

## T A B L E of C O N T E N T S

INTRODUCTION.....	1
KEY OBSERVATIONS .....	1
SUMMARY OF FINDINGS.....	2
<i>Frequency of Visits to the Downtown Boulder Area</i> .....	2
<i>Frequency of Visits to Other Shopping Areas</i> .....	3
<i>Clothing Shopping</i> .....	4
<i>Sporting Goods Shopping</i> .....	6
<i>Personal Services Shopping</i> .....	7
<i>Dining Out</i> .....	10
<i>Flatiron Crossing Issues</i> .....	12
<i>Downtown Activities</i> .....	15
<i>Downtown Boulder Visitation Patterns</i> .....	17
<i>General Likes and Dislikes</i> .....	18
<i>Potential Downtown Improvements</i> .....	18
<i>Transportation Issues</i> .....	20
<i>Advertising Issues</i> .....	22
<i>Special Events</i> .....	24
<i>Quality of Experience</i> .....	26
<i>Respondent Demographics</i> .....	27
OPEN-ENDED COMMENTS.....	29
<i>What word or phrase first comes to mind when you think of Downtown Boulder?</i> .....	29
<i>What shops or services would you like to see added in Downtown Boulder?</i> .....	29
<i>What are the highest priorities for improvements to the public spaces on the Downtown Mall?</i> ....	30
<i>Are there any other ideas you have that would make the downtown area more attractive?</i> .....	30
<i>What would be the most important thing that Downtown Boulder could do to retain your patronage or encourage you to come downtown more frequently?</i> .....	30

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# DOWNTOWN BOULDER PHONE SURVEY 1999

## FINAL REPORT

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### INTRODUCTION

A phone survey addressing general shopping habits and visitation patterns to the Downtown Boulder area was administered during the month of April 1999; a total of 395 responses were gathered from the phone survey. The sample was composed of residents of the City of Boulder (58 percent of responses) and from Boulder County outside the City (42 percent).

The respondent profile in the phone survey tended to be somewhat older when compared to that of the intercept survey administered on the mall. The reasons for this finding are twofold. First, older people tend to be at home with more frequency and also tend to be more willing to answer questions over the phone; second, as will be seen in the summary of findings section below, visitors to the downtown mall area tend to be younger in age.

Some key observations from the survey are presented below, and further analysis of the findings is provided in the body of the report.

### KEY OBSERVATIONS

- Restaurants as a Strength. A key strength of the Downtown Boulder area, especially when compared to other shopping areas in the region, is the variety of restaurants. In fact, dining is the activity that the Pearl Street Mall area captures the greatest percentage of respondents (46 percent typically dine out there). Also, those who indicate that they are frequenting the downtown area more this year than in the past cite enjoyment of the restaurants as the top reason. Leveraging this strength in attracting customers to the area will be a critical strategy in light of the increased shopping competition from Flatiron Crossing.
- Importance of Public Restrooms. Providing clean and adequate restroom facilities is necessary for any lengthy shopping experience, and Downtown Boulder is currently at a competitive disadvantage to other shopping areas in this respect. In addition to enhancing the restrooms, which was one of the primary improvements requested on the survey, signage to direct pedestrians to the restrooms is also important.
- Continued Parking Hassles. As seen in many other surveys, difficulty with parking is one of the primary factors keeping people away from the downtown mall; parking is a weakness that will only be exposed further with the opening of Flatiron Crossing, which will provide free parking. Strategies to improve the parking situation might be pursued. For example, advertising the extension of the time on the meters from two to three hours might help to raise awareness of the change among the public. Also, when the additional parking at 15<sup>th</sup> and Pearl is completed, communicating its availability to the public should be considered.

Perhaps better access through more convenient bus routes from peripheral parts of the city and outlying towns in the county would make it easier for shoppers to come to the Downtown area.

- Additional Issues. The survey revealed a multitude of other issues, both through closed-ended and open-ended questions. Examples of these issues include the preponderance of panhandlers on the Downtown Mall, the mix of retail stores on the mall, the transition from local stores to national chains, and other issues. The body of the report covers many of these topics, and the open-ended comments are summarized at the end of the report. A full copy of the open-ended comments can be obtained from Molly Winter at the Downtown Management Commission, (303) 441-4001, or from Nolan Rosall or Dave Belin at RRC Associates, (303) 449-6558.

## SUMMARY OF FINDINGS

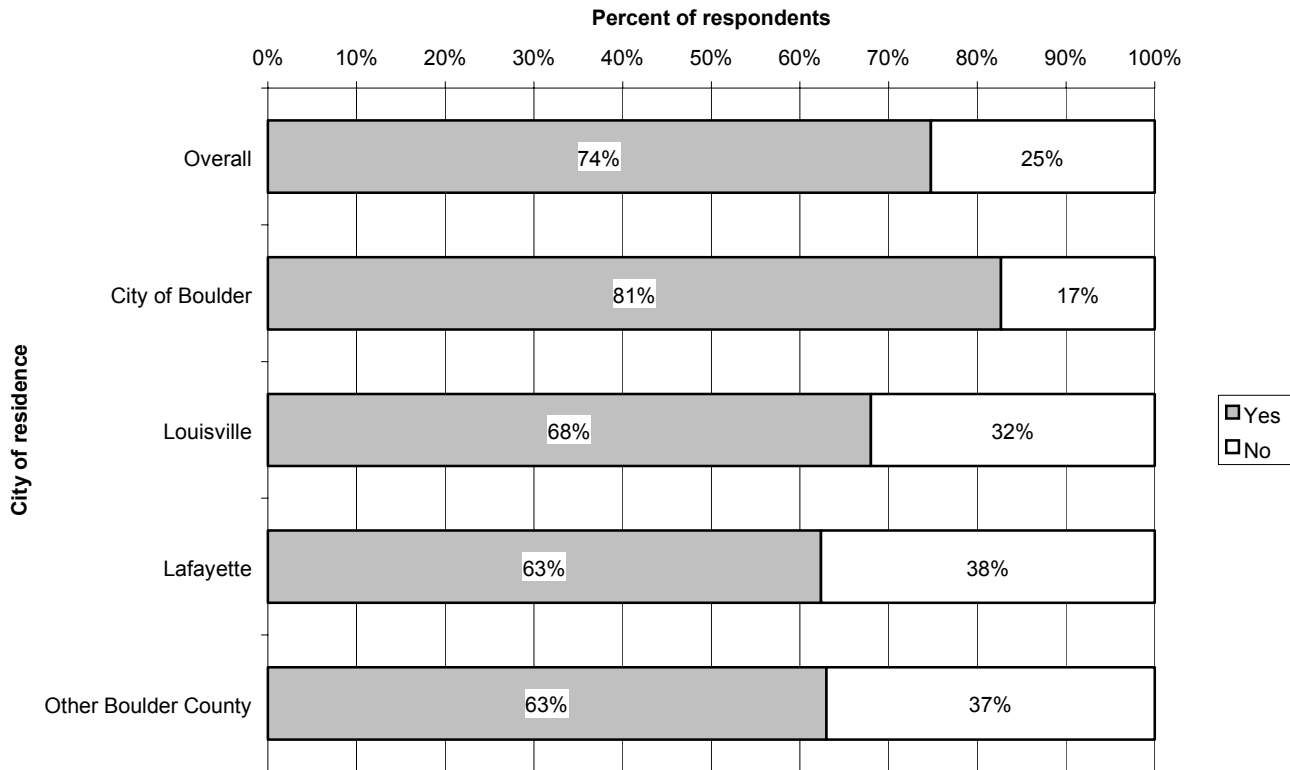
### *Frequency of Visits to the Downtown Boulder Area*

The two major determinants of the frequency of visits to the downtown area appear to be age and distance from the mall. Younger respondents (under 35) and those who live in closer proximity to the downtown area are most likely to visit and to shop in the Pearl Street mall area. Older respondents (over 55) and those who live outside the city are much less likely to frequent the downtown area. (See the section on respondent demographics later in the report for an analysis of the age and other measures of the sample.)

Those who are older tend to make fewer trips. Respondents aged 35 to 54 average 5.8 trips to downtown Boulder and those 55 or over visited only 4.3 times in the past two months. By comparison, those under age 35 have been to the downtown area an average of 9.7 times in the past two months. While these figures indicate that the downtown mall area is still relatively popular with the older age segments, the declining pattern of visits is indicative of the general appeal of the mall – to a younger, more hip, social, and active segment of visitors. Presumably, the outdoor and pedestrian aspects of the mall appeal more to younger people, while older shoppers tend to prefer the controlled environment of the indoor shopping mall. In addition, the phone survey was administered in April, indicating that the older crowd might not have been to the mall in the past two months for weather-related reasons.

Looking at the responses by place of residence, it becomes clear that those who live in the City of Boulder are much more likely to have visited the downtown area in the past two months, while those living outside the city are less likely to have made a visit; figure 1 below illustrates these patterns. Residents of Lafayette are the least likely to have been to the mall in the given time frame. Still, 63 percent of Lafayette residents *have* been in the past two months.

FIGURE 1  
 HAVE YOU BEEN TO THE DOWNTOWN BOULDER MALL AREA IN THE PAST TWO MONTHS?  
 DOWNTOWN BOULDER PHONE SURVEY 1999

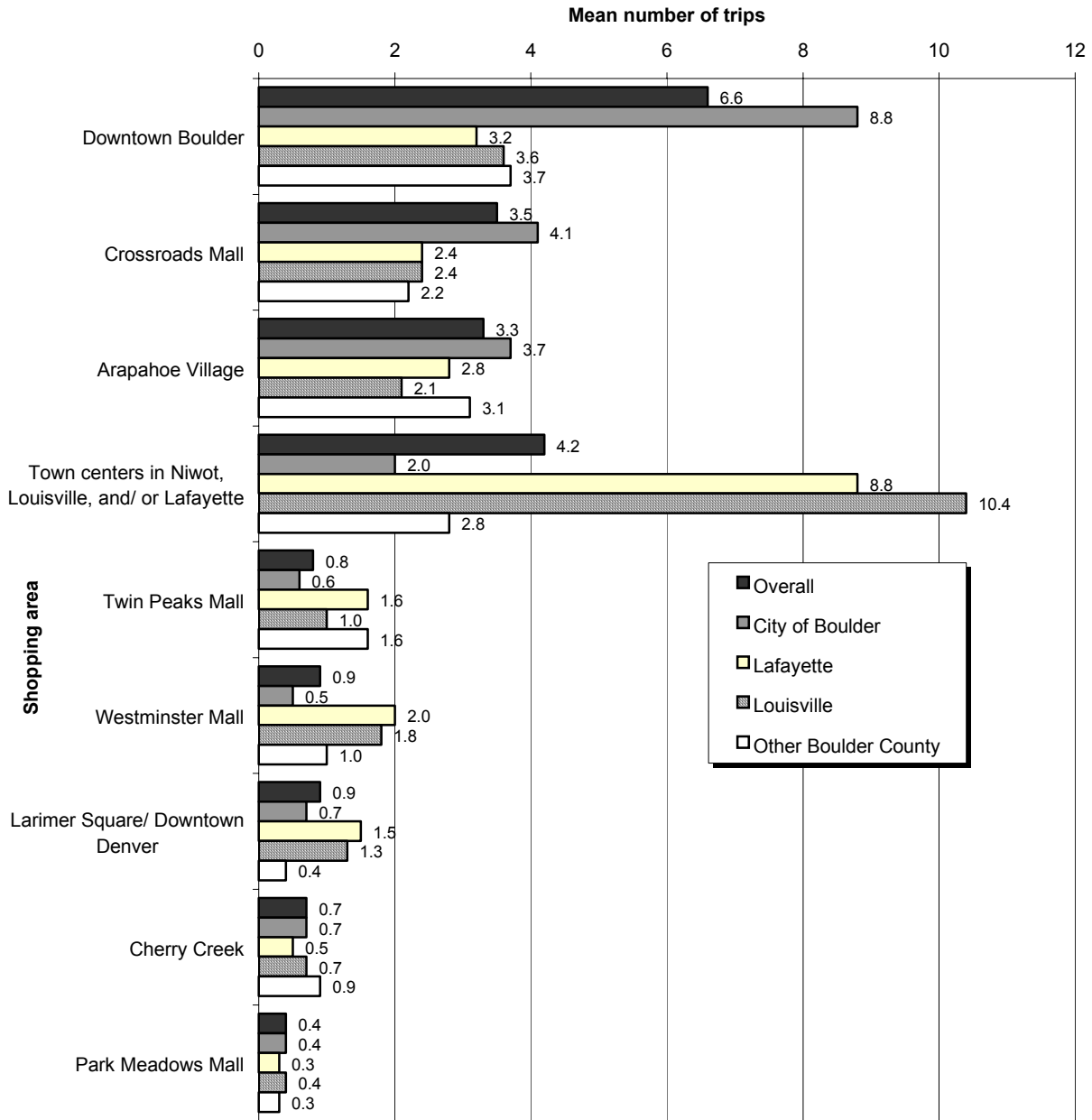


*Frequency of Visits to Other Shopping Areas*

Overall, the Pearl Street Mall/ Downtown Boulder is the most popular place to take a shopping trip, with the average respondent reporting 6.6 trips in the past two months (excluding trips for work or employment). Not surprisingly, it is especially popular with residents of the City of Boulder, who have visited an average of 8.8 times in the last two months, and with respondents under the age of 35, who have made an average of 9.7 visits.

