulder), and has represented a competitive threat to Downtown Boulder. Similarly, the anticipated ***29$^{th}$ Street*** redevelopment area to occupy the former Crossroads Mall, now beginning construction, will offer many attributes that the Downtown Boulder area lacks: free parking, a multi-plex movie theater, and for many Boulder area and County residents, less traffic and congestion to access the area. The environment within which Downtown operates is now very competitive, as customers currently have many choices of where to spend discretionary dollars. This competitive situation will only intensify over the next several years.

### *Advertising/Special Events and Festivals*

- Advertising recall rebounded substantially this year. Overall, ***24 percent said they saw an ad or information source for Downtown Boulder*** prior to their visit (up from 15 percent a year ago); another 10 percent said they saw an ad for an individual downtown merchant (up from 4 percent). In total, 29 percent saw some type of advertising prior to their visit; 71 percent did not see any ads. Each of these figures represents a rebound from last year's results, which were five-year lows for advertising awareness. Awareness of the Downtown Boulder ads was highest among City residents, as 41 percent of this segment indicated awareness of some kind prior to visiting downtown (up from 23 percent a year ago).
- Of the 24 percent who saw a Downtown Boulder ad, ***17 percent saw one of the advertisements at DIA, 20 percent on Denver bus panels, and 6 percent at Denver-area hotels.*** Encouragingly, 27 percent of out-of-state visitors who saw an ad saw the DIA advertisements (though the sample size is low at just 15 persons). Other important findings are that 41 percent of Colorado residents outside Boulder County saw a bus panel on a Denver-area bus (though this sample size is similarly low, at just 17 persons).
- Another new question was added this year to measure participation in Downtown special events and festivals: "Which activities, concerts, special events, festivals, etc have you attended in Downtown Boulder in the past year?" This question, asked only of City and County residents, was asked in an un-aided manner; in other words, the respondent was not prompted or shown the list of special events. Overall, the ***Boulder Creek Festival*** had the highest recall, at 45 percent of City and County respondents saying they had attended the festival. The ***Farmer's Market*** was close behind, at 43 percent, followed by ***Bands on the Bricks*** (35 percent) and ***Arts and Crafts Fairs*** (32 percent).

The remainder of this report provides more detailed discussion of these and other topics.

## RESPONDENT PROFILE

### *Visitor/Resident Mix*

The visitor mix of downtown users evolved slightly this summer, as ***full time City residents rebounded to 39 percent of all users***, up from a low of 37 percent in 2003. This segment represents the largest user group, followed by US residents outside Colorado (27 percent). Colorado residents outside Boulder County (15 percent) and Boulder County residents (14 percent) account for most of the rest of the downtown user population. Summer/part time City residents (3 percent) and International visitors (2 percent) make up the balance of those interviewed this summer. The distribution of users this year is generally aligned with longer-term trends observed over the past four to five years.

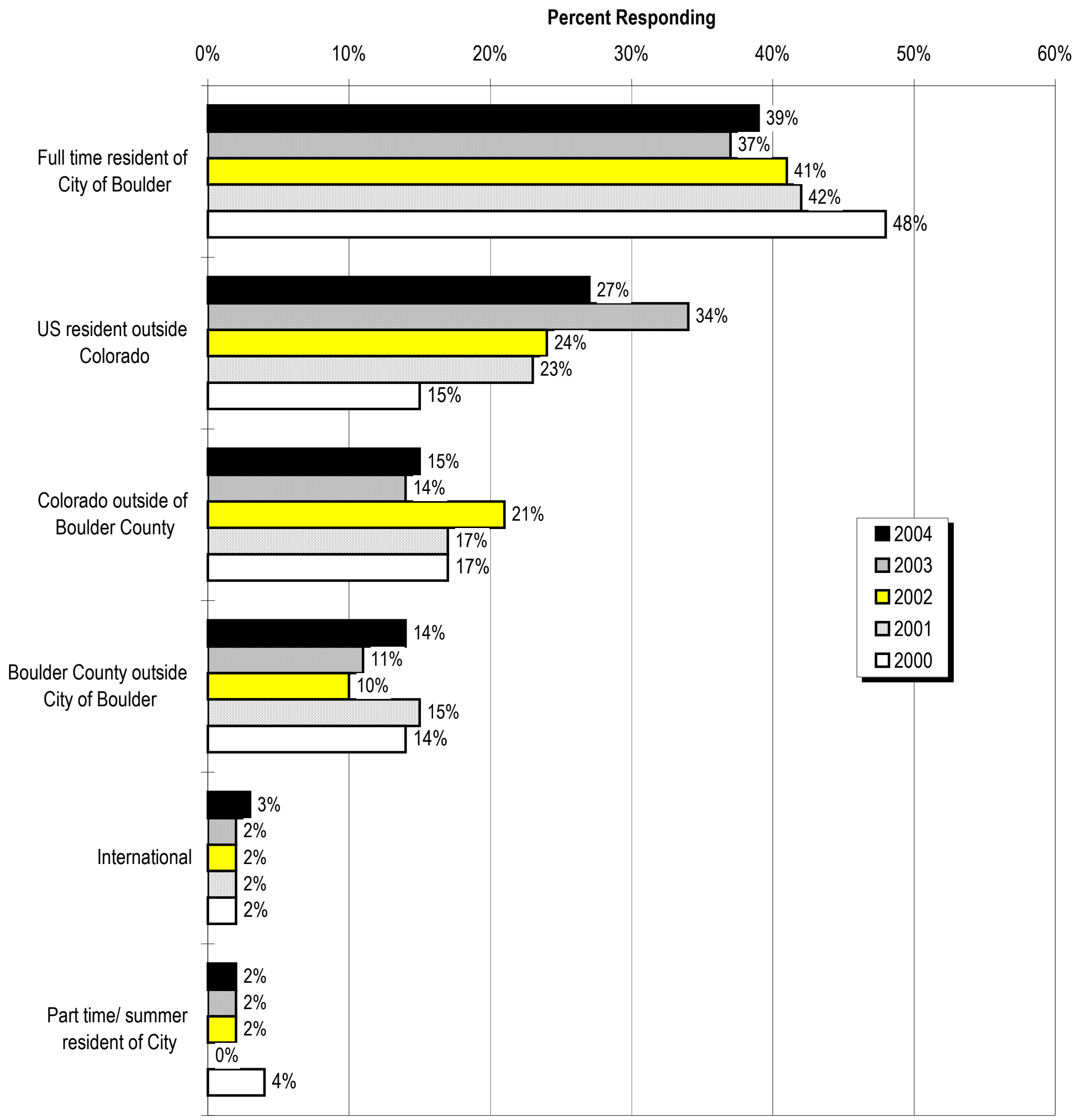
When grouped together, all Colorado residents make up about 70 percent of downtown users, while out of state visitors represent about 30 percent.

The section below details some of the findings related to these various user groups.

- City Residents. The proportion of downtown users from the City of Boulder rebounded from a low of 37 percent last summer to 39 percent this year, which is in the range of the recent past of 37 to 42 percent. However, these numbers are down from the 50 percent recorded in the summer of 1999; given the recent trend, it does not appear that the proportion of downtown users from the City will approach that mark anytime soon. Bringing City residents back downtown was a priority this summer, as construction on Broadway and other areas downtown (One Boulder Plaza, Hotel St. Julien, etc) kept City residents away in 2003.
- US Residents outside Colorado. Generally thought of as “out of town-ers,” “visitors,” or “tourists,” US visitors living outside Colorado continue to make up the second-largest user group downtown, despite a notable decline from last summer (34 percent of all users) to this year (27 percent). Despite this slide, this year’s proportion is actually in line with results from the past four years; last summer’s result was the high mark for this segment. Additionally, International visitors accounted for 2 percent of the sample, meaning that out-of-state users were about 30 percent of all those interviewed this summer.
- Colorado Residents outside Boulder County. Fifteen percent of all downtown users are Colorado residents outside Boulder County, primarily along the Front Range corridor. This segment has fluctuated from 14 to 21 percent of users over the past six years. Many of the respondents in this group are employees in the downtown area.
- Boulder County Residents. Very close in size to Colorado residents are residents of Boulder County outside the City, at 14 percent of all users. This result signifies an increase from 11 percent last summer, and is on the high end of the range of 10 to 15 percent for this segment over the past six summers. Many of these respondents are families with children or downtown employees.

Part time/summer residents of the City (3 percent) and International visitors (2 percent) account for the remaining segments of the visitor base. For most of the rest of the report, part time/summer residents of the City are combined with full time residents, and International visitors are combined with US residents outside Colorado. The results for the recent four-year period are illustrated in Figure 1.

FIGURE 1
VISITOR TYPE
1997 TO 2004



*Demographic Characteristics*

Some shifts were noted in the demographic profile of the visitor base. Most notably, the age profile continues to increase. Some slight modifications to the demographic questions were made this year, including the addition of "university student" to the household status list; adding "$200,000 or more" as the highest household income category; and adding "65 or older" as the highest age category.

The average age of visitors downtown rose again this summer, to 39.1 years from 37.1 years last summer and 35.6 years in 2002. The age distribution is relatively smooth, with 21 percent aged under 24, 23 percent aged 25 to 34, and 21 percent aged 35 to 44. Additionally, 18 percent are in the 45 to 54 age cohort, and 16 percent are 55 or over (11 percent 55 to 64 and 5 percent 65 or older). (See Figure 2A)

Singles without children continue to be the largest household status segment in downtown Boulder, accounting for about 43 percent of downtown users (34 percent singles without children and 9 percent university students). While the addition of the category "university student" to this question makes year to year comparisons somewhat inexact, it is presumed that most university students would have classified themselves as singles without children in prior years.

Singles without children used to be about half of downtown users; now the majority of users are of other household types. These household segments include households with children at home (26 percent, relatively steady over the recent four-year period), couples without children (16 percent, also relatively stable), and empty nesters (16 percent, growing). It appears that the primary shifts related to household status are the decline (in percentage terms) of singles without children, and the increase in couples without children. These patterns are illustrated in Figure 2B below.

Household income figures were definitely up compared to last summer. The proportion in the lowest income ranges fell while the proportion in the highest income cohorts rose; note that this finding is related to the increase in the average age. Of note, those reporting income of under $15,000 declined to 15 percent of survey respondents (from 22 percent); 24 percent reported earning in excess of $100,000 (including 8 percent earning over $200,000).

The gender split among 2003 downtown users was 53 percent male and 47 percent female, about the opposite of the result from a year ago.

TABLE 2
RESPONDENT DEMOGRAPHIC/ SOCIOECONOMIC CHARACTERISTICS

| | YEAR OF SURVEY | | | | 2004 visitor type | | | |
|---|---|---|---|---|---|---|---|---|
| | *2004* | *2003* | *2002* | *2001* | *City of Boulder Resident* | *Boulder Co. Resident* | *CO Resident outside BoCo* | *Visitor from outside CO* |
| **GENDER** | | | | | | | | |
| Male | 53% | 48% | 47% | 54% | 54% | 45% | 51% | 56% |
| Female | 47 | 52 | 53 | 46 | 46 | 55 | 49 | 44 |
| **HOUSEHOLD INCOME** | | | | | | | | |
| $0 - 14,999 | 15% | 22% | 21% | 21% | 21% | 13% | 8% | 10% |
| $15 - 24,999 | 7 | 7 | 6 | 9 | 10 | 5 | 8 | 3 |
| $25 - 49,999 | 20 | 15 | 21 | 23 | 17 | 22 | 38 | 15 |
| $50 - 74,999 | 20 | 16 | 18 | 17 | 18 | 22 | 22 | 20 |
| $75 - 99,999 | 13 | 17 | 14 | 13 | 11 | 17 | 8 | 16 |
| $100,000 to $199,999 (2003 & prior: $100,000 or more | 18 | 23 | 19 | 18 | 17 | 18 | 12 | 22 |
| $200,000 or more | 8 | n/a | n/a | n/a | 6 | 4 | 4 | 14 |
| **AGE** | | | | | | | | |
| 14 - 17 | 3% | 2% | 4% | 4% | 3% | 6% | 3% | 2% |
| 18 - 20 | 8 | 6 | 12 | 9 | 14 | 4 | 3 | 4 |
| 21 - 24 | 10 | 15 | 15 | 17 | 12 | 6 | 12 | 7 |
| 25 - 34 | 23 | 25 | 22 | 24 | 21 | 26 | 31 | 21 |
| 35 - 44 | 21 | 23 | 17 | 20 | 19 | 30 | 24 | 19 |
| 45 - 54 | 18 | 18 | 20 | 17 | 15 | 18 | 18 | 23 |
| 55 – 64 (2003 & prior: 55 or older) | 11 | 11 | 11 | 10 | 11 | 6 | 5 | 16 |
| 65 or older | 5 | n/a | n/a | n/a | 5 | 2 | 4 | 7 |
| *Average age* | 39.1 | 37.1 | 35.6 | 35.5 | 37.4 | 37.5 | 37.3 | 43.0 |
| *Median age* | 37 | 35 | 33 | 32 | 34 | 36 | 34 | 42 |
| **HOUSEHOLD STATUS** | | | | | | | | |
| Single, no children | 34% | 41% | 43% | 46% | 36% | 33% | 41% | 28% |
| Couple, no children | 16 | 19 | 17 | 16 | 15 | 14 | 16 | 18 |
| Household w/children at home | 26 | 28 | 26 | 26 | 21 | 39 | 22 | 28 |
| Empty Nester | 16 | 12 | 14 | 12 | 11 | 11 | 14 | 24 |
| University student | 9 | n/a | n/a | n/a | 17 | 3 | 6 | 2 |
| **EMPLOYEE IN THE DT AREA (Colorado Residents Only)** | | | | | | | | |
| Yes, full-time | 16% | 14% | 19% | 25% | 16% | 16% | n/a | n/a |
| Yes, part-time | 10 | 11 | 9 | 9 | 11 | 6 | | |
| No | 74 | 75 | 71 | 66 | 73 | 78 | | |
| **ARE YOU A STUDENT? (Colorado Residents Only)** | | | | | | | | |
| Yes, high school | 4% | 3% | 5% | 5% | 4% | 4% | n/a | n/a |
| Yes, college/university | 21 | 22 | 24 | 21 | 25 | 9 | | |
| No | 75 | 76 | 71 | 74 | 71 | 88 | | |

FIGURE 2A
VISITOR CHARACTERISTICS
GENDER / AGE

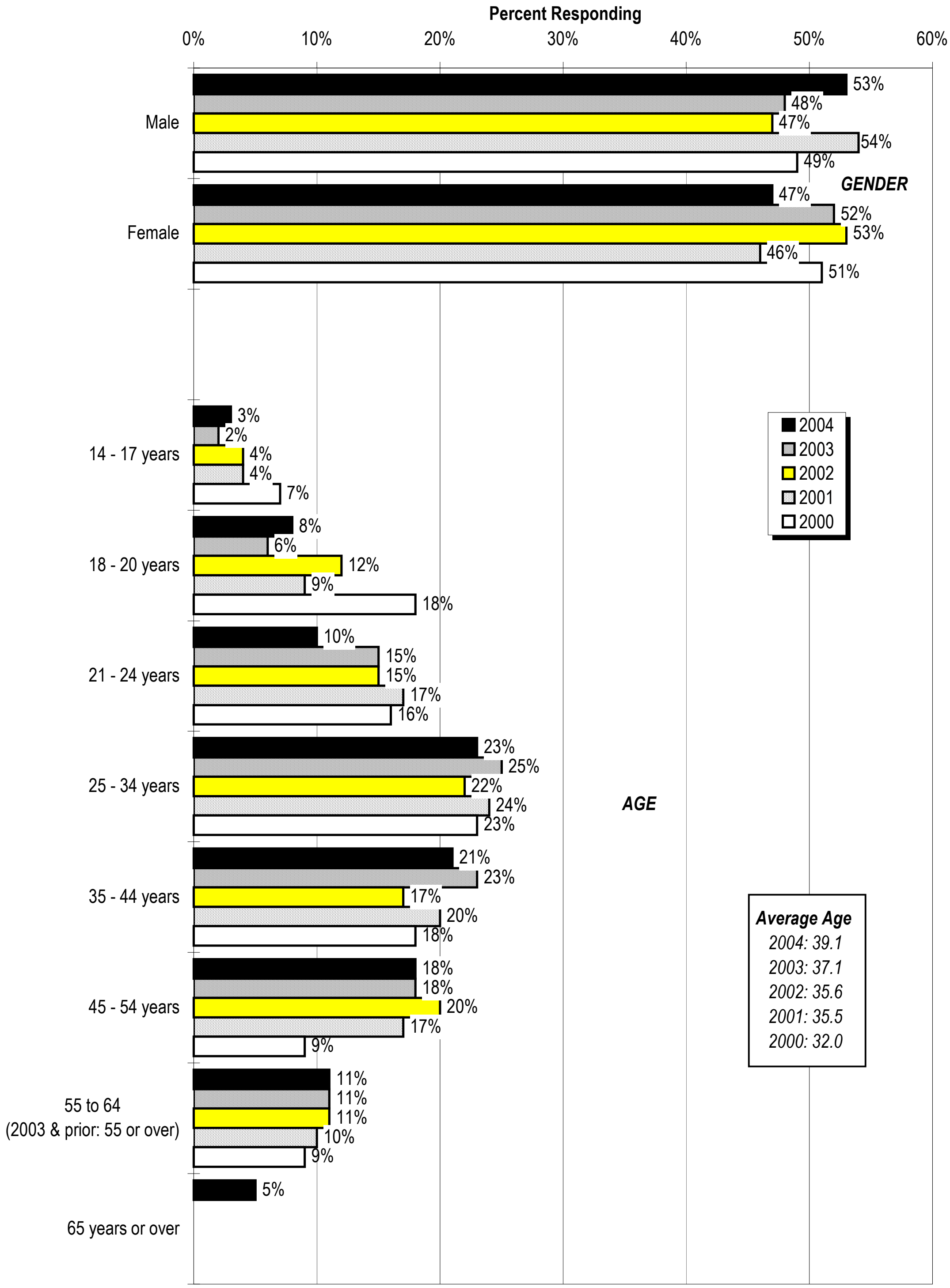
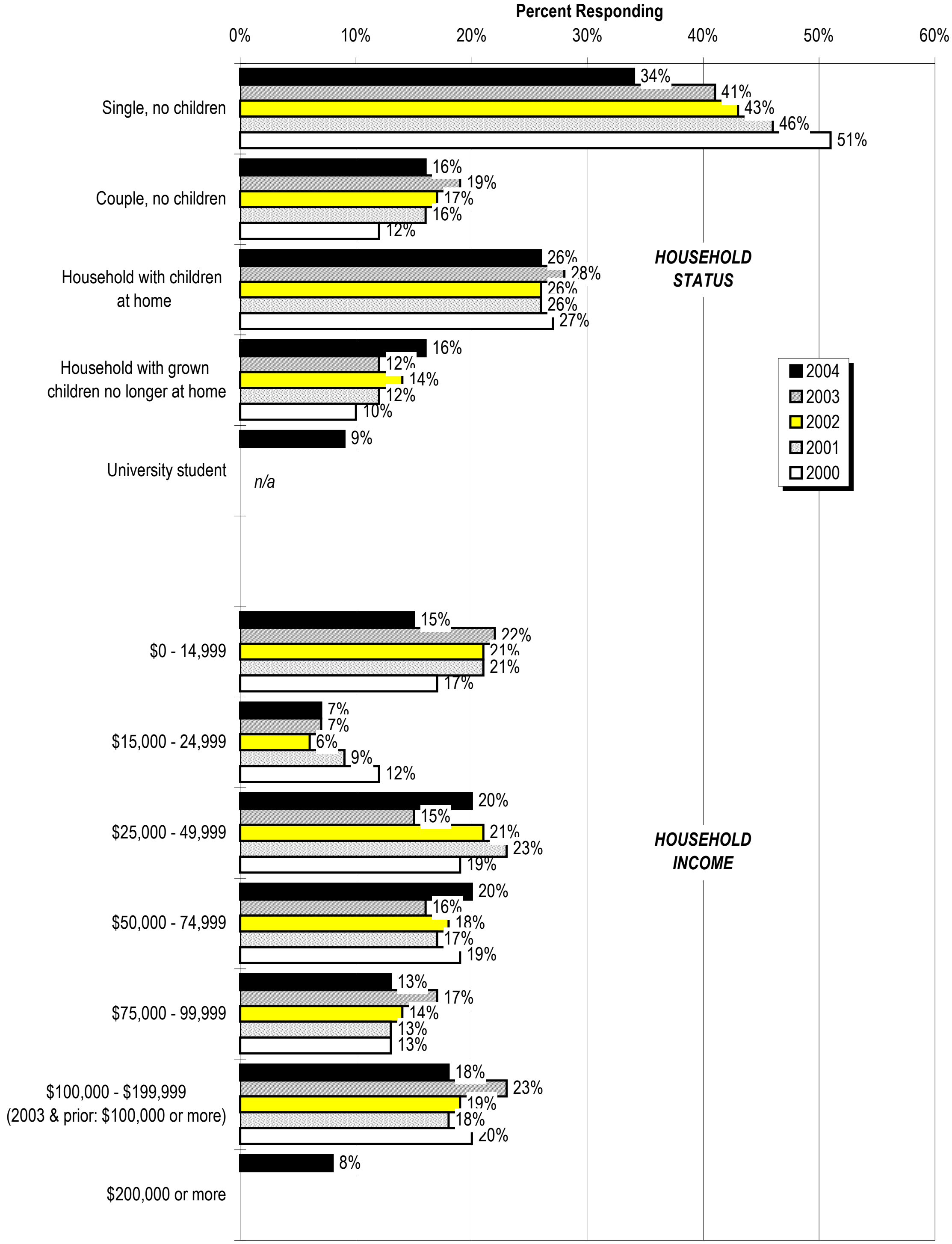


FIGURE 2B
VISITOR CHARACTERISTICS
HOUSEHOLD STATUS / HOUSEHOLD INCOME



### *Demographics by Visitor Type*

The demographic profile of downtown users is presented in this section segmented by the visitor type. Figures 3A and 3B below illustrate the patterns discussed in this section.

Some substantial differences are noted within the various segments of downtown users. Most importantly, out of state visitors are much older and much wealthier than their in-state counterparts. The out of state segment averages 43.0 years, while Boulder City, Boulder County, and Colorado residents all average around 37 years. As well, 14 percent of the out-of-state group reports a household income of $200,000 or more, and 36 percent of $100,000 or more. While this group represents only about 30 percent of the total user population, their age and higher income ranges are worthy of significant attention by the downtown business community. As well, about one-quarter of this group is categorized as an empty nester (a household with children no longer at home).

