Downtown Boulder Telephone Survey
Summary of Key Findings and Observations

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Introduction

This brief report summarizes the key findings and observations from a telephone survey of Boulder County residents regarding the Downtown Boulder area. The survey was commissioned by the Downtown Boulder Business Improvement District. A total of 506 phone surveys were conducted with residents of Boulder, Louisville, Lafayette, and Superior during early June 2004.

Of that respondent sample, 29 percent were non-users of Downtown Boulder, and the other 71 percent were users (respondents who had visited Downtown Boulder for non-work related reasons at least once in the past two months).

The primary purpose of the survey was to understand why people do not come downtown and what can be done to bring people downtown more frequently. The non-user is of particular interest, as is the user who has been coming downtown less frequently than in the past.

The focus of the survey was on many issues related to the Downtown Boulder business community: frequency of visits to the Downtown Boulder area and other retail shopping areas; perceptions of the Downtown Boulder area; ratings of attributes of downtown (including parking, parking garages, shops, restaurants, etc.); awareness of parking alternatives; favorite shopping area for a variety of different shopping activities, proportion of shopping, dining, and entertainment dollars spent in the City of Boulder, changes or improvements that would encourage more frequent use of Downtown, and other important issues.

The results are intended to assist the Downtown Boulder business community in gaining a greater understanding of the strengths, weaknesses, perceptions, and key competitors of the Downtown Boulder area. The results also document the extent to which spending leakage is occurring, the perceptions of Downtown Boulder, and the receptivity to various proposed improvements and changes.

This packet contains an executive summary outlining the major findings from the study, a key findings and observations section with more detail on many of the issues, a series of graphs illustrating the most important results (segmented by a variety of attributes, such as household income, city of residence, and user/non-user), and a set of statistical tables providing a complete data set of results from the phone survey.

Executive Summary

New Findings

This section distills the major NEW findings or findings that have been believed to be true in the past but not to the degree discovered. Please see the remainder of the report for more detail on these and other topics.

1. Uses of Downtown Boulder. Downtown Boulder is most popular for ***bringing out of town guests***, ***meeting friends and hanging out***, ***dining out***, ***arts and crafts shopping***, and ***entertainment***. That Downtown Boulder is number one in all these categories (as compared to other regional shopping areas) suggests an important breadth of strengths that can be capitalized upon. However, it is NOT the primary center for many of the more traditional shopping categories, including clothing shopping, sporting goods shopping, personal services, and other non-grocery shopping. Rather, a variety of other competitive locations dominate these categories, most notably FlatIron Crossing. As will be noted later, shopping is popular elsewhere because of the better mix of stores and more convenient parking in those other locations.

ACTION STEP: Focus and build on the strengths of Downtown Boulder (as opposed to the areas where the Downtown is weak). In all advertising and messaging, emphasize the strengths mentioned above – bringing out of town guests, hanging out/meeting friends, dining, arts and crafts shopping, and entertainment.

TABLE 1
WHICH IS YOUR **FAVORITE** OR PRIMARY SHOPPING AREA FOR EACH OF THE FOLLOWING ACTIVITIES?

	Downtown Boulder	FlatIron Crossing Mall/ FlatIron Marketplace	Superior/Louisville - McCaslin Blvd.	28th & 30th Street in Boulder	Old Town Centers in Niwot, Louisville, and/or Lafayette	South Boulder Neighborhood Shopping Centers
Clothing Shopping	12%	46%	19%	14%	4%	2%
Sporting Goods Shopping	10%	33%	13%	28%	3%	5%
Arts/ Crafts Shopping	40%	5%	21%	6%	7%	8%
Personal Services	17%	7%	14%	22%	14%	12%
Other Non-Grocery Shopping	23%	27%	25%	14%	7%	3%
Dining Out	47%	16%	14%	14%	11%	5%
Entertainment	32%	30%	16%	14%	6%	2%
Bringing In Out-Of-Town Guests	65%	19%	2%	5%	4%	2%
Meeting Friends/ Hanging Out	52%	19%	6%	6%	8%	5%