However, isolating residents from Lafayette and Louisville reveals their pattern of making more frequent shopping trips to the town centers of Niwot, Louisville, and Lafayette (grouped together as one choice on the survey). For example, Lafayette residents have made an average of 8.8 trips to these town centers, but only 3.2 trips to downtown Boulder, in the last two months. Similarly, Louisville residents report an average of 10.4 trips to the town centers, but only 3.6 trips to downtown Boulder, in the same time period. These patterns are displayed in Figure 2 on the following page.

**FIGURE 2**  
 HOW MANY TRIPS HAVE YOU MADE TO THE FOLLOWING SHOPPING AREAS IN THE PAST TWO MONTHS?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999

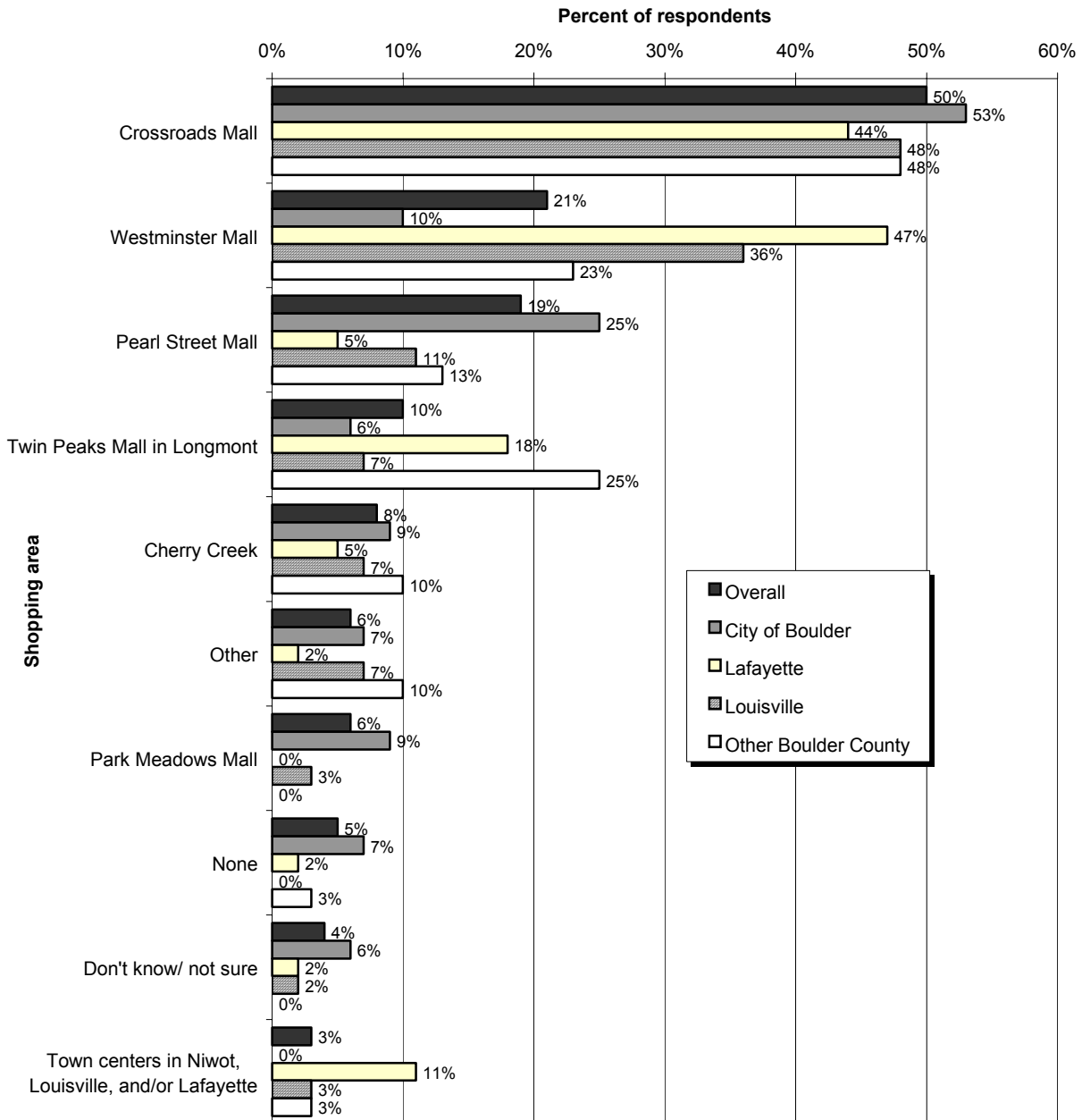


*Clothing Shopping*

The typical place to shop for clothing is the Crossroads Mall, with half of the sample shopping there. The Westminster Mall is the second most popular location for such shopping (21 percent do their clothes shopping there), especially among residents of Lafayette (47 percent) and Louisville (36 percent). The third most popular area for clothes shopping is the Pearl Street mall;

19 percent of the sample typically shops for clothes there, including 25 percent of City of Boulder residents. Few respondents cited other shopping areas, including Twin Peaks, Cherry Creek, and Park Meadows.

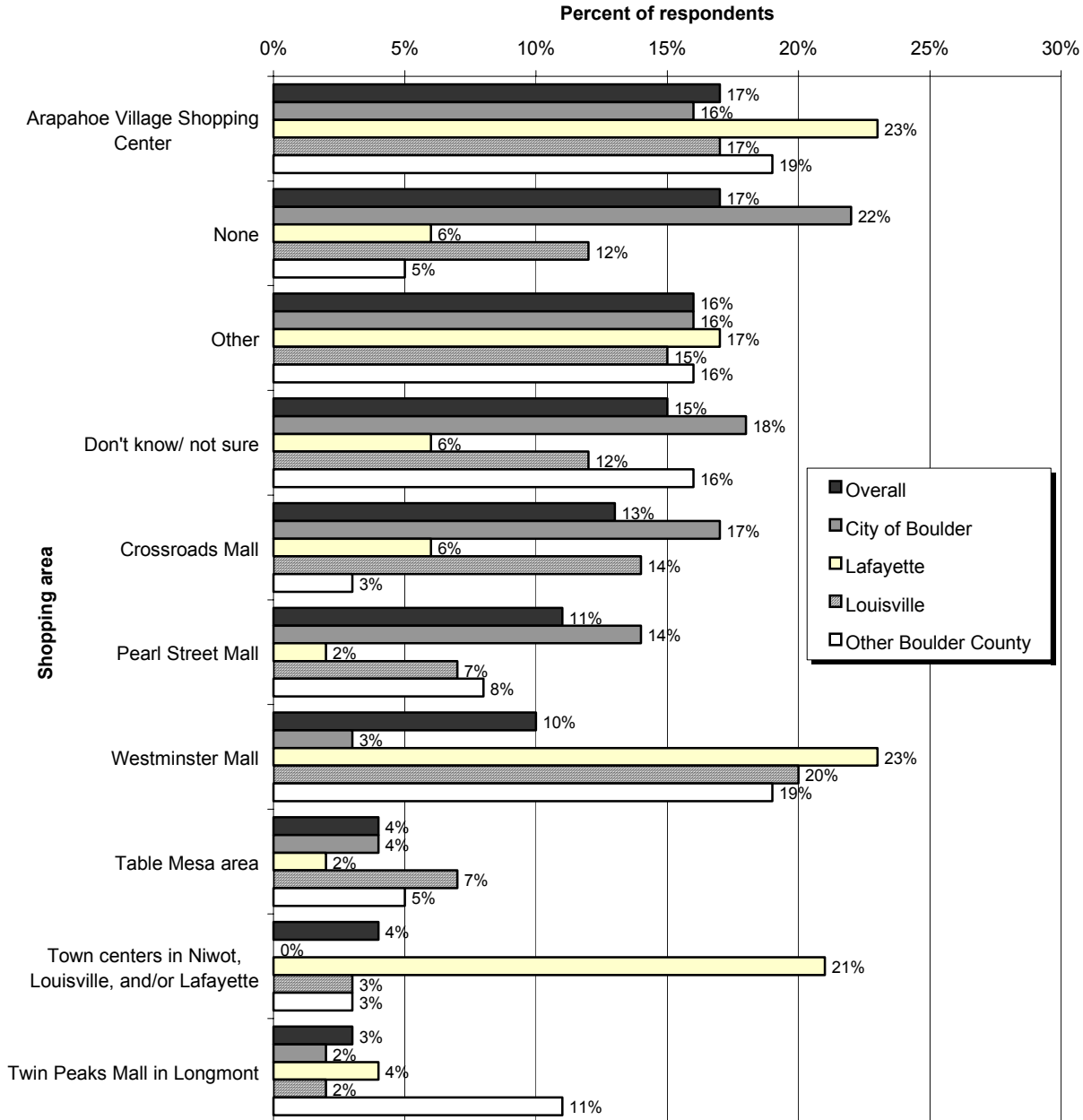
FIGURE 3  
 WHERE DO YOU TYPICALLY SHOP FOR CLOTHING?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



*Sporting Goods Shopping*

Less consensus was observed when respondents were asked where they typically shop for sporting goods. The Arapahoe Village shopping center is the most commonly cited response, with support from 17 percent of the sample. Crossroads Mall (13 percent), Pearl Street Mall (11 percent), and Westminster Mall (10 percent) were the next most frequently selected. Again, Lafayette and Louisville residents exhibit solid support for the Westminster Mall (23 and 20 percent, respectively do their sporting goods shopping there). However, 17 percent answered “none,” 16 percent responded “other,” and 15 percent “don’t know/ not sure.”

FIGURE 4  
 WHERE DO YOU TYPICALLY SHOP FOR SPORTING GOODS?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



*Personal Services Shopping*

The respective town centers appear to be the most frequently cited locations for running personal errands, such as a haircut, banking, or a travel agent (Figure 5), as well as other non-grocery shopping (Figure 6).