Looking at City of Boulder residents, this year's results show an older group that is less likely to be single without children. The average age of City residents is 37.3 years, up from 34.7 years last summer. Also, the proportion of singles without children among City residents declined dramatically from 61 percent a year ago to 36 percent this year. This is partly explained by the addition of the category "university student," of which 17 percent of City residents classified themselves. However, adding the single no children and university student percentages together results in a sum of 53 percent, still down quite a bit from 61 percent last year. In a related finding, the proportion of City residents who are families with children at home jumped to 21 percent from just 15 percent a year ago.

Boulder County residents outside the City tend to be families with children at home (39 percent). This segment is also disproportionately female (55 percent), and predominantly in the 25 to 34 and 35 to 44 age ranges (26 and 30 percent, respectively).

In terms of Colorado residents outside Boulder County, this group tends to be single without children (41 percent) and in the $25,000 to $49,999 income range (38 percent). Thirty one percent of this segment is aged 25 to 34 years, and another 24 percent in the 35 to 44 age range. The gender breakdown is about 50-50.

FIGURE 3A
VISITOR CHARACTERISTICS BY 2004 VISITOR TYPE
GENDER / AGE

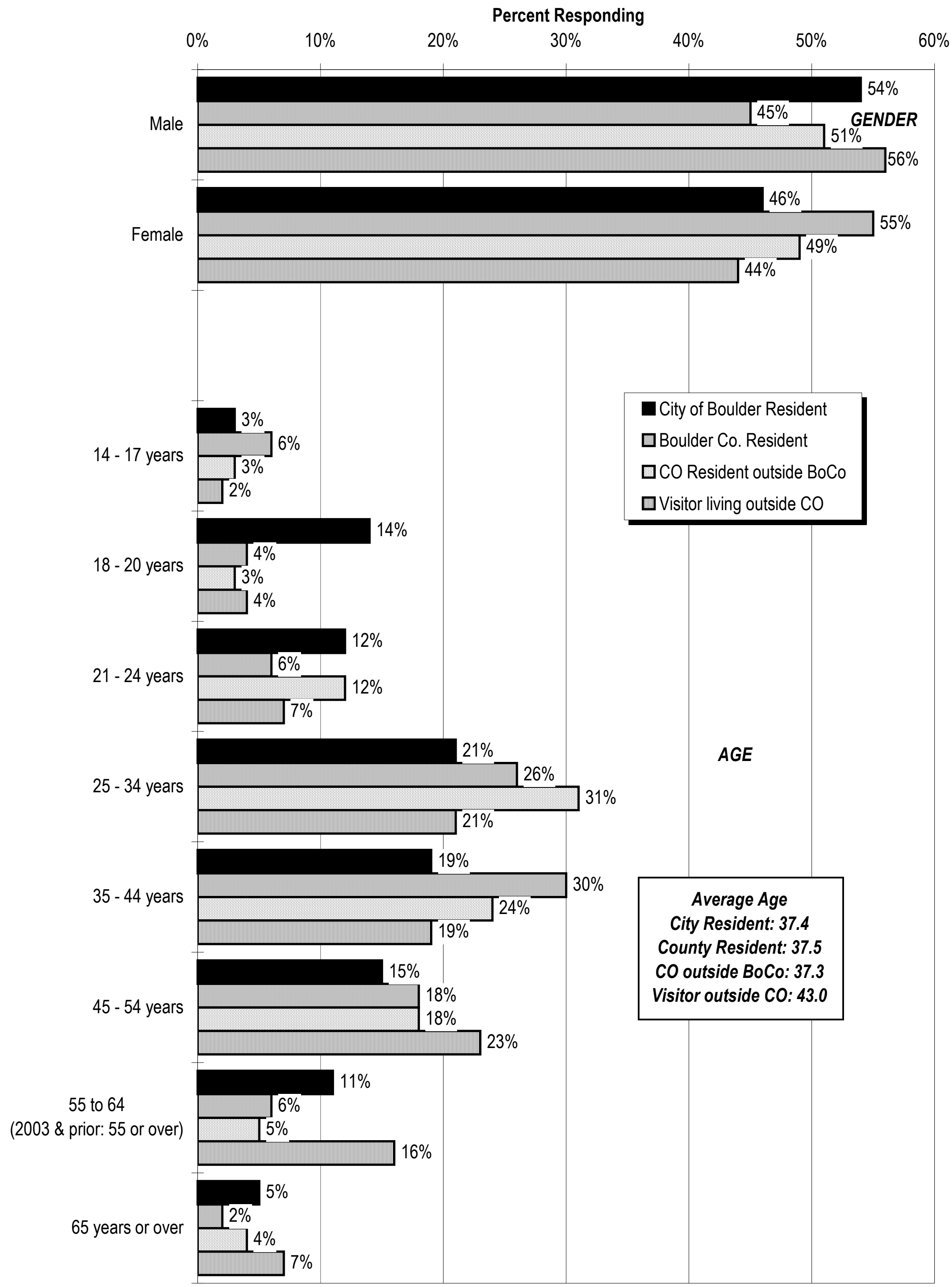
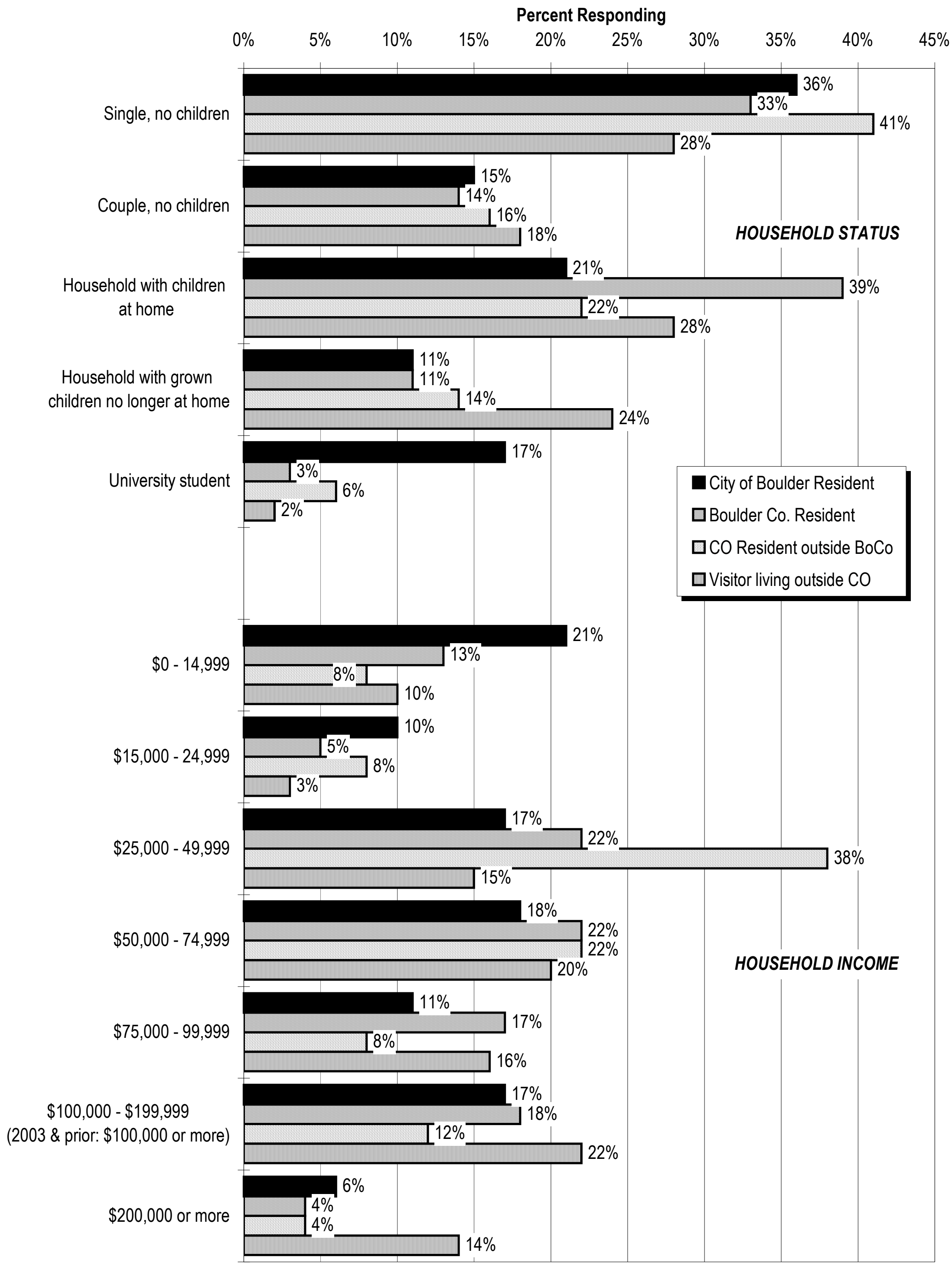


FIGURE 3B
VISITOR CHARACTERISTICS BY 2004 VISITOR TYPE
HOUSEHOLD STATUS / HOUSEHOLD INCOME



## *Geographic Origin*

The majority (70 percent) of downtown mall users are residents of the State of Colorado. Outside of Colorado, the origin of visitors is quite varied, including visitors from other countries. About 70 percent of those interviewed live in Colorado, and the other 30 percent were from out of state (including International countries). The proportion from within Colorado is up from last year, but in line with longer-term averages.

### State of Origin

The geographic residence by state of downtown users was more concentrated within Colorado this summer compared to last year, though in line with long-term averages of around 70 to 75 percent. No particular state accounted for most of the remaining 30 percent; rather, it was spread among many states.

Similar to past survey research, important states continue to include California, New York, Florida, Illinois, Texas, Massachusetts, Missouri, and Ohio. Most of these states have been relatively steady, with some ups and downs, over the recent four-year period; if anything, California is on a slight downward trend and New York is on a slight upward trend. International visitors as a whole represent 2.6 percent of the total visitors to the downtown Boulder area.

TABLE 3
STATE OF ORIGIN

| | 2004 | 2003 | 2002 | 2001 | 2000 |
|---|---|---|---|---|---|
| Colorado | 70.7% | 63.2% | 72.6% | 73.5% | 82.4% |
| California | 3.0 | 3.4 | 4.1 | 1.7 | 2.0 |
| International | 2.6 | 1.7 | 2.4 | 2.4 | 2.2 |
| New York | 2.3 | 2.0 | 1.6 | 1.8 | 1.2 |
| Florida | 1.7 | 1.9 | 1.3 | 0.8 | 0.2 |
| Illinois | 1.8 | 2.0 | 1.0 | 1.7 | 1.6 |
| Texas | 1.4 | 1.9 | 1.6 | 1.7 | 0.4 |
| Massachusetts | 1.2 | 1.4 | 1.0 | 0.6 | 1.2 |
| Missouri | 1.1 | 1.4 | 1.3 | 0.8 | --- |
| Ohio | 1.1 | 0.7 | 1.0 | 0.4 | 0.2 |
| Other US States | 13.1 | 20.4 | 12.1 | 14.6 | 8.6 |
| | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| n= | 662 | 590 | 616 | 944 | 493 |

## City of Origin – Colorado Residents Only

Isolating Colorado residents shows the various cities in the state where downtown users live (this categorization utilizes ZIP codes, which generally approximate – but are not always conterminous with – actual city boundaries). Overall, 61.5 percent of Colorado residents live in Boulder (or at least have a Boulder ZIP code), down slightly from 64.1 percent a year ago.

Looking at the city information more closely shows that Longmont remained the number two Colorado city, at 7.5 percent, up from 5.9 percent in 2003 and 4.7 percent in 2002. Denver stayed at number three, with 6.2 percent of all Colorado residents. Louisville rebounded to represent 4.5 percent of in-state users, up from just 1.6 percent a year ago; on the other hand, users from Broomfield continue to decline, to 1.7 percent of Colorado interviewees (perhaps due to the impact of FlatIron Crossing). Other important contributors from the state include Fort Collins, Lafayette, Nederland, Golden, Aurora, Arvada, and Littleton.

TABLE 4
CITY OF ORIGIN
COLORADO RESIDENTS ONLY

| | 2004 | 2003 | 2002 | 2001 | 2000 |
|---|---|---|---|---|---|
| Boulder | 61.5% | 64.1% | 55.9% | 59.1% | 66.0% |
| Longmont | 7.5 | 5.9 | 4.7 | 5.8 | 4.4 |
| Denver | 6.2 | 4.8 | 8.7 | 7.1 | 4.4 |
| Louisville | 4.5 | 1.6 | 4.9 | 3.7 | 2.0 |
| Fort Collins | 2.4 | 1.6 | 3.8 | 1.9 | 1.2 |
| Lafayette | 2.1 | 2.4 | 2.0 | 2.9 | 3.7 |
| Broomfield | 1.7 | 2.9 | 1.8 | 3.3 | 4.9 |
| Nederland | 1.7 | 2.4 | 1.8 | 1.3 | 1.2 |
| Golden | 1.5 | 0.8 | 1.6 | 1.4 | 1.0 |
| Aurora | 1.3 | 1.1 | 0.4 | 0.4 | 1.0 |
| Arvada | 1.3 | 0.8 | 1.6 | 1.6 | 1.0 |
| Littleton | 1.3 | 0.8 | 1.1 | 1.0 | 1.0 |
| Colorado Springs | 1.1 | 1.9 | 1.3 | 0.4 | 1.0 |
| Westminster | 0.6 | 1.3 | 0.2 | 0.1 | 2.0 |
| Erie | 0.6 | 0.8 | 1.1 | 1.2 | 0.7 |
| Other CO City | 4.7 | 6.8 | 9.1 | 8.8 | 4.5 |
| | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| n= | 468 | 373 | 447 | 694 | 406 |

## County of Origin – Colorado Residents Only

The final geographic analysis looks at the county of residence of those from Colorado, which shows that the majority is from Boulder County (76 percent). This proportion is steady from last year, which had reversed a decline of the proportion of Colorado visitors coming from within Boulder County

Denver represents the second-most important Colorado county in terms of contribution of downtown users (5.6 percent), followed by Jefferson, Larimer, and Weld Counties.

TABLE 5
COUNTY OF ORIGIN
COLORADO RESIDENTS ONLY

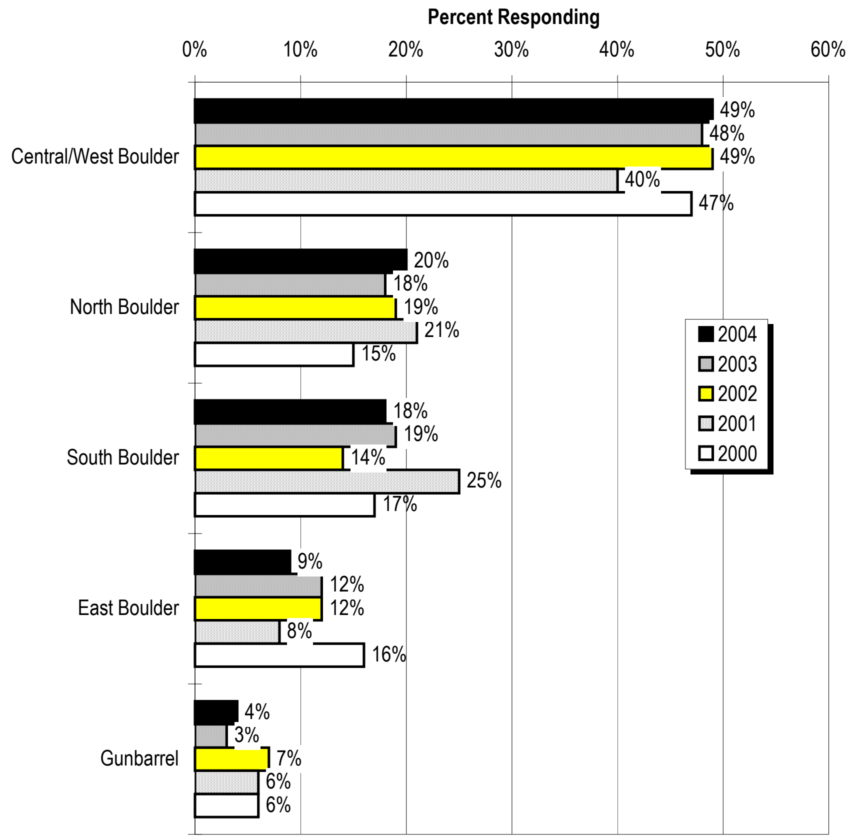
| | 2004 | 2003 | 2002 | 2001 | 2000 |
|---|---|---|---|---|---|
| Boulder | 76.7% | 76.1% | 70.2% | 74.4% | 78.3% |
| Denver | 5.6 | 2.9 | 6.0 | 5.2 | 1.7 |
| Jefferson | 4.1 | 3.2 | 4.9 | 4.9 | 3.4 |
| Larimer | 2.6 | 2.9 | 5.1 | 2.6 | 1.2 |
| Weld | 2.4 | 2.4 | 3.8 | 1.9 | 1.7 |
| Adams | 2.1 | 2.7 | 2.7 | 2.0 | 3.9 |
| Broomfield | 1.7 | 2.9 | 1.8 | 3.2 | 4.9 |
| El Paso | 1.1 | 2.1 | 1.6 | 0.4 | 1.0 |
| Arapahoe | 1.1 | 1.6 | 1.1 | 1.2 | 1.7 |
| Douglas | 1.1 | 1.1 | 0.7 | 0.7 | 0.5 |
| Other CO County | 1.5 | 2.1 | 2.1 | 3.5 | 1.7 |
| | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| n= | 468 | 373 | 447 | 694 | 406 |

### *Residence of Boulder City Residents*

About half of City users live within the Central/West portion of Boulder, making this group the largest segment of Boulder's downtown users. This group has been the core user group for some time, and it appears that this summer was no different.

Slight fluctuations were seen in other neighborhoods of the City. North Boulder residents were up somewhat, to 20 percent from 18 percent a year ago, making them the second largest group of City users. Closely behind were residents of South Boulder, at 18 percent, down a little from 19 percent in 2003. Usage from East Boulder residents was down to 9 percent from 12 percent a year ago, while residents of Gunbarrel represented 4 percent of the City's user population, up a bit from 3 percent. These results are illustrated in the graph below.

FIGURE 4
IN WHAT PART OF THE CITY DO YOU LIVE?




## *Employees and Students*

Employees of the downtown area continue to represent a substantial group of users. In 2004, 24 percent of Colorado residents interviewed work downtown, or about 17 percent of all survey participants. Sixteen percent of Colorado residents work downtown full time and 10 percent work part time. The proportion of employees captured in the survey is similar to last year, which might be surprising given the relatively occupancy rates downtown.

The downtown area employees represent a segment that is in the downtown area regardless of the time of year or the weather conditions, making them an appealing group during certain traditionally slow periods, such as the winter or other times of inclement weather. They are an important segment to consider when formulating strategies targeted at the various segments of customers of the downtown area.

Despite the fact that the surveys were primarily conducted during August, before most schools were in session, 25 percent of Colorado respondents indicated that they were students – 21 percent college/ university students, and 4 percent high school students. In total, about 17 percent of the respondent sample was students. Both student groups are basically stable from last summer. While not specifically asked, it can be assumed that most of the college students are affiliated with CU, either as summer session students or traditional academic year students who remained in town for the summer. The student population represents another important group of customers that could be segmented for separate advertising messages and promotions.

## OVERNIGHT VISITORS

For the second year, a series of questions was added for out of town visitors to help identify and understand some patterns of interest related to this segment. Realize, however, that this information is not representative of all overnight visitors in Boulder; rather, it is descriptive of those overnighters who were intercepted in the downtown Pearl Street Mall area. Overnighters in Boulder who did not visit the Mall area on their trip are thus excluded from the information in this report.

### *Overnight Lodging Patterns*

All out-of-county users were asked if they were spending the night in the Boulder area. Overall, 52 percent were not; these individuals are primarily out-of-county users from the immediate metro area. The remaining 48 percent were spending the night in the Boulder area. Overall, about 21 percent of all users captured in the survey were overnight visitors.

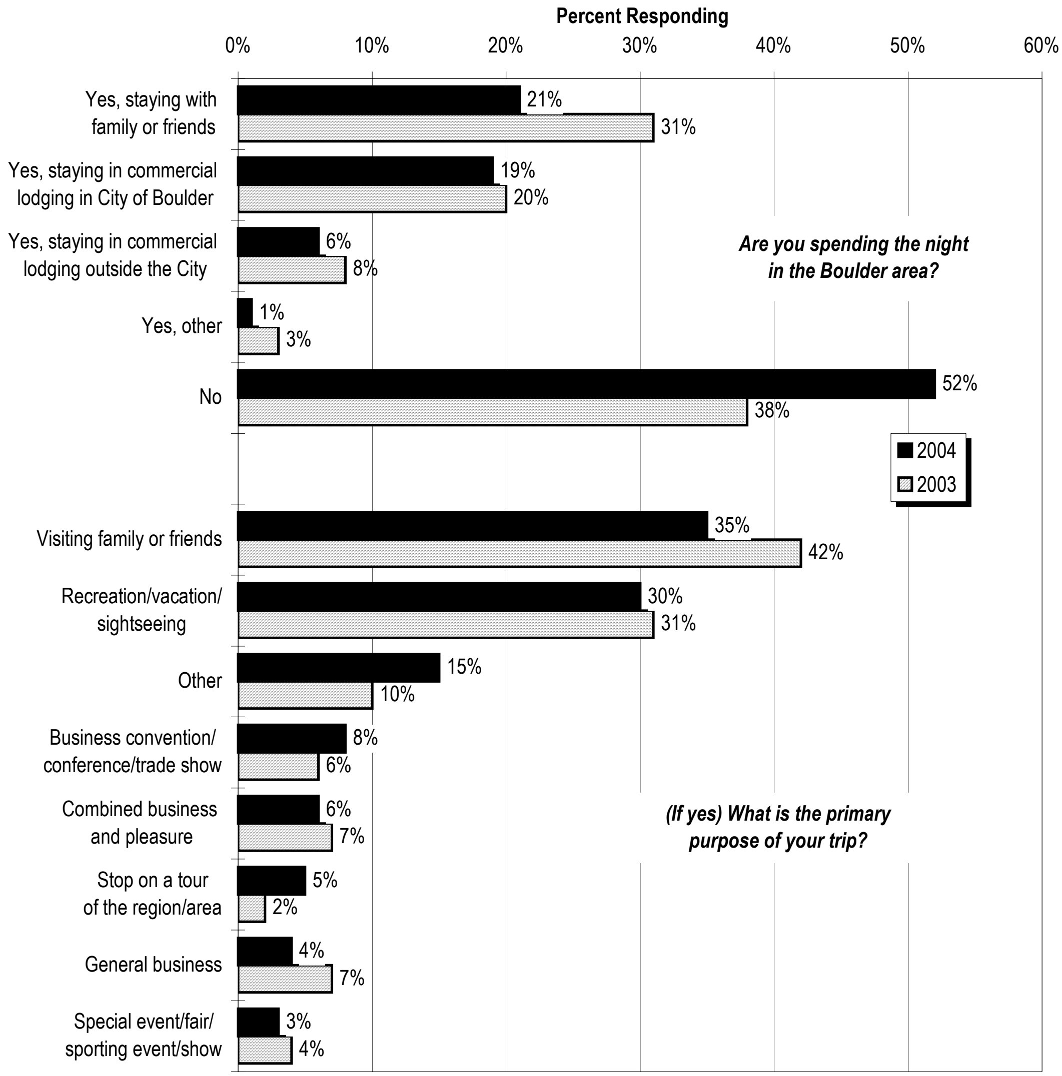
Most overnighters were staying with family or friends. Of those spending the night away from home, 45 percent were spending the night with family or friends, 40 percent were in commercial lodging in the City of Boulder, 13 percent were in commercial lodging outside the City, and the remaining 2 percent had "other" accommodations. In other words, ***nearly half of all overnight visitors were spending the night with family or friends***.