2. Considerable Spending Leakage. Despite what people say is their favorite or primary shopping area, the ***extent of the spending leakage*** for goods and services outside of City of Boulder is considerable. Among City of Boulder residents, 46 percent of shopping expenditures are outside of the City of Boulder, along with 44 percent of entertainment spending and 36 percent of dining spending. Note that the City retains a solid proportion of dining expenditures, though not as much as might be expected. Very high leakage occurs among residents of outlying areas, such as Louisville, Superior, and Lafayette, who do not depend on the City of Boulder for their shopping, dining, and entertainment needs. This leakage, particularly among City residents, represents a huge drain on community resources and local businesses, and is a major concern to the Downtown Business community. This finding, however, should not be a surprise, as the decline in sales tax revenues over the past three years are consistent with these results

> ACTION STEP: To make the Downtown Boulder retail mix more attractive to residents of the area, diversify the retail mix to include more basic retail goods and more locally owned stores. Promote the proportion and number of locally owned storefronts. Make sure articles about new stores, particularly locally owned stores, are in The Daily Camera. Improve collaborative advertising of independent retailers and Downtown BID promotion efforts.

3. Parking Issues. In several sections on the survey, issues related to parking arose. Several different observations about parking are enumerated below.

   - Lack of Consistency in Parking Policies. The lack of consistent parking policies (i.e., meters are free after 6pm weekdays but garages are not; garages are free on Saturdays but meters are not; the time of night garages stop charging varies by day of week and by particular garage, etc.) becomes ***very confusing to the general public***, particularly for the less frequent Downtown user. As well, this inconsistency is very difficult to communicate to the public. On the other hand, parking at competitive sites, such as FlatIron Crossing or 28th/30th Streets, is consistent and clear: free all the time. This is not to suggest that the Downtown adopt such a policy; rather, it is intended to illustrate how confusing the current parking policies can be to the infrequent user.

> ACTION STEP: In the short term, continue to communicate when parking is free, especially to the infrequent and non-user. In the long term, to the extent possible, develop strategies to simplify the parking policies and to make them more consistent.

   - Parking Re-Imbursement Popular. Considerable support was expressed for the ***parking re-imbursement/validation program*** as an incentive to come Downtown more frequently, more so than other potential programs tested. This result indicates that the Downtown is moving strongly in the right direction with its new parking validation program. To the extent that DBI can sign up as many merchants as possible and advertise and market the program widely, the parking validation should prove to be a successful program. Other potential programs that were tested on the survey, including 15 minutes of free parking, credit card parking meters, and increased police presence, did not resonate strongly with survey respondents.

ACTION STEP: Strongly market the validation program; for example, get an article in the Daily Camera, sign up merchants, put signs in parking garages for customer to bring their garage ticket with them, put stickers on parking meters, send postcards to Boulder residents, etc.

- Parking Availability a Factor. While specific ratings of the parking structures (cleanliness, security, interior signage) were generally positive, the ***availability of parking***, and to somewhat lesser extent the ***cost of parking*** and traffic and congestion on the streets approaching Downtown, were significant issues in deterring people from coming Downtown more frequently. That the availability of parking has such a negative perception, when the quantity of spaces available Downtown has grown so much in recent years, is obviously an area of concern. As well, the awareness of the four Downtown parking garages is high; nevertheless, the availability of parking remains a deterrent. The additional spaces in the St. Julien Hotel will further increase supply, though whether their existence improves the negative perception of the availability of parking remains to be seen.

ACTION STEP: The negative perception of the parking availability will be challenging to overcome. The addition of parking spaces at the St. Julien Hotel will be beneficial. Continuing to promote the benefits of the parking structures (cost the same as meters, customer won't get a ticket, they offer shade in the summer and protection from the elements in winter, the validation program, etc.) will be critical in changing the perception.

4. Higher Income Residents Visit More Frequently. One common assumption about Downtown Boulder is that it fails to attract higher-income Boulder residents, who instead go to Cherry Creek, Park Meadows, or other retail shopping areas. However, those with household incomes in excess of $100,000 were about equally likely to have visited the Downtown Boulder area in the past two months, and the number of trips to the area during that period was higher, at an average of 13.0 visits and median of 7.0 visits, than the total sample. This finding suggests that ***higher-income residents are no less likely to visit*** the Downtown Boulder area, and, importantly, ***tend to make more trips on average*** to the Downtown area. In particular, this higher income group attends more Downtown events than other income segments. However, as will be seen later, a large segment of this group indicates spending less money downtown now than in the past, and also spending considerable money outside the City of Boulder.