FIGURE 5  
 WHERE DO YOU TYPICALLY SHOP FOR PERSONAL SERVICES?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999

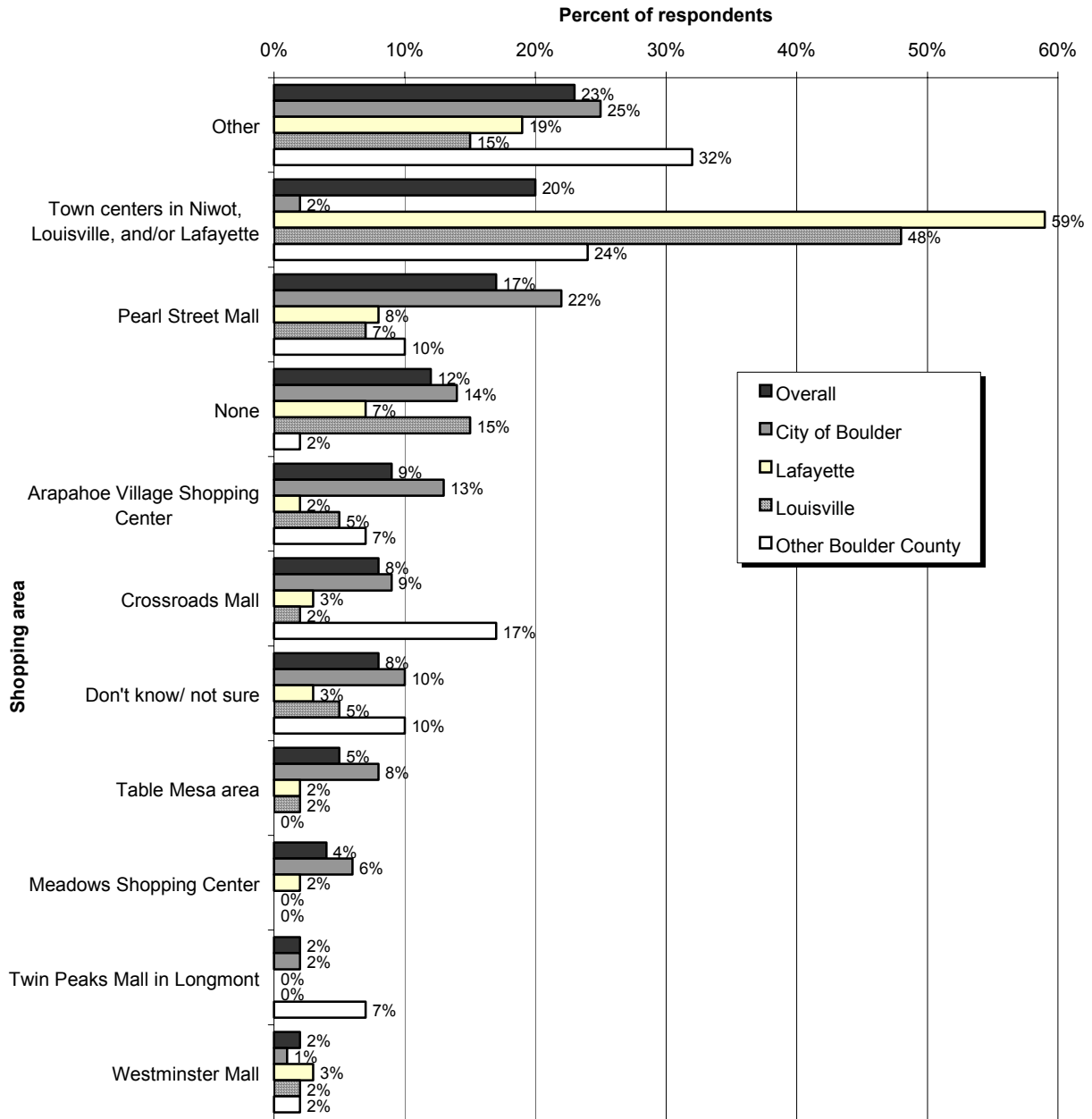
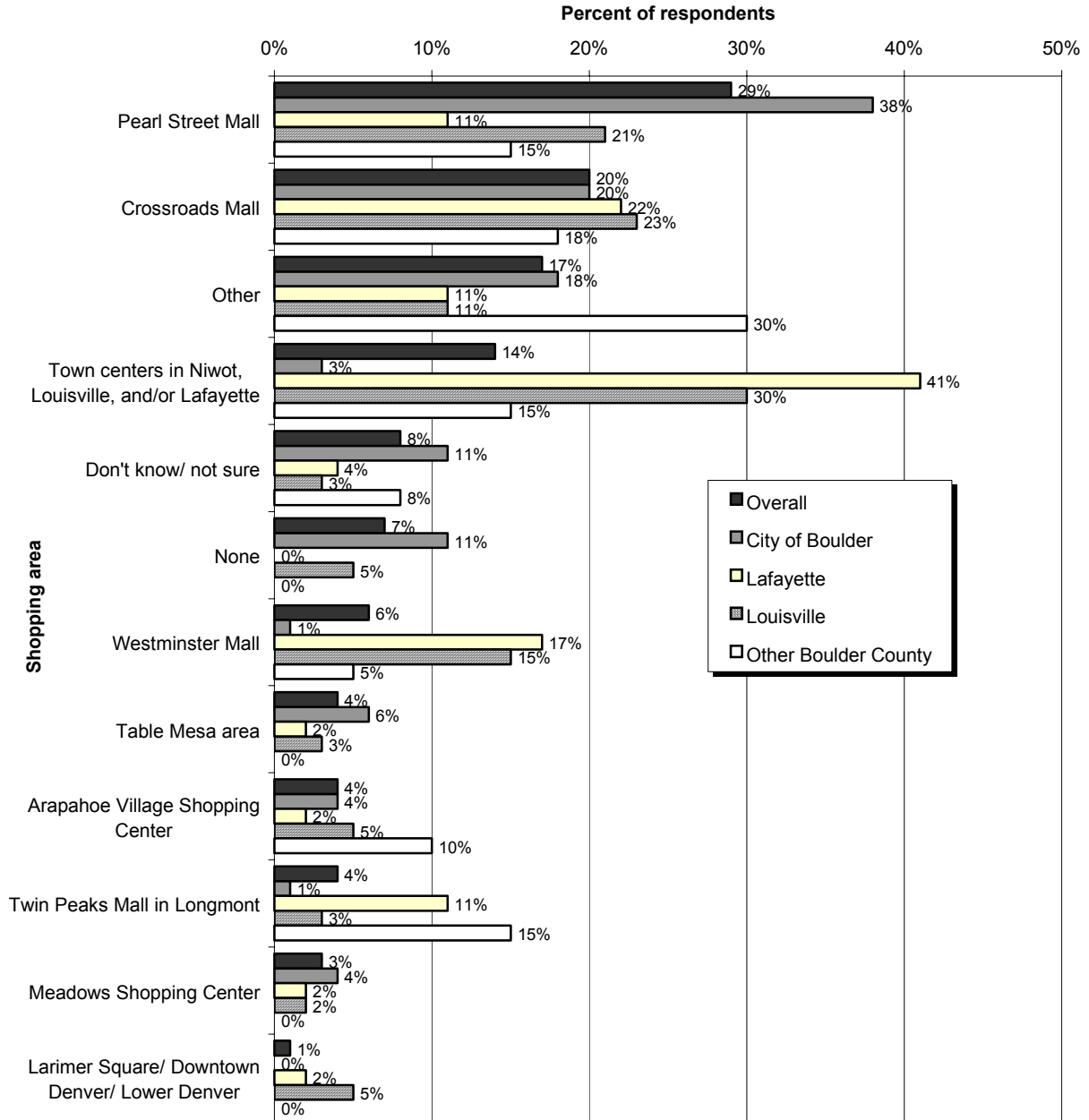


FIGURE 6  
 WHERE DO YOU TYPICALLY SHOP FOR OTHER NON-GROCERY SHOPPING?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999

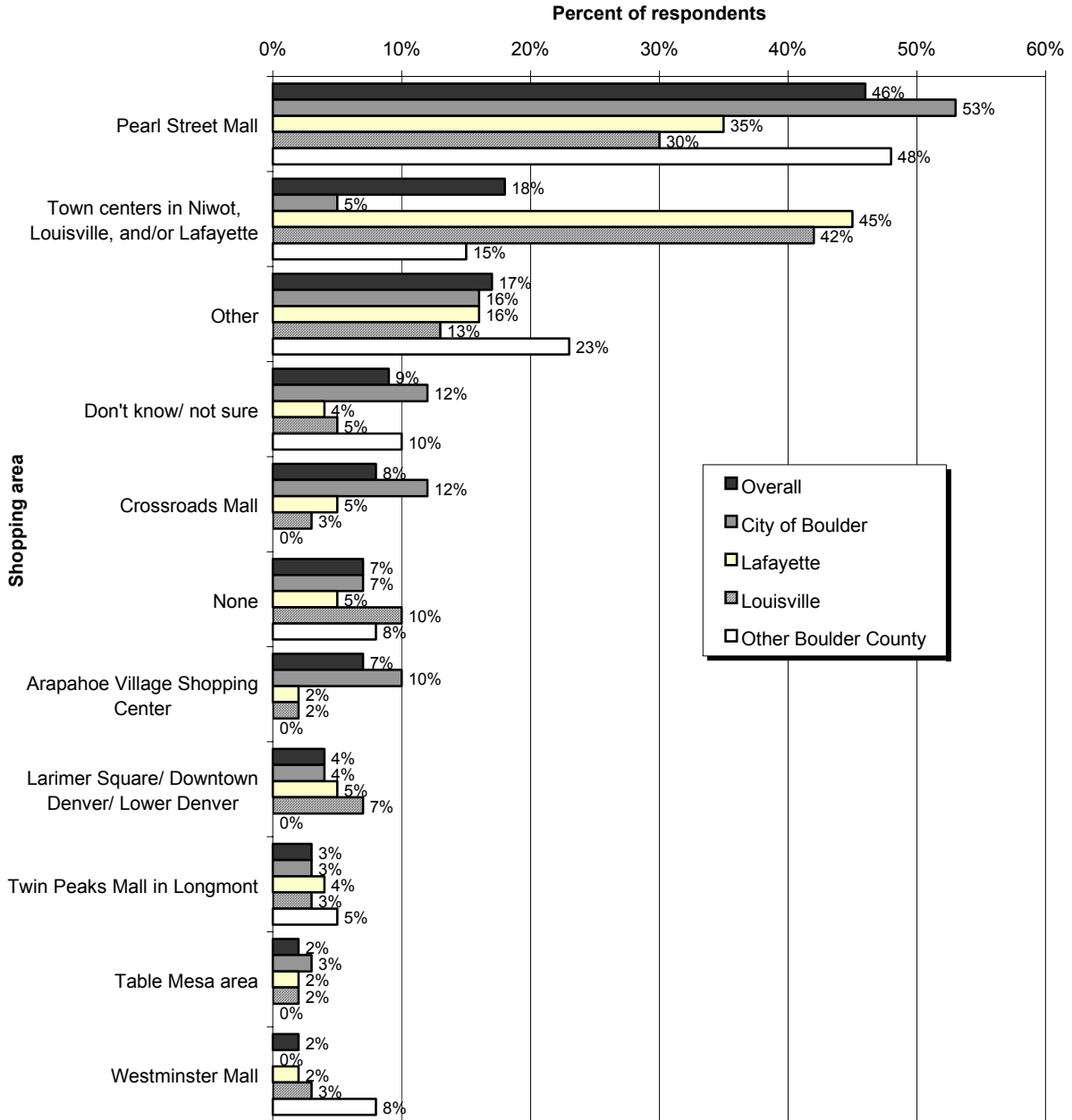


### *Dining Out*

Restaurants are a significant strength of the downtown area. Dining is the activity which the Pearl Street Mall area captures the greatest percentage of respondents. Overall, 46 percent say they typically go out to eat at the Pearl Street Mall, including 53 percent of City of Boulder residents. While the respective town centers are popular with their residents, dining at the Pearl Street Mall is the next most popular location, capturing 35 percent of Lafayette residents, 30 percent of Louisville residents, and 48 percent of those from other locations in Boulder County. Figure 7 below illustrates these trends.

