

Downtown Boulder Summer 2020 User Survey

July - October 2020



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Introduction

This report summarizes the results of a 4-month intercept survey in Downtown Boulder. The purpose is to gain insights into the demographics, motivations and behaviors of visitors to the district including tourists and residents. The summer and fall of 2020 are unlike any in history and it is important to understand the user mix downtown to plan next steps in public policy, communications and marketing.



Methodology

Primary method:

Intercept surveys were conducted on the first two weekends of each month from July through October.

In July, there was an online follow-up survey emailed to those who provided an email address. This method was not carried through in the subsequent months due to relatively low response to the follow-up survey.



4 Months, 24 Survey Days

564

July Surveys

143

August Surveys

168

September
Surveys

108

October Surveys

983

Total
Surveys

Key Findings - Overall

DOWNTOWN VISITOR AGE INCREASED FROM SUMMER TO FALL



As the summer season progressed and we moved into fall, the average age of respondents increased steadily from 35 in July to 41 in October. The October average is consistent with intercept research done in past years. This likely reflects a national trend of older visitors becoming more comfortable venturing out to shop and dine with the certainty that safety protocols are both effective and being enforced. With the onset of colder weather and resulting limits on outdoor dining, this trend could reverse over the winter months.

PEOPLE FEEL SAFE AND COMFORTABLE DOWNTOWN



Both residents and visitors feel safe downtown and the comfort levels increased as time progressed. This is likely related to proactive adoption of safety protocols over the summer along with effective signage, communication and cooperation from merchants and restaurants. The outdoor setting and ease of social distancing also likely contribute to people feeling safe on Pearl Street. This is an asset that should be considered in marketing and communication efforts for the duration of the Covid period.

Key Findings – Overall



OUT-OF-TOWN VISITATION IS STRONG AND CRITICAL TO BOULDER

The percentage of people downtown from outside of Boulder County was highest in July (60%) and August (54%) which is consistent with previous years and illustrates the tremendous importance of tourism to downtown Boulder's economy. The percentage of local residents peaked in September at 61% as the summer season ended. In October, the ratio was split evenly between locals and visitors. Note that with very little business travel and no CU football games or other events, travelers to Boulder are likely driven by outdoor pursuits and general leisure.



DOWNTOWN IS SEEN POSITIVELY WITH PARTICULARLY STRONG RATINGS FROM VISITORS

Net Promoter Scores (NPS) are high for downtown Boulder relative to most comparable destinations. Out-of-town visitors are particularly positive on downtown giving it an NPS score of 82%. Though still positive, the NPS rating by locals is significantly lower at 62%. This variance between locals and tourists is consistent with NPS research nationwide

Key Findings – Overall



DOWNTOWN VIEWED AS SAFE AND CLEAN

Both residents and visitors view downtown Boulder as clean and safe which is the core mission of the Business Improvement District. Overall, 92% of respondents think the district is clean and 90% say they feel physically safe and secure while visiting. Consistent with past years as well as research conducted in comparable destinations nationwide, visitors rate downtown higher than locals.



CUSTOMER EXPERIENCE ALSO POSITIVE FOR DOWNTOWN

Customer service in restaurants and retailers was also rated highly by locals and visitors along with the variety of shops and restaurants. Visitors, in particular, rated the variety of retail shops and restaurants highly at 4.4 out of 5. Locals were less enthusiastic but still positive assigning a rating of 4 out of 5 to the assortment of options downtown.

Key Findings - Visitors



TEXAS, CALIFORNIA AND ILLINOIS ARE TOP STATES FOR VISITORS

These three states have been the largest contributors of visitation in our surveys in 2016 and 2018 as well as in 2020. New York, Nebraska, Minnesota, Missouri and Pennsylvania were the other states with measurable representation in the 2020 survey. Over the 4-month survey span, out-of-state visitation peaked in August at 35% and dropped off in September to 28% and 24% in October.



HOTEL LODGING PEAKED IN AUGUST AND SEPTEMBER

The percentage of overnight visitors staying in hotels peaked in August and September before dropping back in October. Overall, hotels accounted for 39% of lodging compared to 27% for friends/family and 24% for RBO. In the summer of 2018, friends/family had the largest lodging share at 44% compared to 35% for hotels and 17% for RBO. The drop in staying with friends and family along with the jump in RBO likely reflects the national trend of travelers seeking social distance. While hotel occupancy numbers are down in 2020, it appears they have held onto their share of a smaller pool of travelers.

Key Findings - Visitors

METRO DENVER VISITORS ARE SIGNICANT FOR DOWNTOWN



Over the 4 months of surveying, visitors from Metro Denver counties outside of Boulder accounted for 20% of downtown traffic. This number increased in October to 24% with 13% of October visitors coming from the City of Denver. Marketing efforts aimed at metro area visitors appear to be working and are definitely worthwhile in a period where a strong preference for car travel and day trips is the new normal.



VISITOR SPENDING REMAINS CRITICAL TO DOWNTOWN

Over the course of the research, visitors far outspent locals on an average visit downtown. In the retail category, people from outside the Boulder area spent more than double the average for local residents (\$88 vs. \$40). Food and beverage spending by tourists was more than triple that of locals per visit at \$97 vs. \$29. These findings are consistent with past research and reinforce the importance of visitors and their spending to the downtown economy.

Key Findings - Visitors

AIR TRAVELERS STILL AN IMPORTANT PART OF VISITOR MIX



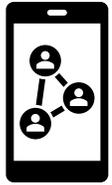
The percentage of travelers who flew into DIA or other regional airports averaged nearly 20% over the course of the July-October period. However, for overnight visitors, the split was roughly 50/50. While US air travel is down dramatically, this is still a significant portion of visitors and illustrates the importance of DIA. National research is increasingly showing greater comfort levels with flying as a mode of travel. However, with renewed Covid spikes in destinations along with a continued dearth of business travel, the recovery of air traffic will likely continue to be slow for the foreseeable future.

LENGTH OF STAY AND ROOM RATES WERE STRONG



Although the average stay dropped to 3.3 nights in October, the average for the 4-months was a relatively strong 4.1 nights. This is slightly higher than the 2016 and 2018 summer average of 3.9 nights. Nightly room rates among respondents staying in Boulder (\$237) was higher than the publicly reported rate of \$162 and likely reflects a large percentage of survey respondents staying in downtown hotels with higher rates than other local properties.

Key Findings - Visitors



SOCIAL MEDIA IMPORTANT TO TRIP PLANNING

While most visitors to Boulder relied on prior personal experience or word of mouth, social media platforms were also important with 20% of travelers using Facebook, Instagram, etc. for trip planning. The Downtown Boulder website along with printed visitor guides were each used by about 5% of travelers.



VISITORS ALSO SPENT TIME IN ESTES PARK AND DENVER

Among out-of-town visitors, the majority made Boulder their only stop which is likely due to the high number of day trippers in the sample. However, Estes Park was visited by 27% and Denver was a stop for 20% of those traveling to Boulder. Mountain resort towns were additional stops for 13%. More than a quarter of Boulder travelers also visiting Estes Park and Rocky Mountain National Park reinforces the importance of this nearby draw to Boulder visitor traffic.

Key Findings - Locals



RESIDENTS ARE RELATIVELY COMFORTABLE DINING INDOORS

Over 80% of locals think indoor dining should be allowed and nearly two thirds said they were somewhat or very comfortable dining indoors as long as safety protocols are enforced. This is a strong show of confidence compared to national research which shows 40-50% feeling comfortable. Any downtown marketing aimed at dining should reinforce safety protocols that diners can expect this winter season to keep customers safe. And note that 34% of locals are still somewhat or very uncomfortable.



EXPANDED OUTDOOR SEATING POPULAR WITH LOCALS

Three quarters of local respondents want to keep some or all of the expanded outdoor seating areas after the Covid restrictions are lifted. The same large majority favors keeping West Pearl and 10th Streets closed after Covid with 44% favoring permanent closures and 29% preferring closures during certain time periods. Note this research focused on people using and enjoying these expanded public spaces. It will be important to gauge sentiments from a broader resident sampling.

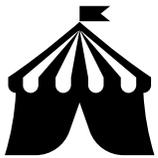
Key Findings - Locals

LOCALS ARE COMING DOWNTOWN LESS OFTEN



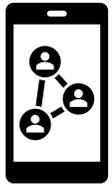
Over the summer/fall survey period, just 8% of residents said they would be coming downtown more often than usual in coming months compared to 41% who said they would make fewer visits than in a normal year. On a positive note, the number of those expecting to visit less often fell from 50% in July to 35% in October. The number of those who are “not sure” grew from 4% in July to almost 20% in October, illustrating the instability people are feeling as Covid spikes continue and the winter season begins.

PEOPLE ARE EAGER FOR OUTDOOR EVENTS



Just over half of local respondents (52%) said they would attend an outdoor event downtown if given the opportunity. However, that number grew from 48% in the August survey to 60% in October. Of those who would likely attend, nearly 80% said they would require safety protocols in place and enforced. This receptivity should be noted as planning evolves toward the spring season and viability of modified outdoor event formats.

Key Findings - Locals



SOCIAL MEDIA IS THE KEY CHANNEL TO REACH LOCALS

22% of local respondents are aware of Downtown Boulder advertising and messaging. While word of mouth is the top source of information on downtown, nearly a third of residents said they rely on social media for information. The Daily Camera and “other newspapers” combined are used by 22%. Individual merchant and restaurant websites were mentioned by 18% of local residents.



OUTDOOR SEATING STILL STRONGLY PREFERRED

While indoor seating with safety protocols in place is gaining acceptance, outdoor options are strongly preferred with 87% of respondents feeling comfortable eating outside. The compromise solution of eating under a tent is also seen as safe by most people with 74% feeling comfortable in that scenario. Any solutions to providing outdoor seating in colder weather will likely pay off with increased traffic for restaurants.

Key Findings - Locals



TRANSIENT ISSUE IS GROWING CONCERN

While 6% of locals say that conditions with transients have improved, 33% say they have gotten worse over the past few years. In 2018, 10% said things had improved and 10% said they had declined. Clearly the transient issue is a bigger concern this year than in the past. 37% say things have “stayed the same” vs. 31% in the last survey in 2018.



BOULDER RESIDENTS ARE COMFORTABLE WELCOMING VISITORS

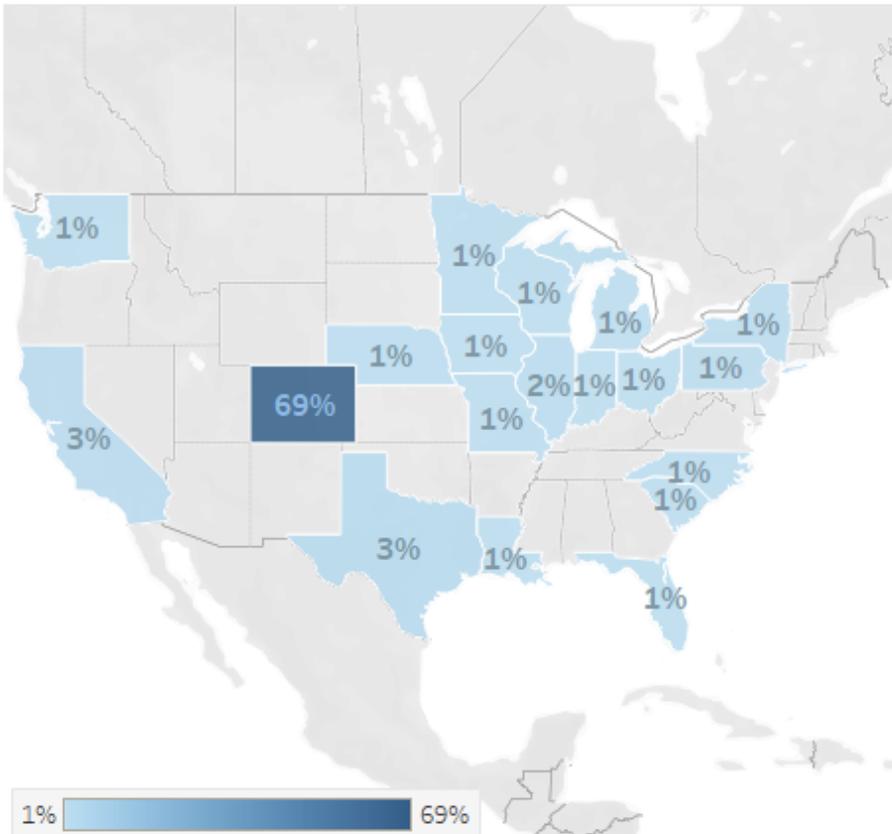
Boulder residents consistently supported welcoming visitors to town throughout the 4-month survey period with 81% in favor. However, most people did agree that some restrictions should be in place. Note also that locals are generally satisfied with the pace of reopening businesses in Boulder with 68% saying it was “about right.”

Demographics

Respondent Geography: State

Texas, California and Illinois are the top three states for visitors coming to Boulder. Overall 31% of downtown visitors were from outside of Colorado. Predictably, that percentage dropped in October but is still substantial at 24%

US State - Overall



*States representing less than one percent of respondents not shown.