> ACTION STEP: Attracting this group is an example of marketing to your strengths. Focus targeted marketing efforts on this high-income group, emphasizing themes that resonate with this group. Consider direct mailing to group due to their propensity to respond to such promotion. Mine existing data sources to understand their patterns and preferences. Understand their needs better by conducting focus groups or other detailed research.

5. Middle Income Households Visit Less Frequently. In several different points in the survey results, middle income groups ($50,000 to $74,999 and $75,000 to $99,999) were under-represented in frequency of visiting and spending patterns. This segment averaged ***fewer trips to Downtown Boulder*** in the past two months, tended to ***spend more outside the City of Boulder***, and is more likely to say they ***are coming to Downtown Boulder less frequently over the past three years***. This "hole" in the demographics might be a concern to the business community, as this group clearly represents a sizeable number of people in the Boulder area (28 percent of City residents and 34 percent of County residents fall into these two income ranges; 39 percent of survey respondents fell into these income ranges).

> ACTION STEP: Attracting this group is an example of marketing to your opportunities. While under-represented, this segment is clearly a large opportunity for the Downtown, especially if a diversified retail mix with a broader combination of basic stores and locally owned stores are secured. Again, mine existing data sources to understand this group's patterns and preferences. Use findings to determine the level of effort that should be expended in attracting this group.

6. Presence of Panhandlers a Factor. While most respondents do not feel that the Downtown is unsafe, nor do they feel personally threatened, 43 percent indicate that the ***presence of panhandlers is a deterrent to visiting downtown***. This percentage is quite high and indicative of a potential nuisance for Downtown users. Again, contrast the panhandling part of the Downtown Boulder experience to that at FlatIron Crossing, 28th/30th Streets, or any of the other competitive centers where panhandling is basically a non-issue.

> ACTION STEP: Continue strategies to disperse panhandlers, particularly in the 1300 block of the Mall. Potential ideas include more vending carts on the block and a higher police presence in the area.

Confirming Findings

The remaining bullet points in the executive summary document patterns and trends that have been occurring in Downtown Boulder, including the decline in the frequency of coming downtown and the fact that users are spending less money Downtown.

7. Decline in Frequency of Visiting Downtown. The ***frequency of trips to Downtown Boulder is declining*** among a substantial proportion of the population, with 43 percent saying they are coming less frequently and only 10 percent coming more often compared to three years ago. Primary reasons for not coming include that parking is hard to find, people prefer to shop elsewhere, there is too much traffic, and the shopping is too expensive.

8. People Spending Less Downtown. Similarly, a high proportion indicated that they are ***spending less in Downtown*** currently than three years ago, with 49 percent saying they are spending less on entertainment, 49 percent less on shopping, and 44 percent less on dining. This result is clearly reflective of the increased competitive environment within the City and in the surrounding communities. The decline in spending, along with the decline in the frequency of trips noted in the paragraph above, are a potent "double-whammy" for Downtown businesses.

9. Changes that Would Increase Visits. Among desired changes which would encourage more frequent visits to Downtown were a ***better mix of stores/more local stores***, ***more affordable/less expensive stores***, ***free parking***, and ***expanded parking facilities***. Clearly, the two biggest general factors are the type of stores Downtown (a better mix, more affordable, more local stores) and parking (availability and cost).

10. Parking and Shops. Though it has been said before in this report, the most important issues identified in the survey facing Downtown bear repeating here: ***parking and shopping***. In several different questions on the survey, and in open-ended comments, two central themes emerged in terms of the key weaknesses of Downtown Boulder: the shopping (not the right mix of stores, stores too expensive, need more affordable stores, no stores I like, need more local stores, etc.) and parking (availability of parking, parking hard to find, cost of parking, traffic/congestion). As detailed later in this report, a ***different mix of stores*** and ***more available parking*** are probably two of the biggest changes that would positively impact people's visitation Downtown.

11. Threat of 29th Street. Proximity of residence to the Downtown is a definite factor in frequency of use, particularly in light of the perceived traffic/congestion encountered in getting Downtown, combined with the issue of, "parking is hard to find." As well, some of the weaknesses of Downtown documented in this survey were the availability and cost of parking, and the mix of retail shops. In this context, the redeveloped 29th Street (when completed), with its appealing mix of stores, restaurants, activities, a movie theater, grocery shopping, big box retailers, and convenient and free parking, combined with its more central location relative to much of the population base, will represent a ***very strong competitor*** for Downtown businesses. 29th Street will offer things that Downtown Boulder cannot offer – free parking, a mix of stores (including grocery shopping, practical stores, less expensive stores, a movie theater, and hardware store). Thus, 29th Street is anticipated to considerably complicate already substantial issues for the Downtown. Clearly, the Downtown community needs to do its best during the next two years to prepare for this changing dynamic.