Additionally, younger respondents are more likely to make their shopping and dining trips to the Pearl Street area. For example, 66 percent of those under the age of 35 typically dine out in the Pearl Street mall area, compared to 46 percent of the overall sample. Likewise, 26 percent of those under 35 shop for clothing at the downtown mall, compared to 19 percent overall. A similar pattern is observed for the other retail goods mentioned above.

FIGURE 7  
 WHERE DO YOU TYPICALLY DINE OUT?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



*Flatiron Crossing Issues*

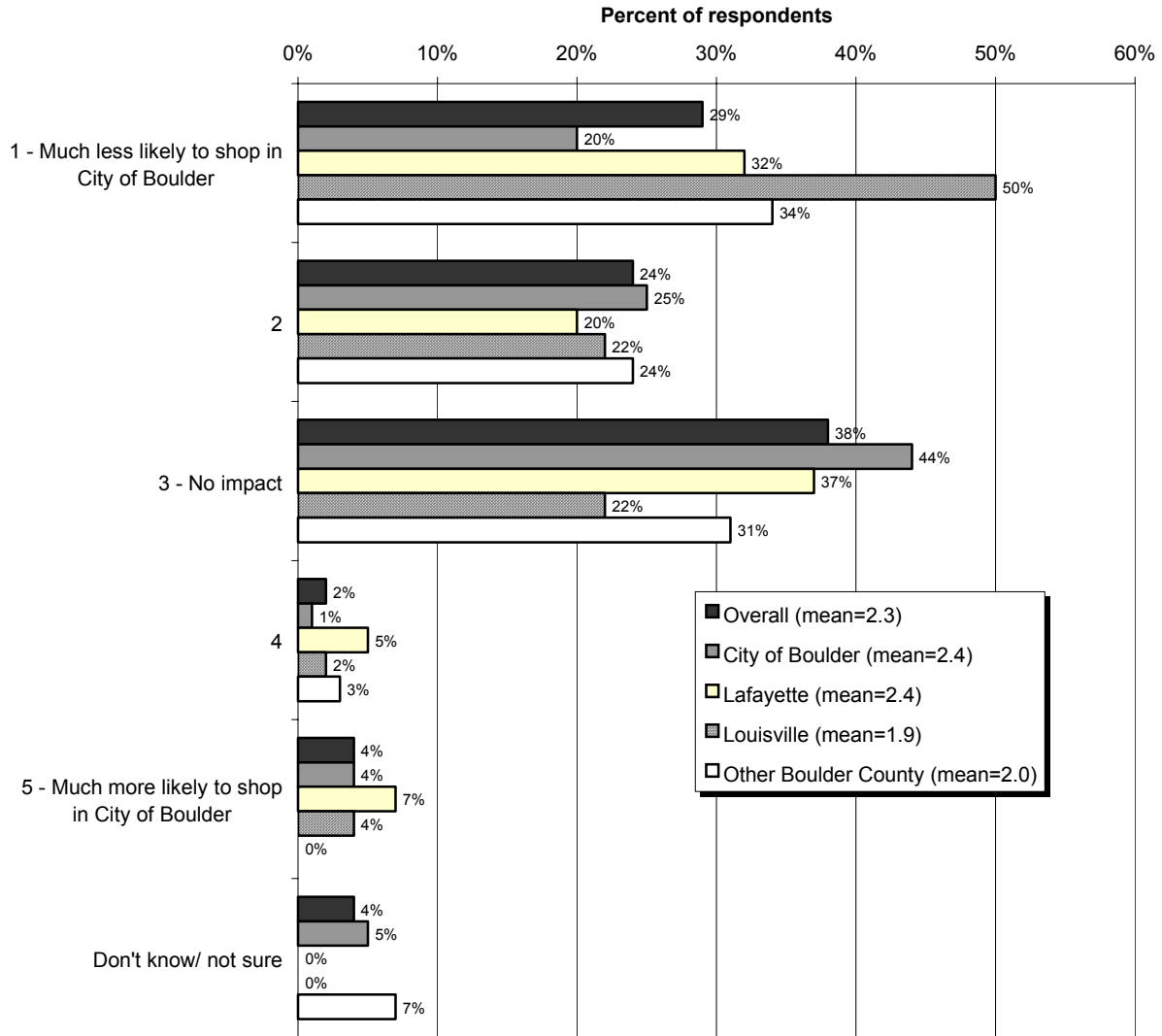
Respondents were asked if they were aware of Flatiron Crossing, and if so, what impact they think its presence might have on their shopping patterns, both with respect to the City of Boulder in general and with respect to Downtown Boulder in particular. Respondents were asked to rate the impact of Flatiron Crossing on a one to five scale, with a one representing “Much less likely to shop in the City of Boulder/ Downtown Boulder,” a three being “No Impact,” and a five being “Much more likely to shop in the City of Boulder/ Downtown Boulder.”

Awareness of Flatiron Crossing is high, with 72 percent indicating that they have heard of the planned shopping area. Many indicate that they think the presence of Flatiron Crossing will have “no impact” on their shopping patterns, both in Boulder in general (38 percent overall) and with respect to the Downtown Boulder area in particular (57 percent overall).

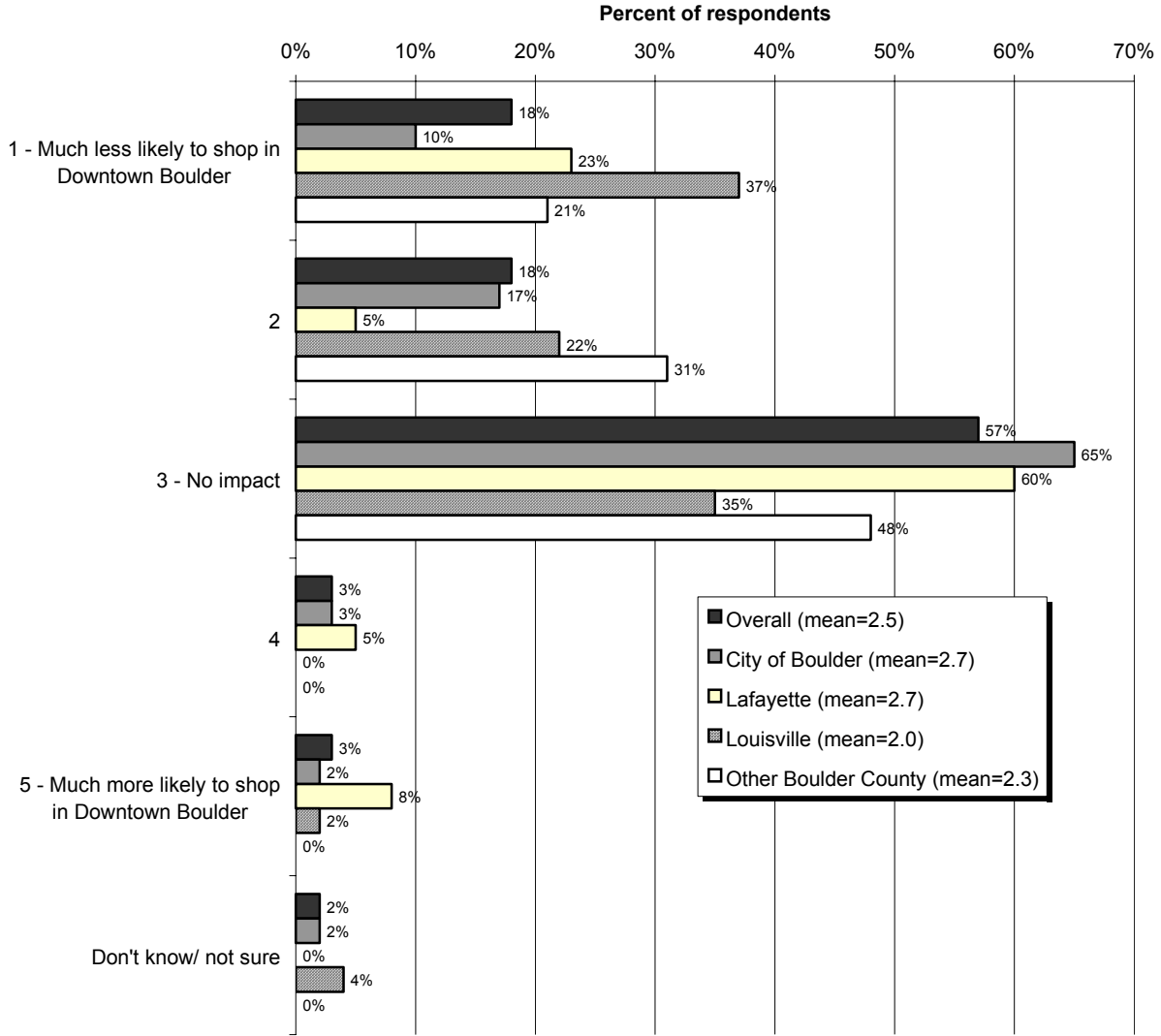
It appears that Downtown Boulder will be better insulated, when compared to the City of Boulder in general, from the impact of Flatiron Crossing. While 18 percent say they will be “much less likely” to shop specifically in Downtown Boulder, an even higher 29 percent say they are “much less likely” to shop in the City of Boulder in general. Nevertheless, Flatiron Crossing presents a serious threat to both Boulder and Downtown Boulder.

Looking at the data by residence of the respondent reveals some interesting, and somewhat troublesome, patterns. For example, 50 percent of the respondents from Louisville say they will be “much less likely” to shop in the City of Boulder, and 37 percent are “much less likely” to shop in Downtown Boulder. Lafayette residents and those from other areas of the county (outside the City) are also more likely to display similar tendencies. Residents of the City of Boulder, on the other hand, are most likely to say that Flatiron Crossing will have “no impact” on their shopping patterns in the City in general (44 percent) and Downtown specifically (65 percent). These patterns are presented in the two graphs that follow.