The results of this question show how strongly the influence of local friends and family is in bringing their overnight guests to the downtown Pearl Street Mall area as part of their trip/tour of Boulder. Indeed, the Pearl Street Mall has been known as a great place to bring out-of-town friends, a distinction that is borne out in the survey results.

Of those individuals spending the night in the Boulder area, the ***average number of nights in the Boulder area is 4.2*** (with a median of 4 nights), signifying relatively long trips in the area for this segment (See Figure 5). Perhaps overnighters on shorter stays don't have time to visit the Downtown Boulder area, and thus are not captured in the research.

The average size of the overnight travel party is 2.4 persons, with a median of 2 persons. Twenty-nine percent were traveling alone, and 38 percent of respondents had one other travel partner.

FIGURE 5
OUT-OF-COUNTY USER QUESTIONS




## *Purpose of Trip to Boulder*

The ***primary purpose of the trip for overnighters was visiting family/friends***; 35 percent of the overnight segment said this was their primary purpose for visiting the area. The other substantial reason was general recreation/vacation/sightseeing, at 30 percent. Some were in town for business reasons –8 percent were in town for a business convention, conference, or trade show, and just 4 percent said general business was their primary purpose in visiting Boulder. Another 6 percent were combining business and pleasure. All combined, these represent 18 percent of overnighters interviewed in Downtown Boulder who listed business as one of the reasons for their trip. Five percent noted that Boulder was part of a stop on a trip of the region, and 3 percent said they were in town primarily for a special event, fair, sporting event, or show (See Figure 5).

Interest exists in understanding how important specifically the Pearl Street Mall area of Downtown Boulder was in overnighters' travel plans. Overall, the results show that it was important to some overnighters and not important to others, but on balance ***the Pearl Street Mall/Downtown Boulder area was more important than unimportant***. Twenty percent said it was "very important" (or 5 on a 1 to 5 scale), and another 29 percent rated the importance a four out of five; therefore, 49 percent said it was important in their travel plans. Only 13 percent said that the Pearl Street Mall area of Boulder was "neither important nor unimportant" in the travel plans. Eight percent rated the importance a two out of five, and the remaining 29 percent rated it a one out of five, or "not important." The average score was 3.0, down slightly from 3.1 last summer.

### *Overnight Visitor Spending in Boulder*

A new series of questions was added this summer that asked for spending patterns of overnight visitors while in Boulder (not specifically the Pearl Street area, but the City as a whole). Overall, ***the average overnighter spent $130.21 per person per day*** (median of $95).

This total spending figure can be broken down into categories: the average overnighter spent $46.83 per person per day for lodging (including those staying with family or friends and not spending for lodging), $41.25 for dining and entertainment, and $38.45 on average per person per day for shopping. An additional $1.77 on average was spent on other sundry items.

As might be expected, visitors staying in commercial lodging spend considerably more per person per day than those staying with friends and family. Those staying in commercial lodging spend an average of $185.70 per day, including $81.58 for lodging, $46.15 on shopping, and $53.17 for dining. In contrast, those staying with friends and family spend about $61.17 per person per day, including only $2.40 per day for lodging (an occasional person staying part of their visit in a hotel/motel), and an average of $27.50 for shopping and $27.50 for dining (more meals eaten " at home").

### *Information Sources Used*

Overnighters were also asked about the information sources they used to plan their trip to Boulder. Given that visiting family and/or friends was the top purpose of the trip, it is not surprising that ***word of mouth/talked to family or friends was also the top information source***, with 47 percent of overnighters citing it. Twenty-three percent used a website (generally boulder.com) to plan their trip, and 22 percent said they used the experience of a prior visit as an information source. Other information sources were less commonly used, such as a travel agent (9 percent), a brochure (4 percent), and a magazine article (4 percent). Eleven percent of overnighters said they did not use any information sources in planning their trip.

***Awareness of signage for the downtown area was lower*** this summer compared to last. Forty-three percent saw signs for parking, down from 52 percent a year ago; 27 percent saw signs directing them to the downtown area, down from 34 percent last summer. It seems that the existing signage is not adequate for informing out-of-county residents how to get to the downtown area in general and where to find parking downtown.

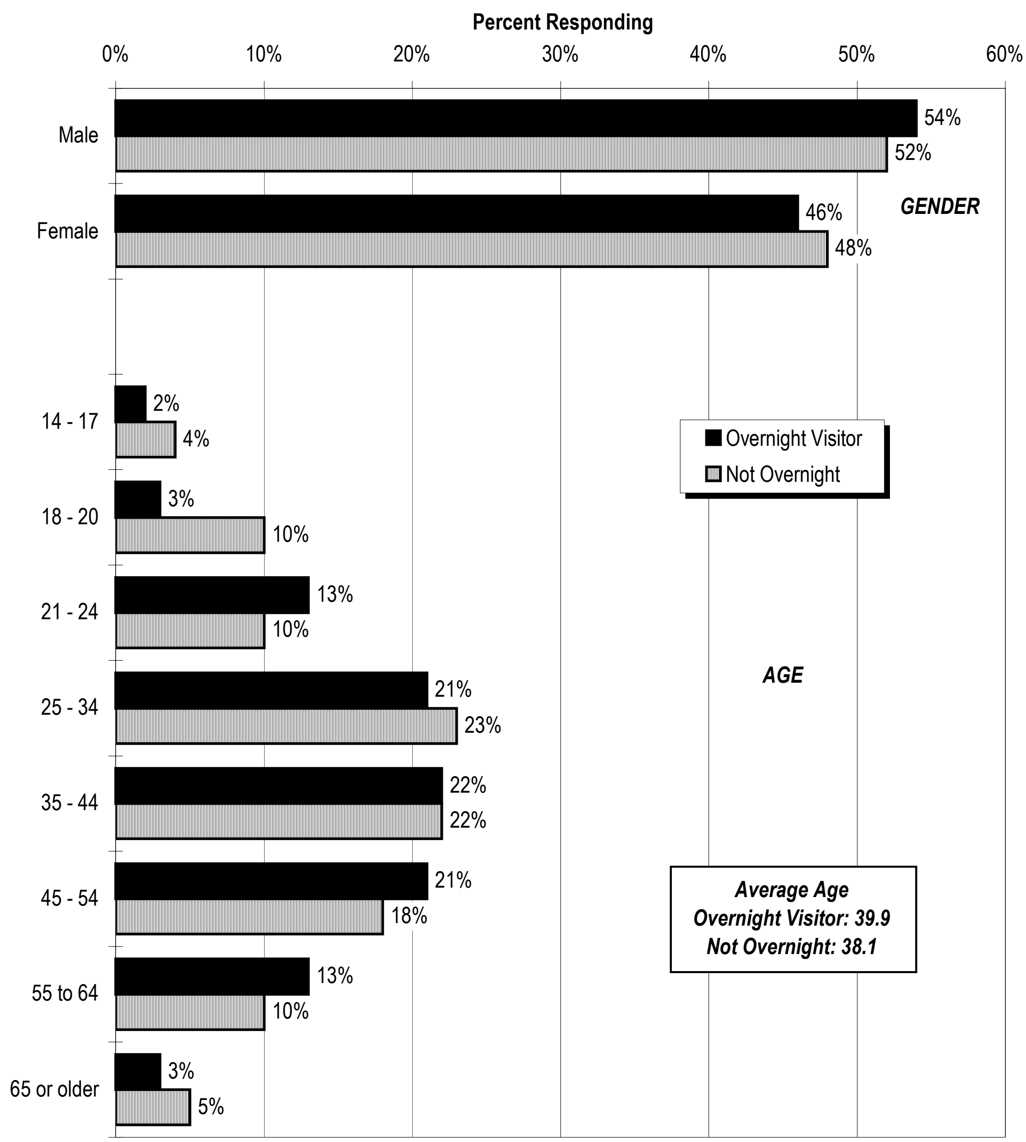
*Overnight Demographics*

Comparing the demographics of overnight visitors on the mall to non-overnight users (or day users) show some interesting contrasts. Figures 6A and 6B below illustrate graphically the patterns discussed in this section.

Overnight visitors are, on average, ***a bit older*** than their day user counterparts – 39.9 years versus 38.1 years. The overnight segment shows an almost perfectly shaped bell-curve distribution between the various age segments, with a slight peak at 35 to 44 years (22 percent).

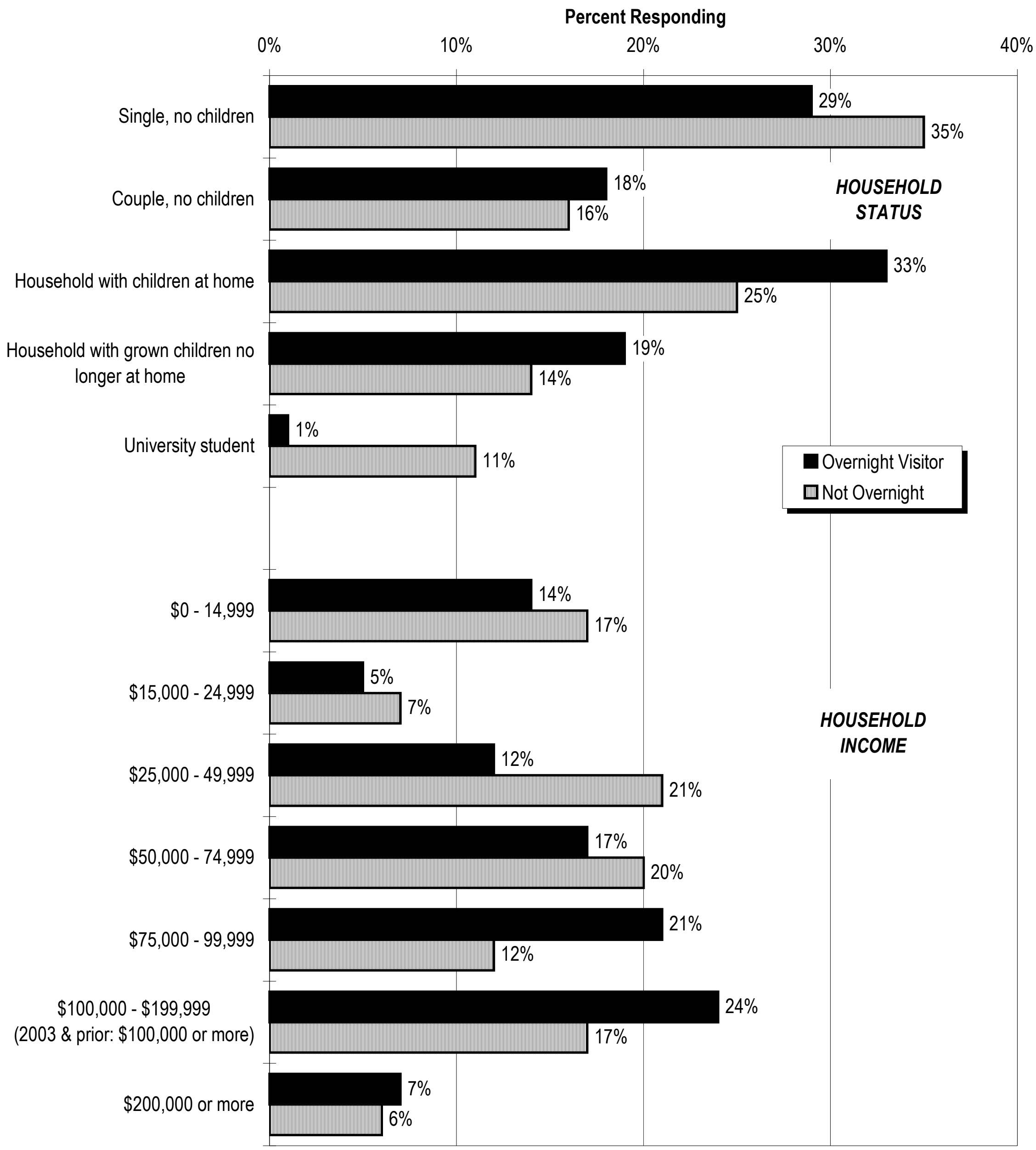
Overnight visitors tend to be families with children at home or empty nesters, whereas day visitors are more apt to be singles without children or university students.

FIGURE 6A
VISITOR CHARACTERISTICS BY OVERNIGHT/DAY VISITORS
GENDER/AGE



Some clear differences also emerge in the comparison of household income; ***overnight visitors clearly report a higher level of affluence***, with 31 percent earning in excess of $100,000, compared to 23 percent of day users. As well, 21 percent of overnighters earn $75,000 to $99,999, compared to 17 percent of day users. On the other end of the income spectrum, 14 percent of overnighters earn under $10,000, versus 17 percent of day users. (See Figure 6B.)

FIGURE 6B
VISITOR CHARACTERISTICS BY OVERNIGHT/DAY VISITORS
HOUSEHOLD STATUS / HOUSEHOLD INCOME



## SPENDING PATTERNS

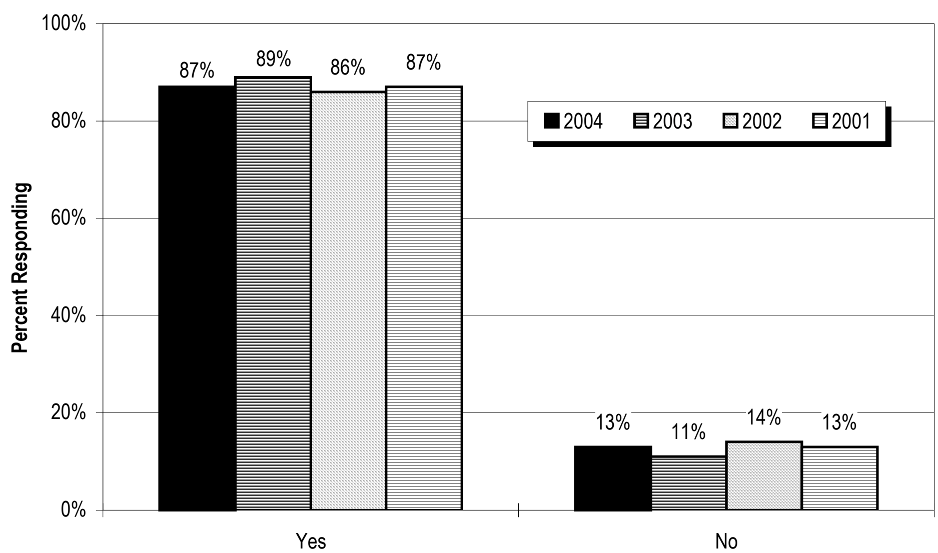
Shopping and dining remain the top activities of downtown users, though shopping was noticeably less important as a primary reason for coming downtown compared to last year. Overall, the ***proportion making a purchase declined*** and the ***average amount spent per capita was also down***, almost entirely attributable to a decline in retail spending.

The ***average amount shoppers and diners spent this summer declined by 14 percent, to $38.33, from $44.58 last year***. This figure is the lowest recorded in the past six years of surveys, and is about 5 percent less than the prior low of $40.51 in 2002. See the section below for more detail about the various components of total spending.

### *Spending Penetration*

Figure 7A illustrates shopping penetration among the downtown user segment for the past four years. This year, ***87 percent of all users said they would be making a purchase downtown" today***," down from 89 percent a year ago but still aligned with longer term results.

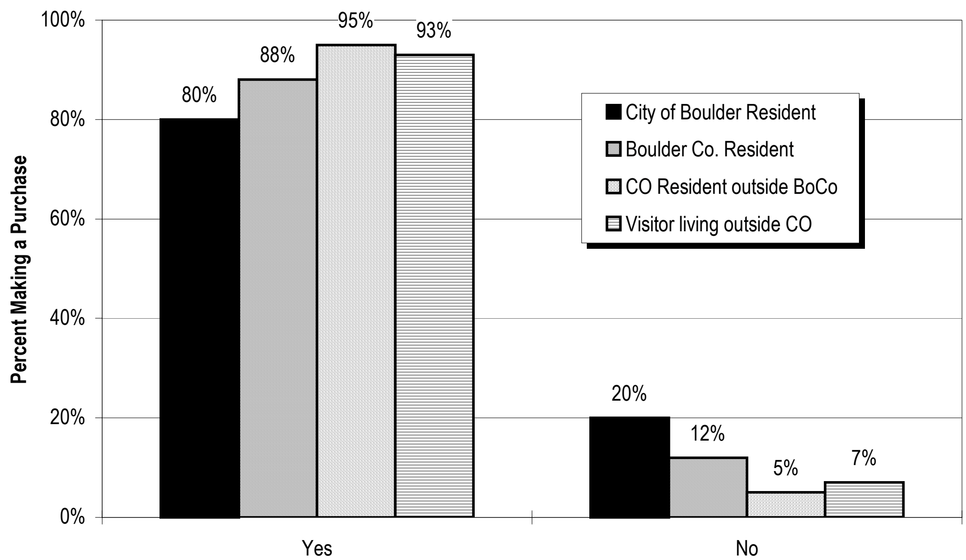
FIGURE 7A
ARE YOU SPENDING MONEY TODAY?
2001 TO 2004



Ninety-three percent of out-of-state visitors said they would make a purchase downtown (down from 97 percent a year ago), the highest penetration level of the four visitor segments. Ninety-five percent of Colorado out-of-county visitors were also making a purchase.

Boulder County and City of Boulder residents exhibited a lower propensity to spend money, though still quite high at 88 and 80 percent, respectively. Because of their more frequent visits to the downtown mall area, the lower penetration percentages for these two segments are less of a concern. The more frequent trips to the downtown area tend to compensate for the lower frequency of making a purchase.

FIGURE 7B
ARE YOU SPENDING MONEY TODAY?
BY 2004 VISITOR TYPE

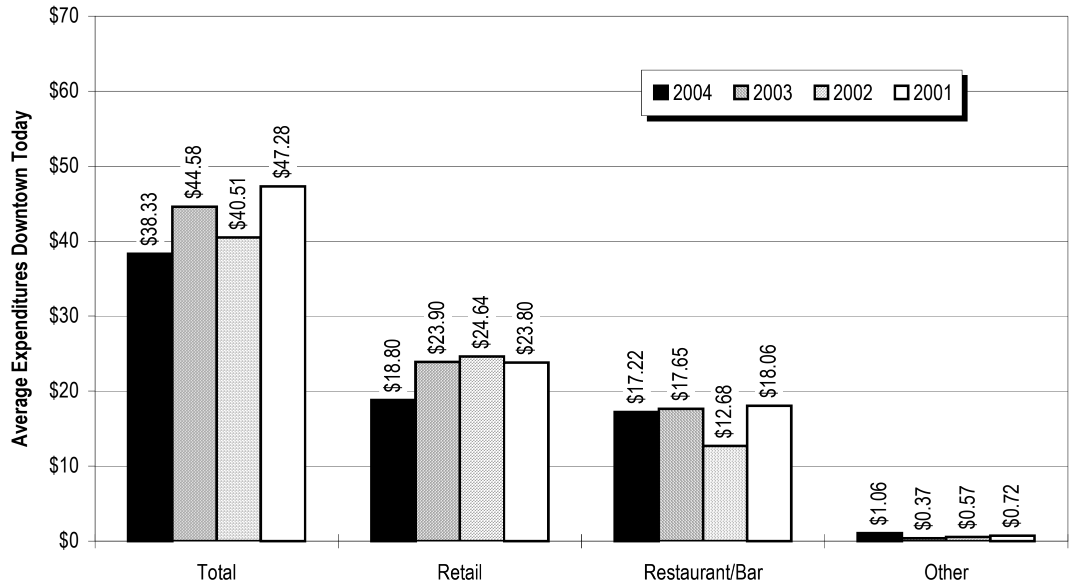



*Spending Amounts*

Spenders were asked to indicate the types of purchases they made (or were planning to make), while non-spenders skipped the specific spending pattern question. The three categories of spending were: 1) restaurant/bar/coffee shop; 2) retail store/art gallery/shop; and 3) "other" spending.

The ***average amount shoppers and diners spent this summer declined by 14 percent, to $38.33, from $44.58 last year***. This figure is the lowest recorded in the past six years of surveys, and is about 5 percent less than the prior low of $40.51 in 2002. As seen in Figure 8, average restaurant/bar spending was basically stable in comparison to last year at about $17, while ***retail spending declined 21 percent*** to $18.80 per person. It is apparent, then, that the overall decline in per capita spending is attributable to the decline in retail spending.

FIGURE 8
AVERAGE SPENDING PATTERNS (AMONG ALL SPENDERS)
BY SPENDING CATEGORY, 2001 TO 2004



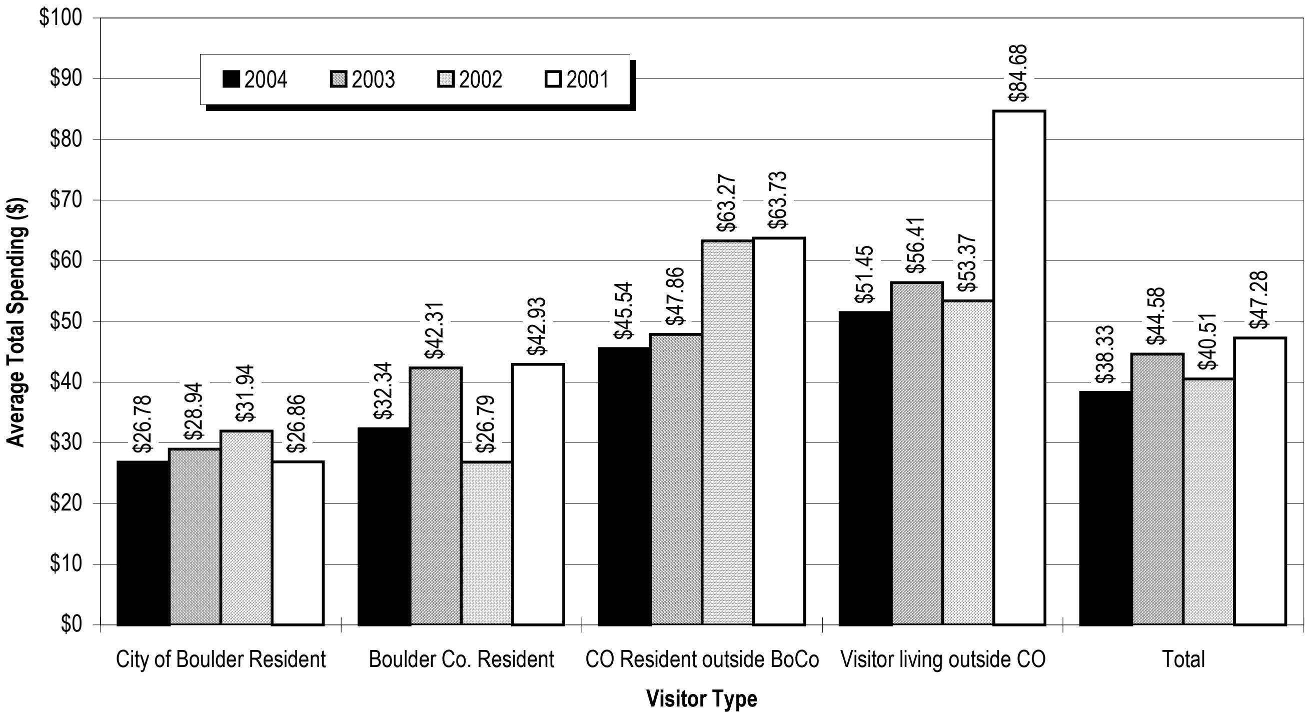

Looking at total per capita spending figures by visitor type shows continued patterns from past years – the farther from Boulder the user lives, the greater the spending. However, this year, each of the four major visitor segments experienced a decline in average spending, meaning that the overall drop was not attributable to any one visitor segment, but rather to the general user population as a whole.