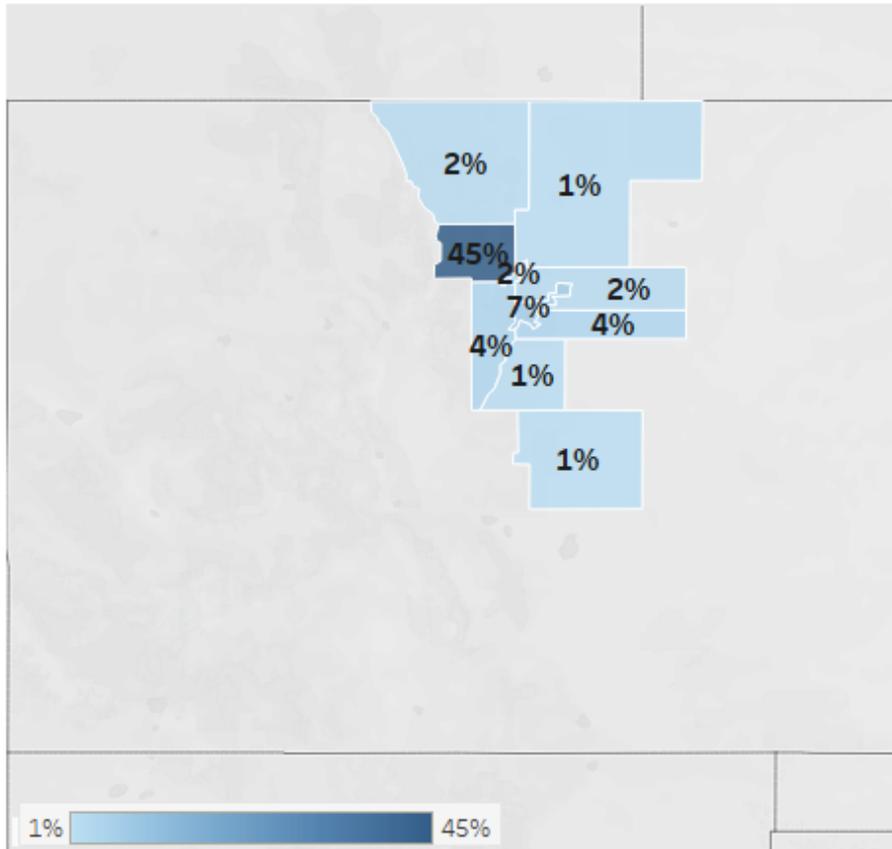
State: Top 10 by Month

	Overall	July	Aug	Sept	Oct
Colorado	69%	69%	65%	72%	76%
Texas	3%	3%	5%	3%	5%
California	3%	2%	5%	3%	
Illinois	2%	2%	2%	1%	2%
Nebraska	1%	2%	2%		
Minnesota	1%	2%	1%		
New York	1%	1%	4%	2%	1%
Missouri	1%	1%	3%		2%
Pennsylvania	1%	1%	1%	2%	
Other	16%	17%	11%	17%	14%
n=	836	534	94	104	104

Respondent Geography: County

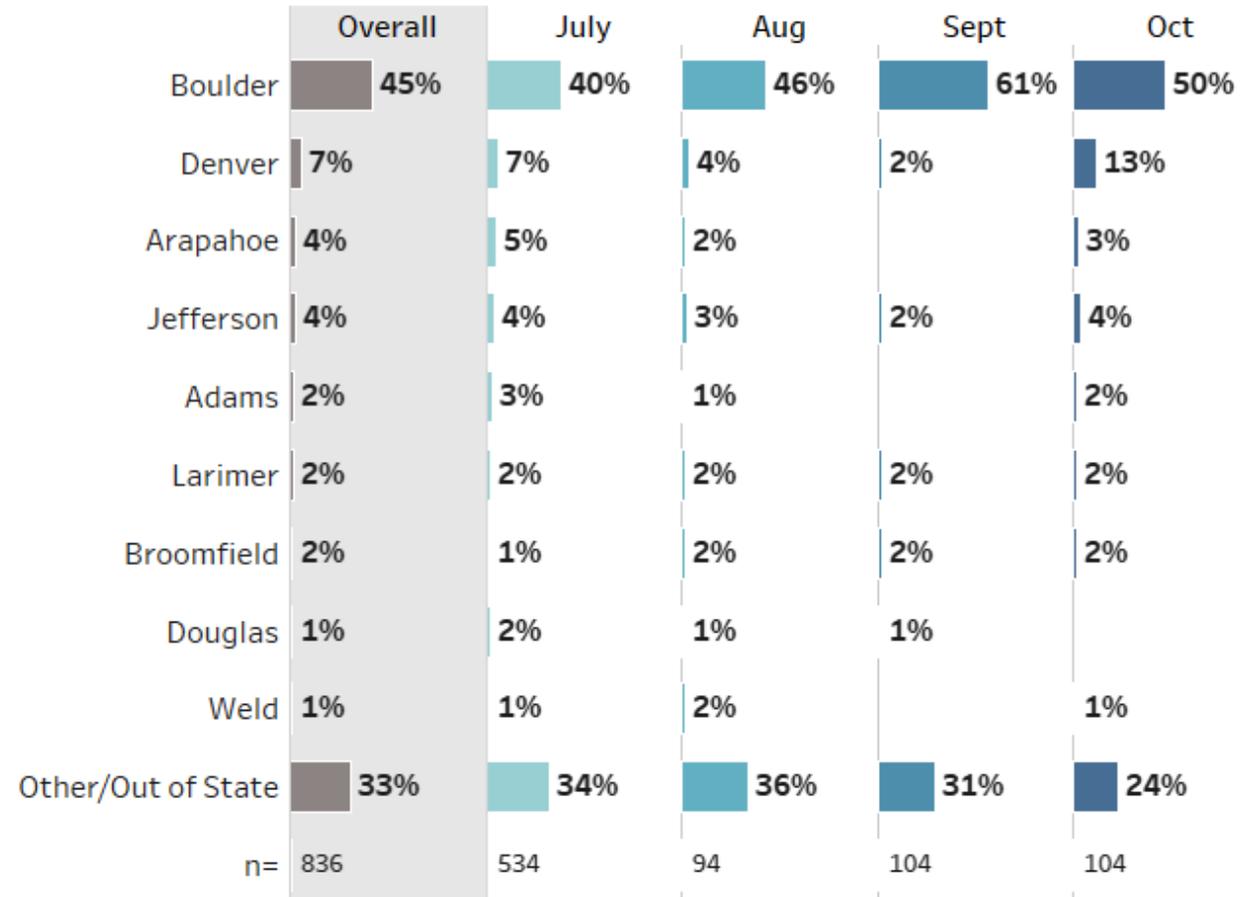
Over the summer and fall, 1 in 5 downtown visitors came from Denver metro counties outside of Boulder County with Denver residents being most likely to visit.

Colorado County - Overall



*Counties representing less than one percent of respondents not shown.

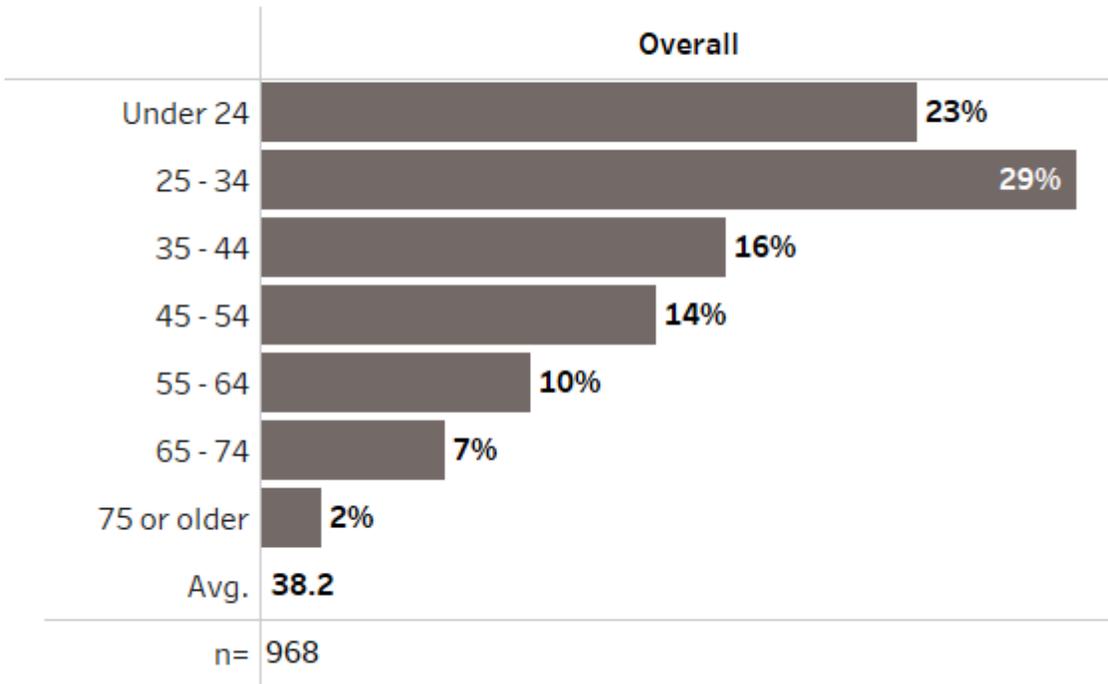
Colorado County: Top 10 by Month



Age/Gender

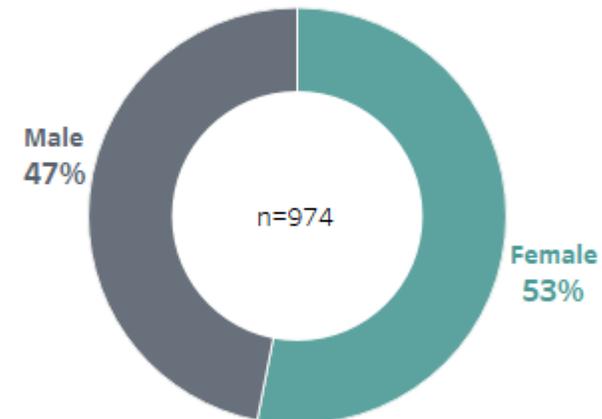
The average age increased over the 4-month sampling period as older residents grew more comfortable going out to shop and dine.

Age of respondent



Source: RRC Associates

Respondent Gender

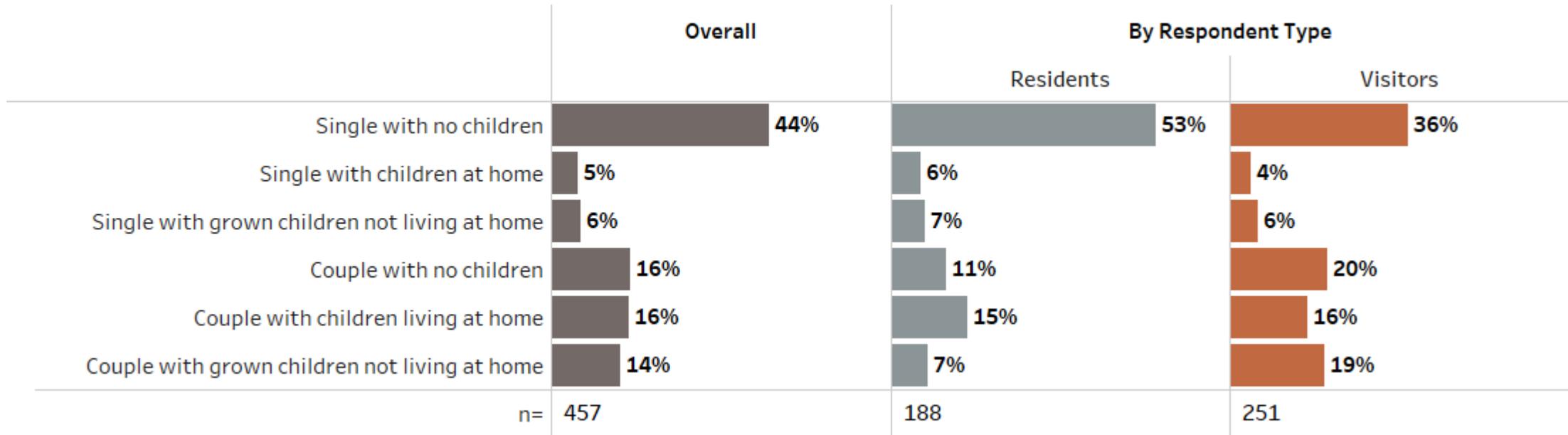


Source: RRC Associates

Household Status

20% of visitors have children living at home

What category best describes your household status?

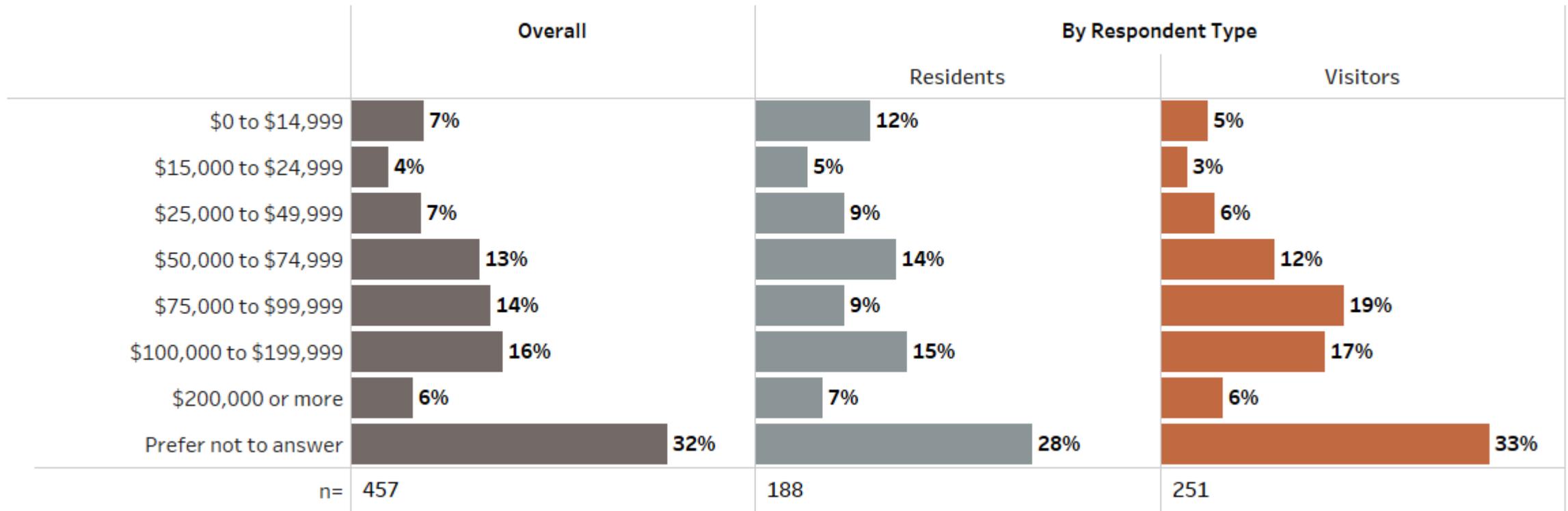


Source: RRC Associates

Annual Household Income

Overall downtown visitors in 2020 were not as affluent as in past years. 22% of respondents had HH incomes of \$100,000 or more compared to 31% in 2018 and 37% in 2016. This is likely due in part to the younger age of downtown visitors earlier in the summer.