**FIGURE 8**  
**IMPACT OF FLATIRON CROSSING ON SHOPPING IN BOULDER IN GENERAL**  
**BY RESIDENCE OF RESPONDENT**  
**DOWNTOWN BOULDER PHONE SURVEY 1999**



**FIGURE 9**  
**IMPACT OF FLATIRON CROSSING ON SHOPPING SPECIFICALLY IN DOWNTOWN BOULDER**  
**BY RESIDENCE OF RESPONDENT**  
**DOWNTOWN BOULDER PHONE SURVEY 1999**

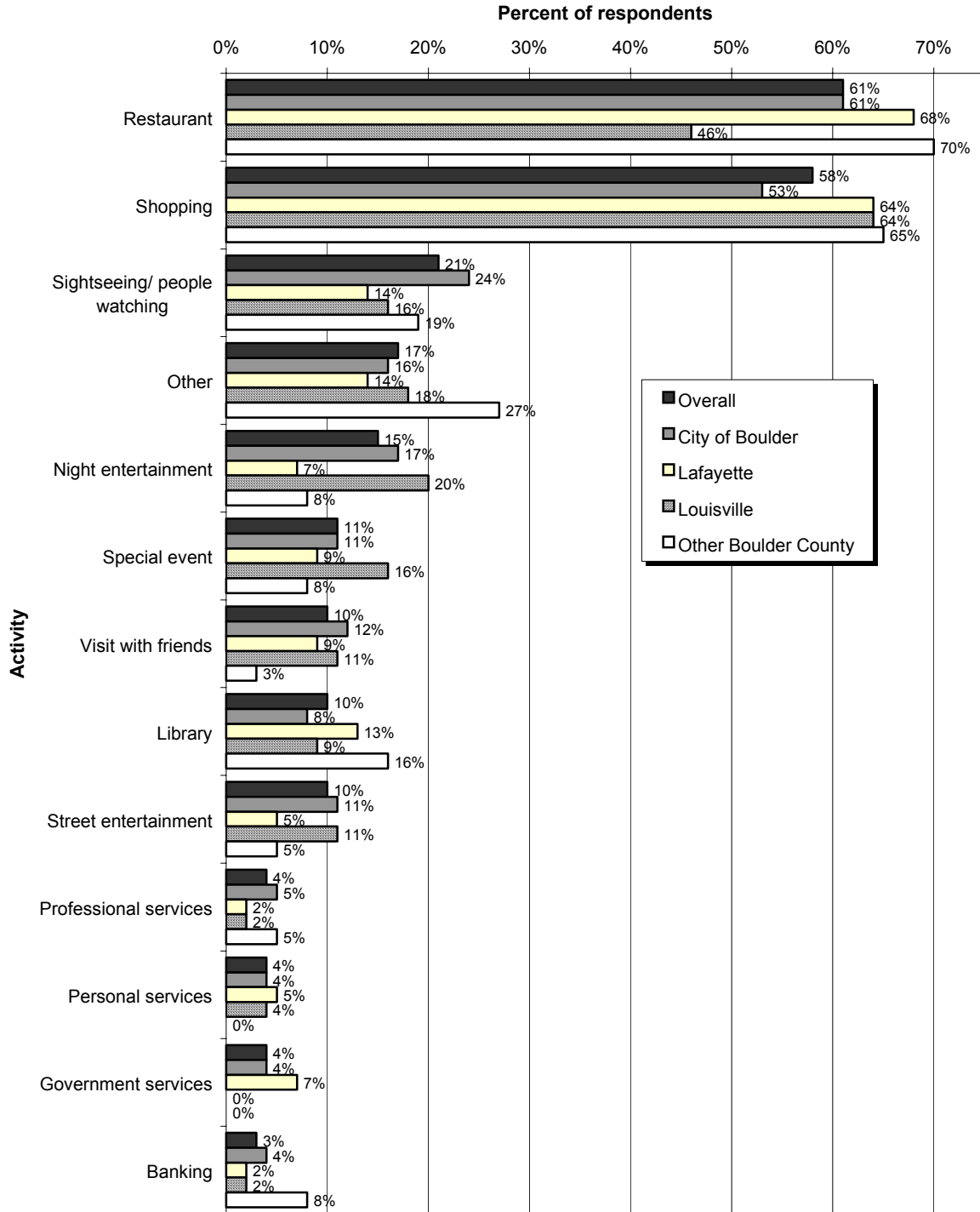


*Downtown Activities*

As noted in previous surveys, dining and shopping are the two most popular activities when respondents come to downtown Boulder, with 61 and 58 percent, respectively, of the sample selecting these activities. Dining was mentioned earlier as one of the strengths of the Downtown area, and one that might be protected and fostered. The Downtown restaurants represent a competitive advantage that will be difficult for other areas to replicate. On the other hand, the shopping is more clearly threatened by other opportunities, particularly Flatiron Crossing.

Other activities do not receive such across-the-board support. This second tier of activities includes sightseeing/ people watching (21 percent), night entertainment (15 percent), special events (11 percent), and visits with friends, the library, and street entertainment (each 10 percent). These patterns, as seen below, are fairly consistent by place of residence.

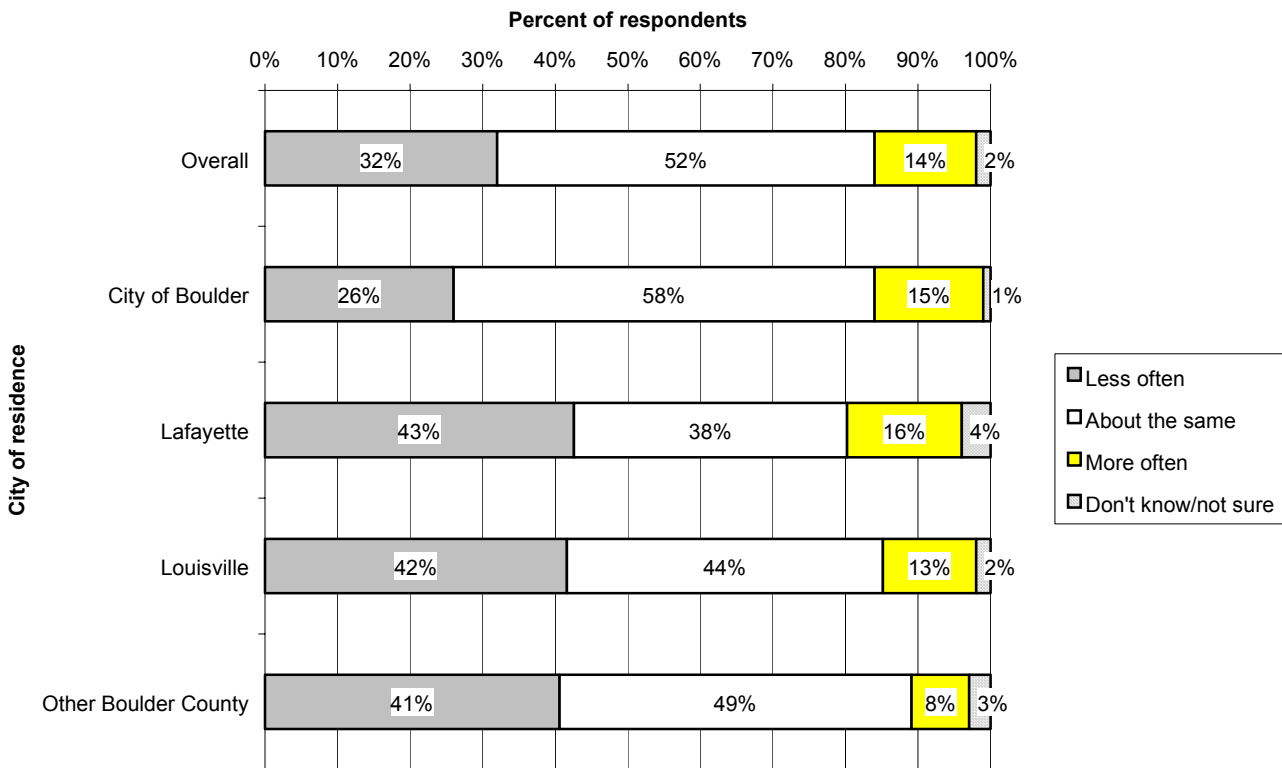
FIGURE 10  
 WHAT ACTIVITIES DO YOU TYPICALLY PARTICIPATE IN WHEN IN DOWNTOWN BOULDER?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



*Downtown Boulder Visitation Patterns*

Overall, 32 percent of respondents have visited the downtown Boulder area less frequently than in years past, 52 percent visit with about the same frequency, and 14 percent go to the downtown area more often than in the past. Approximately 40 percent of county residents outside the city say they have visited the downtown area less often than in years past.

FIGURE 11  
 COMPARED TO THE PAST SEVERAL YEARS, HAVE YOU VISITED DOWNTOWN BOULDER THIS YEAR: ?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



Those who indicated they patronize the downtown area less frequently than in years past were asked for the reason(s) they don't go as often. In unaided recall, the primary reason, cited by 17 percent of the segment, is that parking is too hard to find. Eleven percent said that their lifestyle has changed, and 6 percent indicated that there is too much traffic. When asked to list additional reasons, 22 percent said that parking is too hard to find, followed by 13 percent who said there is too much traffic and 12 percent who said it is too crowded.

Those who indicated that they make trips to the downtown area more often were asked for their reasons for the shift in their habits. Asked to name the primary reason for the more frequent visits, 16 percent of the segment indicated that they like the restaurants. This further underscores restaurants as a competitive strength of the downtown area. Another 10 percent each said the primary reason is that they like the shops and the nightlife. Working or living closer to the area is also an important factor in the visitation patterns, as 8 and 6 percent, respectively, cited as the reason. When asked to list additional reasons, enjoyment of the general atmosphere is the most common reason (18 percent).

### *General Likes and Dislikes*

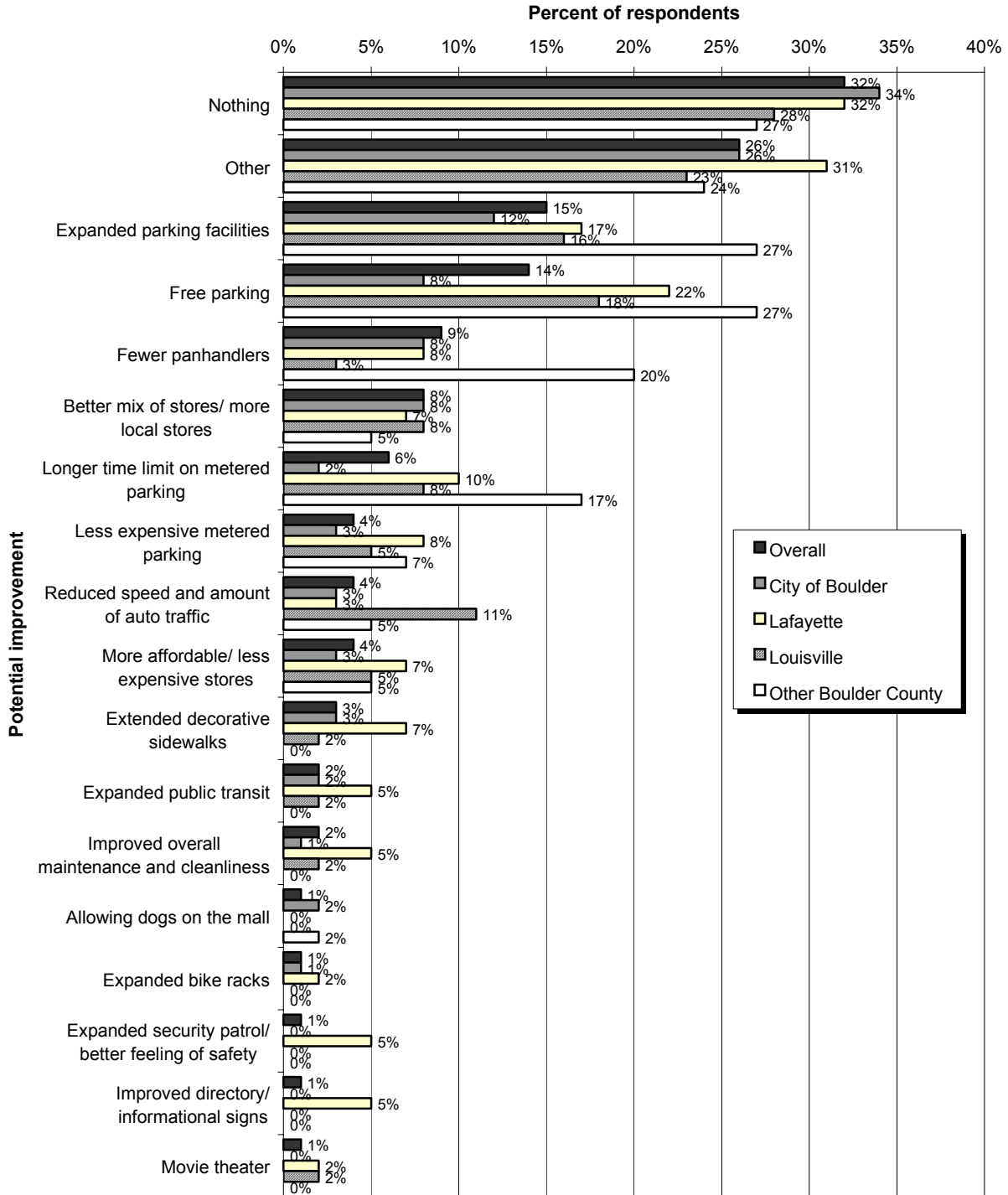
All respondents were asked for their general likes and dislikes about the downtown mall area. Restaurants and shopping, and to a lesser extent, landscaping/ flowers and trees, the pedestrian aspect, people watching, and street performers, were most often selected as positive aspects of the downtown area. By far the aspect disliked the most is the difficulty of finding parking, followed by, to a lesser extent, the number of panhandlers, the crowds, and the traffic. Interestingly, 10 percent said there is nothing they dislike about the downtown area.