- As seen in Figure 9, City of Boulder residents spent the least, on average, at $26.78 per spender, down from $28.94 a year ago.
- Boulder County residents saw the largest decline, following a big increase in 2003, to $32.34 per spender from $42.31 in 2003
- For the second straight year, Colorado residents outside Boulder County spent less; this segment averaged $45.54, down slightly from $47.86 a year ago.
- Again, out-of-state visitors spent the most on average, at $51.45 (though down from $56.41 in 2003).

Figure 9 illustrates the pattern of total average spending by visitor type over the past four years. It is clear from this graph that the decline in overall spending was attributable all visitor segments.

The median spending number was also down, to $21.50 from $25.00 a year ago, and even with the result from 2002. This means that half of spenders were spending $21.50 or more, and half were spending $21.50 or less.

FIGURE 9
AVERAGE TOTAL SPENDING PATTERNS (AMONG ALL SPENDERS)
BY YEAR BY VISITOR TYPE

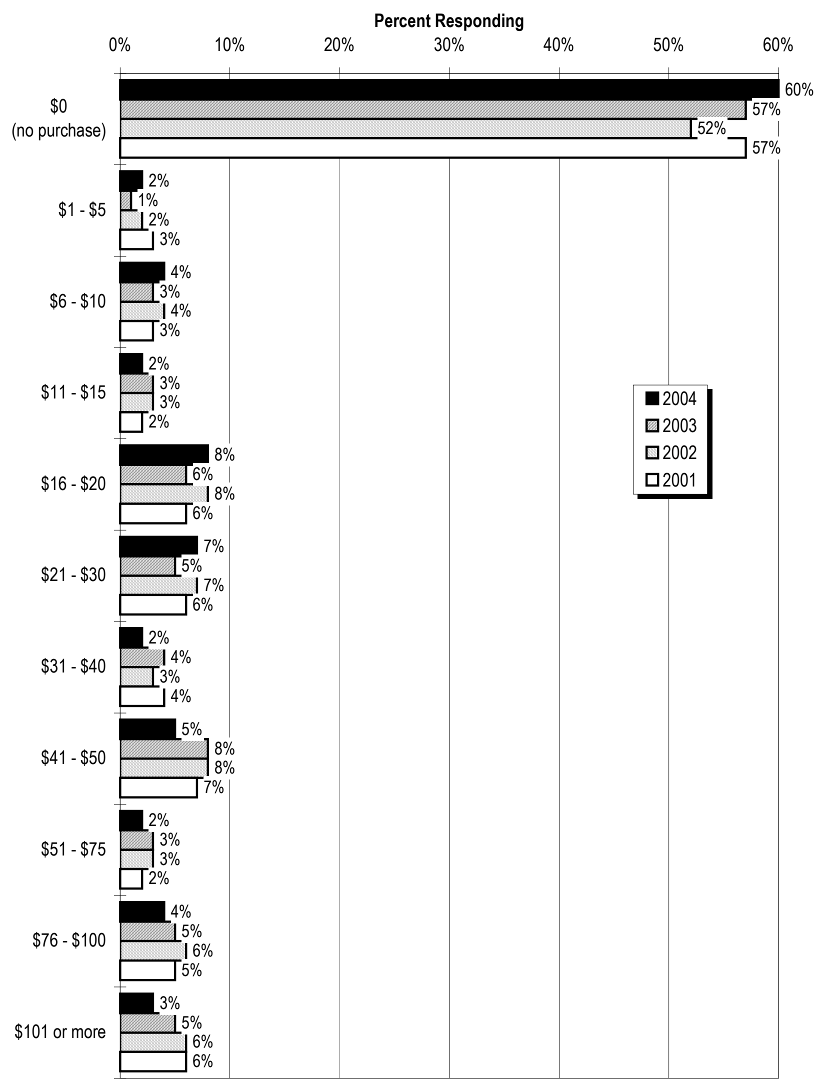



Retail spending remains the largest component of total spending, though just barely ahead of restaurant/bar spending this year. Recall that retail spending averaged $18.80 in per capita spending. However, 60 percent were not planning to buy anything in a retail store on the day of their interview; this percentage of "non-purchasers" has been increasing over the past several years. As shown in Figure 8, this year's decline in retail spending comes on the heels of three years of basically flat per capita retail spending at around $24. Figure 10 shows the distribution of retail spending, and shows the majority (60 percent) is not spending on a retail purchase.

Obviously this pattern of the declining role of retail in the overall vitality of downtown is cause for concern and warrants further attention. Many factors besides actual “retail mix” contribute to this situation, which makes solution a complicated objective. Several opportunities for comments and suggestions designed to improve the downtown retail environment were included in the survey. A summary of those suggestions is given later in this section of the report.

This perception of the retail environment declining as a primary strength of downtown was also documented in the phone survey conducted among the general population. Clearly we are experiencing decline in the overall economic environment in Boulder County and in Colorado, and the consumer is generally more cost-conscious and careful about retail shopping. Downtown is not unique in this. Nevertheless, the City of Boulder is losing market share in dramatic fashion to outlying retail centers located in Broomfield, Superior and Louisville. Downtown retail shopping is impacted at least in part by this pattern, as residents find increasing variety and value in retail offerings at multiple locations.

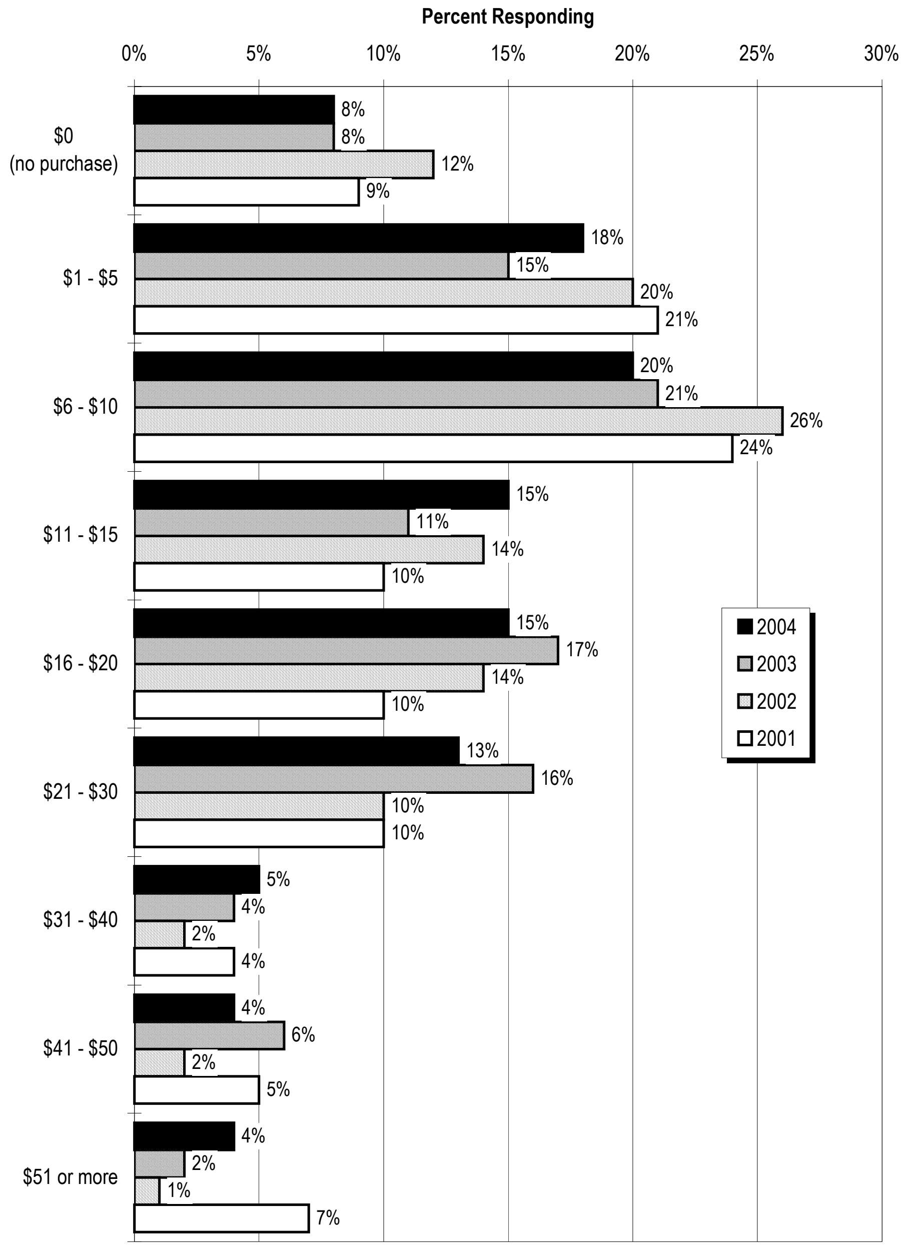
FIGURE 10
AMOUNT SPENT IN RETAIL STORES/GALLERIES



Most spenders were buying food or drink; 92 percent of spenders were making a restaurant/bar/coffee shop purchase. ***The average purchaser spent $17.22 on food or drink, a slight 2 percent decline over $17.65 last year.***

The median figure for food and beverage spending was again $15, meaning that about half the people were spending less than $15, and half spending more than $15. Figure 11 shows the distribution of spending on food and drink.

FIGURE 11
AMOUNT SPENT IN RESTAURANTS/BARS




Even fewer – only 7 percent – spent money on any other services. The average amount spent on other items was just $1.06.

## VISITS TO DOWNTOWN BOULDER AND OTHER SHOPPING AREAS

An area of ongoing concern of the downtown merchants is the shopping patterns of downtown customers to competing shopping locations. All Boulder County residents were asked how frequently in the past two months they had visited the Downtown Boulder area, as well as a list of other regional shopping centers.

The average number of non-work visits to the Downtown Boulder area was up slightly: 12.8 visits in the past two months, up from 12.2 visits in the past two months recorded in both 2003 and 2002. The median number was stable at 8 visits. Not surprisingly, City residents exhibited higher visit figures (average of 14.1, median of 8) than County residents (average of 8.9, median of 5).

Within the City, those who live in the ***Central/West Boulder area*** report an average of 16.9 visits (median of 10), and residents of ***North Boulder*** visit an average of 14.3 times (median of 10). These results indicate that the downtown users from the City and County tend to be dedicated, repeat users, particularly those residents of the close-in neighborhoods. Much of this segment is clearly the strongest customer base for the downtown area, with the high number of repeat visits. With the high average and median figures, it is clear that the downtown area enjoys a loyal segment of local visitors who provide vitality and character to the area through their continued patronage and participation, something few other rival shopping areas can boast.

However, as the population of the County has grown, especially in towns to the east of Boulder, the retail shopping and dinging/entertainment offerings have become more competitive in those areas. This growth in the diversity of retail and dining options has had a dual effect: it tends to retain residents of those towns, who once came to Boulder for some of their shopping needs; and to a certain extent it lures City residents to these areas. One good example of this trend is FlatIron Crossing, which offers extensive shopping, dining, and entertainment options. FlatIron Crossing draws residents of Broomfield, Louisville, Superior, Lafayette, and even residents of South Boulder, and has represented a competitive threat to Downtown Boulder. Similarly, the anticipated 29$^{th}$ Street area to occupy the former Crossroads Mall will offer many attributes that the Downtown Boulder area lacks: free parking, a movie theater, and less traffic and congestion to access the area. These competitive threats need to be taken seriously by the Downtown Boulder community.

The sum of three primary competitive shopping areas outside the City – FlatIron Crossing, Louisville/Superior at McCaslin, and Old Town Lafayette/Louisville/Niwot – provides evidence of the magnitude of the competitive threat to the Downtown Boulder area. Adding the trips to these three areas together, the average downtown user made 6.5 trips (2.7 to the McCaslin area of Louisville/ Superior, 2.4 to FlatIron Crossing, and 1.4 to Louisville, Lafayette, and Niwot Main Street/Old Town areas). This figure is up from 5.7 trips recorded in 2003. Boulder County residents averaged 8.7 visits to these three areas (up from 7.0 visits last year), while City residents averaged 5.1 trips. Recall that these trips were made by people interviewed in Downtown Boulder; a phone survey to selected County residents this summer showed that, while most people had visited Downtown Boulder, the number of visits to other shopping areas was much higher.

The shopping area outside of the City of Boulder with the most competitive attraction, measured by the average visits by users of Downtown Boulder, was the McCaslin area of Louisville and Superior, which overtook FlatIron Crossing. The average number of visits to Louisville/Superior was up to 2.7 visits in the past two months among all Downtown Boulder users, up from 2.0 visits a year ago. However, about half of downtown users had **not** patronized the McCaslin area in the past two months. FlatIron Crossing was steady at an average of 2.4 visits in the past two months.

While much focus has been shopping and dining outside the City, the second most popular shopping area among downtown users (behind Downtown Boulder) was actually the Arapahoe Village stores (McGuckin's, etc.). This area averaged 4.5 visits in the past two months, up from 3.8 visits last year and 3.1 visits the year prior. Arapahoe Village is especially popular among City residents, who visited on average 4.8 times, as opposed to County (non-City) residents, who made only 3.4 visits in the past two months to Arapahoe Village.

Other shopping areas were also queried on the survey. Downtown Denver averaged 1.5 visits, about even from 1.4 visits last year. The Louisville, Lafayette, and Niwot Main Street/Old Town areas averaged 1.4 visits (up from 1.0 visits in 2003), and Cherry Creek averaged 0.4 visits from Downtown Boulder users (about even from 0.3 times a year ago). Figure 12 illustrates the number of visits and the average number of visits to the shopping areas queried on the survey form.

FIGURE 12
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY

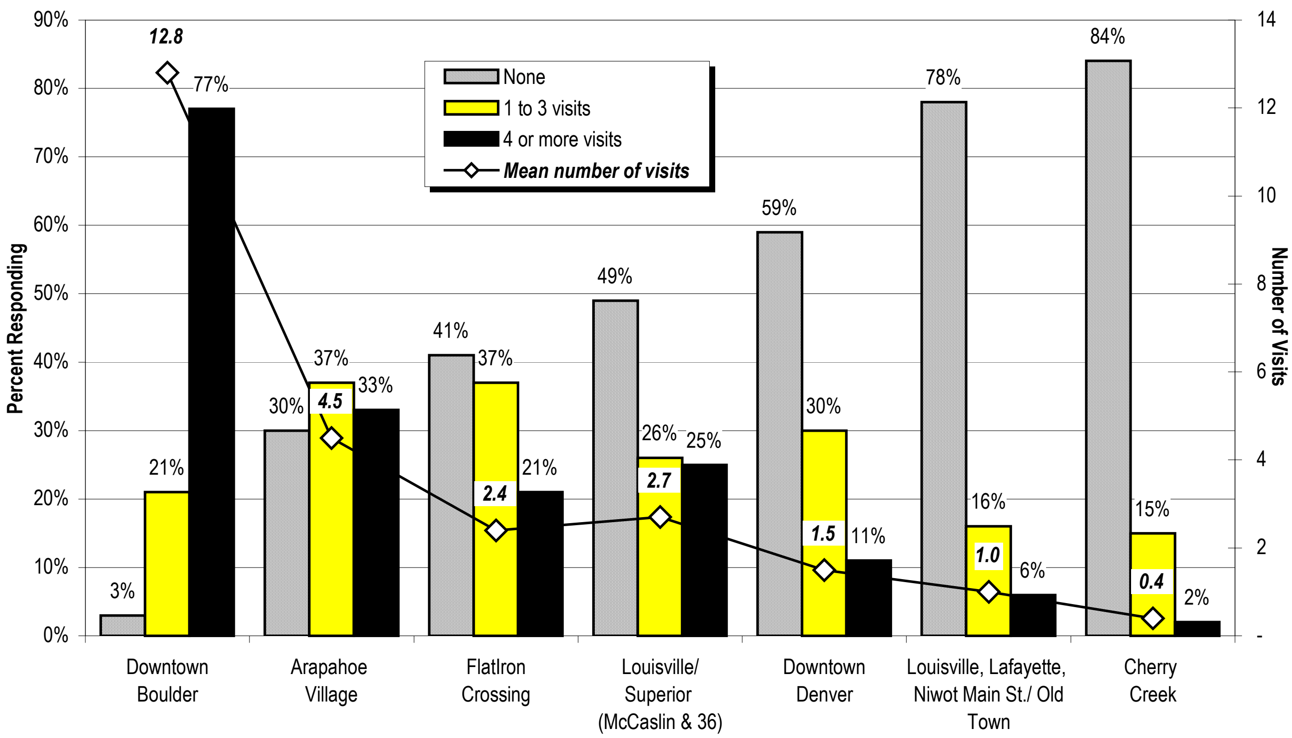
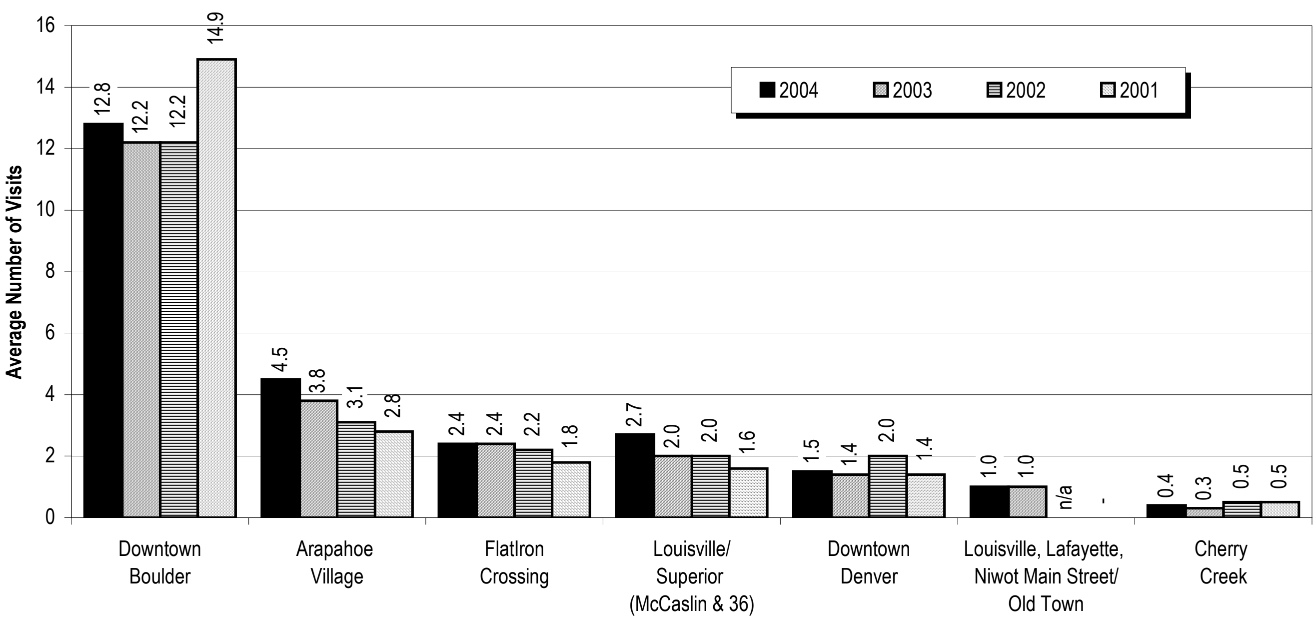


Figure 13 illustrates the historical pattern in terms of average visits to each of the shopping areas discussed on the survey. Note the upward trend at Arapahoe Village and Louisville/Superior (McCaslin & US36) over the past three years.

FIGURE 13
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY



Respondents who said they visited FlatIron Crossing and Downtown Denver in the past two months were asked several follow-up questions. These respondents were asked to elaborate on both the strengths and the weaknesses of Downtown Boulder compared to FlatIron Crossing and/or Downtown Denver. These questions were asked in an open-ended nature, and are summarized in the section below. A full text of the comments in response to these questions is presented in the appendix section of this report.

### *FlatIron Crossing*

#### Strengths of Downtown Boulder in Comparison

The strengths of Boulder mentioned by those who visit FlatIron Crossing were similar to those noted above: the atmosphere, outdoor setting, flowers, friendly people, closer to home, overall design of the mall, the variety of stores, and unique shops.

*Architecture, atmosphere, street life, friendly, meeting folks*
*Outdoors, energetic, better stores*
*Play areas for kids, landscape, trees*
*It's more convenient, has a home town feel*
*It's convenient- I live a couple blocks away*
*Culture, diversity*
*Outdoors*
*Walking distance, many shops*
*The atmosphere; fewer big brand name shops*

#### Weaknesses of Downtown Boulder in Comparison

No movie theater, no big stores, crowds, less selection/variety, pay parking, homeless people, and expensive stores were all weaknesses compared to FlatIron Crossing.

*They don't have a movie theater*
*Too crowded; pay to park*
*Street people/ panhandlers*
*Parking is harder to find*
*Parking - bogus parking tickets*
*Not as much shopping - clothing stores*
*Groupies/loiterers, rain*
*Lack of variety*
*Lacking specialty shops*

### *Downtown Denver*

Strengths of Downtown Boulder in Comparison

Boulder is seen as being smaller, less crowded, closer, easier to navigate, having less traffic, and safer that Downtown Denver.