Which category best describes your annual household income?



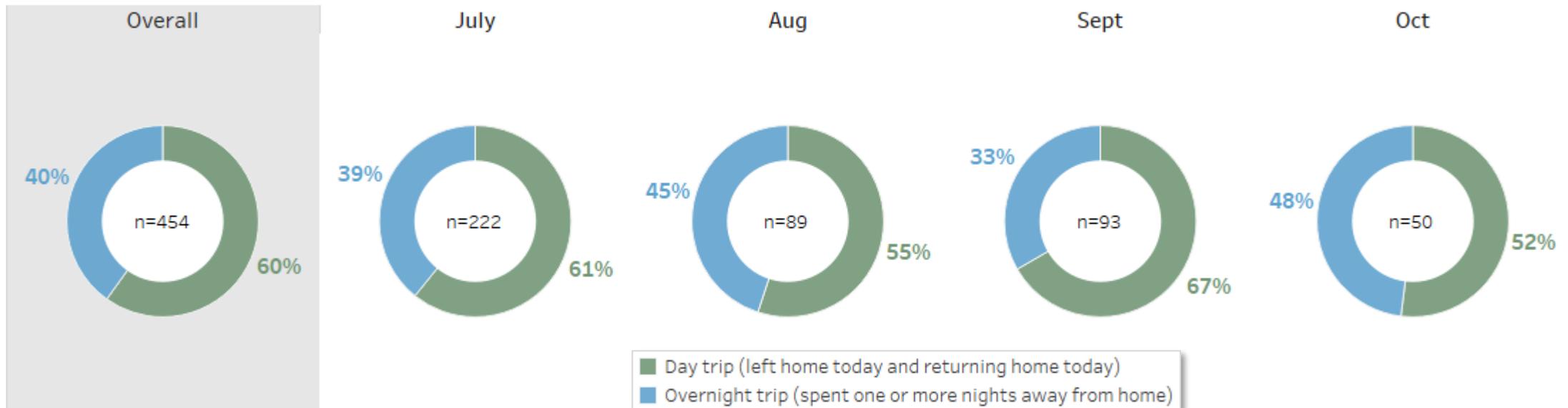
Source: RRC Associates

Visitor Type & Activities

Visitor Type

Overall, 60% of visitors from outside the Boulder area were on a day trip from home vs. 40% on an overnight trip. Boulder's strategic location on the Front Range allows diversity of visitor types.

Which best describes your visit to Boulder?

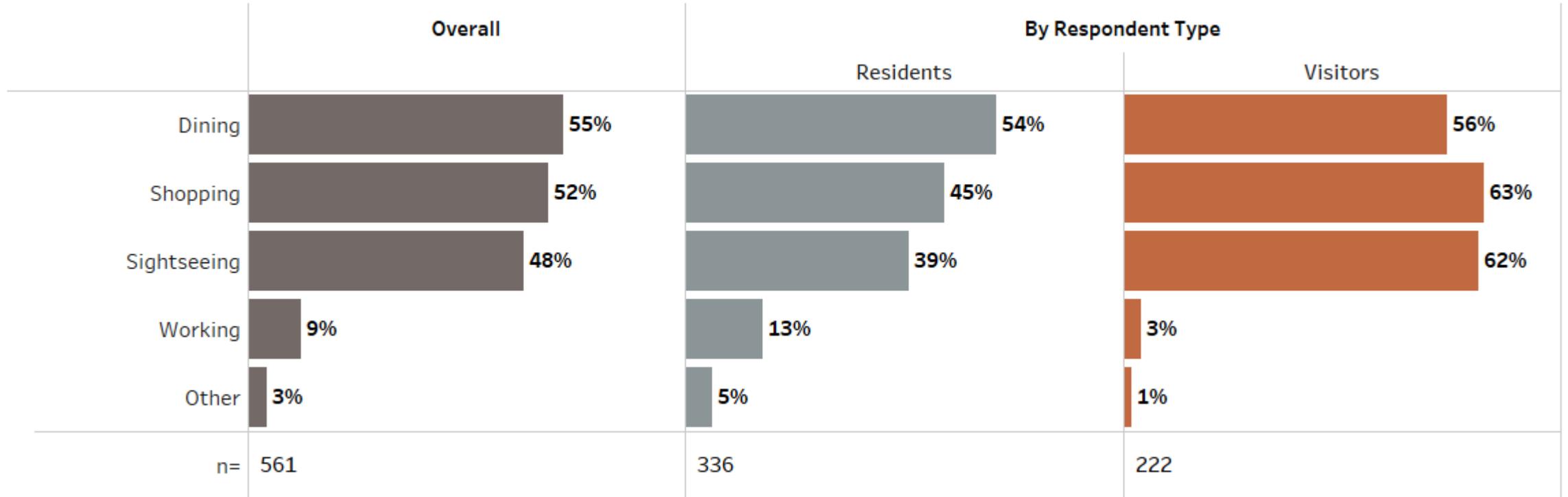


Source: RRC Associates

Activities

Consistent with past years, dining is the top overall activity downtown followed closely by shopping. Note that visitors were more likely to shop than dine.

What activities are you engaging in on your visit downtown today? (Check all that apply)



Source: RRC Associates

COVID-19

Feeling of Safety

89% of people feel somewhat or very comfortable visiting downtown Boulder – a positive reflection on Covid policies.

Thinking about the pandemic and related precautions, how safe and comfortable do you feel spending time in downtown Boulder today?

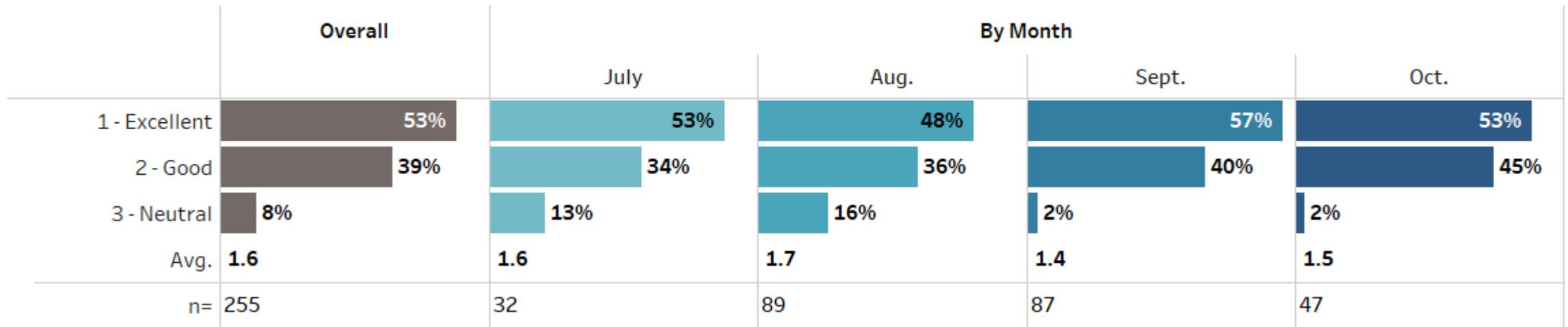
	Overall	By Respondent Type		By Month			
		Residents	Visitors	July	Aug.	Sept.	Oct.
1 - Very comfortable	44%	36%	53%	38%	50%	55%	51%
2 - Somewhat comfortable	45%	51%	40%	49%	43%	38%	42%
3 - Somewhat uncomfortable	9%	11%	7%	11%	7%	6%	6%
4 - Very uncomfortable	1%	2%	0%	2%		1%	
Not sure	0%	1%		0%		1%	1%
Avg.	1.7	1.8	1.5	1.8	1.6	1.5	1.6
n=	929	496	411	561	94	167	107

Source: RRC Associates

Boulder's Handling of COVID-19

92% of downtown visitors feel that Boulder has done a good or excellent job in reaction to Covid.

Based on your experience and travels, how would you rate Boulder's overall reaction and policies to COVID-19 and the reopening process?



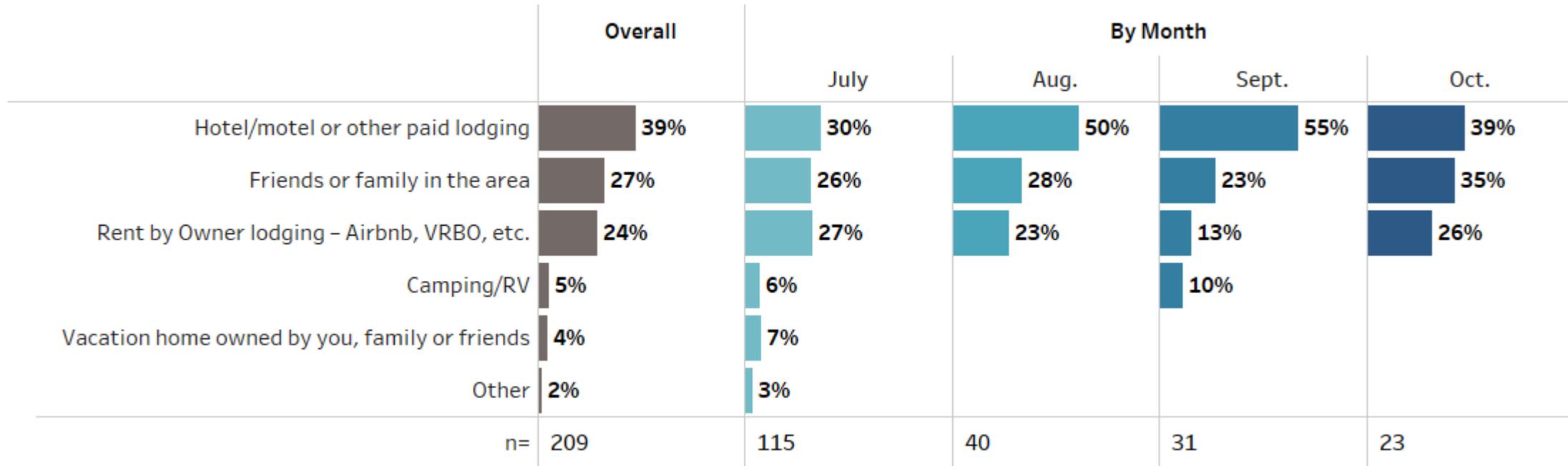
Source: RRC Associates

Visitor Questions

Accommodation Type

Commercial lodging accounted for 39% of overnight stays compared to 35% in 2018. Vacation rentals increased to 24% from 17% likely due to the desire for social distancing.

What type of lodging are you staying in on this visit to the area?

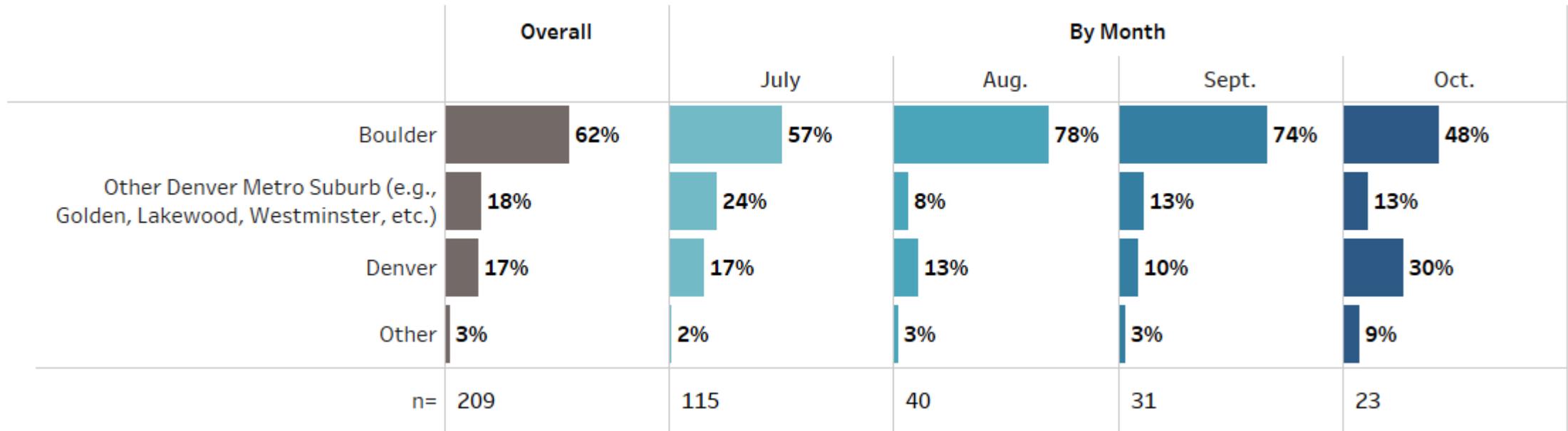


Source: RRC Associates

Location of Accommodations

Most overnight visitors stayed in Boulder especially in August and September.

Where are you staying?