### *Potential Downtown Improvements*

Respondents were also asked to cite improvements to the downtown area that would encourage them to visit more frequently. Interestingly, “nothing” was the top vote-getter, capturing 32 percent of the overall sample. This can either be interpreted that respondents are content with the downtown area, or that they are so turned off by the area that nothing would make them come more frequently. An “other” reason was the next most significant choice, at 26 percent (see below for examples of “other” reasons). Expanded parking facilities and free parking were the two most frequently selected closed ended response, with 15 and 14 percent, respectively, of respondents choosing them as the improvements that would make them come downtown more often. Other popular selections were fewer panhandlers (9 percent), a better mix of stores/ more local stores (8 percent) and a longer time limit on the parking meters (6 percent). Perhaps awareness of the new, extended three-hour limit on the downtown meters is not very high, and increasing that awareness might be a possible strategy to enhancing the image of the parking downtown.

Other improvements that would encourage more frequent visitation include improving the ease of getting there, more benches, more bathrooms, and more diverse shops. Other reasons listed were quite varied, and a full list is included in the text of the comments.

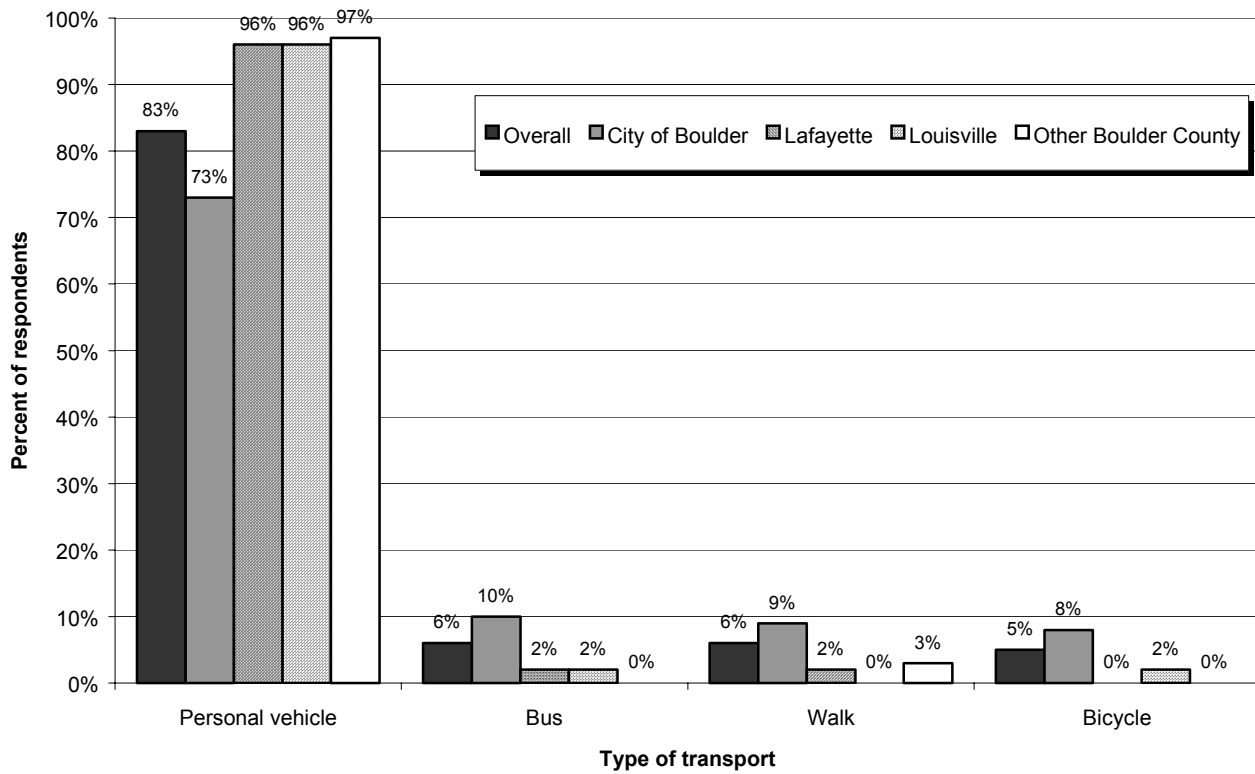
FIGURE 12  
 WHAT IMPROVEMENTS MIGHT ENCOURAGE YOU TO VISIT DOWNTOWN BOULDER MORE FREQUENTLY?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



*Transportation Issues*

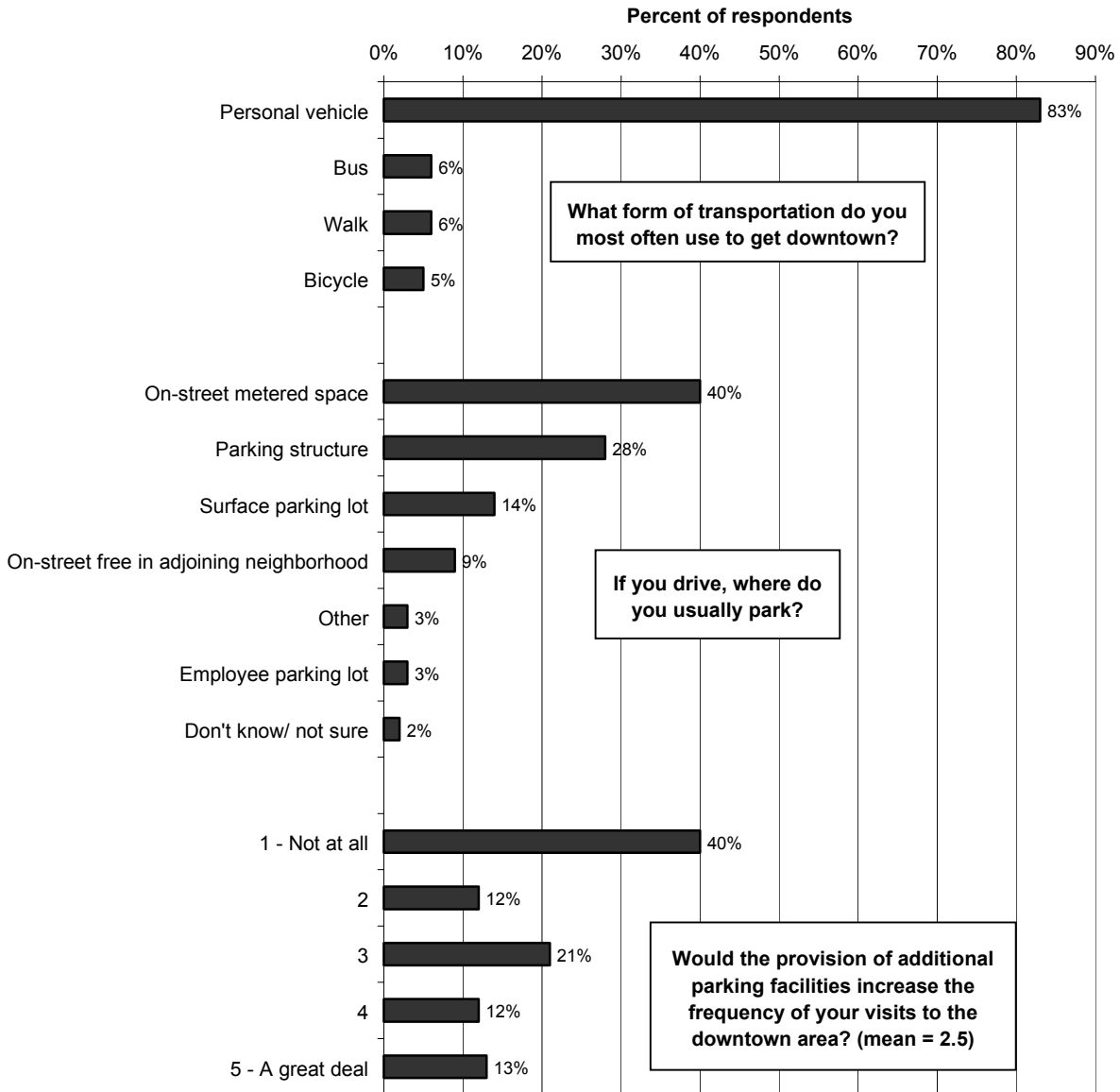
Looking at parking, a generally challenging issue, the sample seems to rely less on parking structures and facilities than on metered spaces on the street, and it also appears that additional facilities will not be as influential in stimulating more visits as might be hoped. While residents of the City of Boulder are the most likely to use alternate modes of transportation to the downtown area, the vast majority of those from outside Boulder drive to the downtown. This obviously puts a premium on providing parking spaces for these shoppers. It also points to the poor bus service from outlying towns to the downtown core. The chart below illustrates the transportation patterns by place of residence.

FIGURE 13  
 WHAT FORM OF TRANSPORTATION DO YOU USE MOST FREQUENTLY TO GET TO DOWNTOWN BOULDER?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



As seen in the figure below, on-street metered spaces are the most common place to park, suggesting shorter trips. Forty percent of those who normally drive say they park in metered spaces on the street, while 28 percent park in structures. Additionally, the plurality of respondents (40 percent) says that additional parking facilities would have no impact on their frequency of visits.