> *Smaller town atmosphere*
> *Safer, closer to home, more quaint*
> *The air quality is better; nestled against the mountains; more places to just sit around*
> *Smaller, easier to get around*
> *Proximity; keep money in town*
> *More of a community feeling*
> *Looks better, less crime, more walker/parking friendly*
> *Less traffic; pleasant atmosphere*
> *Easier to navigate*

Weaknesses of Downtown Boulder in Comparison

Boulder does not have as many stores, nightlife, or bars as Denver, which is seen as a weakness among those who like to visit Denver. Other weaknesses are the expensive stores and less diversity in Boulder.

> *Less variety*
> *Not as many good restaurants*
> *Lack of entertainment*
> *Better bars in Denver*
> *The shops and restaurants are more expensive in Boulder*
> *Worse panhandlers*
> *Parking, lack of shuttle*
> *Little nightlife, no dancing*

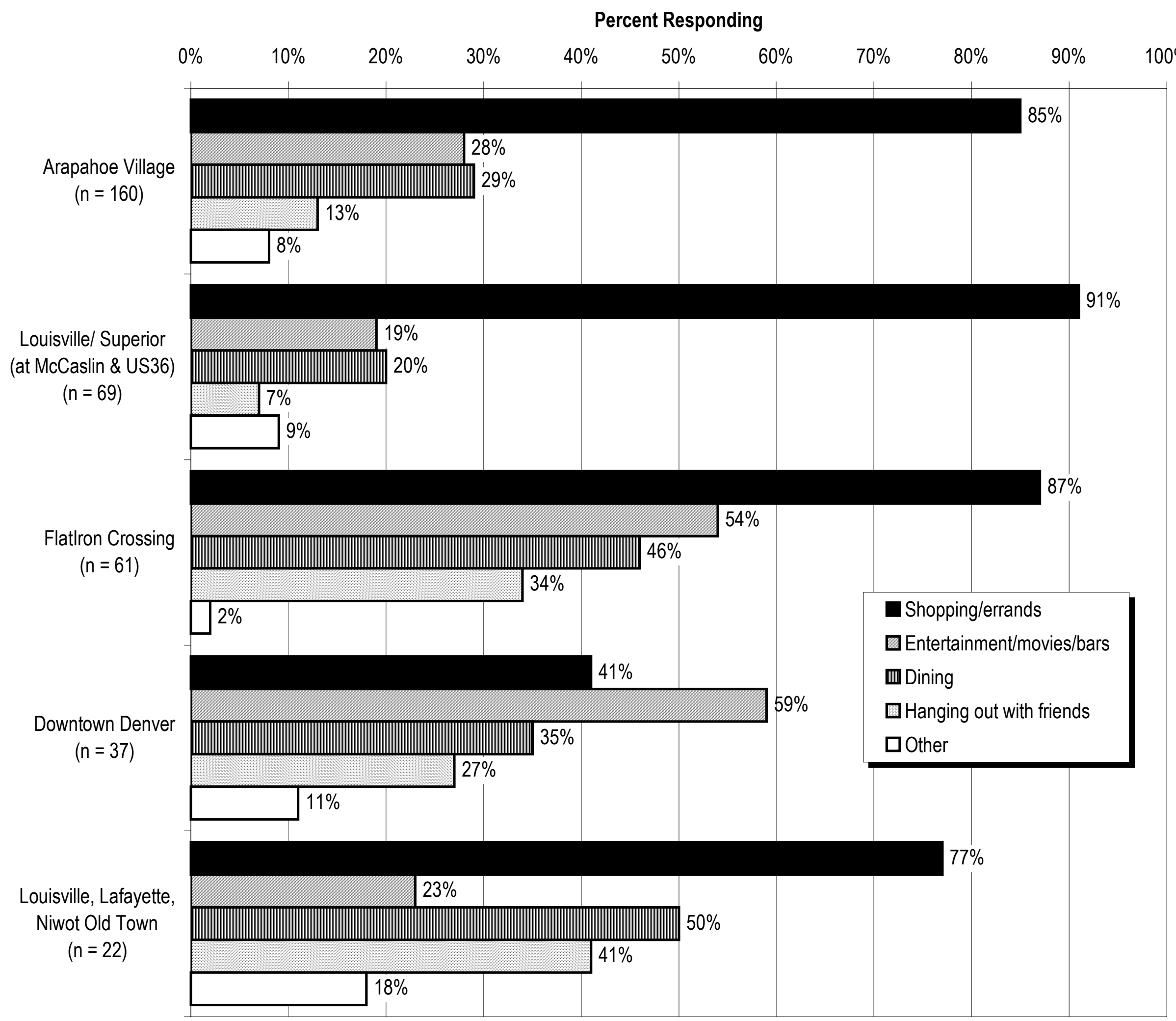
### *Reasons For Visiting Other Shopping Areas*

Respondents were asked in a closed-ended manner the reasons they like to visit their (non-Downtown Boulder) most frequently patronized shopping area. Some of the response patterns, illustrated in Figure 14, are quite interesting and reveal the reasons people go to certain shopping areas.

Shopping/errands tends to be the most popular reason for patronizing a certain area, with the notable exception of Downtown Denver, which people frequent for entertainment/movies/bars (most likely bars).

Shopping/errands dominated Arapahoe Village, Louisville/Superior (McCaslin & US36), FlatIron Crossing, and Louisville, Lafayette, Niwot Old Town. ***FlatIron Crossing was also popular for both entertainment/movies/bars and dining***; this result reveals how directly a competitor it is with Downtown Boulder.

FIGURE 14
WHY DO YOU LIKE TO VISIT YOUR FAVORITE SHOPPING AREA?
BOULDER CITY/COUNTY RESIDENTS ONLY



Louisville/Superior was almost exclusively visited for shopping/errands. Arapahoe Village was somewhat diverse in the reasons people like to go there, including entertainment/ movies/bars and dining. Downtown Denver is most popular for entertainment/bars, followed by shopping and dining. The Lafayette/Louisville/Niwot Main Street areas are primarily popular for shopping/errands, but also popular for dining options.

The results of this question show that ***FlatIron Crossing/The Village at FlatIrons is clearly the other shopping area with the greatest diversity of participation and thus the most direct competitor to Downtown Boulder***. To a lesser extent, this same observation is true of the Old Town areas of Louisville, Lafayette, and Niwot and Arapahoe Village, which also offer a diversity of options. The other shopping districts (Downtown Denver, Louisville/Superior at McCaslin & US 36) tended to be single dimensional in the way customers used them, which presents less of a threat to the multi-dimensional and diverse offerings of Downtown Boulder.

## PARTICIPATION IN DOWNTOWN BOULDER ACTIVITIES

Downtown users were asked about the primary motivation for coming downtown, as well as any other activities they would be participating in on their visit downtown. In the discussion below, the primary reason is presented alone, and then the primary reason is combined with the other reasons to paint a complete picture of the mix of activities the downtown user group enjoys as a whole.

In terms of the primary reason for coming to Downtown Boulder, three motivations continue to be quite important: ***shopping, hanging out/enjoying the ambiance/people watching, and eating a meal***. However, following a year of stability, some substantial shifts were seen this year. Specifically, ***hanging out was up in popularity and shopping declined in popularity*** for the primary reason for coming to Downtown Boulder.

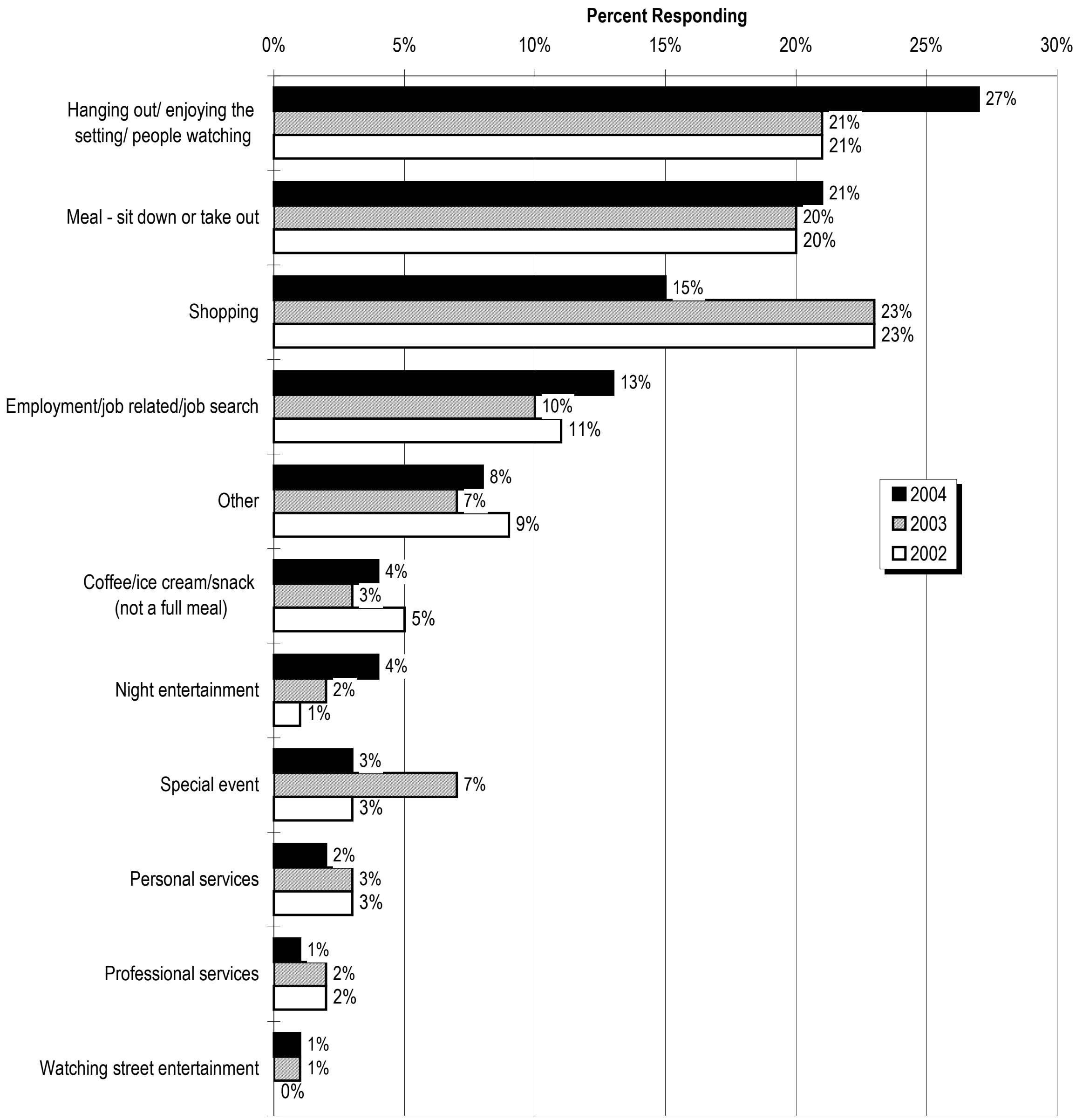
Each of these three activities has been popular throughout the past few years, though a clear pecking order emerged this year. Overall, 27 percent said they came primarily for hanging out, 15 percent for shopping, and 21 percent for dining.

A fourth primary motivation was employment or job related reasons, which increased to 13 percent from 10 percent a year ago. Clearly, more employees were intercepted in the survey this summer, suggesting that a greater proportion of the user base was primarily in the downtown area for work-related reasons.

Other less important primary reasons include coffee/ice cream/snack (4 percent, up from 3 percent in 2003), night entertainment (4 percent, up from 2 percent a year ago), a special event (3 percent, down from 4 percent), personal services (2 percent, down from 3 percent), professional services (1 percent, down from 2 percent), and watching street entertainment (1 percent, unchanged). Some of these activities are important reasons to come to Downtown Boulder, but are not the ***primary*** reason for coming.

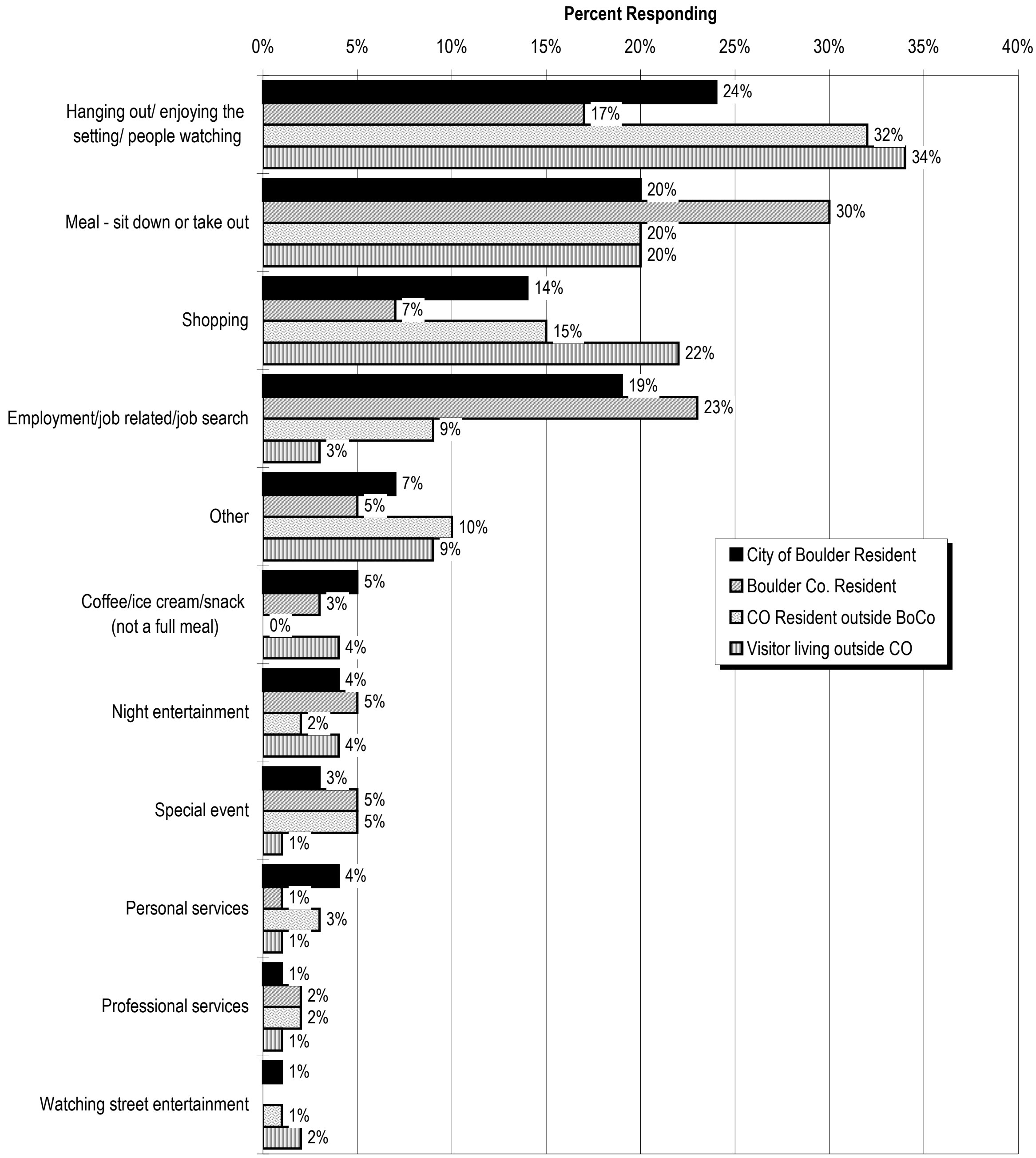
Seven percent cited an "other" reason for coming downtown today. These responses were quite varied, and, among residents, included reasons such as church, meeting people, killing time, reading, and walking. Out-of-county visitors also had diverse "other" reasons, such as playing music, drinking beer, visiting son, a concert, and other reasons.

FIGURE 15A
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY




Some distinct difference are noted when local residents and out-of-county visitors are segmented in response to the primary reason for coming downtown today. In particular, out of state visitors are much more likely to say that shopping and hanging out/enjoying the setting were the primary reason for visiting. Job/employment reasons were important for City and County residents; in fact, for both these user groups, work-related reasons outpaced shopping as the primary reason for coming downtown. Having a meal was consistently popular with each of the four user groups, with Colorado residents outside Boulder County the most likely to come downtown for a meal (30 percent selected as primary reason).

FIGURE 15B
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY
BY 2004 VISITOR TYPE



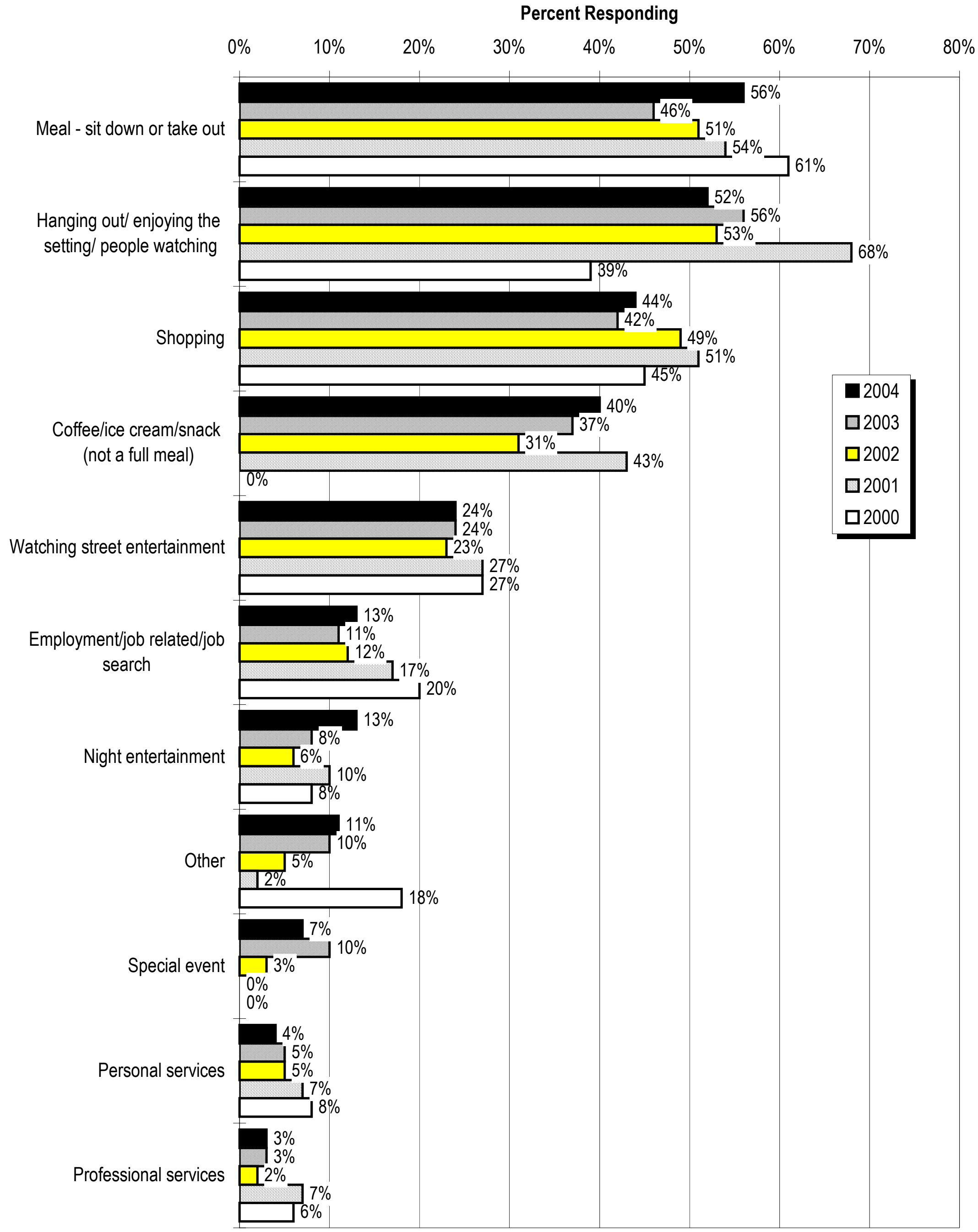
A follow-up question asked what other activities the interviewee was doing while downtown. When the responses to this question were added to the primary reason question, the results show ALL the activities the respondent was doing downtown.

Eating a meal was the top overall activity, with 56 percent of all respondents indicating that they were eating during their visit. Hanging out/ enjoying the setting was also widely popular (52 percent). Shopping was strong at 44 percent, though recall that it declined noticeably as the primary reason for coming. Forty percent were saving a coffee/ice cream/snack, making this activity fairly popular as well. The historical patterns are largely consistent for these four activities.

Watching street entertainment was the sole activity in a second tier (24 percent), followed by a third tier of employment/job related (13 percent), night entertainment (13 percent), and "other" activities.

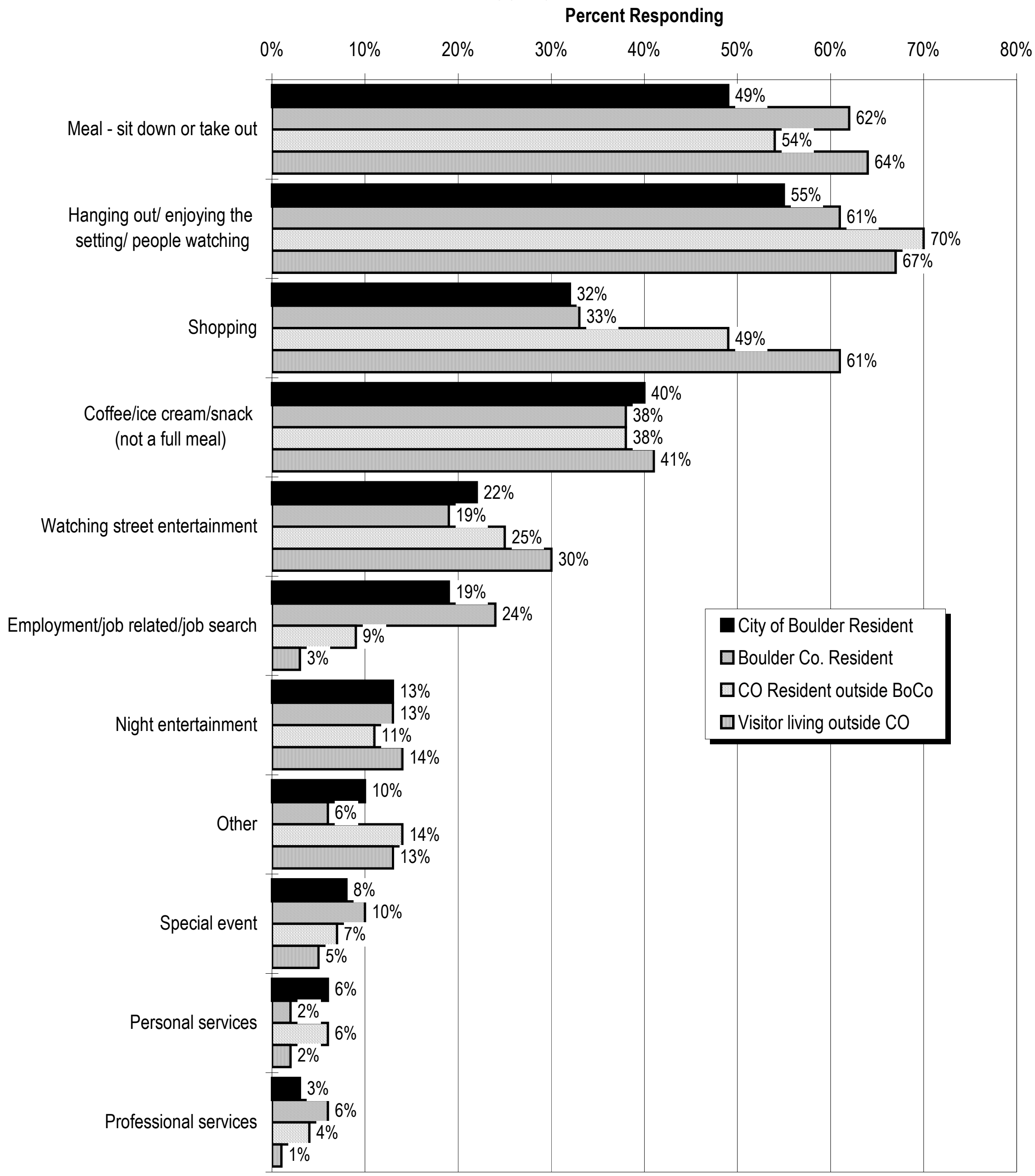
Special events slipped somewhat, to 7 percent from 10 percent a year ago. Personal services (4 percent) and professional services (3 percent) rounded out the list of all activities in which mall users participate.