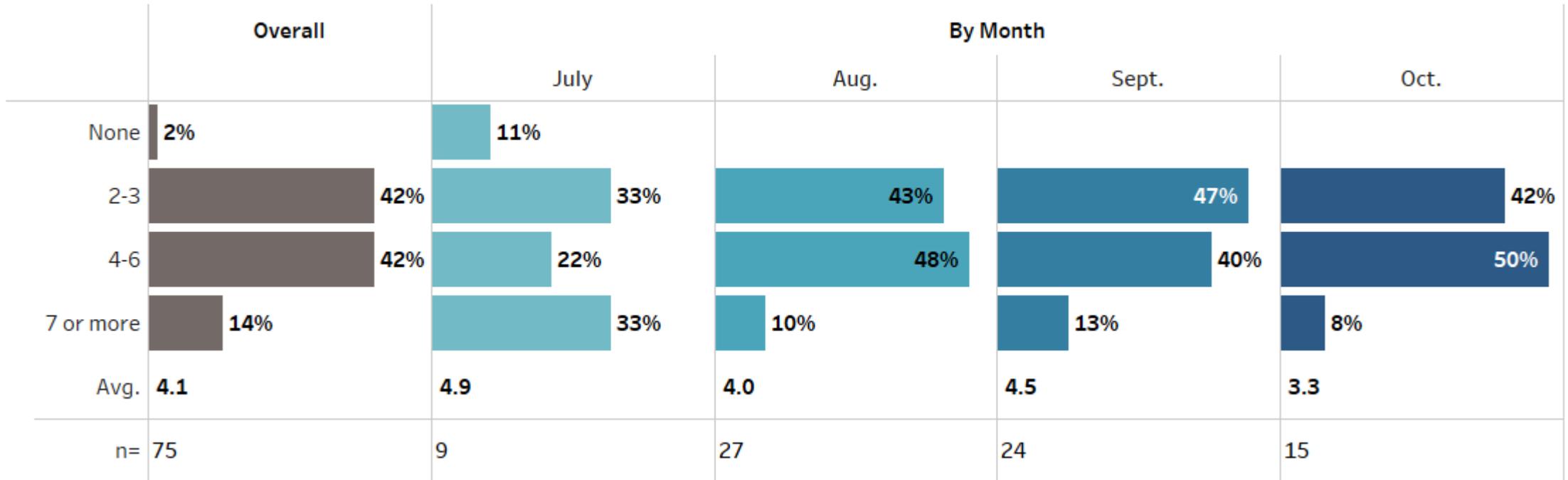


Source: RRC Associates

Number of Nights

Average stay for overnight visitors averaged 4.1 nights – slightly higher than 2016 and 2018 (3.9 nights)

How many nights did you stay in the Boulder area on this trip?

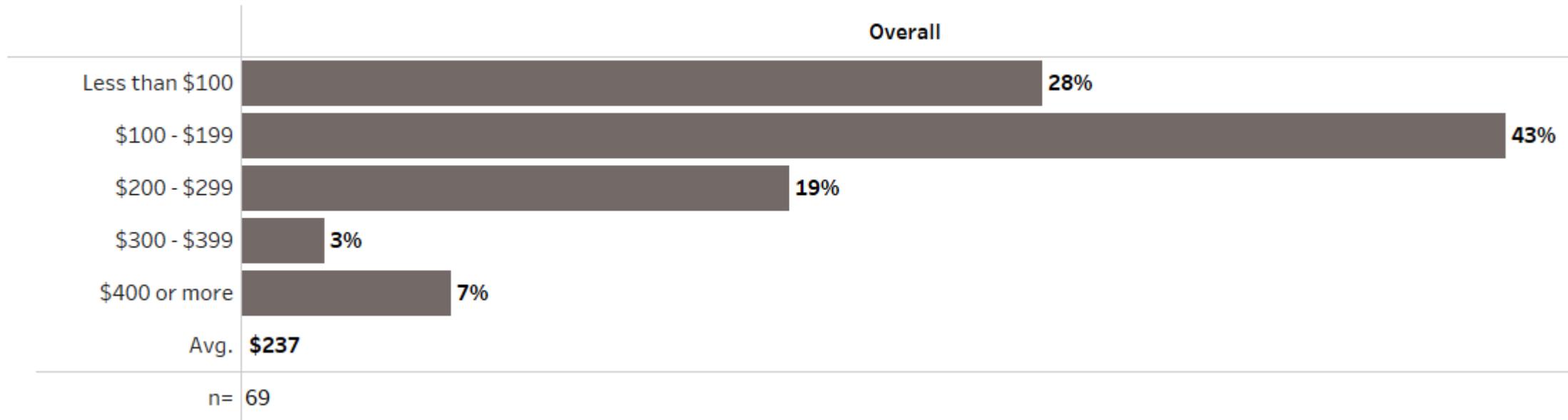


Source: RRC Associates

Nightly Rate

Among downtown survey respondents, the average nightly rate for lodging was \$237

What was the nightly rate for your lodging accommodations?

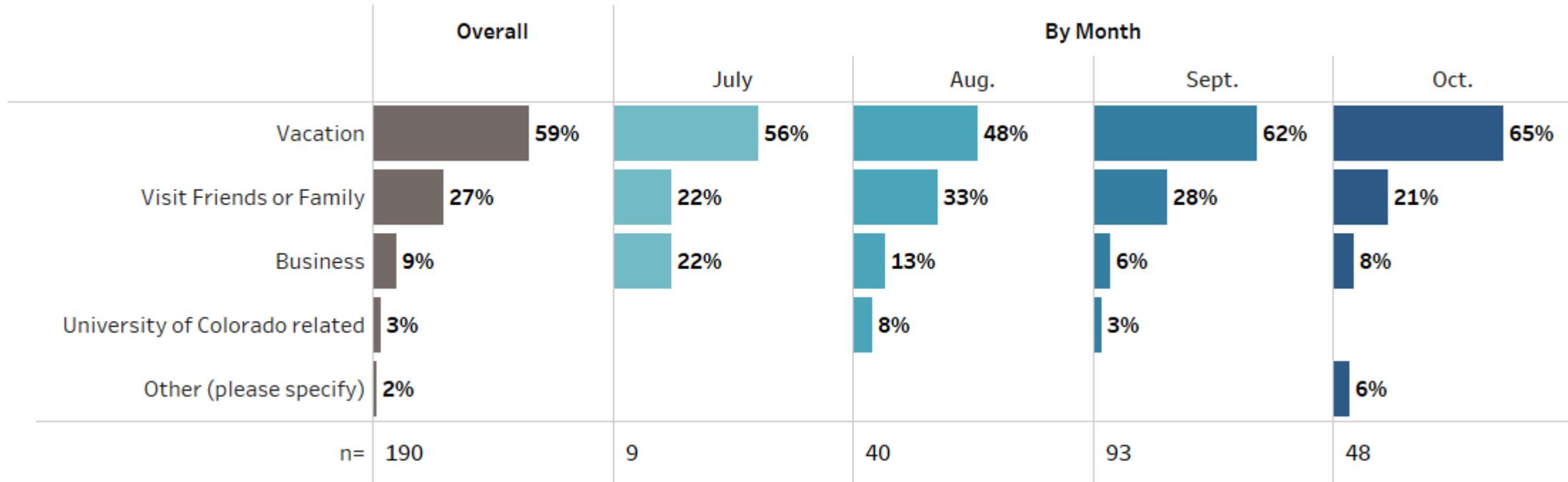


Source: RRC Associates

Primary Reason for Visit

Vacation and visiting friends/family were the primary drivers of visitation. Some of the “business” travel may be related to people traveling to work remotely.

What was the primary reason for your visit to Boulder?

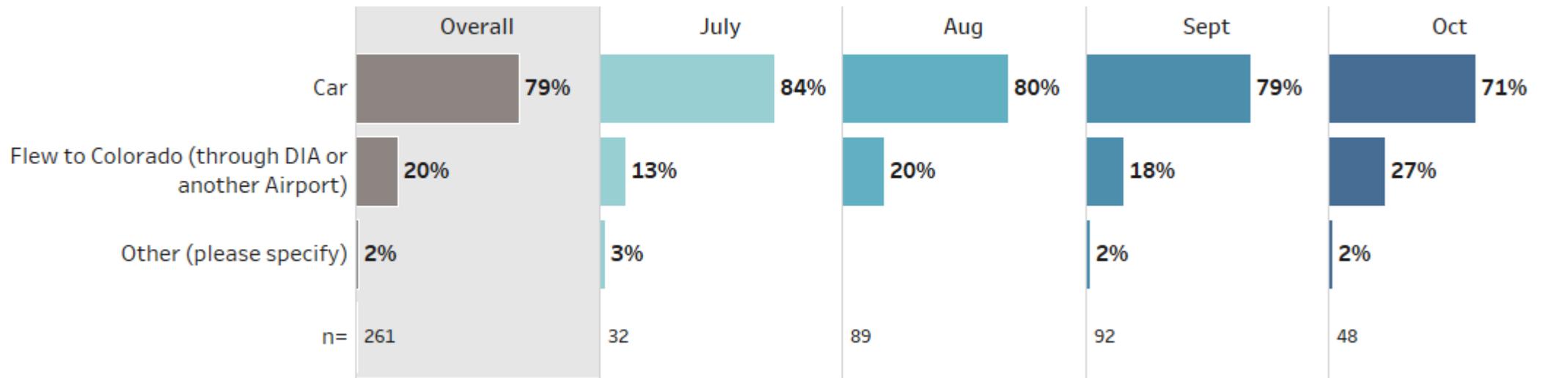


Source: RRC Associates

Mode of Transport

While road trips were dominant this summer and fall, air travel was still important, accounting for 20 percent of visitors from outside the Boulder area. For overnight visitors, the split was roughly 50/50.

What was the primary way you traveled to the Boulder area?

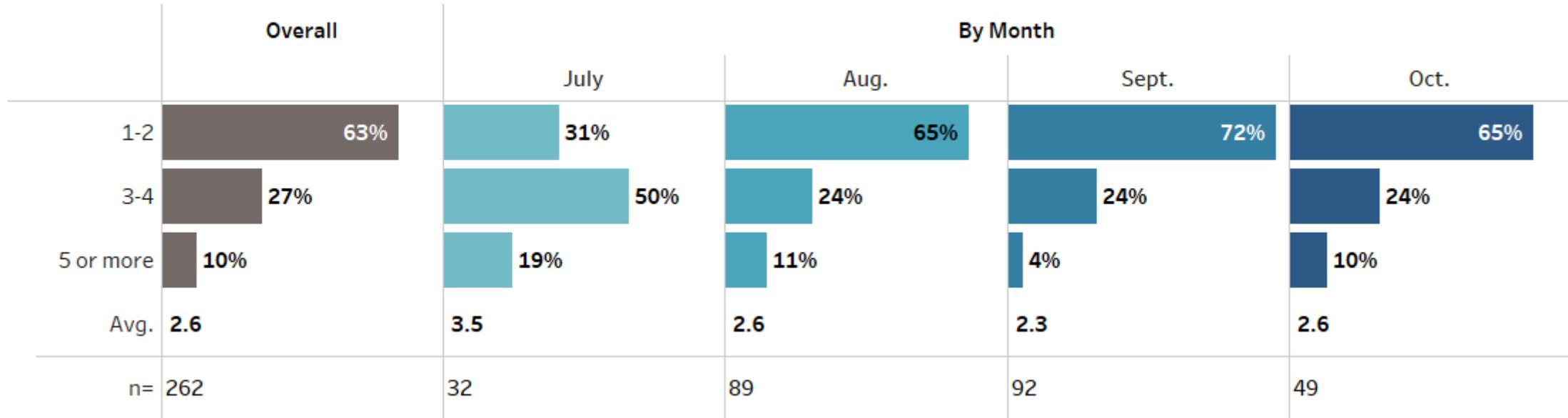


Source: RRC Associates

Number of People in Travel Party

At 2.6, the average size of travel parties in 2020 is exactly the same as 2018 and in sync with prior years as well.

How many people were in your travel party?

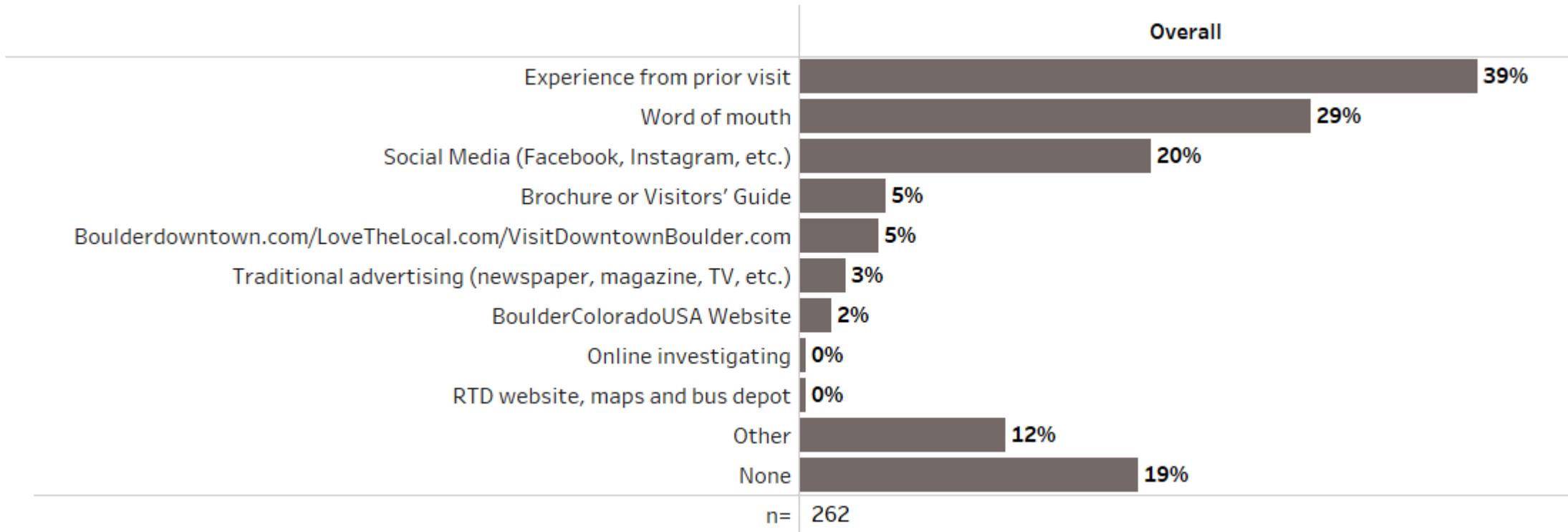


Source: RRC Associates

Information Sources

Aside from past visits and word of mouth, social media is the top choice for information on visiting Boulder and downtown.