FIGURE 14  
 TRANSPORTATION ISSUES  
 DOWNTOWN BOULDER PHONE SURVEY 1999



### *Advertising Issues*

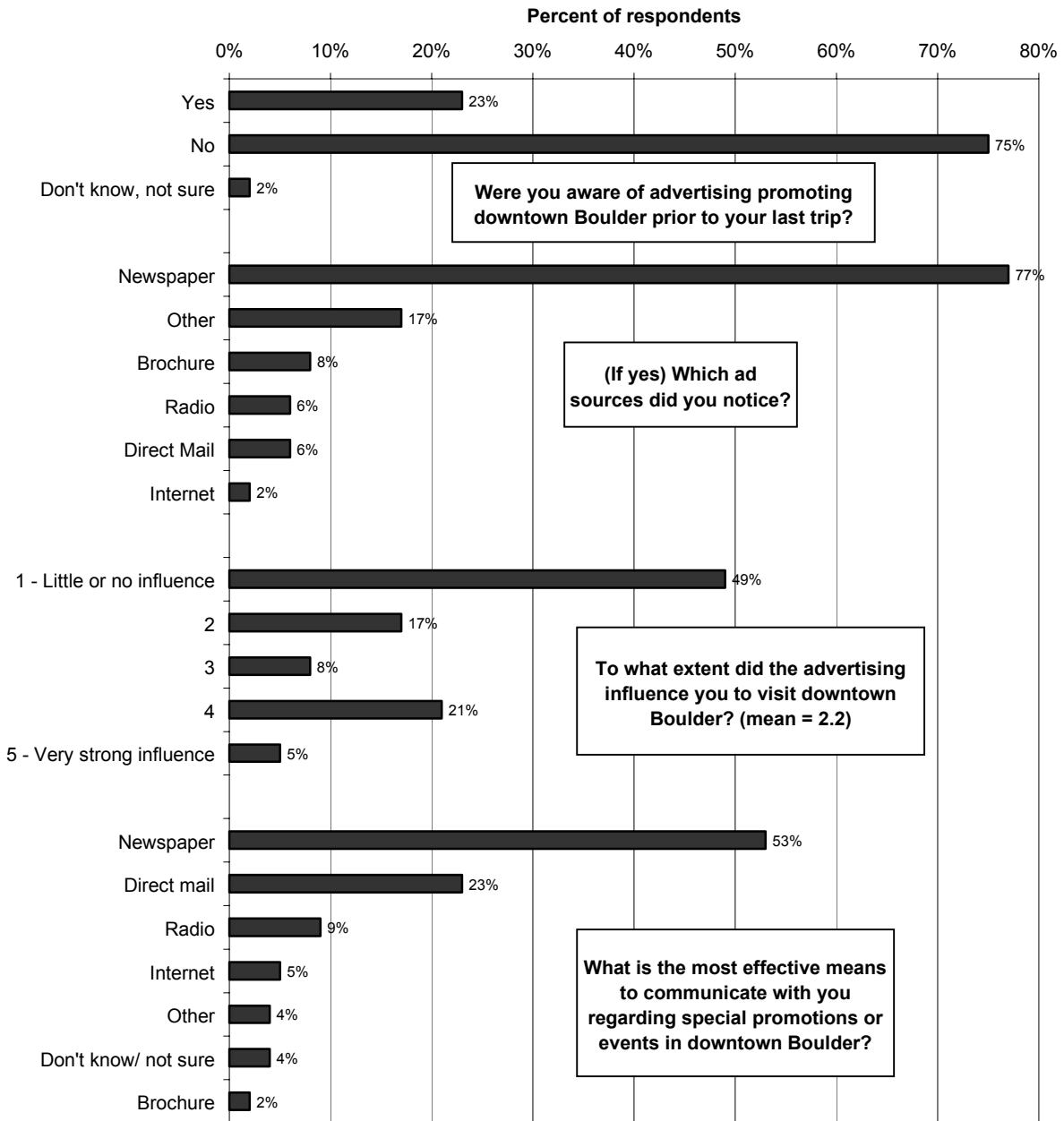
Advertising seems to reach only a few people interviewed. In all, 75 percent do not remember seeing advertising prior to their last trip to the downtown area. Looking at it another way, however, this means that almost one-quarter (23 percent) *did* see some advertising.

Of those who recalled ads at all, the most common ad is seen in the newspaper, followed by “other” sources (which include word of mouth, general familiarity with the area, bus signs, posters, and shows, among others), and brochures, radio, and direct mail. These patterns are displayed in the graph on the following page.

Despite the fact that half of those who saw ads said they had little or no influence on them to visit Downtown Boulder, the ads were effective with some people. In fact, 21 percent rated their effectiveness a four out of five, indicating that, with certain segments, the advertisements are modifying visitation behavior.

It appears that newspapers, which are already the most frequently recalled source of ads, are the best way to promote Downtown Boulder, particularly for special events or promotions. Fifty three percent indicated that they would prefer newspapers, while another 23 percent would favor direct mail as a means of contacting them.

FIGURE 15  
 ADVERTISING ISSUES  
 DOWNTOWN BOULDER PHONE SURVEY 1999



### *Special Events*

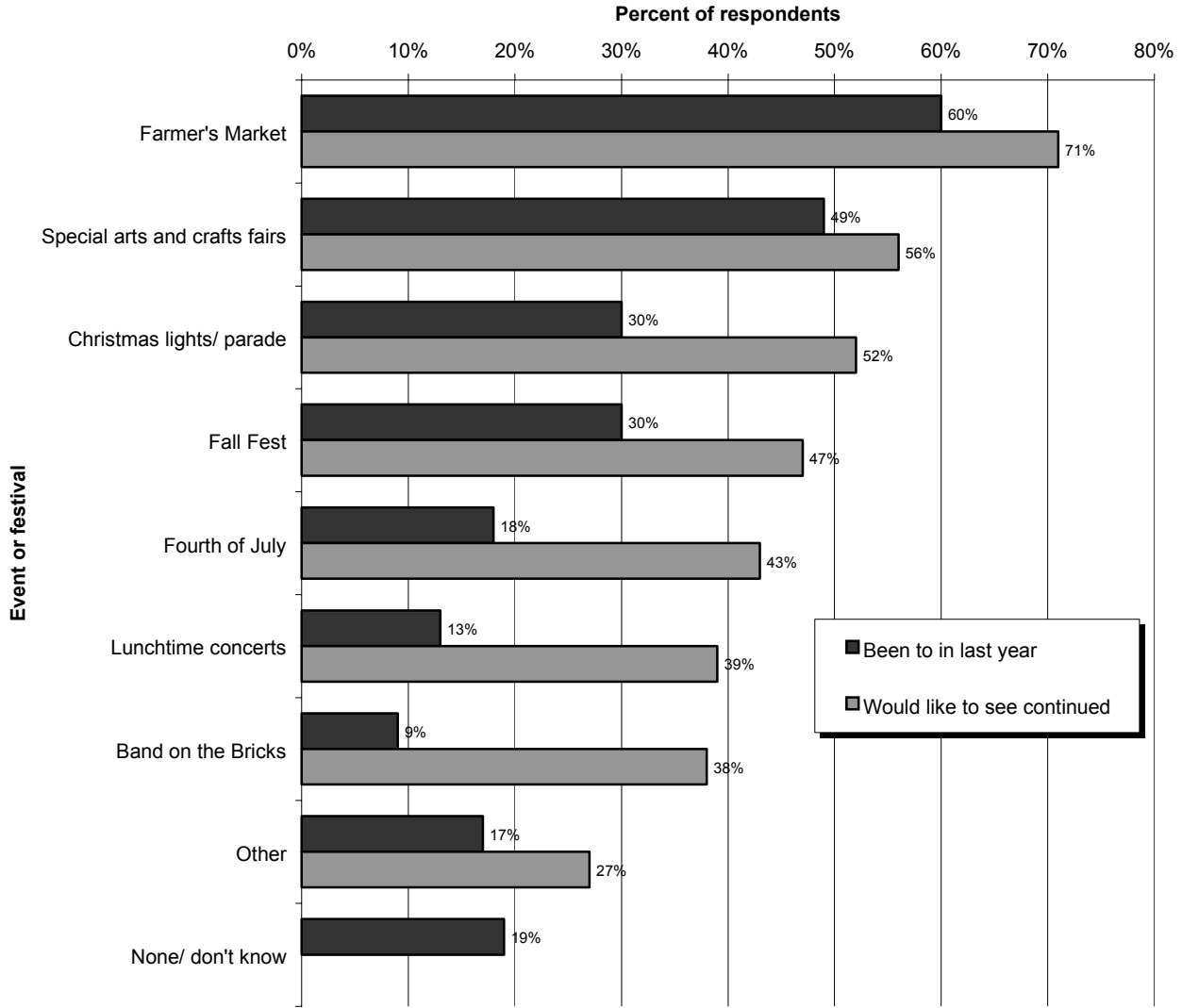
The Farmer's Market is the most popular event in the downtown area, with 60 percent of the sample indicating they have been there in the past year. Special Arts and Crafts fairs, the lighting of the Christmas lights, and Fall Fest are also popular (illustrated in Figure 13 on the following page). In addition, the Boulder Creek Festival, which was not on the list of events, was mentioned frequently as an "other" event attended in the past year.

Most of these events occur on the weekends, when parking is more easily accessible, likely adding to their appeal. Strong support is observed for the continuation of almost all of the events listed.

When asked for other types of events that the respondent would like to see, different kinds of musical events were listed frequently. For example, concerts, jazz bands, philharmonic concerts, and general requests for music were common. Also, other arts and crafts fairs were mentioned often.

Older respondents appear to come to the mall with equal or greater frequency than other segments for some of these special events, especially the Farmer's Market and special arts and crafts fairs. As such, additional special weekend events targeted at this older segment could be a vehicle to promote increased visitation to the downtown area.

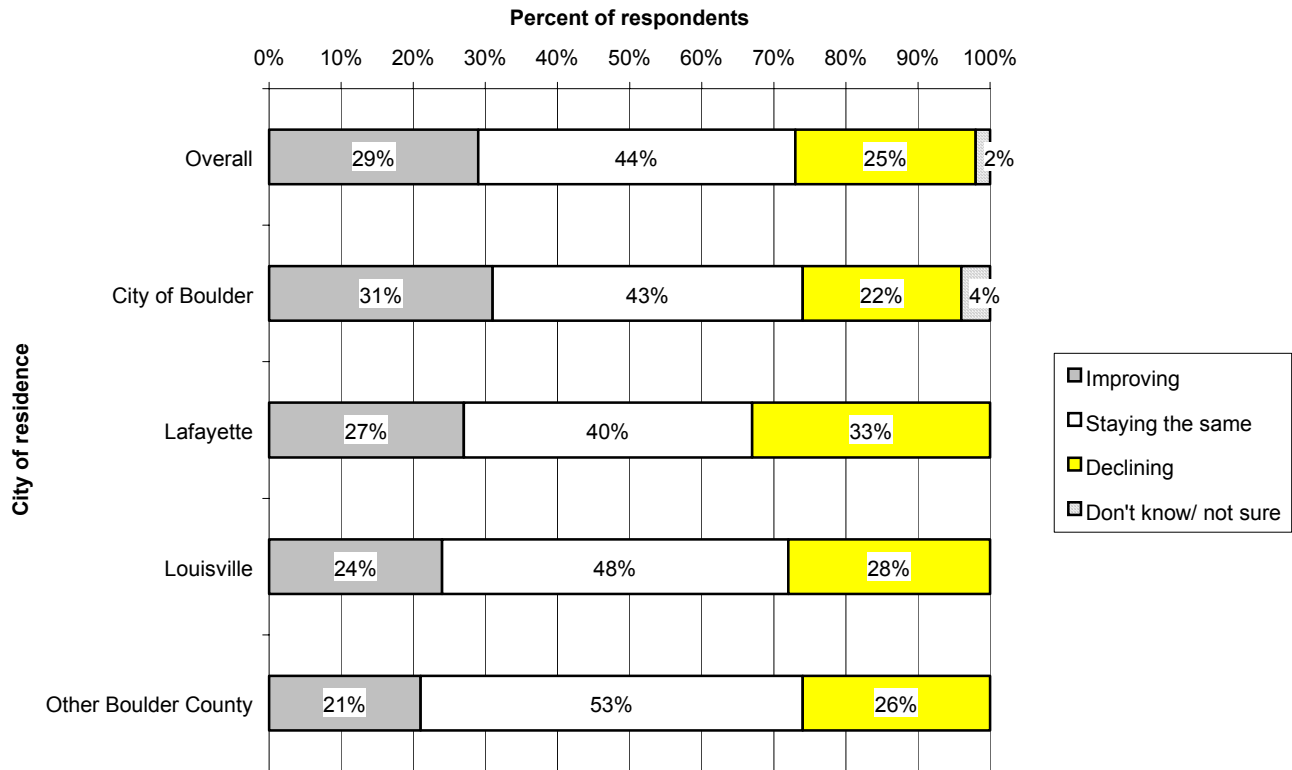
FIGURE 16  
 WHICH OF THE FOLLOWING EVENTS OR FESTIVALS HAVE YOU ATTENDED IN THE PAST YEAR,  
 AND WHICH WOULD YOU LIKE TO SEE CONTINUED?  
 DOWNTOWN BOULDER PHONE SURVEY 1999



*Quality of Experience*

Those residents who have been visiting downtown Boulder for over a year were asked if their experience in recent years had been improving, staying the same, or declining. Overall, 29 percent responded their experience downtown is improving, 44 percent said staying the same, and 25 percent said declining. City of Boulder residents were slightly more likely to indicate their experience is improving and slightly less likely to say it is declining. The opposite is true of those respondents outside the city of Boulder.