FIGURE 16A
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
2000 TO 2004



The participation in activities was also segregated by visitor type. This segmentation allows for an understanding of what the various visitor groups are doing downtown; the results generally parallel the primary reason for visiting Downtown Boulder discussed above. That is, visitors from Colorado and outside Colorado are more likely to be participating in a greater number of activities, especially hanging out/ enjoying the setting, eating a meal, and shopping. Boulder City and County residents are much less likely to be shopping, but eat a snack with about the same frequency as out-of-town visitors.

FIGURE 16B
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
BY 2004 VISITOR TYPE



## GENERAL RATINGS OF THE DOWNTOWN EXPERIENCE

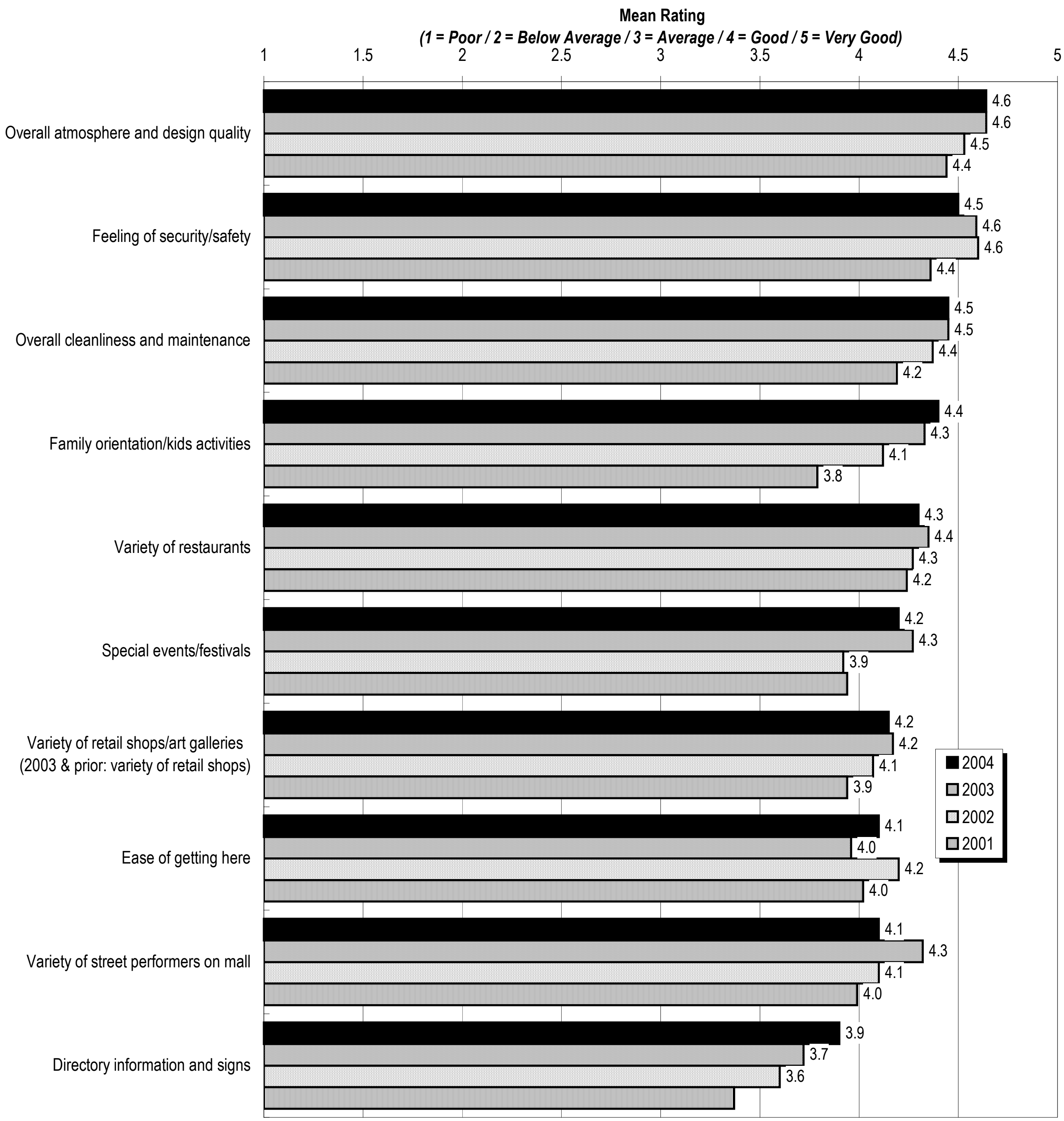
An important and ongoing part of the research downtown is rating the level of satisfaction with various aspects of the experience. The monitoring and tracking of the satisfaction with the downtown experience is important to understand the strengths and weaknesses of the area, and to identify trends over time related to user satisfaction. It also provides a sense of the overall impression of the downtown and of how users perceive the downtown, which allows for an effective and cohesive marketing plan for the area as a whole.

These satisfaction ratings have been tracked each year in the research program. Respondents were asked to rate the aspect on a five-point scale, with one representing "poor," three representing "average," and five representing "very good." A few ratings attributes were dropped from the survey this year in an effort to streamline the flow of the questionnaire.

The ratings in general remained quite good again this year; in fact, most attributes exhibited stability or improvement over already-high 2003 scores (some did decline, however). Overall atmosphere and design quality, feeling of safety and security, and overall cleanliness and maintenance remained quite highly rated, and particular improvements were noted for family orientation/ kids activities, ease of getting here, and directory information/ signs. Some other patterns or findings of note are mentioned below.

- Overall atmosphere/ design quality averaged 4.6 out of five, the highest rating on the survey and even with the 2003 result for this quality.
- Feeling of safety and security slipped to 4.5 from 4.6 a year ago, though it remains the second-highest attribute.
- Overall cleanliness and maintenance was stable at 4.5, suggesting continued satisfaction with the condition of the mall facilities.
- Improvement in family orientation/ kids activities helped this attribute leapfrog to the number four spot, replacing variety of restaurants. This category has shown steady improvement over the past four years
- The satisfaction with the variety of restaurants, long a strength of Downtown Boulder, slipped to 4.3 from 4.4 a year ago, the first decline following consistent improvement for the past four years.
- Two attributes averaged 4.2 out of five: special events/ festivals and variety of retail shops/ art galleries.
- Last summer, ease of getting here was one of the only ratings categories to drop; the category rebounded this year slightly to 4.1 from 4.0. The completion of the Broadway construction project clearly helped this attribute, though smaller construction projects were present this summer as well.
- Directory information and signs continued its steady improvement to 3.9 this year, though it remains the lowest rated attribute of the downtown mall.

FIGURE 17
GENERAL RATINGS OF THE DOWNTOWN EXPERIENCE
2001 TO 2004



### *Suggestions for Improving the Downtown Area*

A follow up question to the satisfaction ratings asked about any suggestions for improvements to the downtown area. The responses were quite broad in nature, but some common themes emerged in the responses.

#### Suggestions from Local Residents

Local residents of the Boulder County area tended to focus their comments on improving the amount of parking, filling the vacant storefronts, homeless people, more police presence (especially at night), and enforcing the no dogs/no bikes regulations. Many of these comments echo sentiments captured in last summer's survey, indicating that, at least among the resident population, many of the issues around the downtown area remain the same. Some sample comments include:

*Police the area more so you don't get harassed by young beggars*
*Less homeless*
*Add benches to water fountain for children*
*Build another parking garage*
*Fill up the stores*
*Get rid of transients*
*I still see dogs and bikes on the mall- they shouldn't be here*
*More parking lots*
*Less panhandlers and solicitors*
*Parking should be free*
*Parking is a pain*
*More of a police presence at night 13th to 14th streets*

#### Suggestions from Visitors

Visitors tended to focus on slightly different issues, including providing better directional signage to the downtown area for those driving into town, more parking, and too many homeless people. Again, these sentiments are consistent with past feedback. Also, several comments noted what a great place Downtown Boulder is to visit.

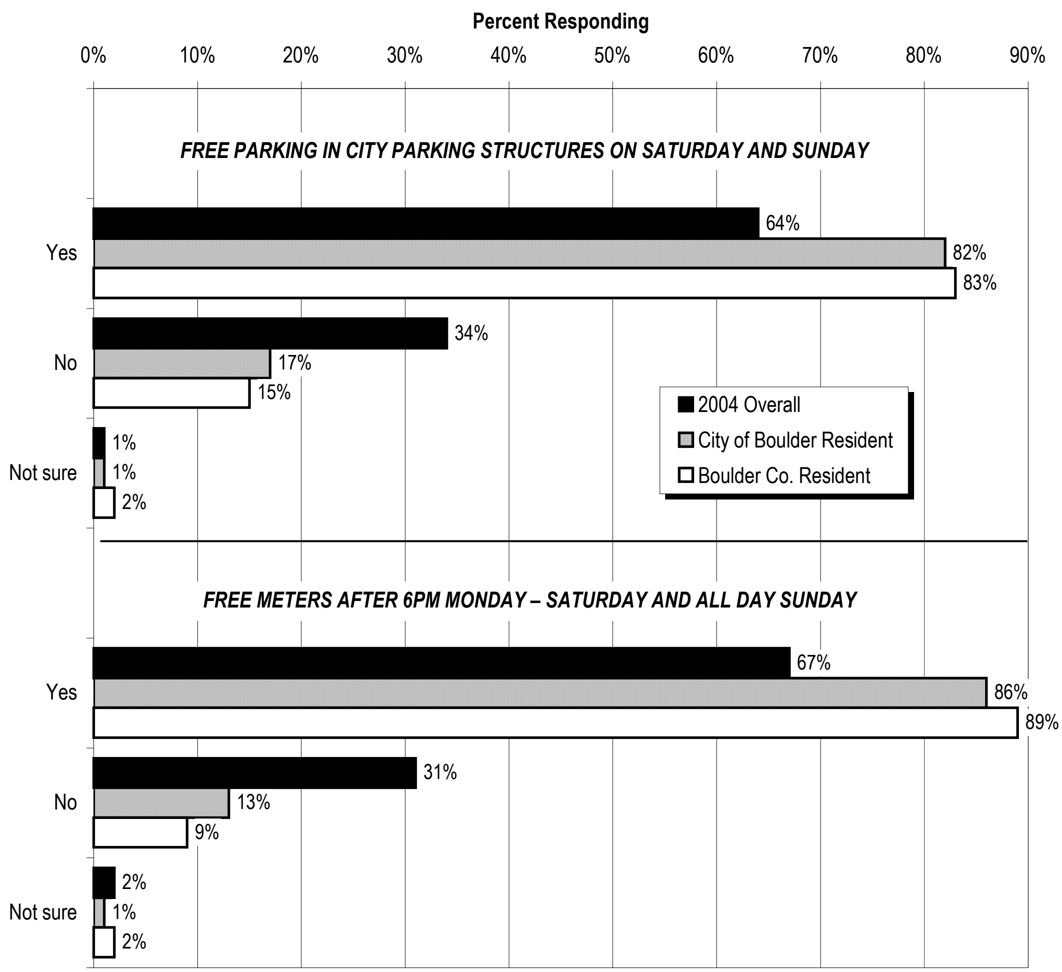
*Better signs to get here*
*Get rid of transients*
*There are too many bums*
*Orientation for new comers*
*Parking meters too expensive*
*Parking needs to be expanded*
*More availability of parking*
*It's already wonderful*
*It's great already*
*Keep up cleanliness of mall*
*Cheaper shops - it's too expensive*

## PARKING ISSUES

In an effort to learn about new issues related to parking, the parking satisfaction ratings were replaced with several new questions this year. Specifically, awareness of the times and locations of free parking in the Downtown area was queried, as well as awareness of the new parking validation program. As well, respondents were asked for suggestions to improve the parking situation downtown (other than "free" or "more" parking).

All respondents were asked about their level of awareness of free parking in city garages on Saturdays and Sundays, and also at the meters after 6pm Monday through Saturday and all day Sunday. Of course, City and County residents were most aware of these free alternatives; in fact, the level of awareness was over 80 percent for each of these free alternatives. This level of awareness is reasonably high, though among those interviewed Downtown, it might be expected to be higher.

FIGURE 18
AWARENESS OF FREE PARKING ALTERNATIVES IN DOWNTOWN BOULDER

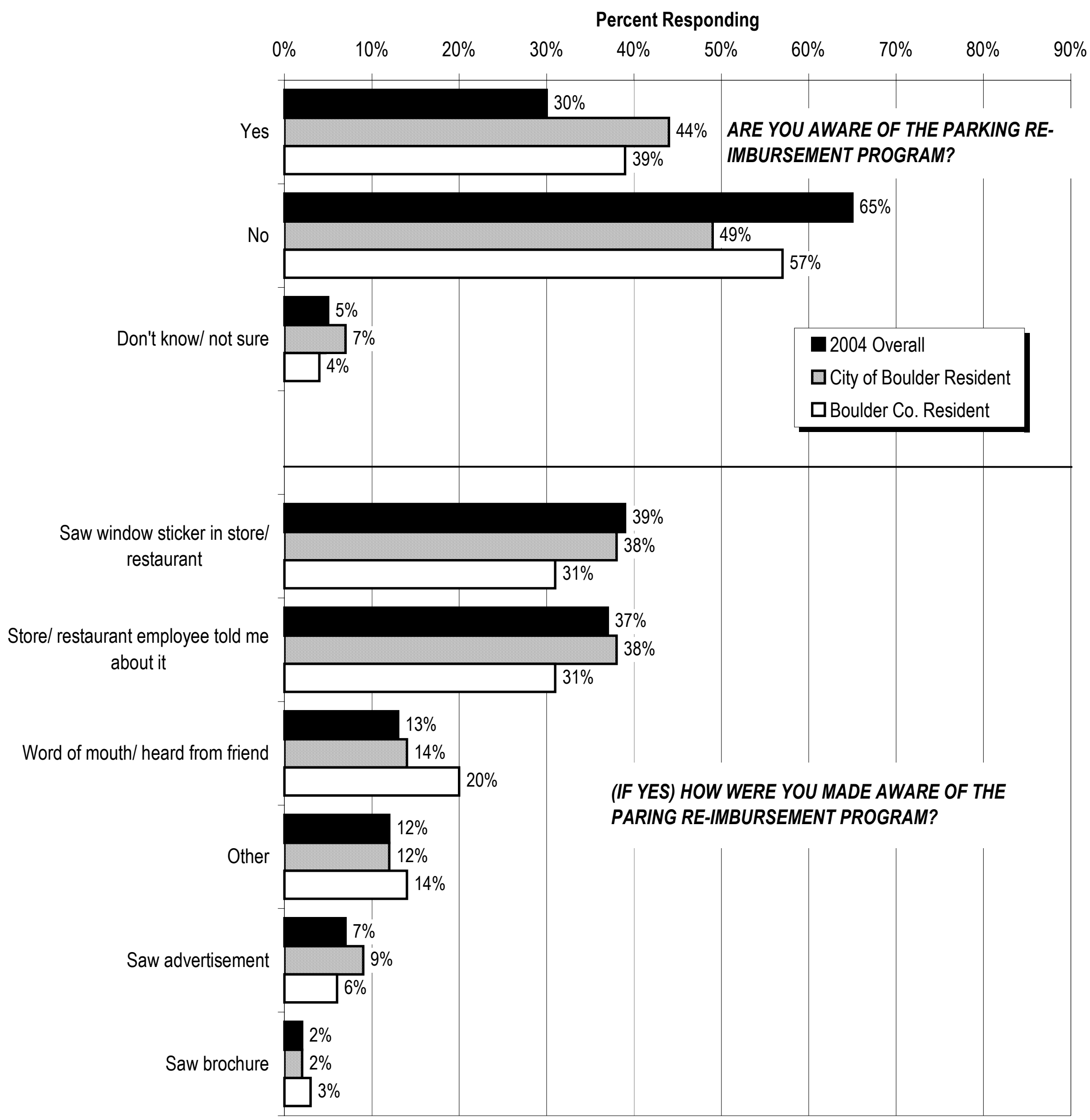


*Parking Re-Imbursement*

Two more parking questions were added this year: one asking about awareness of and the other asking the importance of a new parking re-imbursement program with Downtown merchants. Overall, 30 percent of those interviewed were aware of the program, including 44 percent of City residents and 39 percent of County residents. Awareness should continue to increase as the program gains traction and word of mouth spreads.

Those who were aware of the program were asked how they first learned about the parking re-imbursement program. Most either saw a sticker in the window of a store or restaurant or heard about it from an employee of a store or restaurant. This result indicates that the participating merchants are doing a good job in spreading the word about the program. Other ways people were made aware of the program include word of mouth, an advertisement, and a brochure.

FIGURE 19
AWARENESS OF PARKING RE-IMBURSEMENT PROGRAM



The importance of the parking re-imbursement program was moderate among users, though more important among those who drove downtown and less important among those who walked or took the bus. Overall, it was ***most important to Boulder County residents***, 43 percent of whom said it is "Important" or "Very Important" in encouraging them to come to Downtown Boulder more frequently. Similarly, among City and County residents who drove downtown this trip, 40 percent indicated that the parking re-imbursement program is "Important" or "Very Important." The overall importance scores tended to be weighed down by those who rode the bus or walked downtown, who largely said that the re-imbursement program was not important in encouraging them to come downtown more frequently (see Figure 20B below). Clearly, the downtown business community is on the right track with the re-imbursement program.

FIGURE 20A
IMPORTANCE OF PARKING RE-IMBURSEMENT PROGRAM
BY CITY OF RESIDENCE

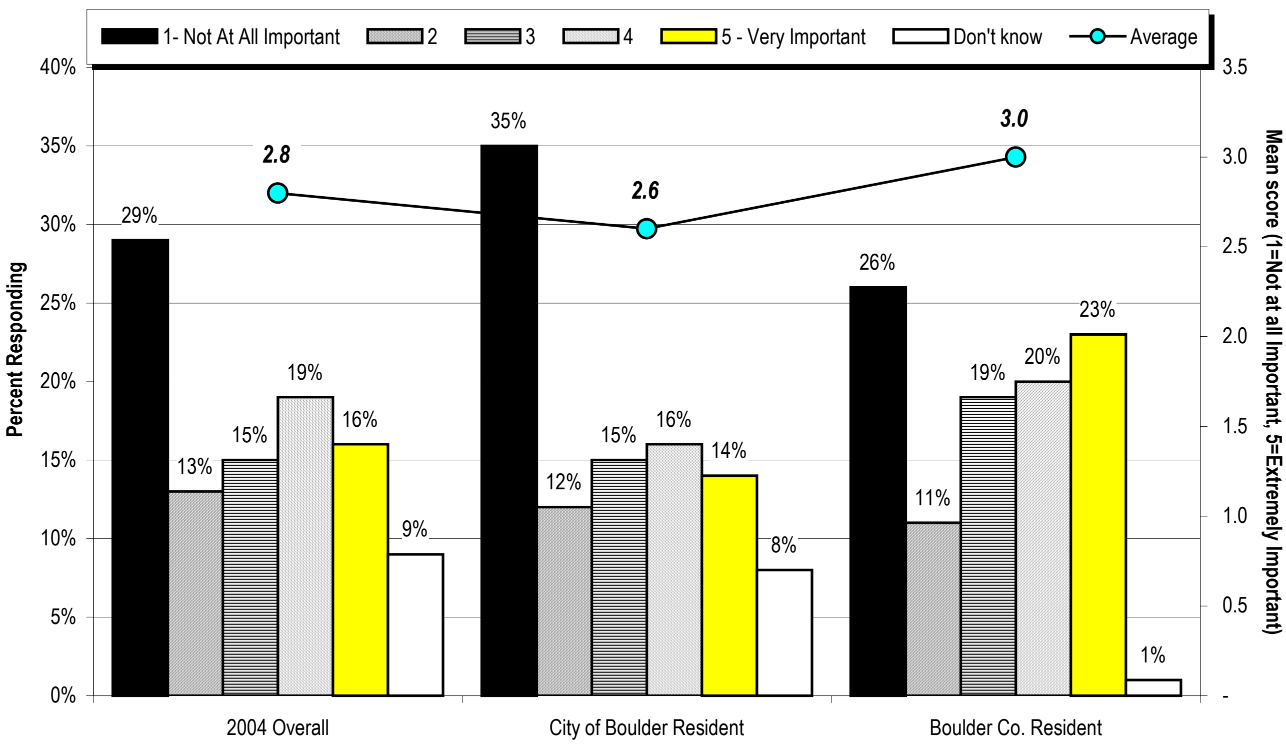
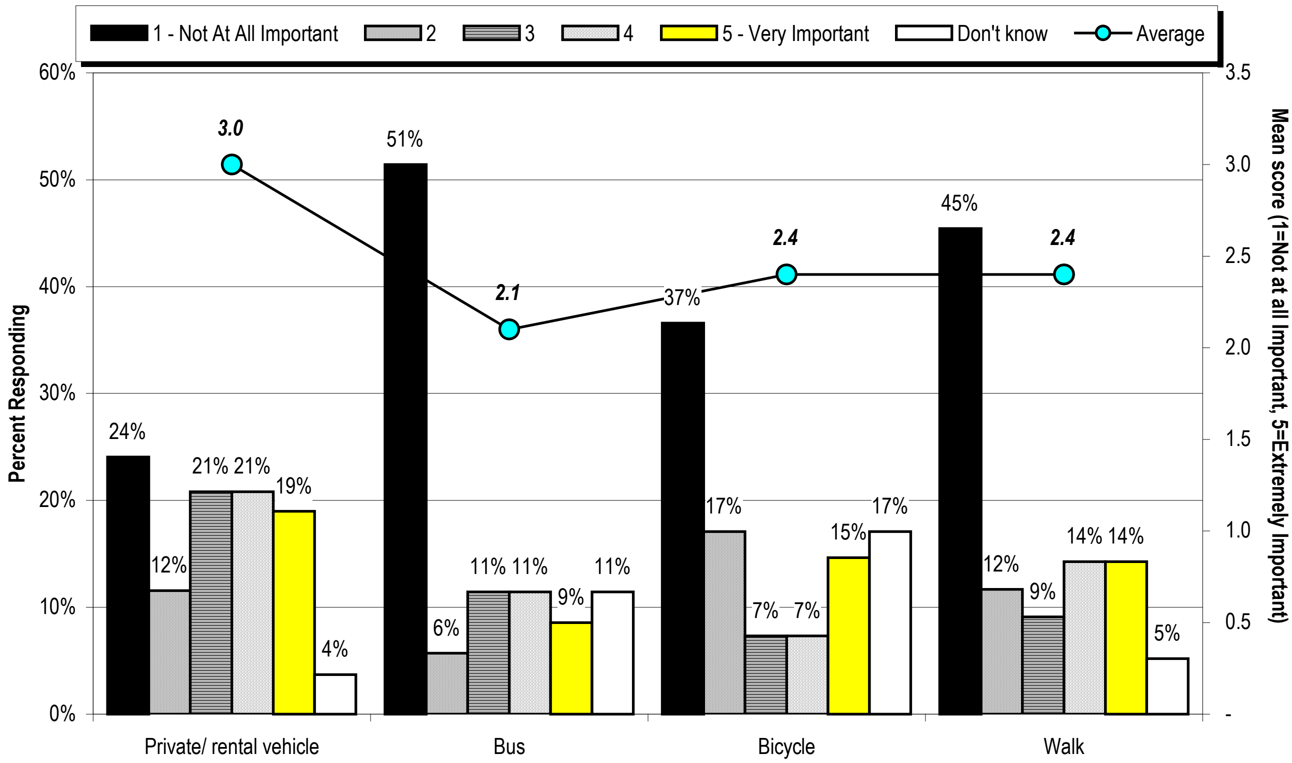


FIGURE 20B
IMPORTANCE OF PARKING RE-IMBURSEMENT PROGRAM
BY MODE OF TRANSPORTATION DOWNTOWN




## *Suggestions to Improve Parking*

Respondents were asked for suggestions to improve parking in the downtown area (other than free parking or more parking). Results are presented below by whether the survey participant was a Boulder City/County resident or from outside the county.