Conclusion

The primary reason for the Downtown Boulder BID's commission of this study was to probe the perceptions of the local market due to their decreased representation over the past three years in the intercept survey. The recommended actions enumerated in this report are outlined below and should help start the process of prioritizing resources to reinvigorate the local market's visitation to Downtown.

Category	Recommended Action Step(s)
Uses of Downtown Boulder	Focus and build on the strengths of Downtown Boulder (as opposed to the areas where the Downtown is weak). In all advertising and messaging, emphasize the strengths mentioned above – bringing out of town guests, hanging out/meeting friends, dining, arts and crafts shopping, and entertainment.
Considerable Spending Leakage	To make the Downtown Boulder retail mix more attractive to residents of the area, diversify the retail mix to include more basic retail goods and more locally owned stores. Promote the proportion and number of locally owned storefronts. Make sure articles about new stores, particularly locally owned stores, are in The Daily Camera. Improve collaborative advertising of independent retailers and Downtown BID promotion efforts.
Lack of Consistency in Parking Policies	In the short term, continue to communicate when parking is free, especially to the infrequent and non-user. In the long term, to the extent possible, develop strategies to simplify the parking policies and to make them more consistent.
Parking Re-Imbursement Popular	Strongly market the validation program; for example, get an article in the Daily Camera, sign up merchants, put signs in parking garages for customer to bring their garage ticket with them, put stickers on parking meters, send postcards to Boulder residents, etc.
Parking Availability a Factor	The negative perception of the parking availability will be challenging to overcome. The addition of parking spaces at the St. Julien Hotel will be beneficial. Continuing to promote the benefits of the parking structures (cost the same as meters, customer won't get a ticket, they offer shade in the summer and protection from the elements in winter, the validation program, etc.) will be critical in changing the perception.
Higher Income Residents Visit More Frequently	Attracting this group is an example of marketing to your strengths. Focus targeted marketing efforts on this high-income group, emphasizing themes that resonate with this group. Consider direct mailing to group due to their propensity to respond to such promotion. Mine existing data sources to understand their patterns and preferences. Understand their needs better by conducting focus groups or other detailed research.
Middle Income Households Visit Less Frequently	Attracting this group is an example of marketing to your opportunities. While under-represented, this segment is clearly a large opportunity for the Downtown, especially if a diversified retail mix with a broader combination of basic stores and locally owned stores are secured. Again, mine existing data sources to understand this group's patterns and preferences. Use findings to determine the level of effort that should be expended in attracting this group.
Presence of Panhandlers a Factor	Continue strategies to disperse panhandlers, particularly in the 1300 block of the Mall. Potential ideas include more vending carts on the block and a higher police presence in the area.

Appendix – Additional Findings and Observations

Visitation and Uses of Downtown Boulder

- Visits in Past Two Months. Downtown Boulder is a very popular place in general, as ***71 percent of the respondent sample had been to the area at least once in the prior two months***. (Recall that the survey was conducted in early June, meaning that nearly three-quarters had been during March and/or April, which are not typically the busiest months in the downtown area). In fact, before quotas were mandated, among the first 300 surveys conducted, 80 percent had been to the downtown Boulder area in the past two months. In fact, as the survey reached its conclusion, it was difficult to find people who had *not* been to the Downtown Boulder area. This level of patronization indicates that the area remains one of the most popular retail and restaurant centers in the region.

  The group that had been to Downtown Boulder in the past two months is referred to in this report as the "user group." The 29 percent who had not been to the area in the time period are called the "non-user group" (even though three-quarters of this group had been to Downtown Boulder in the past year, but just not in the past two months).

  Eighty percent of City residents have visited the Downtown Boulder area in the past two months. Lafayette (54 percent) and Louisville (52 percent) residents were substantially less likely to say they have visited the Downtown Boulder Mall area in the past two months.