What information sources did you use in planning your trip to Boulder and your visit to downtown? (Check all that apply)

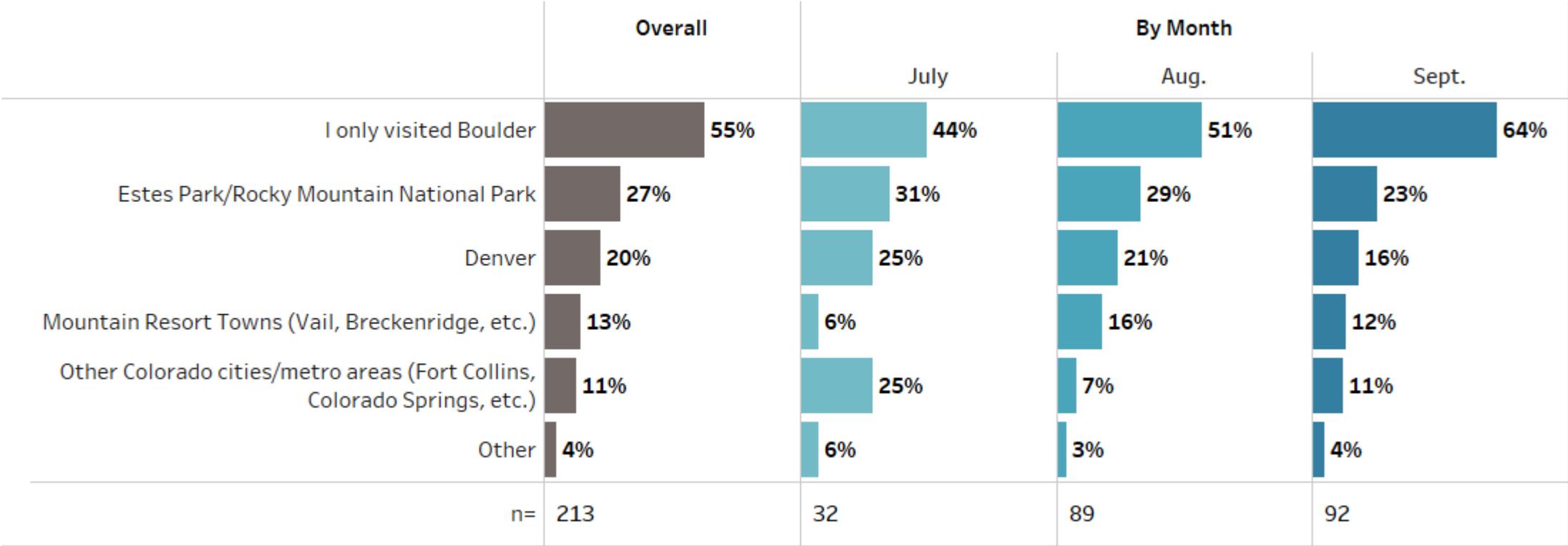


Source: RRC Associates

Other Locations Visited

A significant number of Boulder visitors also stopped in Estes Park and Denver.

Where else did you visit during your most recent trip to Boulder?



Source: RRC Associates

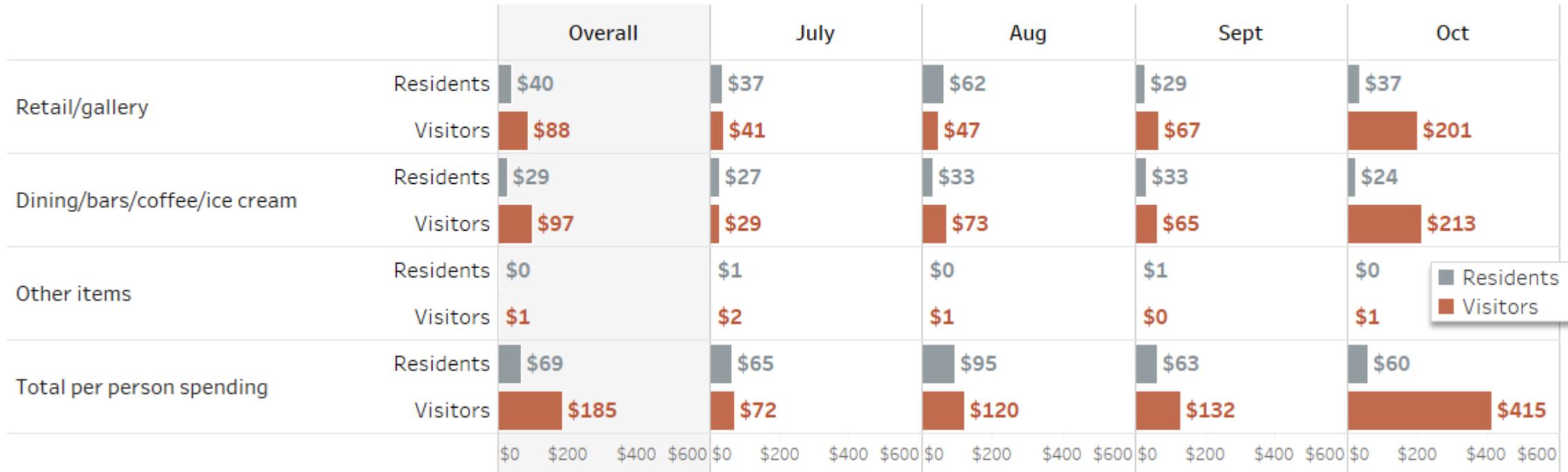
Spending

Spending

Visitors spending per capita increased sharply in October and was almost triple that of locals over the 4-month span. This wide margin is consistent with past years' research.

Overall, how much did you and your travel party spend on the following in downtown Boulder during your most recent visit?

Average Spend Per Person Per Day, Excludes Lodging

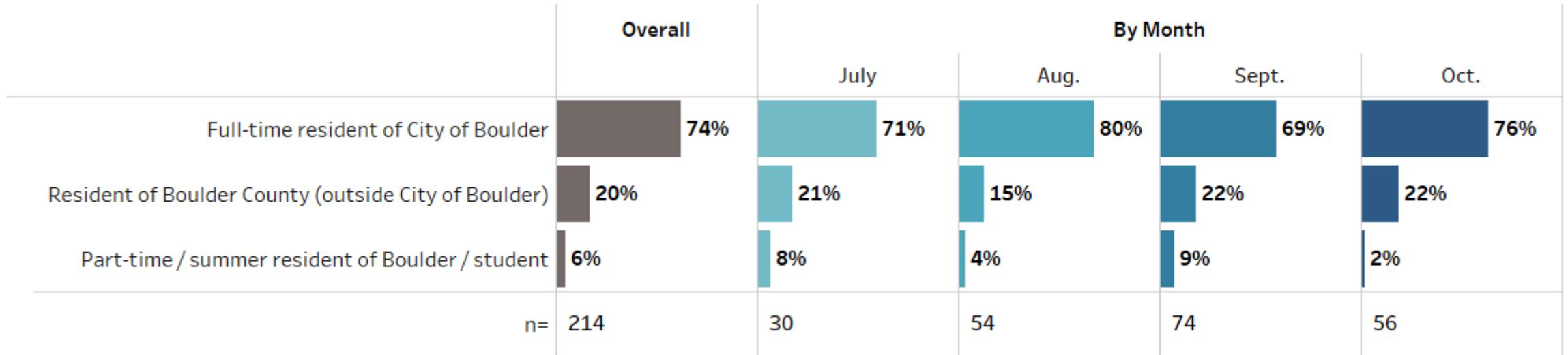


Local Resident Questions

Resident Type

Three quarters of local residents live in the city of Boulder with 20% living elsewhere in the County.

Where is your primary residence? Are you a...

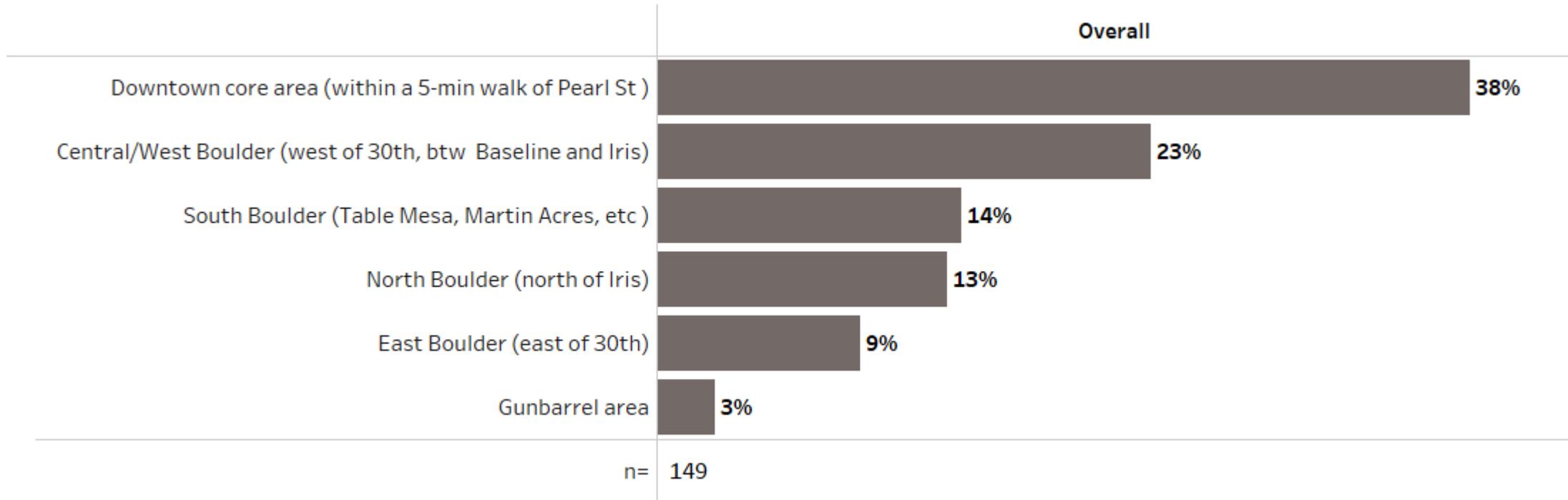


Source: RRC Associates

Location of Residence

The number of city residents living in downtown is similar to 2018 (38% vs. 35%).

In which part of Boulder do you live?

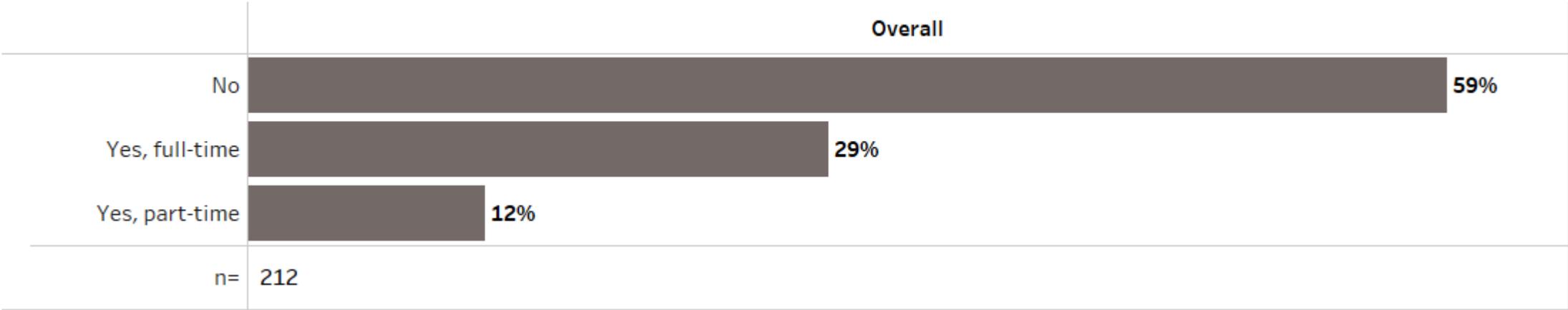


Source: RRC Associates

Employment in Downtown Boulder

Among area residents, about 4 out in 10 work downtown. Despite the trend toward working remotely, employees are still a large part of the downtown user mix.

Are you a full-time or part-time employee within the Downtown Boulder area?

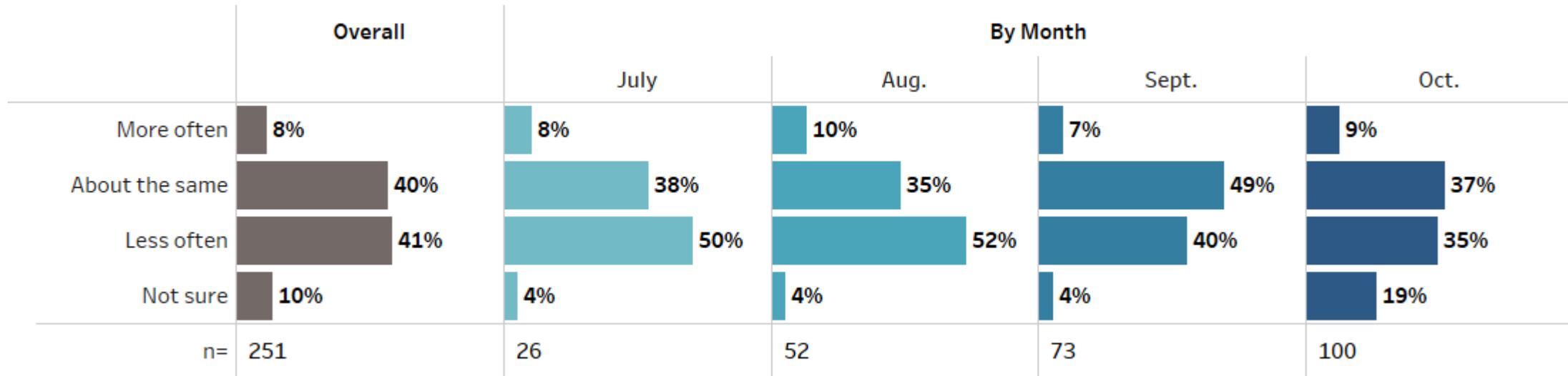


Source: RRC Associates

Downtown Visitation Relative to “Normal”

A significant number of local residents are planning to come downtown less frequently. This is likely due to the trend toward working remotely and the lack of events downtown – both larger outdoor events and those occurring in venues.