### Comments from Residents

Residents focused on general areas for improvement to parking: allowing longer time on the meters, more bus service to the area, and more leniency from parking enforcement personnel. Downtown Boulder has already spent substantial time an effort on these same issues, indicating that the efforts are clearly on the right track. Nevertheless, parking services still has a substantial public relations challenge to improve parking sentiment among Boulder residents.

*No more "parking nazis"*
*Free meters on Saturday*
*Lots after 7 PM should be free*
*Free busing and public transportation*
*Five-minute grace period for meters*
*Bigger spaces*
*Free bus at big parking lot*
*More parking time for your money*

*Saturdays free*
*There should be more mass transportation*
*Shuttle bus areas near mall*

## Comments from Visitors

Visitors had less input about the parking situation, presumably because they are less familiar overall with the local rules and regulations. Yet even this group noted how stringent the parking enforcement is in Downtown Boulder. Other thoughts were to do a better job advertising when and where the parking is free.

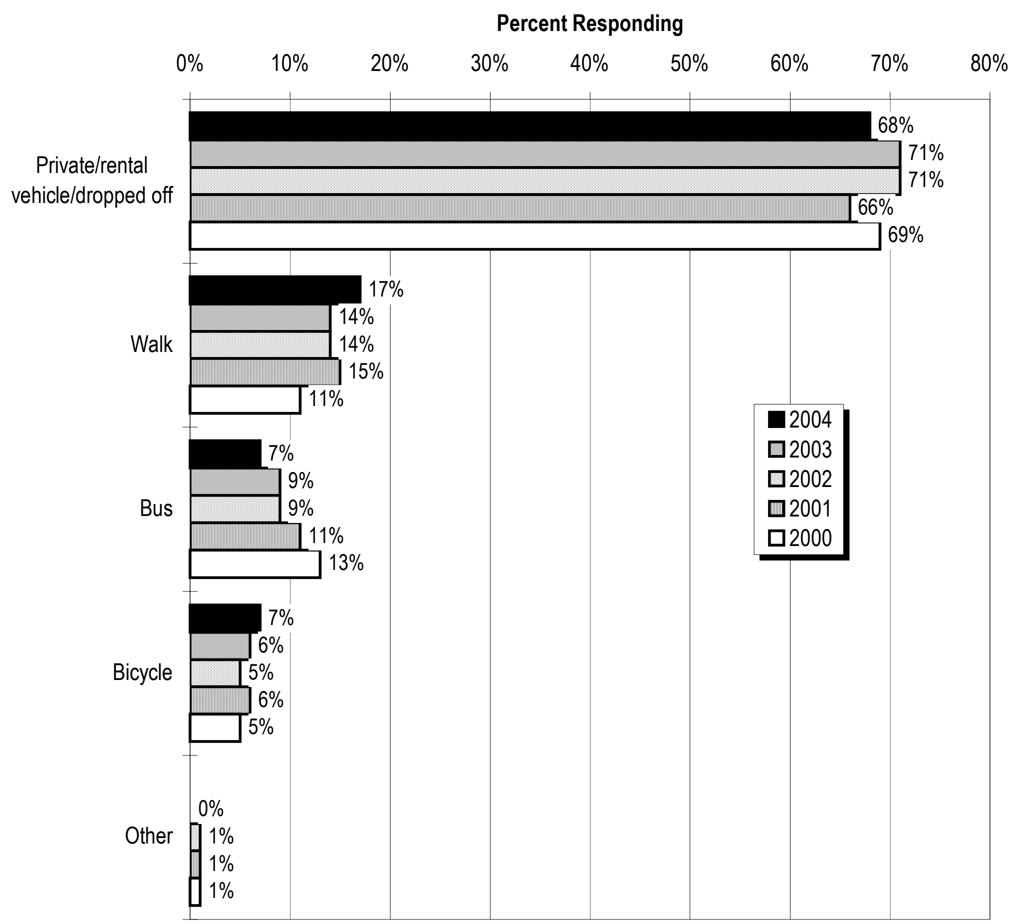
*Advertise information in question #32 (free parking times)*
*The meters are watched too closely*
*More time for a quarter*
*Better signage*
*Advertise free parking on weekends; free shuttle from parking lot*
*Make Saturday free too*
*Shuttle service*

## TRANSPORTATION DOWNTOWN

The proportion of mall users who used a personal vehicle to get downtown declined to 68 percent from 71 percent each of the past two years. The slip in the proportion of drivers is consistent with the increase in City users over last year's results.

Looking at the other modes of transportation suggests that a larger proportion of users came from the immediate residential area: 17 percent walked (up from 14 percent), and 7 percent rode a bike (up from 6 percent). Interestingly, the proportion using a bus to get downtown continues to decline, to just 7 percent this year from a high of 13 percent in 2000. This result is seen despite continued efforts from Go Boulder and a generally wide distribution of Eco-Passes among downtown employees.

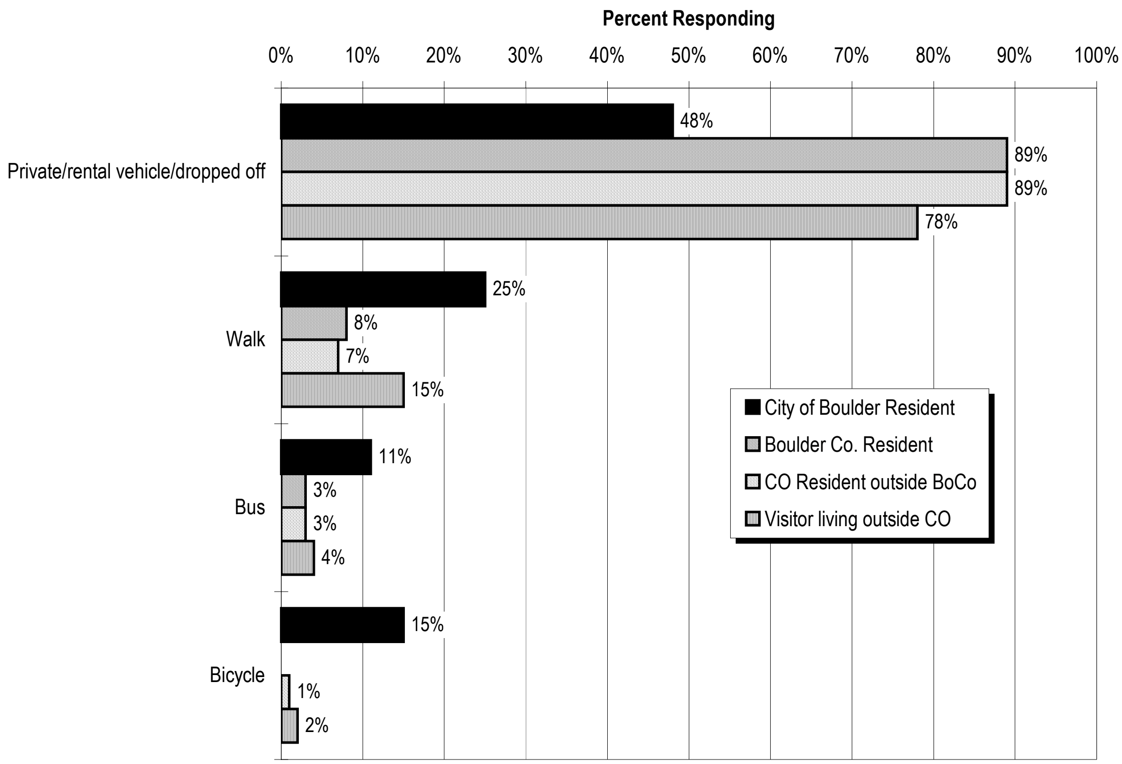
FIGURE 21A
MODE OF TRANSPORTATION DOWNTOWN
2000 TO 2004




When the results are segmented by the visitor type, some more interesting patterns emerge. Less than half of Boulder City residents reported driving to the downtown area: 25 percent walked (up from 21 percent), 15 percent rode a bike (up from 12 percent), and 11 percent took the bus (down from 15 percent). Beyond the City, the majority drove a personal vehicle, with about 90 percent of Boulder

County and Colorado residents driving. Visitors from outside Colorado were less likely to drive (78 percent) by comparison, and more likely to walk (15 percent), a similar finding from previous years. Presumably, these respondents walked downtown from their nearby accommodations.

FIGURE 21B
MODE OF TRANSPORTATION DOWNTOWN
BY VISITOR TYPE




## *Alternate Modes of Transport*

Walking was the most common alternate method of transport to the downtown area in 2004, with 17 percent overall saying they walked (up from 14 percent in 2003). City residents and visitors from outside Colorado were the most likely to walk downtown. Targeting these two segments to continue to utilize the downtown area, and to walk to reach the area, could be an effective strategy in increasing participation downtown without adding to vehicle traffic. Other alternate modes included 7 percent who rode the bus and 7 percent who biked.

Overall, one in five of those interviewed downtown said they own an Eco-Pass; City of Boulder residents are most likely to have such a bus pass (38 percent). Eighty-two percent of those who rode the bus downtown indicated that they own an Eco-Pass, suggesting a large and important influence of the Eco-Pass on bus ridership.

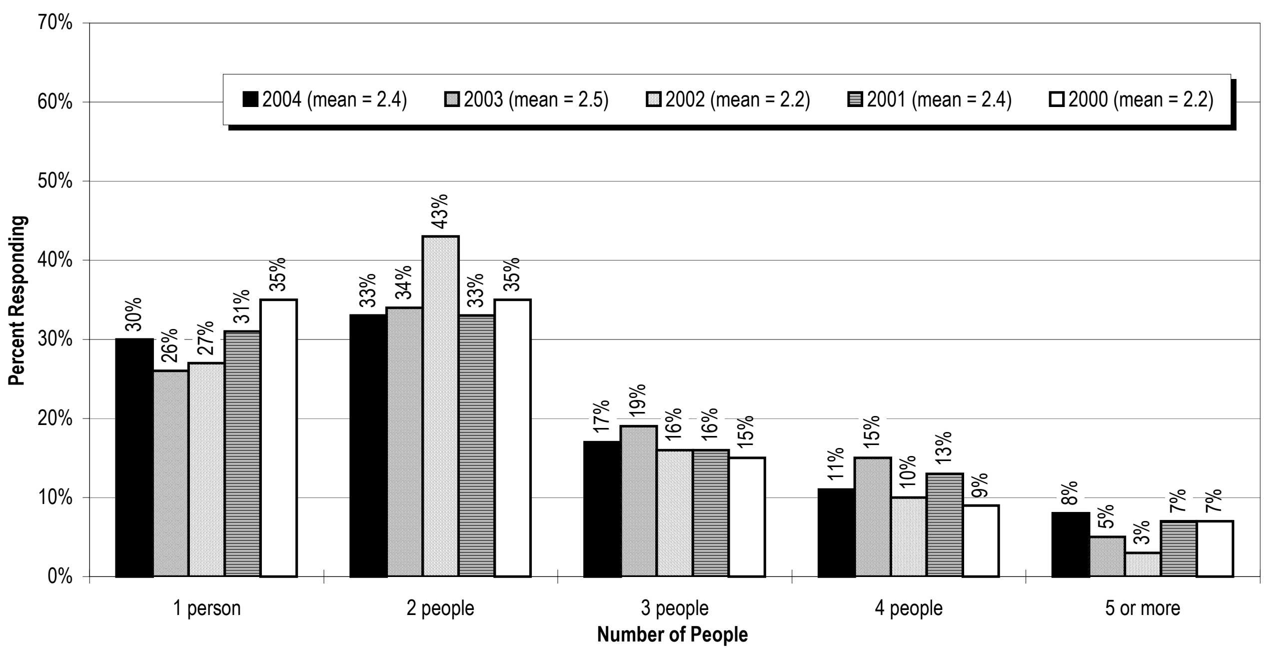
*Personal Vehicle*

Those who drove a personal vehicle were asked how many people came in their car, where their car was parked, and if they owned a parking permit. The proportion who said they drove alone increased this year, to 30 percent, following four years of decline. As a result, the average number of people in the car declined to 2.4 this year, from 2.5 last year. (The increase is primarily due to a greater proportion of those with three and four people in their car.)

As well, 33 percent drove with one other person (two total), about the same as last year. A smaller proportion than in the past was driving with three (17 percent) and four (11 percent) people total, which helped to increase the overall average number of people per car. Eight percent said five or more came in their car, up from 5 percent last year.

The median number of people per car remained 2, consistent the past

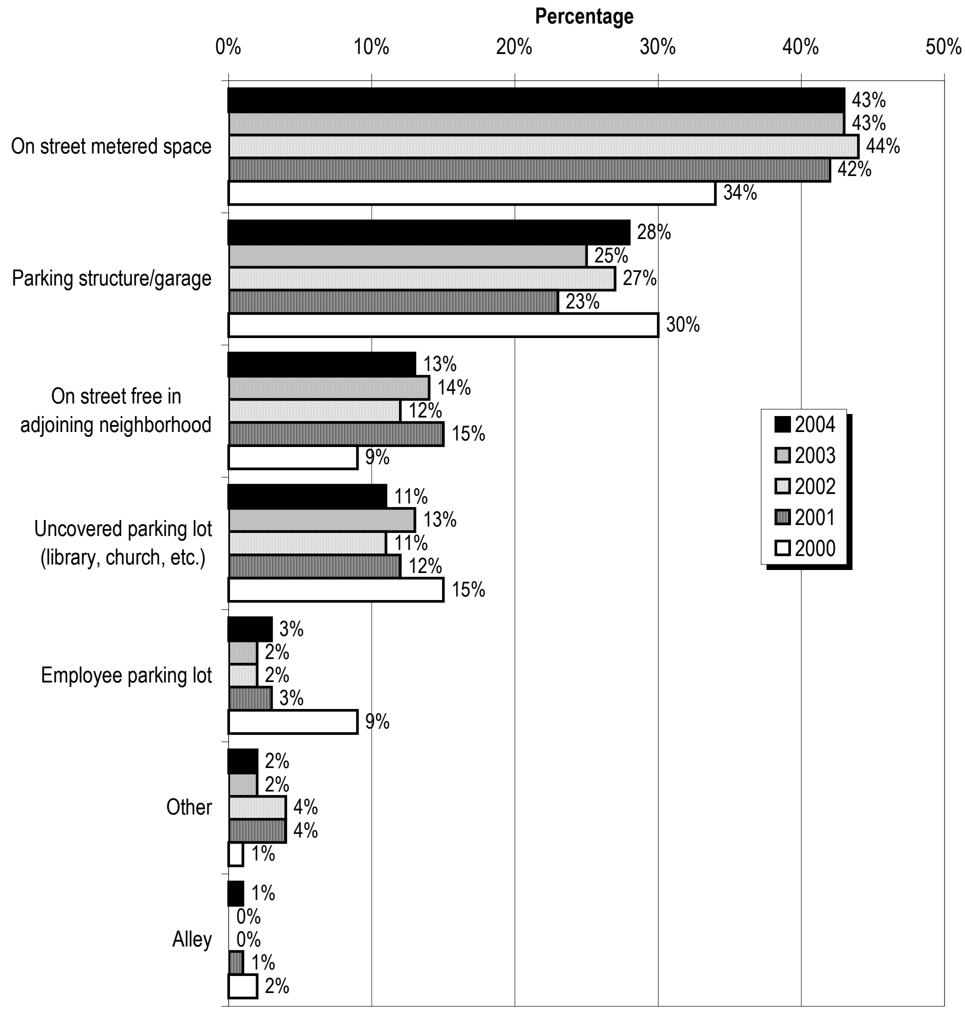
FIGURE 22
INCLUDING YOURSELF, HOW MANY PEOPLE CAME IN YOUR CAR? (CARPOOLING PATTERNS)
2000 TO 2004



In terms of where people parked when they drove downtown, findings are largely similar to historical patterns. On street metered spaces remain the most popular, with 43 percent of drivers. Twenty-eight percent said they parked in a parking structure/ garage, up from 25 percent last year. About the same proportion parked free in an adjoining neighborhood (13 percent) and in a surface parking lot (11 percent).

The following graph shows the historic patterns of parking in the downtown area.

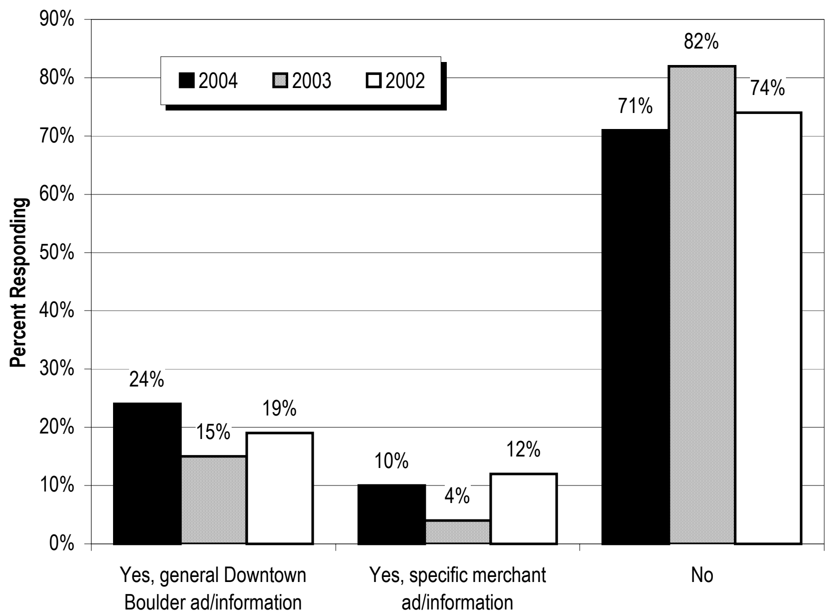
FIGURE 23
LOCATION OF PARKED VEHICLE
2000 TO 2004



## ADVERTISING AWARENESS

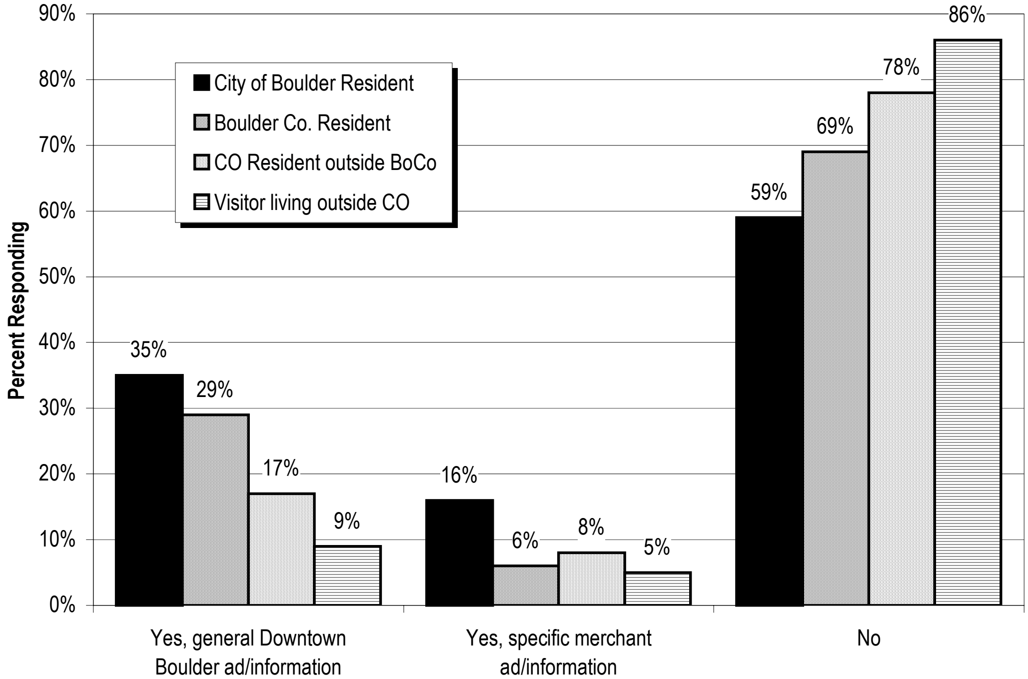
Advertising recall rebounded this year. Overall, ***24 percent said they saw an ad or information source for Downtown Boulder*** prior to their visit (up from 15 percent a year ago); another 10 percent said they saw an ad for an individual downtown merchant (up from 4 percent). In total, 29 percent saw some type of advertising prior to their visit, and 71 percent did not see any ads. Each of these figures represents a rebound from last year's results, which were five-year lows for advertising awareness.