- Primary Uses of Downtown. Downtown Boulder is the most popular place for ***bringing out of town guests*** (65 percent of all respondents said DTB is their primary place for bringing out of town guests), ***meeting friends/ hanging out*** (52 percent), ***dining out*** (47 percent), ***arts and crafts shopping*** (40 percent), and ***entertainment*** (32 percent). Among City residents, it is even more popular for bringing out of town guests (73 percent), meeting friends/ hanging out (63 percent), and dining out (59 percent).

  Downtown Boulder is NOT the most popular for many of the more traditional shopping categories, including ***clothing shopping*** (FlatIron Crossing/ FlatIron Marketplace, 46 percent), ***sporting goods shopping*** (FlatIron Crossing, 33 percent), ***personal services*** (28^{th}/30^{th} Streets, 22 percent), and ***other non-grocery shopping*** (FlatIron Crossing, 27 percent).

- Frequency of Trips to Downtown Boulder. In terms of the frequency of visiting the Downtown Boulder area, ***43 percent said they are visiting less often*** than they did three years ago, 46 percent are visiting about the same amount, and only 10 percent said they are visiting more frequently than they did three years ago. These figures are comparatively worse than the 1999 Phone Survey, when 32 percent said they were visiting less often and 14 percent were visiting more often. One of the primary differences seen in this question had to do with income – the lower (under $50,000) and higher (over $100,000) segments showed similar patterns, but the middle income groups ($50,000 to $74,999 and $75,000 to $99,999) were much more likely to be coming downtown less often – about 50 percent of middle-incomers were coming less frequently to Downtown Boulder. This "hole" in the demographics might be a concern to the business community, as this group clearly represents a sizeable number of people in the Boulder area (28 percent of City residents and 34 percent of County residents fall into these two income ranges).

- Reasons for Fewer Trips. The three primary reasons for fewer trips to the Downtown Boulder area in the past three years are that ***parking is hard to find*** (12 percent), ***live too far away now*** (12 percent, primarily Lafayette and Louisville residents), and ***prefer to shop elsewhere*** (11 percent). ***Too much traffic*** and the ***shopping is too expensive*** are also important reasons people are visiting Downtown Boulder less frequently. In particular, the upper-incomers number one reason for not coming downtown as often was too much traffic. Those who have not been to the downtown area in the past two months were more apt to say that too much traffic and that the shopping has declined are the reasons they don't come downtown as often (though the other reasons mentioned above are also important to this segment).

- Reasons for More Trips. The primary reason for making more trips to the downtown area is "***live closer to the area now***," underscoring the critical relationship the downtown area has with the nearby residents. This result, combined with the observation above that one of the main reasons people come downtown less is that they live too far away, suggests the impact on the downtown area of the population migration within Boulder County. Other important reasons for more frequent trips downtown were ***I like the shops***; ***I like the restaurants***, and the ***nightlife***.

Visitation and Uses of Competitive Shopping/ Entertainment Areas

- FlatIron Uses. FlatIron Crossing was popular among higher income respondents (over $100,000 in household income) for ***clothing shopping***, ***sporting goods shopping***, and ***entertainment***.

- Louisville Patterns. FlatIron Crossing/ FlatIron Marketplace was particularly popular among ***residents of Louisville*** for the same attributes that Downtown Boulder generally claims as strengths: ***meeting friends/ hanging out***, ***entertainment***, ***bringing out of town guests***, and ***dining out***. Of secondary importance to this geographic segment was the McCaslin area of Louisville and Superior.

- Lafayette Patterns. Residents of Lafayette displayed an affinity for the "***Old Town Centers in Niwot, Louisville, and/or Lafayette,***" for meeting friends/ hanging out, dining out, other non-grocery shopping, personal services, and arts and crafts shopping.

- Number of Visits to Other Areas. The most popular shopping areas to visit for non-work related reasons are ***McCaslin Boulevard*** in Louisville/ Superior (7.2 times visited in the past two months), ***28th/30th Streets*** in Boulder (7.1 times), ***Downtown Boulder*** (6.2 times), and ***South Boulder*** neighborhood shopping centers (BaseMar, Meadows, Table Mesa, etc. – 5.5 times). Somewhat less frequently patronized are ***Old Town*** centers in Niwot, Louisville, and/ or Lafayette (3.6 times), ***North Boulder*** neighborhood shopping centers (3.3 times), and

FlatIron Crossing/FlatIron Marketplace (3.3 times). Not significant in terms of the number of visits in the past two months were Hover and Pratt in Longmont, Larimer Square/ 16th Street Mall/ LoDo, Westminster Mall, Cherry Creek, Colorado Mills, and Park Meadows.