Compared to a “normal” summer, how often do you expect to visit downtown Boulder?

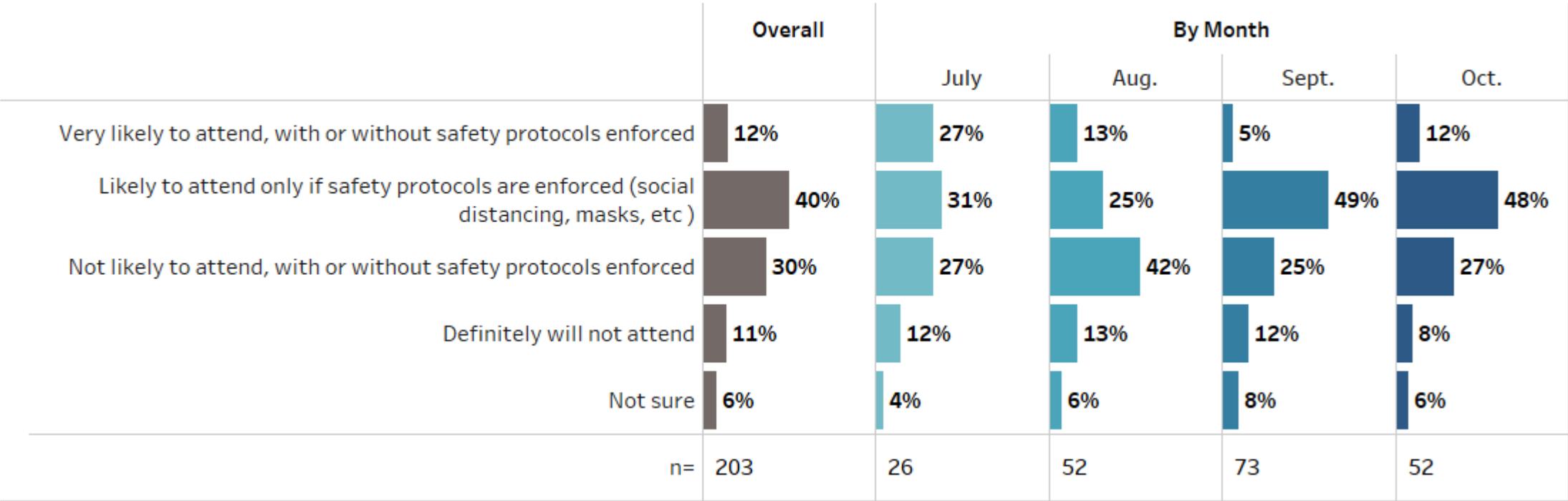


Source: RRC Associates

Outdoor Event Attendance

Over half of residents are likely to attend an outdoor event in downtown if one occurs. Of those who would attend, a large majority would only feel comfortable if safety protocols are enforced.

If an outdoor event such as a concert or art show was to take place in downtown Boulder in the next 3-4 months, how likely would you be to attend?

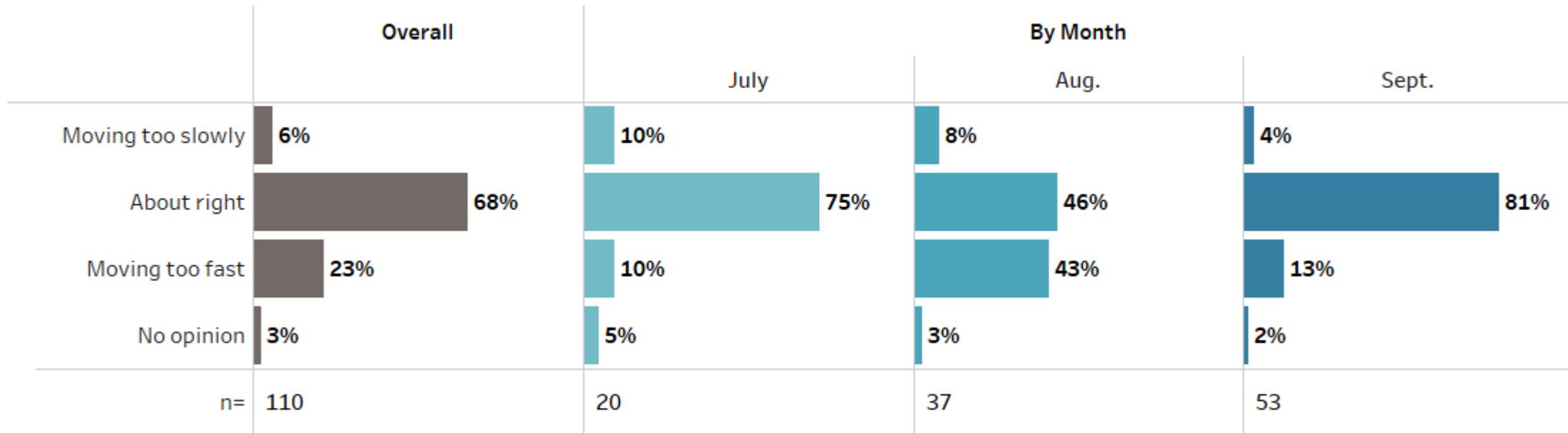


Source: RRC Associates

Pace of Reopening

Local residents feel that the reopening process was handled well in Boulder.

As a local resident, how do you feel about the speed of reopening businesses such as restaurants and retail in Boulder?

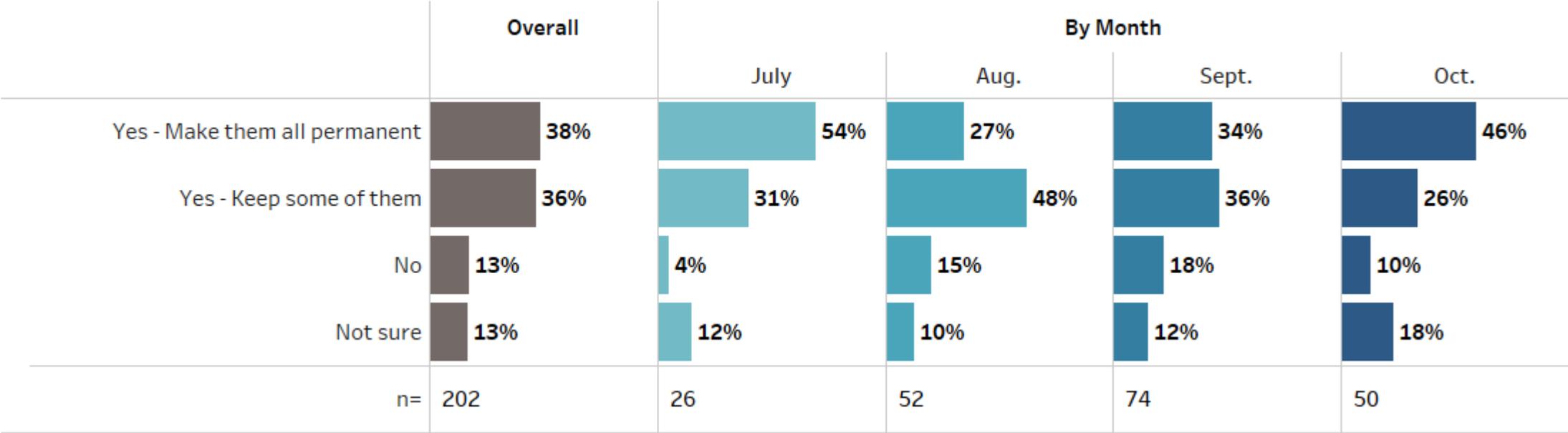


Source: RRC Associates

Outdoor Dining Expansion

Most people favor keeping at least some of the outdoor dining changes after Covid restrictions are lifted.

Regarding expanded outdoor dining and gathering spaces on streets, parking lots, and the Pearl Street Mall, do you support making those changes permanent after the COVID-19 restrictions have been lifted?

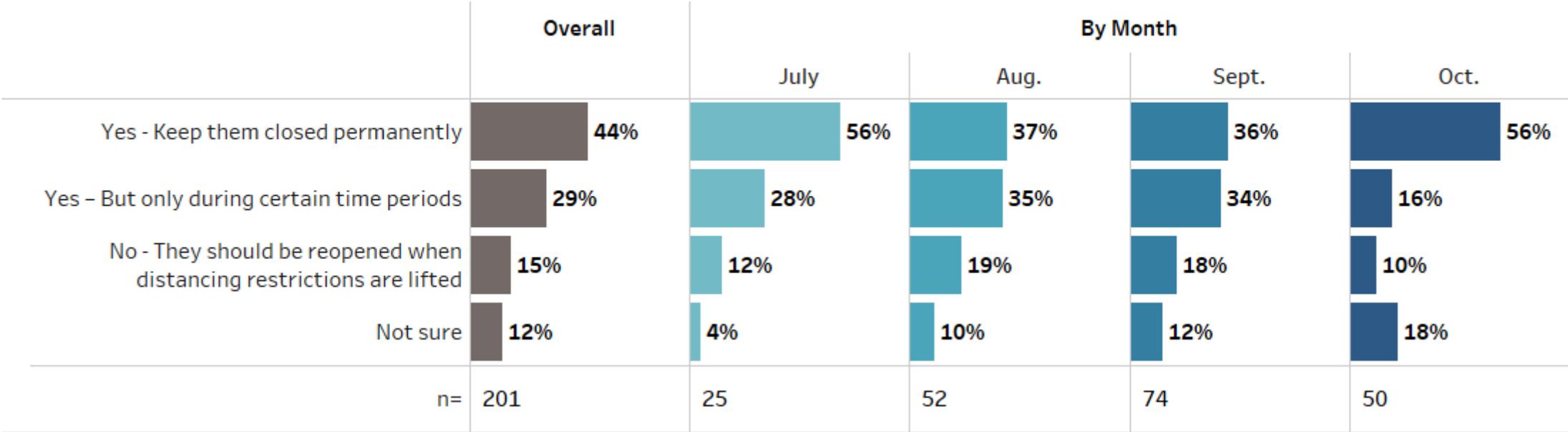


Source: RRC Associates

Support For Keeping Streets Closed

Most Boulder residents support keeping downtown streets closed all or part-time after restrictions are lifted.

Pearl Street from 9th to 11th Streets and a portion of 10th Street downtown have been closed to allow more dining and expanded public space. Do you support keeping those streets closed after COVID-19 restrictions are lifted?

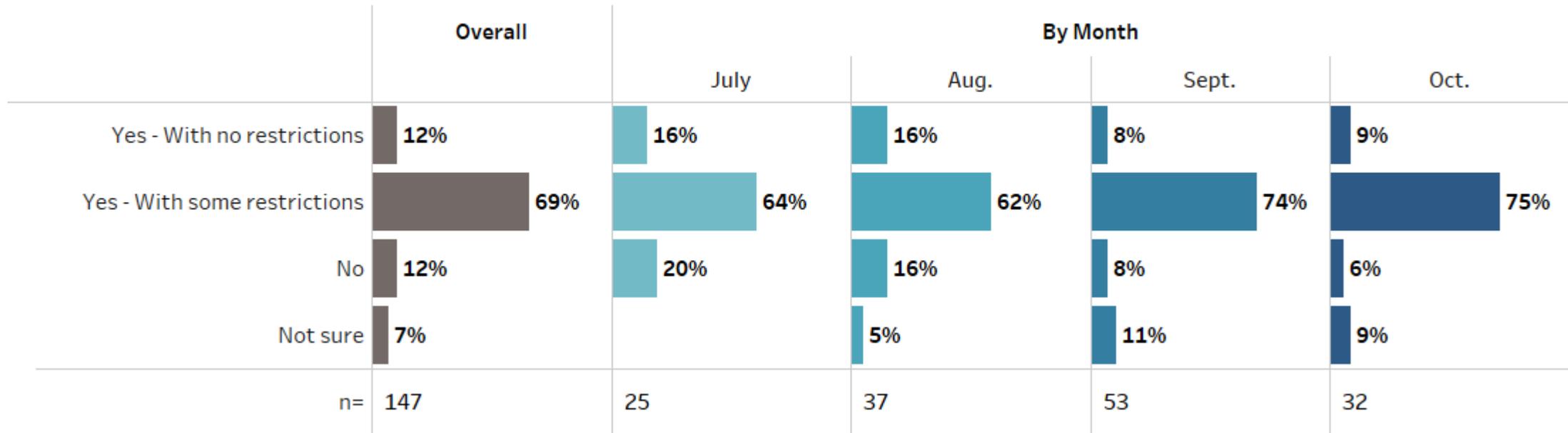


Source: RRC Associates

Welcoming Visitors

Residents are comfortable welcoming visitors to Boulder during the Covid period. This is consistent with research done in 2019 regarding attitudes toward tourism.

During this COVID-19 period, do you think Boulder should welcome visitors to the city as a way to support businesses and the local economy?