FIGURE 24A
ADVERTISING AWARENESS



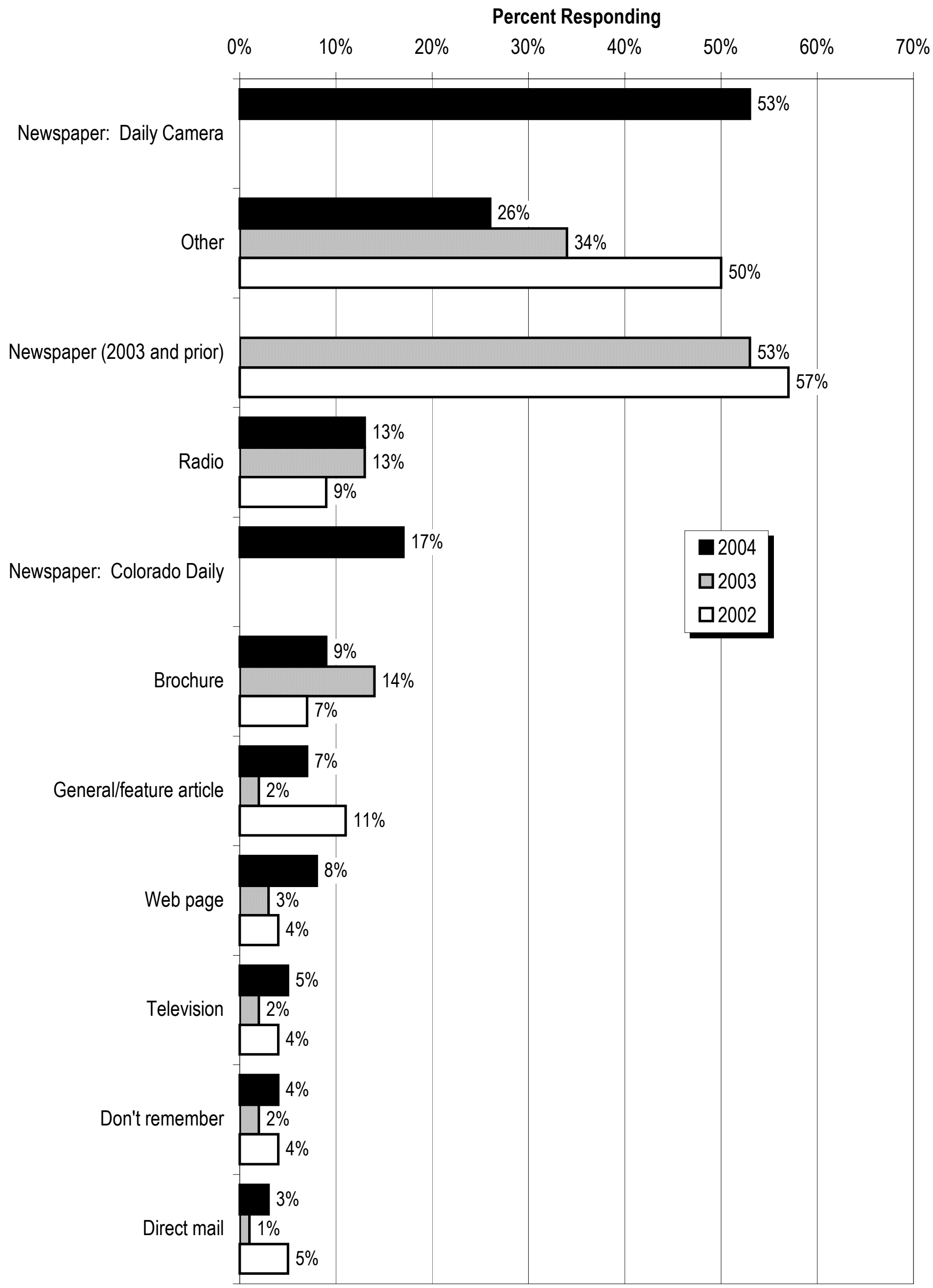

Awareness of the Downtown Boulder ads was highest among City residents, as 41 percent of this segment indicated awareness of some kind prior to visiting downtown (up from 23 percent). As seen in Figure 24B below, nearly four out of ten City of Boulder residents saw or heard some type of ad – 35 percent a general Downtown Boulder ad, and 16 percent a specific merchant ad. Thirty-one percent of County residents also saw or heard an ad. Awareness was lowest for out-of-county and out-of-state visitors, at 22 and 14 percent, respectively.

FIGURE 24B
ADVERTISING AWARENESS
BY VISITOR TYPE




Among those who saw an ad or information source for Downtown Boulder, ***53 percent saw a Daily Camera ad, 17 percent saw an ad in the Colorado Daily, 13 percent heard an ad on the radio, and 9 percent saw a brochure***. Eight percent said they saw a web page, 7 percent a general or feature article, and 5 percent a television ad. Twenty-six percent also cited an "other" source of Downtown Boulder advertising (many of whom said the Boulder Weekly or bus panels).

FIGURE 25
RECALL OF SPECIFIC ADVERTISING SOURCES



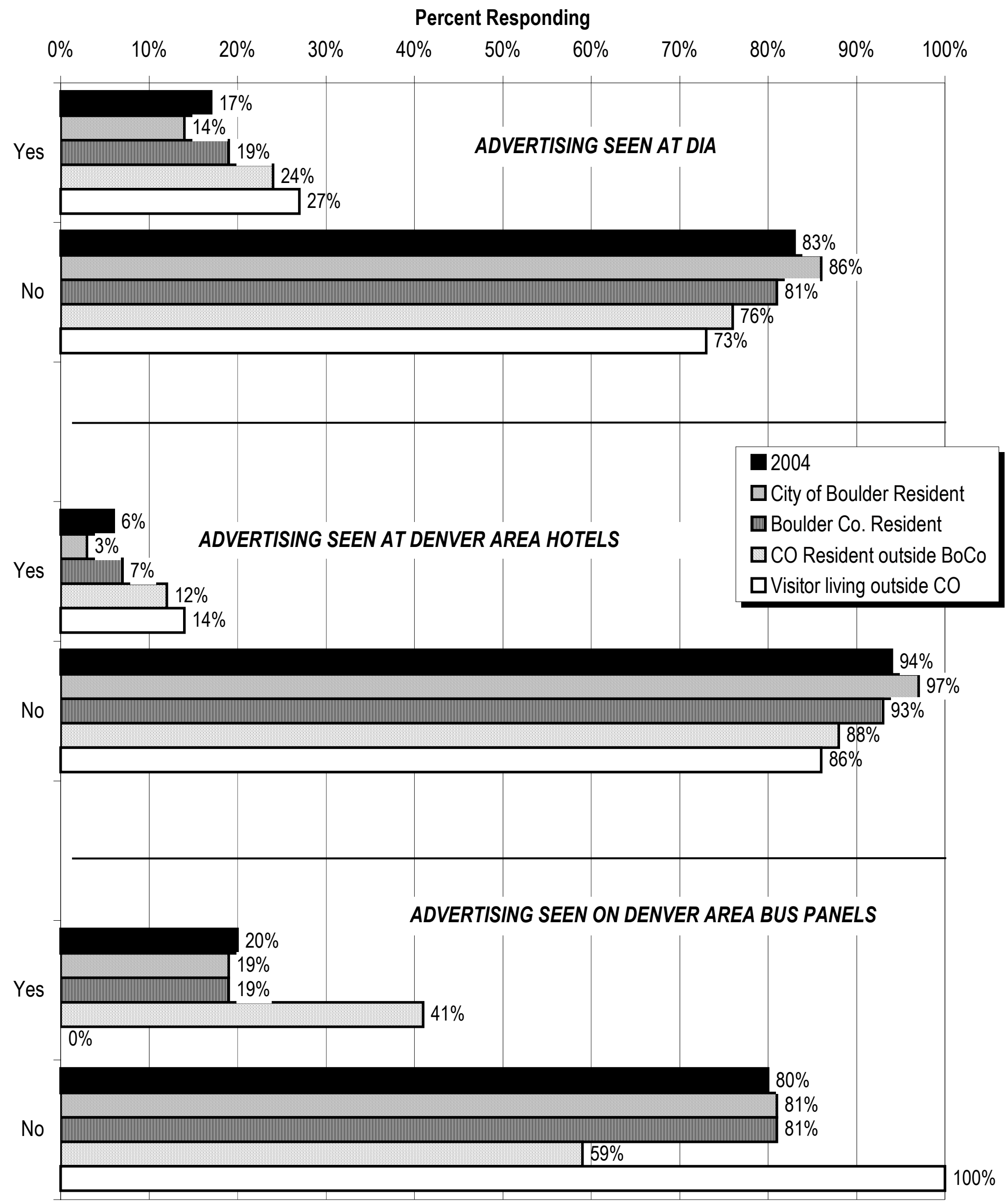

Interestingly, Colorado visitors from outside Boulder County were most apt to hear a radio ad for Downtown Boulder (29 percent), suggesting that this media was successful in reaching the regional audience.

### *Denver and DIA Advertising*

Those who said they saw Downtown Boulder advertising (24 percent of the sample) were also asked about specific Denver and DIA ads.

Of the 24 percent who saw a Downtown Boulder ad, 17 percent saw one of the advertisements at DIA, 20 percent on Denver bus panels, and 6 percent at Denver-area hotels. Encouragingly, 27 percent of out-of-state visitors who saw an ad saw the DIA advertisements (though the sample size is low at just 15 persons). Other important findings are that 41 percent of Colorado residents outside Boulder County saw a bus panel on a Denver-area bus (though this sample size is similarly low, at just 17 persons).

FIGURE 26
RECALL OF SPECIFIC AD SOURCES (AMONG THOSE WHO SAW DOWNTOWN BOULDER ADS)



## SPECIAL EVENTS/ CONCERTS/ FESTIVALS DOWNTOWN

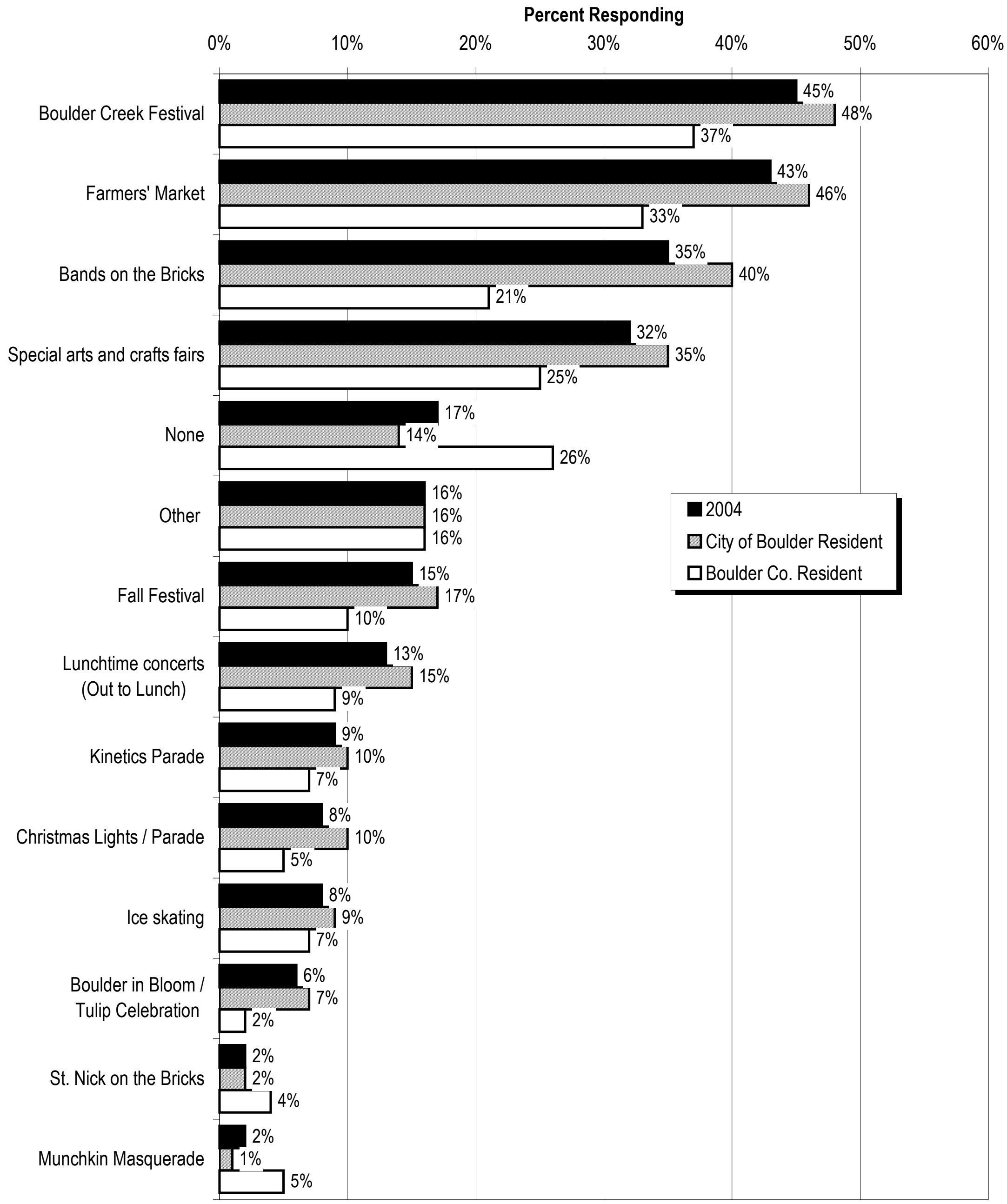
Another new question was added this year to measure participation in Downtown special events and festivals: "Which activities, concerts, special events, festivals, etc have you attended in Downtown Boulder in the past year?" This question, asked only of City and County residents, was asked in an un-aided manner; in other words, the respondent was not prompted or shown the list of special events. Rather, respondents had to recall which special events in Downtown Boulder they had attended in the past year. This style of questioning exhibits not only participation patterns, but also how memorable the event actually was.

Overall, the Boulder Creek Festival had the highest recall, at 45 percent of City and County respondents saying they had attended the festival. The Farmer's Market was close behind, at 43 percent, followed by Bands on the Bricks (35 percent) and Arts and Crafts Fairs (32 percent). Much lower recall was observed for Fall Festival (15 percent), Out to Lunch concerts (13 percent), the Kinetics Parade (9 percent), the Christmas Lights or Christmas Parade (8 percent), ice skating (8 percent), and Boulder in Bloom/The Tulip Festival (6 percent). Some of the lower recall might be attributable to the timing of the survey compared to the date of the event; recall that surveys were conducted from mid-June to early September, meaning that, for example, the last Fall Festival was nearly a year ago when the surveys were administered.

Generally, City of Boulder residents attend special events and festivals with greater frequency compared to their counterparts in Boulder County. Indeed, one-quarter of County residents said they had not attended any special events in the past year, compared to only 14 percent of City residents.

Sixteen percent said they attended an "other" event or festival, including the Jewish Festival, the Asian Festival, Kids Fest, and various other events.

FIGURE 27
WHICH ACTIVITIES, CONCERTS, SPECIAL EVENTS, FESTIVALS, ETC. HAVE YOU ATTENDED IN DOWNTOWN BOULDER IN THE PAST YEAR?



## OTHER DOWNTOWN PATTERNS

### *How Long Have You Been Visiting Downtown Boulder?*

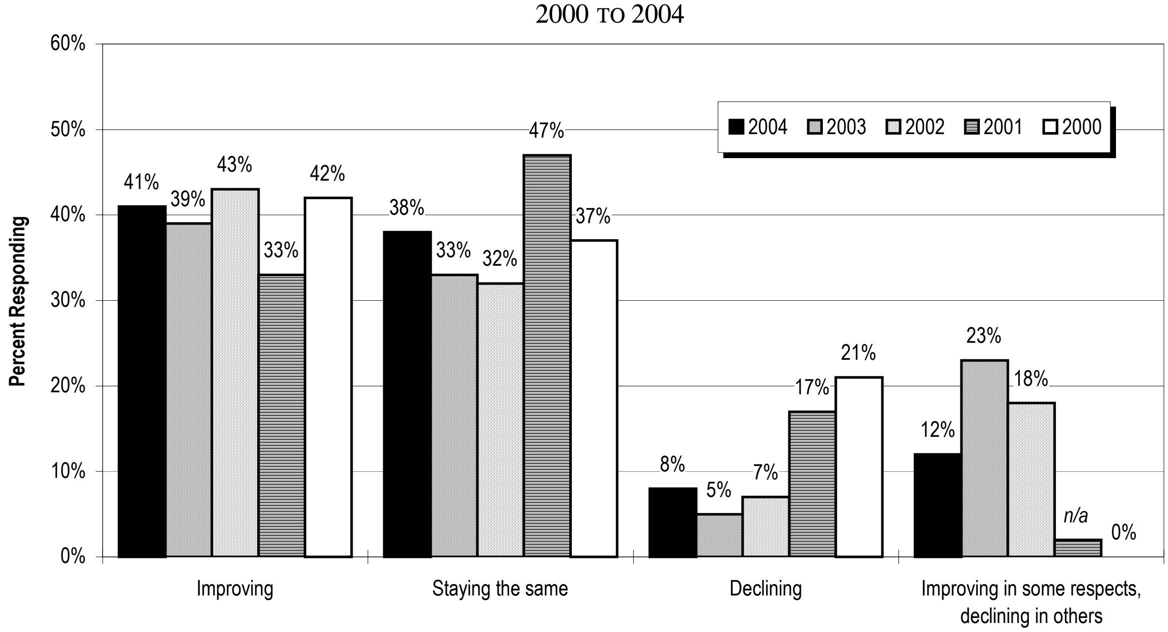
A question asked all respondents how many years they had been visiting Downtown Boulder. While this year's average number of years is slightly higher, the patterns remain largely similar to past years. Sixteen percent were making their first visit, and another 6 percent have been visiting less than a year. The distribution of the remaining participants is spread out among a number of years, including 36 percent who have been visiting more than ten years (up from 28 percent). The average number of years is 7.2 and the median 5; the average is about a year higher compared to 2003, but the median is the same.

### *Is the Downtown Experience Improving or Declining?*

Those who indicated that they have been visiting more than two years were asked if they thought the downtown experience over the past several years has been improving, staying the same, declining, or improving in some respects and declining in others. A higher proportion of respondents said that the overall experience in Downtown Boulder is either improving or staying the same – 80 percent versus 72 percent in 2003.

A very positive finding is that the proportion saying that the downtown experience has been declining is only 8 percent, a very low figure. Compared to last year, a higher proportion said the area is improving (41 percent versus 39 percent). However, because the interviews were being conducted in Downtown Boulder, a certain "self-selection bias" tends to come into play for this type of question. As well, more respondents think the area is staying the same (38 percent versus 33 percent in 2003), and fewer think it is better in some respects and declining in others (12 percent versus 23 percent). Figure 28 illustrates these trends over the past four years.

FIGURE 28
OVER THE PAST FEW YEARS, HAS THE DOWNTOWN BOULDER AREA BEEN IMPROVING, STAYING THE SAME, DECLINING, OR IMPROVING IN SOME RESPECTS AND DECLINING IN OTHERS?
2000 TO 2004



No matter the response, participants were asked why they felt the way they did about the direction of the downtown experience. The results of the open-ended question are summarized below segregated by whether the survey participant is a resident of Boulder County or from outside the county. The reader is encouraged to read the entire list of comments in the appendix section.

### *Quality of Experience Improving*

#### Comments from Visitors

Comments from visitors about the improvements were varied, generally noticing the improved level of cleanliness, fewer homeless people, the landscaping, and other improvements. Some comments are included below to give a flavor of the types of things visitors said about why downtown Boulder was improving.

*Cleaner, not as many street people, shopping was diverse*
*It's cleaner, there's more upper scale shops*
*More stores, clean, shade*
*The whole mall seems like more of a park area for relaxing*
*They have improved the area - less beggars are around*
*East and west end expanding*
*Feels safer, design/waterfalls nice*

#### Comments from Residents

Generally, comments from residents also included noticing many of the general improvements in the past several years, generally noticing the improved level of cleanliness, the increased number of people downtown, the landscaping, and other improvements. Some comments from residents:

*Ambassadors are better*
*Better flowers*
*Cleaner, better stores, good greenery*
*Cleaner, safer, stores and restaurants, improved quality and variety*
*Cleaner; nicer landscaping*
*Landscaping, design changes, free concerts etc.*
*More people come down*
*Renovations and all the flowers and plants are nice*
*They built fountains and ice skating is cool*

### *Quality of Experience Declining*

#### Comments from Visitors

Both visitors and residents who thought the area was declining noted that some of the local stores are closing.

*Local stores leaving*
*Performers being picked on by police*
*Businesses leaving; rent's too high*
*Favorite stores gone*

#### Comments from Residents

*Becoming too corporate*
*Less street life, more commercial*
*Not as clean, not as many shops*
*Loss of business*
*They are more strict on the parking regulations*
*Too many corporate stores*
*Vagrants have become outrageous*
*Too many beggars*

### *Additional Types of Retail Stores Desired*

In an effort to better understand the potential need for an expanded or refined retail and commercial mix in the downtown area, survey participants were asked what specific types of stores they thought were needed in the Downtown Boulder area. Responses, which are quite varied, are presented from visitors and residents.

#### Comments from Visitors

Visitors had various ideas for more stores, including some of the selected responses presented below.

*Outback Steakhouse would be nice*
*Electronic store*
*Gadget store - Brookstone*
*Men's Banana Republic*
*More boutiques and art galleries*
*Small cheap café, late night*
*Nice men's stores*
*Sports stores, tennis shoes*

#### Comments from Residents

Residents also had a variety of stores and commercial used in mind, including more bars and nightlife (including under 21 clubs), general comments about fewer chain stores, functional grocery store or fresh food market, and other suggestions.

*Arcade like place*
*25-35 year old range*
*Cheap nail/salons and cheap personal service providers*
*Family style restaurant*
*Hardware, grocery*
*Inexpensive restaurants*
*More affordable eating places like Falafel King*
*More ethnic restaurants*
*More takeaway restaurants in the $10 range*
*Nordstrom, Indian food, cheaper healthy food, music store*
*Ralph Lauren, Men's Banana Republic, Hollister*
*Skate shop*
*Technology oriented businesses*
*Upscale restaurants*
*Vegetarian restaurants*