Spending Patterns

- <u>Spending Leakage.</u> Respondents were also asked to estimate the proportion of their current expenditures that are spent outside the City of Boulder (not just outside Downtown Boulder) for the three categories of spending. Overall, ***half or more of the spending is done outside the City of Boulder*** – 57 percent of shopping, 56 percent of expenditures, and 49 percent of dining expenditures. These figures are high due to the influence of Lafayette and Louisville respondents, who tend to say that about 80 percent of all their shopping is outside of Boulder; however, a ***substantial proportion of City residents' purchases are made outside Boulder***: 46 percent of shopping, 44 percent of entertainment, and 36 percent of dining expenditures. These figures are of major concern to the Downtown Business community.

- <u>Decline in Amount of Spending.</u> One of the key areas of the survey asked respondents if the amount they spend in Downtown Boulder has increased, decreased, or stayed the same over the past three years. Overall, very few said that their spending in Downtown Boulder has increased over that time period; ***most said their expenditures had either decreased or stayed the same***. This pattern of response makes sense given the declining sales tax revenues in the Downtown Boulder area over the past three years.

  Forty-four percent of all respondents said their dining spending in Downtown Boulder has declined, 49 percent have reduced their entertainment spending in Downtown Boulder, and 48 percent have lowered their spending on shopping in Downtown Boulder in the past three years. These numbers are a serious concern and are evidence of the considerable decline in spending in the Downtown Boulder area. On the other hand, spending for dining in Downtown Boulder was most likely to have increased over the past three years, as 23 percent said they have increased their dining expenditures. Fifteen percent have increased their entertainment spending, and only 9 percent have increased their shopping expenditures.

  The figures tend to be reduced by the group that has not visited Downtown Boulder in the last two months, but even those who have visited the area recently say that their spending has generally stayed the same or declined for each of the three categories of spending.

- <u>Quality of Experience Over Past 3 Years.</u> In another disappointing finding, ***more respondents said the quality of the experience downtown area is declining than said it is improving*** – 26 percent versus 20 percent. This result is seen despite the many physical improvements to the downtown area, such as the pop jet fountain, the re-bricking of many of the areas of the mall, the addition of several new food and vending carts, the vertical rock waterfall, and other improvements. About half said the quality of the experience has been staying the same.

However, looking only at those who have been downtown in the past two months, slightly more said the area has been improving over the past several years (24 percent) than declining (21 percent). It is primarily those who have not been downtown in the past two months who tend to say it is declining (38 percent) versus improving (10 percent).

Among those who said the area was improving, many cited the improved parking, better restaurants, general upgrades, and other improvements such as the flowers and fountain as reasons for the improvement. Those who said the general experience was declining said many stores they used to go to have closed, parking is a hassle, the crowds, high prices, traffic, chain stores/commercialization, and panhandlers.

Parking Issues

- Awareness of Parking. Awareness of most of the parking options in Downtown Boulder is generally high, though some important exceptions exist and the opportunity remains to continue to educate the population on the parking options. One of the hurdles to effectively communicating the various parking options is the ***lack of consistency*** of when certain options are free. For example, meters are free weekdays after 6pm but garages are not; garages are free on Saturdays but meters are not; the time of night when garages stop charging varies by the day of the week, etc. A more consistent series of parking policies across the various parking options would make it easier to communicate and easier for the customer to remember.

  Highest awareness was for ***free meters*** after 6pm Monday-Saturday and all day Sunday (79 percent overall) and the ***15th and Pearl*** parking structure (74 percent). Slightly lower awareness was seen for the 11th and Walnut structure (66 percent), free parking in structures on Saturday and Sunday (also 66 percent), and the 11th and Spruce structure (65 percent).

  Residents of Lafayette and Louisville were generally less aware of all of the parking options than compared to their Boulder counterparts, especially so for the 11th and Walnut structure (Randolph Center) and the City and Library lots free after 6pm Monday-Saturday and all day Sunday.