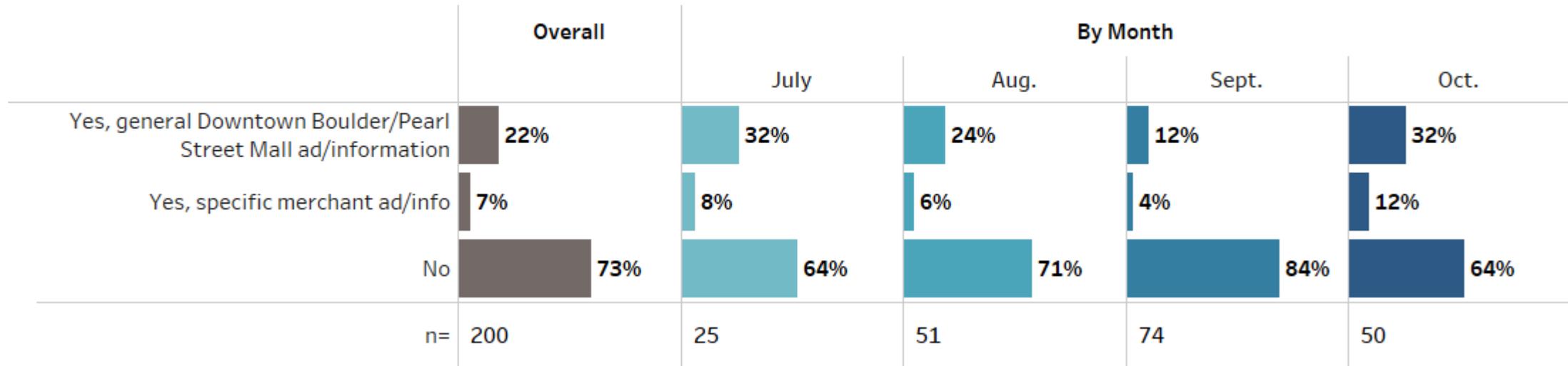


Source: RRC Associates

Awareness of Advertising/Information

About 1 in 5 residents is aware of Downtown Boulder advertising and messaging.

Were you aware of any advertising or information sources promoting Downtown Boulder in general or an individual Downtown merchant prior to your visit?



Source: RRC Associates

Advertising/Information Sources

Top media choices for information include social media and newspapers – both Daily Camera and others.

Which ads or information sources did you notice? (Check all that apply)

	Overall	By Month			
		July	Aug.	Sept.	Oct.
Word of mouth/Recommendations	42%	33%	46%	52%	33%
Facebook/Twitter/Instagram/Pinterest/YouTube/Other social media	31%	67%	26%	40%	23%
Individual restaurant or retail websites	18%	33%	36%	17%	5%
Other newspaper/publication	12%		3%	17%	16%
Daily Camera	10%	44%	8%	6%	9%
Other web page(s) (please specify)	6%		3%		14%
BoulderDowntown.com/LoveTheLocal.com/VisitDowntownBoulder.com	5%	44%	5%		4%
Downtown Boulder Visitor Guide	5%	56%		4%	2%
5280 Magazine	5%	22%		4%	5%
General article or feature article	5%	33%			7%
Digital Direct Mail	2%	11%			4%
Boulder Convention & Visitor Bureau Guide	1%		3%		2%
BoulderColoradoUSA.com	1%			2%	
n=	153	9	39	48	57

Ratings & Likelihood to Recommend

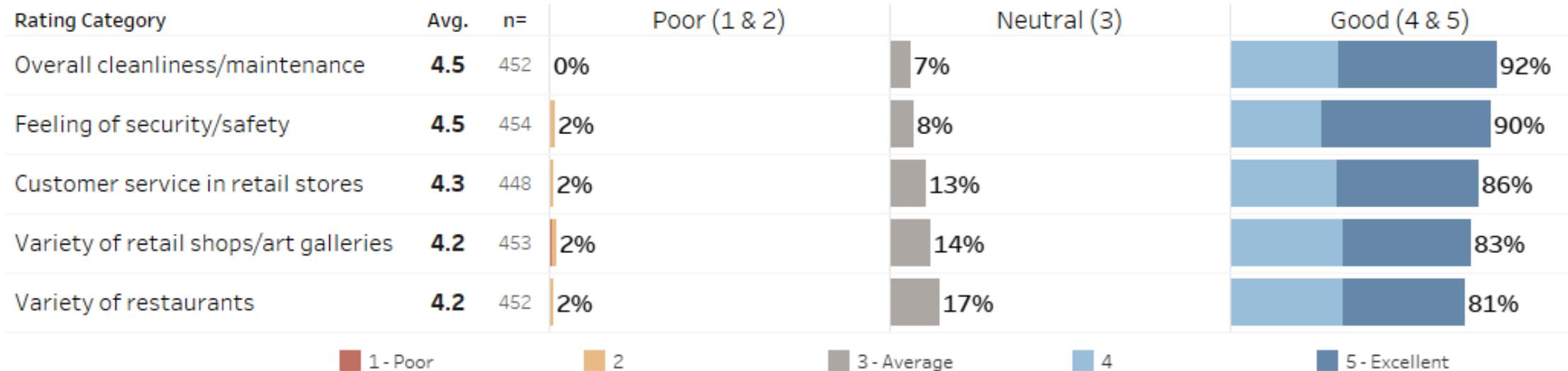
Downtown Boulder Ratings

Overall, ratings for downtown were excellent with people feeling the district is safe and clean.

Using a scale of 1 to 5 where 1 is poor and 5 is very good, how would you rate Downtown Boulder in terms of the following?

Overall Average and Percent Responding 1 - 5

*Categories are sorted in descending order by the average rating.



Downtown Boulder Ratings

While still a net positive score, downtown was rated lowest on the variety of shopping options offered.

Using a scale of 1 to 5 where 1 is poor and 5 is very good, how would you rate Downtown Boulder in terms of the following?

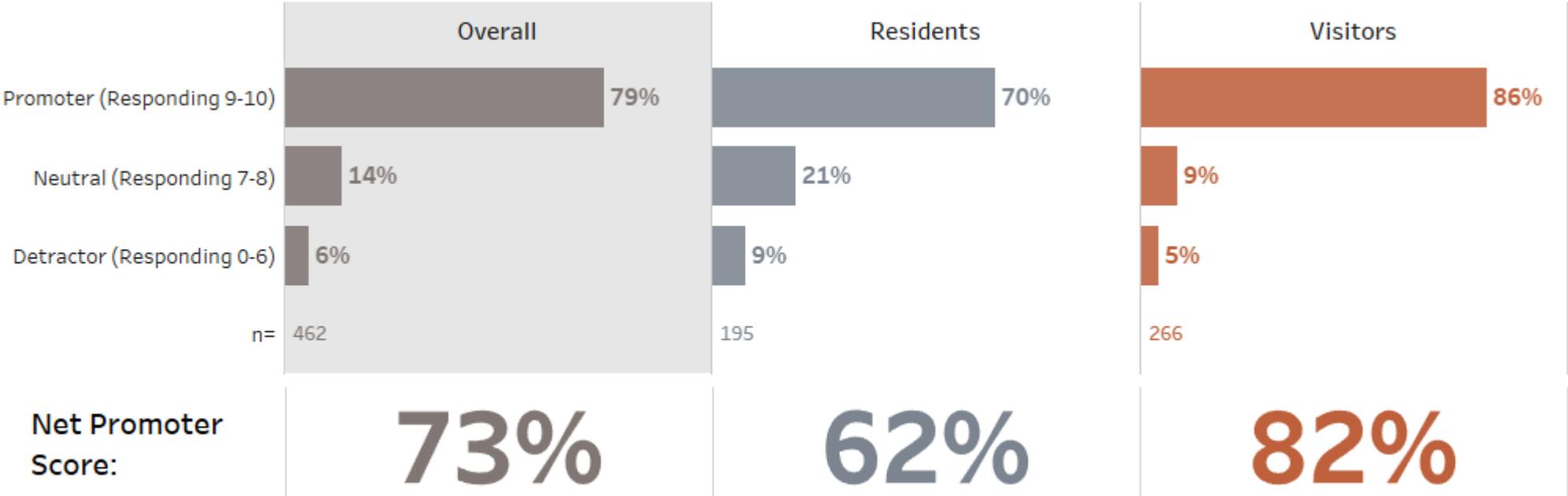
Average Rating by Visitor Type

	Overall	By Respondent Type	
		Residents	Visitors
Overall cleanliness/maintenance	4.5	4.4	4.5
Feeling of security/safety	4.5	4.4	4.6
Customer service in retail stores	4.3	4.2	4.4
Variety of retail shops/art galleries	4.2	4.0	4.4
Variety of restaurants	4.2	4.0	4.4

Source: RRC Associates

Likelihood to Recommend by Visitor Type

Net Promoter Scores (NPS) downtown are strong. Consistent with other destinations, visitors give their experience higher ratings than locals.

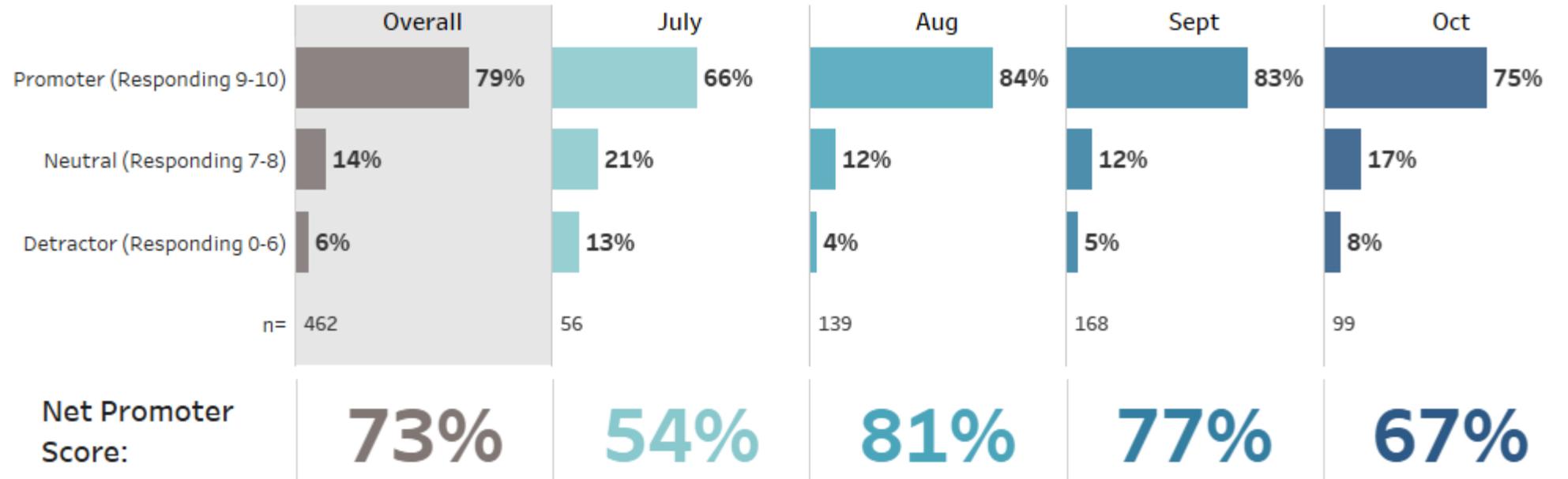


NPS score is the percent of promoters (9 & 10) minus the percent of detractors (0-6).

Likelihood to Recommend by Month

NPS scores saw a sharp drop in October, likely due to the higher ratio of locals surveyed.

Overall, how likely would you be to recommend downtown Boulder as a summer destination to a friend or relative?
Use a scale from 0 to 10 where 0 is Not at all likely and 10 is Extremely likely.



NPS score is the percent of promoters (9 & 10) minus the percent of detractors (0-6).

Likelihood to Recommend Comments

High marks for the people in Boulder and the quality of amenities showed up in comments on NPS.

Any comments on why you would or would not recommend downtown Boulder as a summer destination to a friend or relative?



167 comments :

Nice/great/beautiful people
People watching

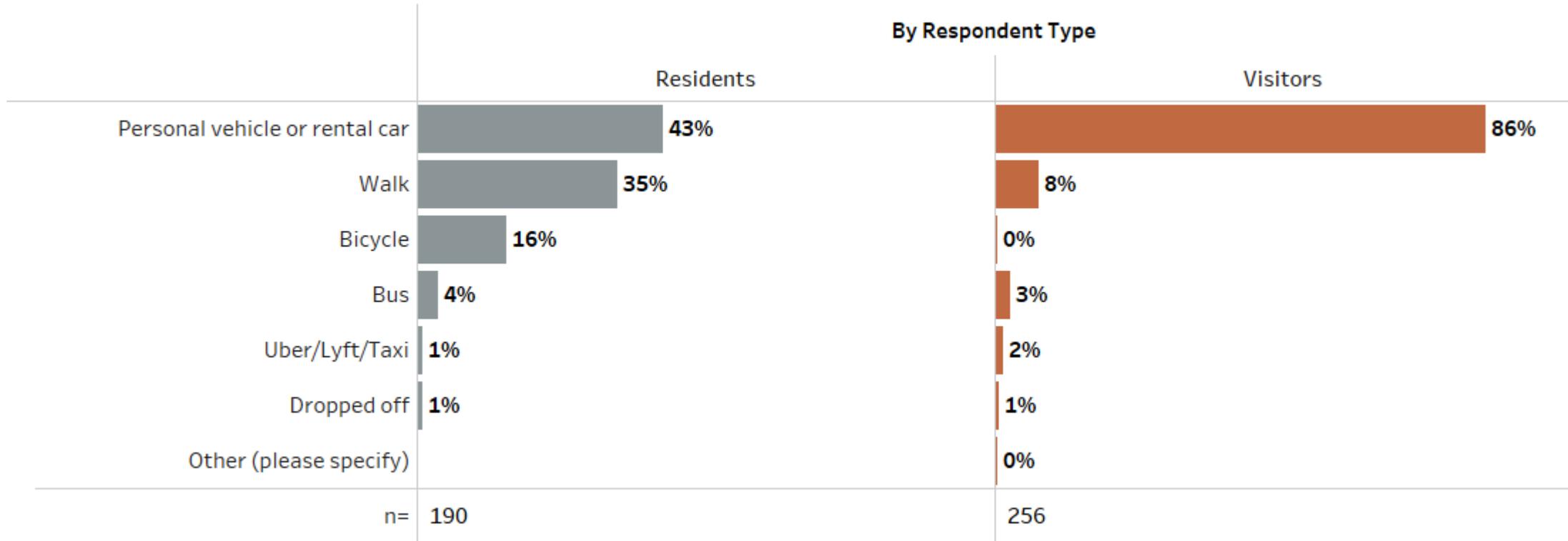
Nice people
Nice area/place
Nice restaurants

Transportation & Parking

Transportation to Downtown Boulder

Residents used a variety of modes to get downtown although personal vehicle use by city residents increased from 2018 (43% vs. 37%).