FIGURE 17  
 IN RECENT YEARS, HAS THE QUALITY OF YOUR EXPERIENCE DOWNTOWN BEEN: ?  
 BY RESIDENCE OF RESPONDENT  
 DOWNTOWN BOULDER PHONE SURVEY 1999



When asked why their experience is improving, many people cited the improved cleanliness and overall appearance, new restaurants, landscaping, and different shops. Those who say their downtown experience is declining were apt to mention congestion (crowds and traffic), national or chain stores replacing locally owned ones, and parking problems.

*Respondent Demographics*

As mentioned earlier, the sample in the phone survey was somewhat older than that in the intercept survey. The two graphs below illustrate the patterns of the profile of these two groups.

FIGURE 18  
RESPONDENT DEMOGRAPHICS  
DOWNTOWN BOULDER PHONE SURVEY 1999 AND INTERCEPT SURVEY 1998

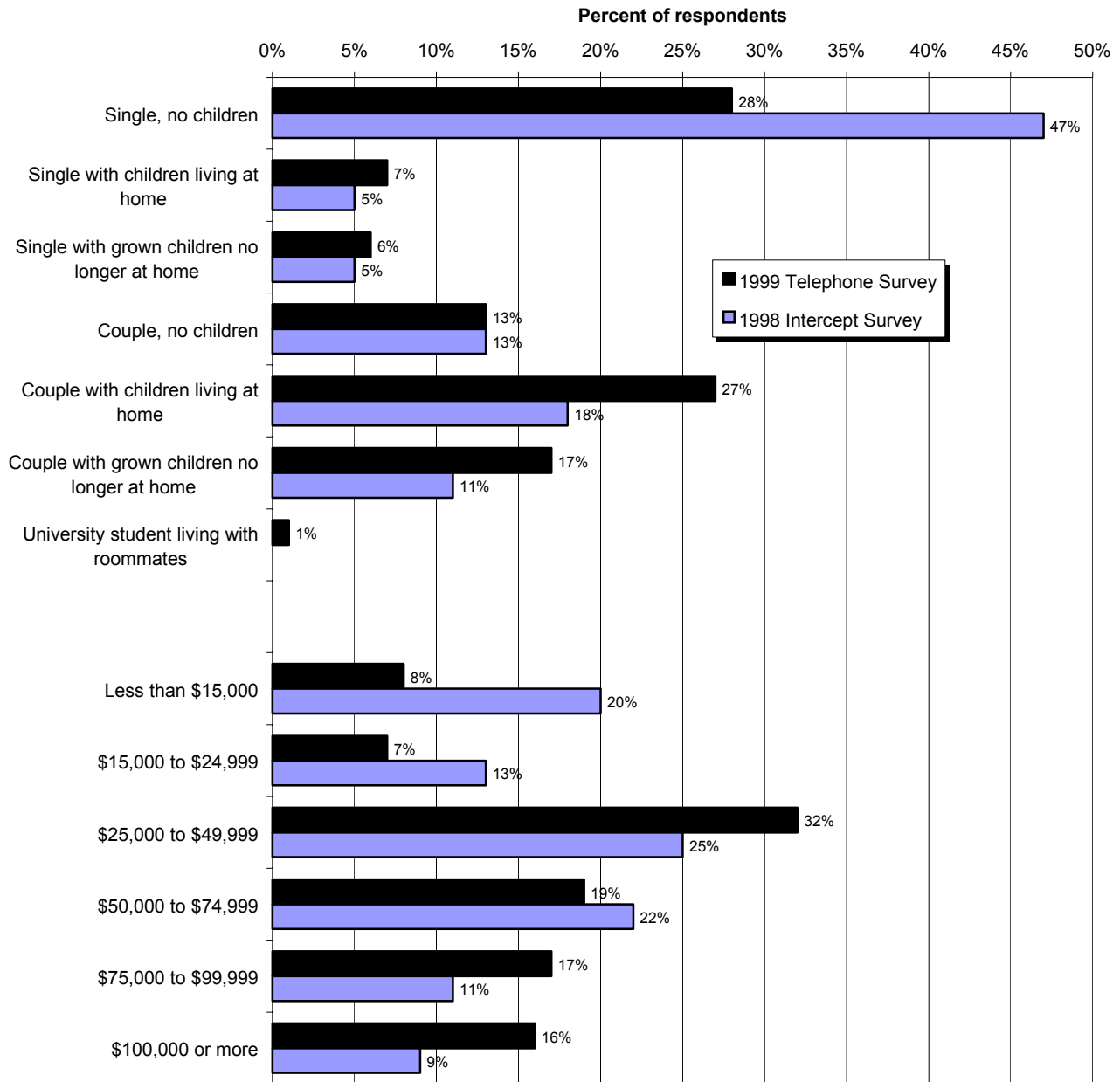
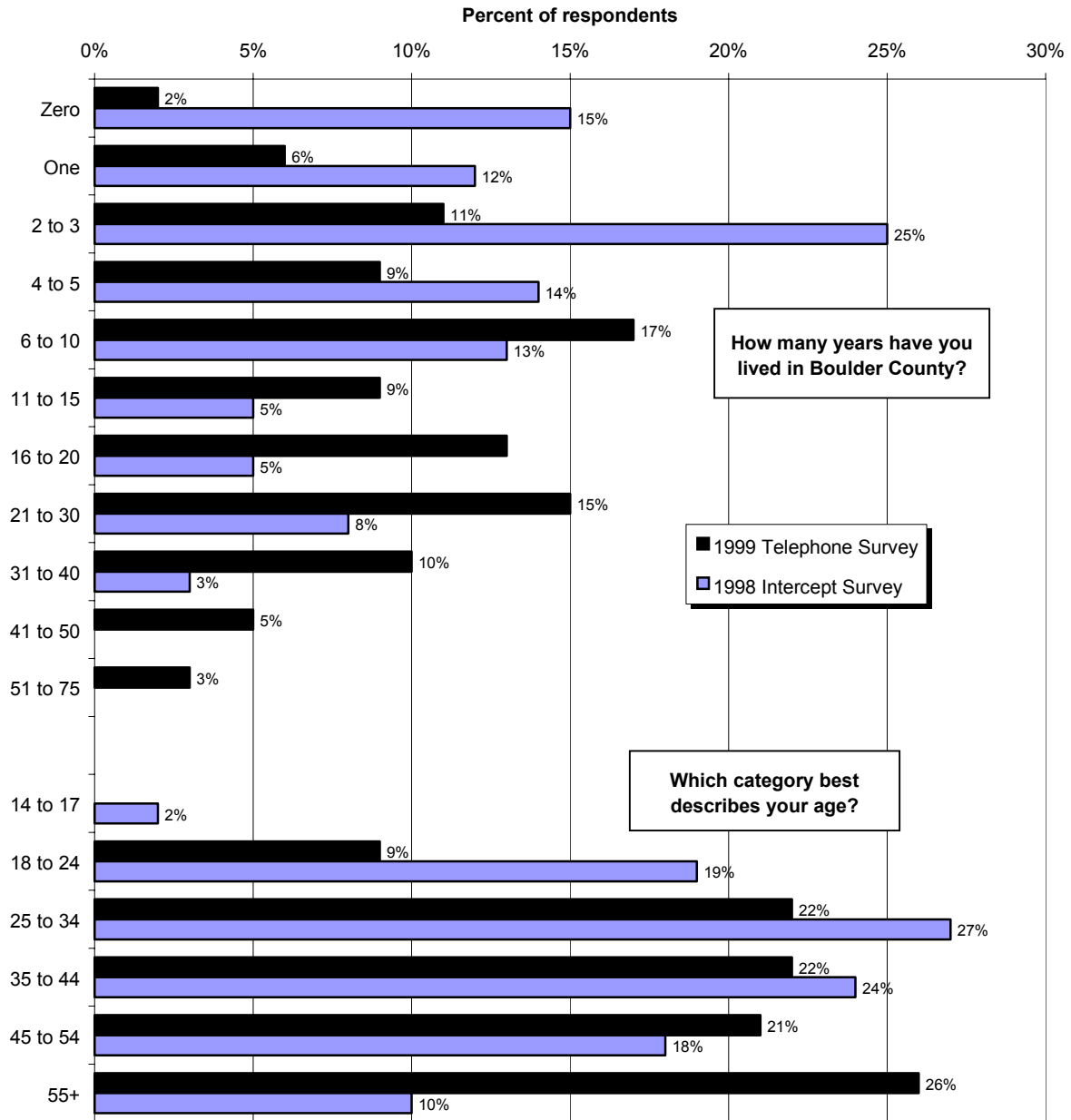


FIGURE 19  
 RESPONDENT DEMOGRAPHICS  
 DOWNTOWN BOULDER PHONE SURVEY 1999 AND INTERCEPT SURVEY 1998



## OPEN-ENDED COMMENTS

Several important issues were covered in the survey in open-ended questions. As the responses were quite numerous, only a summary of these comments is included here. A full copy of the open-ended comments can be obtained from Molly Winter at the Downtown Management Commission, (303) 441-4001, or from Nolan Rosall or Dave Belin at RRC Associates, (303) 449-6558.

*What word or phrase first comes to mind when you think of Downtown Boulder?*

Responses to this question were quite varied, and ranged from the positive to the negative. Typical examples of the former are included below.

*Beautiful*  
*Fun*  
*Convenient*  
*Mall*  
*Pearl Street*  
*Quaint*  
*Unique*  
*Interesting*

In addition, some less-than-flattering responses were recorded. Some representative ones follow.

*Congested*  
*Crowded*  
*No Parking*  
*Traffic*  
*Expensive*

*What shops or services would you like to see added in Downtown Boulder?*

Respondents suggested various other shops. Specific clothing stores were frequently mentioned, such as for women, for men, and for older people. Other suggestions include a hardware store, a movie theater, and restaurants. Some comments include:

*Clothing Shops*  
*More restaurants*  
*Cool Coffee Shops*  
*Hardware Shop*  
*Less trendy stores, more practical stores*  
*Department Store*  
*Good hip hop store*  
*More locally owned and operated shops*  
*Fly Fishing Shop*  
*Women's clothing, professional business wear*  
*J. Crew*

*What are the highest priorities for improvements to the public spaces on the Downtown Mall?*

Restrooms (in all its various iterations, such as more restrooms, better restrooms, restrooms, public restrooms, etc.) emerged as by far the most popular renovation. Other improvements mentioned include more parking, more benches, cleanliness, reduction of loitering, general landscaping, sidewalks, and traffic. Selected suggestions are listed below.

*Added seating areas*  
*Better restrooms*  
*Trash, facelifts of buildings*  
*Extend the Mall itself*  
*More public restrooms*  
*Street lights, trees, brickwork*  
*More landscaping*  
*Parking*  
*Restrooms*  
*Outdoor eating places*  
*Benches*  
*Traffic*  
*The benches and continue planting*

*Are there any other ideas you have that would make the downtown area more attractive?*

Construction, panhandlers, and general cleanliness appear to be the greatest priorities for making the area more attractive. Some suggestions are listed below.

*Empty the trash cans more often*  
*Better landscaping*  
*Fewer people, no bums*  
*Just keep it clean*  
*Make it more children friendly*  
*Shuttle service from parking*  
*Fountains*

*What would be the most important thing that Downtown Boulder could do to retain your patronage or encourage you to come downtown more frequently?*

In light of the emerging competition from Flatiron Crossing, Downtown Boulder would like to know what it could do to continue to attract business. Responses to this question were quite varied, but some general themes did emerge, with parking as the most predominant. Other suggestions included a different mix of stores, retaining the small town feel of the Mall, and more competitive pricing. Some comments include:

*More free parking*

*Keep it nice and clean*  
*Better access*  
*Keep prices competitive*  
*More convenient and less expensive*  
*Stop being so strict about parking regulations*  
*Traffic is why I don't go to Boulder*

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