- Utilization of Parking Structures. About ***two-thirds of the respondent sample said that they park in the parking structures***, though there is a notable difference between those who have visited the area in the past two months (72 percent park in structures) versus those who have not been Downtown (only 52 percent park in the garages). Not only do those who haven't been downtown lately not park in the structures as frequently, they rate the attributes of the garages (security, cleanliness, and interior signage) lower on average.

  Respondents who said they don't park in the parking structures were asked why not. "I don't have a car," "I don't go to Downtown Boulder," "I walk/take the bus/ride my bike," and "I don't want to pay for parking" were typical responses. Almost no one mentioned not feeling safe in the parking structures, though the lack of those responses does not mean that safety is not an issue with some people.

- Ratings of Parking Structures. In terms of rating the parking structures, the ***cleanliness***, ***security***, and ***interior signage*** of the garages all fared well, with over half the respondent sample giving a positive rating for each of the three attributes.

- Perception of Parking. The perception of parking attributes is generally negative, most significantly for the ***availability of parking***. Nearly half the respondents rate the availability of parking negatively, and almost 60 percent of the group that has not been downtown in the past two months rated parking availability negatively. ***Price of parking***, however, was not far behind availability, with 39 percent rating the price of parking negatively. Signage for parking was more positively received, with only 27 percent rating it negatively and 38 percent indicating a positive perception of the signage for parking in Downtown Boulder.

Improvements and Changes Desired

- Influence of Potential Changes. Several potential initiatives were tested on the survey in terms of how they might influence the visitation to Downtown Boulder. The number one initiative would be ***parking re-imbursement from merchants***, which 61 percent said would increase their frequency of visiting downtown. Especially encouraging is that this program would also positively impact those who have not visited downtown in the past two months (55 percent said would increase visits). Higher income respondents would also increase their frequency of visits with a validation program. Other changes were only moderately well-received, including 15 minutes of free parking, increased police presence, and credit card parking payment.

- Desired Improvements and Changes. In terms of what improvements or changes would encourage more visits to the downtown area, a ***better mix of stores/more local stores*** topped the list, with 25 percent mentioning it in an unaided, open-ended question. Additionally, 12 percent mentioned ***more affordable/less expensive stores***; combined, these two store-related attributes represent 37 percent of the overall feedback, a substantial proportion mentioning something about the mix of stores. Two parking-related attributes, ***free parking*** (19 percent) and ***expanded parking facilities*** (17 percent), were the next most popular improvements; these two responses are clearly related to the complaints about the cost and availability of parking in the Downtown Boulder area. The combined 36 percent of improvements related to parking makes parking basically tied with the mix of stores for the improvements that would bring people downtown more often.

  Generally similar feedback was seen between those who have visited the area in the past two months and those who have not. Those who have not been downtown in the past two months were somewhat more interested in parking-related improvements: 20 percent would like to see free parking, and another 20 percent requested expanded parking facilities. Twenty-four percent would like to see a better mix of stores, while another 13 percent want more affordable/less expensive stores.

Looking at the higher-income respondents ($100,000+ HHI), the mix of stores was the most important driver to visitation, with 37 percent saying a better mix of stores/more local stores would bring them downtown more often, and another 13 percent mentioning more affordable/less expensive stores, for a total of 50 percent between the two store-related categories. Parking was important to this group as well; 20 percent said free parking and 15 percent said expanded parking facilities would bring them Downtown more often.

- Types of Stores Desired. One of the primary threads in the feedback overall is the need for a better mix of stores. All respondents were asked in an open-ended fashion the specific types of restaurants, shops, or services that should be added to Downtown Boulder. The suggestions are very diverse and are similar to the general feedback collected on the Downtown User Survey: ***moderately priced stores***, ***a bakery***, ***practical stores***, ***more locally owned stores***, ***a steakhouse***, ***moderately priced restaurants***, ***a department store***, ***family friendly stores***, ***international restaurants***, ***a drugstore***, ***a movie theater***, and ***a small grocery/market***. Some specific stores mentioned include Dillard's, Chili's, Black Eyed Pea, Macaroni Grill, Ikea, and Crate & Barrel. Nonetheless, many survey participants thought the mix of stores downtown was just fine – diverse, a good mix, "It's good the way it is".