How did you get downtown Boulder on the day you were surveyed?



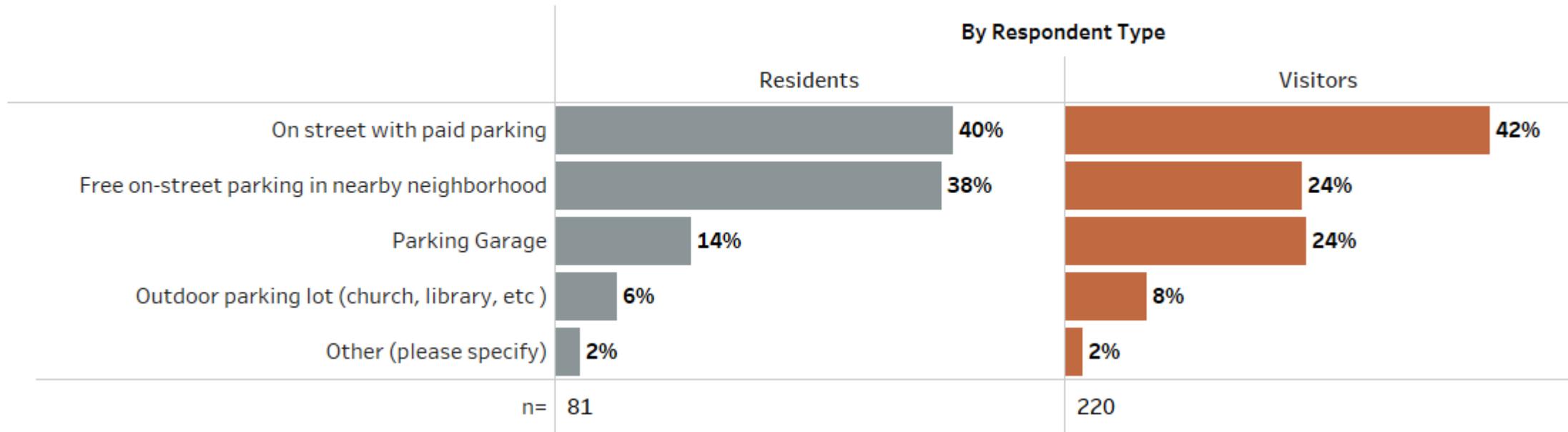
Source: RRC Associates

Parking Location

On-street parking – paid and unpaid- was the dominant choice of those who drove downtown.

[If used personal vehicle or rental car]

Where did you park on your downtown visit?



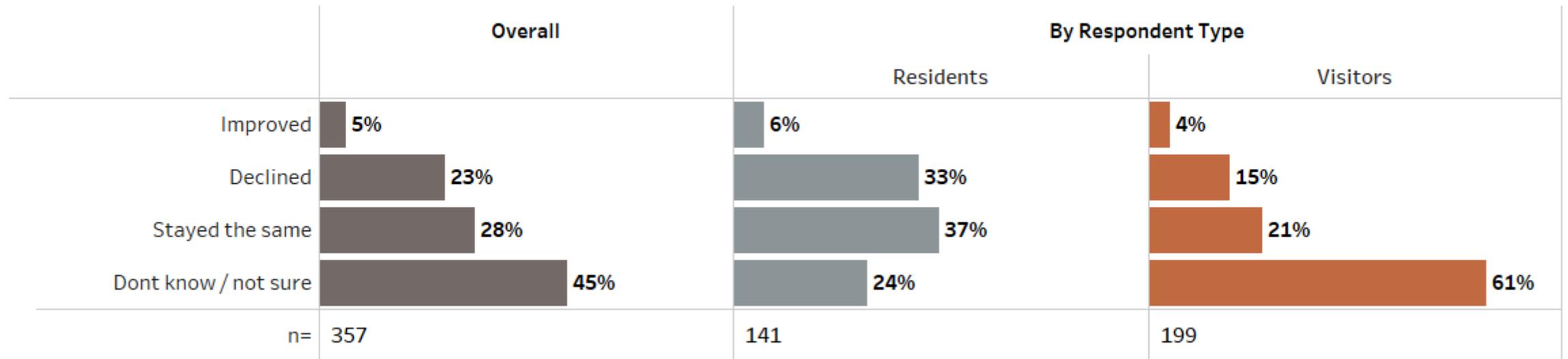
Source: RRC Associates

Additional Questions

Panhandling/Transient Situation

One third of residents feel the transient situation has gotten worse vs. 6% who think it has improved.

Over the past few years, would you say the situation with panhandlers / transients has:

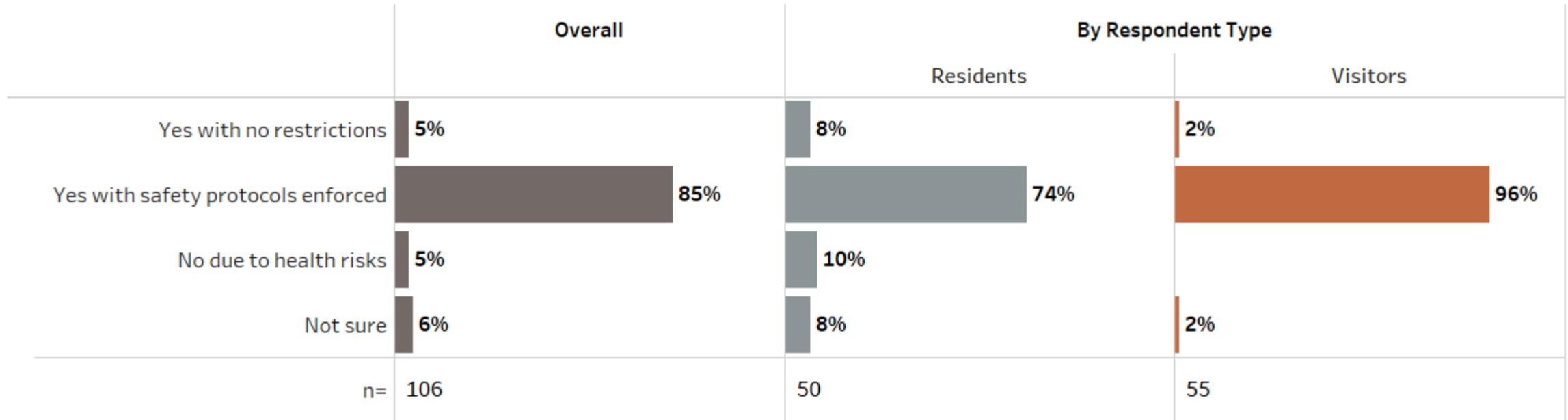


Source: RRC Associates

Indoor Dining in Winter

A wide majority of both residents and visitors think indoor dining should be allowed – with safety protocols enforced.

As winter approaches and Covid continues to be a concern, do you think restaurants should be allowed to offer indoor dining?

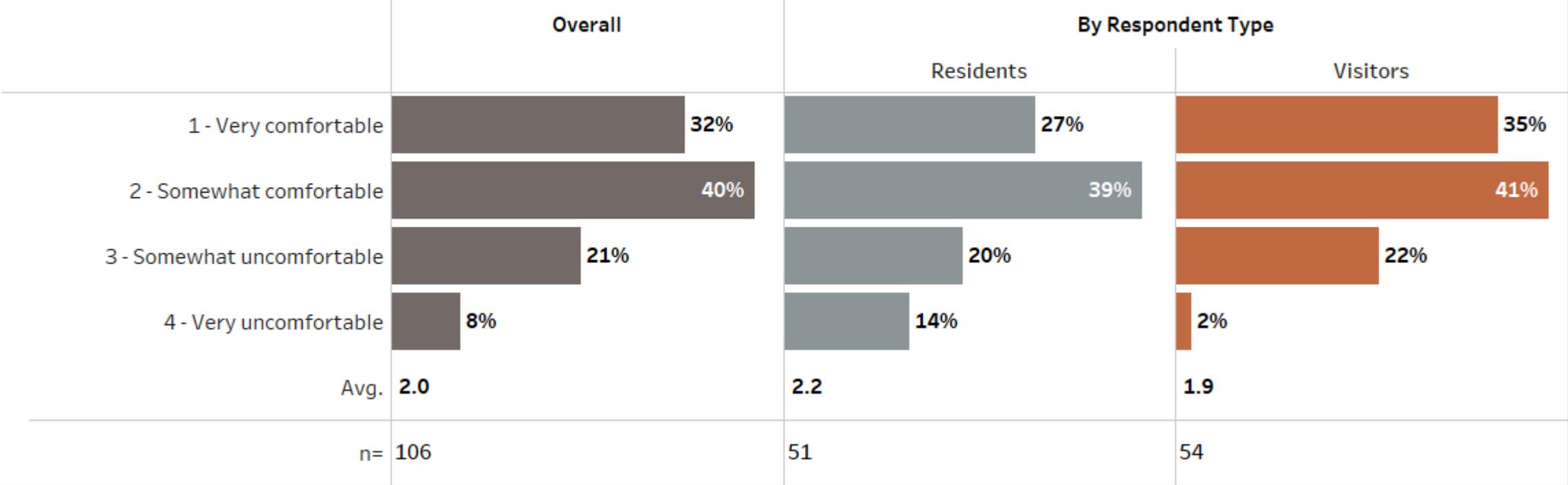


Source: RRC Associates

Comfort Level Eating Indoors

A majority also feel somewhat or very comfortable eating indoors with safety protocols. About one third of residents and one quarter of visitors are not comfortable eating indoors.

As the weather gets cooler, how comfortable are you eating indoors at a restaurant with safety protocols in place (distancing, disinfecting, mask requirement, etc.)?



Source: RRC Associates

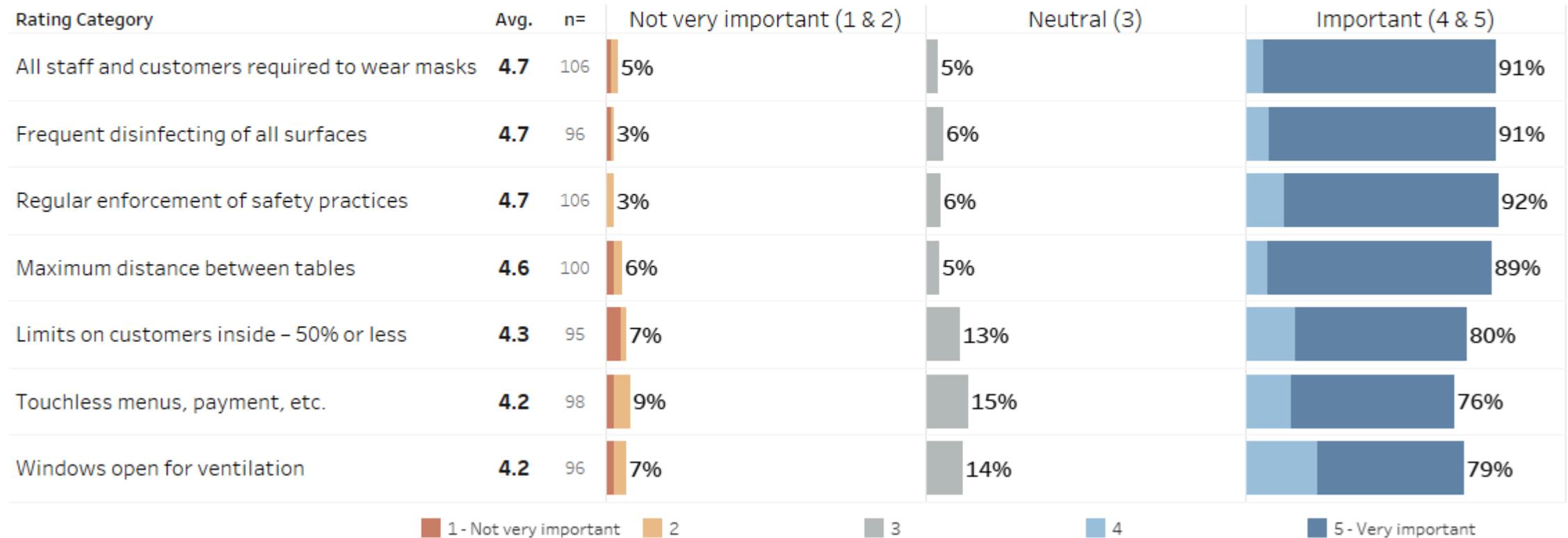
Importance of Restaurant Practices

Masks, distance, disinfecting and enforcement are top priorities in terms of safety protocols for indoor dining.

Please rate how important the following practices are to increasing your level of comfort while eating indoors at a restaurant: Please use a scale from 1 to 5 where 1 is not very important and 5 is very important

Overall Average and Percent Responding 1 - 5

*Categories are sorted in descending order by the average rating.



Comfort Level Dining

While a majority of respondents are comfortable dining indoors, respondents still feel far safer dining outdoors either open air or under a tent.

Please rate your level of comfort regarding your health with each of the following: Please use a scale from 1 to 5 where 1 is very uncomfortable

Overall Average and Percent Responding 1 - 5

*Categories are sorted in descending order by the average rating.