Like Best/Like Least/Perceptions of Downtown Boulder

- Like Best about Downtown Boulder. The aspects of Downtown Boulder that people like best are diverse; the top attributes include the ***flowers and trees/landscaping*** (29 percent), the ***shopping/ nice shops*** (27 percent), and the ***restaurants*** (24 percent). Other strengths include the friendly atmosphere/home feel, pedestrian aspect, street performers, and people watching.

- Like Least about Downtown Boulder. Several aspects of Downtown Boulder were singled out as the ones people like the least. "***Parking is hard to find***" is the aspect that people like the least (30 percent mentioned it, a very high percentage), followed by a series of additional aspects: too many panhandlers, too expensive, parking too expensive, too much traffic, local businesses forced out by national chains, no stores I like, and too crowded.

- Perception of Downtown Boulder. Perception of various attributes of Downtown Boulder was generally strong. ***Restaurants*** and ***street entertainment*** were the most highly rated (each 4.1 out of five), followed by safety/ security, organized entertainment, customer service, and special events. ***Shopping*** and ***value for price paid*** were noticeably lower rated than the other attributes and clearly show room for improvement.

- Those who have not been to Downtown Boulder in the past two months tend to rate their perception of the above attributes in the same rank order, but on average about 0.4 to 0.6 points lower than those who have been to Downtown Boulder in that same time period.

Other Issues

- Attendance at Events. Survey participants were asked in an unprompted manner which special events, activities, festivals, concerts, etc. they had attended in the past year (only those who had visited in the past two months were asked this question). While comparisons to the 1999 survey are not exact because those questions were asked in a prompted manner, the general trend appears to be that of a decline in the attendance at these special events.

  The Boulder Creek Festival (35 percent) and Farmer's Market (25 percent) were the most popular, followed by special arts and crafts fairs (16 percent) and Bands on the Bricks (15 percent). Other events were mentioned less often, including the Christmas Lights/Parade (8 percent), Kinetics Parade (8 percent), lunchtime concerts/Out to Lunch (6 percent), Boulder in Bloom/Tulip Festival (5 percent), Fall Fest (also 5 percent), ice skating (3 percent), St. Nick on the Bricks (1 percent) and Munchkin Masquerade (also 1 percent). These results might help the Downtown area to prioritize the events in terms of advertising, promotion, and investment in such events.

- Presence of Panhandlers. While the rating for the perception of safety/ security fares relatively well, ***over 40 percent said that the presence of panhandlers is a deterrent to visiting Downtown Boulder***. Nearly half the group that had not been downtown in the past two months said that the presence of panhandlers is a deterrent to visiting the area. The group with the highest likelihood of saying that the presence of panhandlers is a deterrent to visiting is the high-income segment ($100,000+ in HHI), as nearly 60 percent of this group agreed with the statement.

- Twenty-Ninth Street. 29th Street will likely be a significant threat to Downtown Boulder. If the redevelopment of the Crossroads Mall area evolves with an appealing mix of stores, restaurants, activities, movie theater, grocery shopping, etc, then ***its location might be the most compelling attraction for many Boulder area residents***. The shifting of the population base to the east, along with complaints about the amount of traffic and congestion in getting to Downtown Boulder, could be two important factors in the popularity of 29th Street. As much of the population growth continues in the eastern part of the City and County, the additional time, congestion, and distance to come to Downtown Boulder will be an additional hurdle to visiting.

- Advertising Awareness. More than half were aware of advertising or information sources for Downtown Boulder, with newspapers by far the most commonly cited advertising/info source.

- City of Residence. The majority of survey respondents are residents of the City of Boulder (69 percent), with the remainder residing in either Louisville (18 percent) or Lafayette (13 percent).

- Demographics. The respondent sample was quite diverse and representative overall. The largest household group was households with children living at home (34 percent), followed by Empty Nesters (26 percent) and singles without children. Couples without children accounted for 13 percent. The remaining 5 percent were university students.

The largest group of respondents reported household income of $50,000 to $74,999 (25 percent), with 14 percent earning $75,000 to $99,999 and 22 percent in the $100,000+ bracket. Thirty percent had a household income of under $50,000.

In terms of age, the average was 48.2 overall, with a median of 48 years. Twenty-one percent were 34 and younger, 19 percent 35 to 44 years old, 26 percent 45 to 54 years old, 18 percent 55 to 64 years old, and 16 percent 65 or older.

Fifty-nine percent of respondents were female, and 41 percent were male.

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