DOWNTOWN BOULDER

USER SURVEY

SUMMER 2008

FINAL REPORT

NOVEMBER 2008

PREPARED FOR
DOWNTOWN BOULDER, INC.
CITY OF BOULDER, DOWNTOWN AND UNIVERSITY HILL MANAGEMENT DIVISION/PARKING SERVICES
BOULDER CONVENTION AND VISITORS BUREAU

PREPARED BY

RRC ASSOCIATES
4940 PEARL EAST CIRCLE, SUITE 103
BOULDER, COLORADO 80301
303/449-6558
WWW.RRCASSOC.COM

TABLE OF CONTENTS

INTRODUCTION **1**
Methodology 1
Terminology 2
EXECUTIVE SUMMARY **3**
Visitor Mix 3
Overnight Visitors 4
Accommodations 5
Visitor Demographics 5
Marketing and Media 6
Visitation Patterns 6
Purpose of Visit-All Visitors 6
Spending Patterns 7
Transportation and Parking 8
Transient/Panhandler Issues 8
Hop 2 Chautauqua 8
Activities/ Special Events/ Festivals/ Free Concerts 9
Satisfaction Ratings 9
Downtown Experience-Improving or Declining 10
Competitive Shopping Areas 10
Comments 11
GRAPHS **14**

DOWNTOWN BOULDER USER SURVEY
2008
FINAL REPORT

INTRODUCTION

This report summarizes the results of the 2008 Downtown Boulder User Survey, a randomly administered intercept survey of downtown area pedestrians conducted on and near the Pearl Street Mall area of Boulder, Colorado. A total of 779 interviews were completed during the research period between mid July 2008 and mid September 2008.

The purpose of the downtown user research program is to identify and monitor on an ongoing basis the characteristics and experiences of mall users. Key topics in this year's survey include the mall visitor mix (visitors and residents), spending patterns, quality of the visitor experience, advertising awareness, mode of travel to the downtown area, panhandlers' behavior, suggestions for improvements, and other important issues. Additionally, Boulder County residents were asked about, competitive issues, including the frequency of visiting other major shopping areas, awareness of downtown parking alternatives and attendance at special events and festivals. Out of town visitors were asked if they were spending the night, information sources they used for planning their visit, total spending while in Boulder and the primary purpose of their trip to Boulder. And finally, this year's survey included questions relating to the new 'Hop to Chautauqua' bus service from Downtown Boulder to Chautauqua Park.

Presentation of research results are intended to assist Downtown Boulder, Inc, the City Downtown Management Commission, the Downtown Business Improvement District, and the Convention & Visitors Bureau's understanding of key issues and concerns from the perspective of the visitor/user in order to set priorities for improvement, image, branding, and functioning of this key downtown area. The report is presented in two primary sections; an executive summary highlighting key findings and trends, followed by a series of graphs illustrating year-to-year trends and results by visitor type.

Methodology

Interviews were conducted at various times throughout the day, between 11:30 a.m. and 8:00 p.m. along Pearl Street from 10th Street to 16th Street. Similar to the research conducted in 2007 and prior years, the surveys were concentrated on the pedestrian area of Pearl Street Mall, though a portion of the research was done both one block east and one block west of the mall proper. The interviewing methodology has been consistent in terms of time of day, time of year, location of interviews, and sampling procedures; thus, year-to-year comparisons are valid.

The 2008 survey is the sixteenth Downtown Boulder User Survey RRC Associates has conducted for Downtown Boulder, Inc., the City of Boulder, and the Boulder Convention & Visitors Bureau. In this report, the 2008 results are compared to results from prior years, particularly the most recent results, to assist in identifying trends. Year to year, many questions remain similar, allowing for monitoring of longitudinal trends.

Several questions are *only* asked to overnight visitors, or to City and County residents and as a result, only the segment to which the question was posed is discussed. In other situations, however, only the segments with notable changes are discussed in an effort to highlight a particular issue and avoid repetitive, less noteworthy situations.

Terminology

Throughout the report, in narrative form with the executive summary and graphs that follow, two points of comparison are used: year-to-year comparisons and visitor mix comparisons. Year-to-year comparisons identify long-term trends and frequently use averages of all visitor types. Delineation of the visitor mix employs the following classifications:

- Visitors/user*:* All survey respondents.
- Local: Residents of the City of Boulder and Boulder County (non-City) but delineated when appropriate. In addition, City of Boulder residents are segmented as non-student and student.
- Boulder County resident: Living in Boulder County, outside the City of Boulder.
- Colorado resident: Colorado visitors residing outside Boulder County.
- Visitor residing outside Colorado: Except for an initial discussion of visitor mix residency, this term includes US visitors residing in other states, international visitors and part-time/summer resident.
- Overnight visitor: Visitors staying the night regardless of residency.

EXECUTIVE SUMMARY

A common theme throughout this summer's Downtown Boulder research program is increased penetration and usage among residents of the immediate vicinity. More City of Boulder locals (non-students and students) walked to visit the downtown area compared to previous years and more local residents (City of Boulder and Boulder County) shopped in the downtown area than in previous years, showing increased frequency of use and interest in this core area. Local patrons (Boulder City and County residents), on average, visited the downtown area 15 times (10 visits, median) in the past two months and approximately 20 percent of City of Boulder patrons (non-students and students), visited the area 21 to 60 times in the past two months.

While other visitor segments are equally important, this close-in local segment of the downtown visitor mix, comprised of consumers and employees, is vital to long-term sustainability of the area and its businesses. ***As quality mixed-use development continues to animate areas adjacent to Pearl Street, the local visitor segment is likely to increase proportionately within the Downtown Boulder visitor mix.***

Visitor Mix

This survey defines visitors by residency in broad terms (City, County, State, International and part-time/summer residents) and by segmenting the largest, local population into locations within Boulder County and City. All categories are presented below with relevant highlights.

- Full time City of Boulder residents: As in the past, this segment dominates the downtown mix of residents and visitors; ***37 percent of downtown users reside in Boulder***.
    - *Core downtown Boulder/Central/West Boulder*: This past summer saw a shift in the geographic mix of City of Boulder resident-users. While the overall proportion of total visitors residing in the City of Boulder remained relatively unchanged at 37 percent, there was an ***increase in the proportion residing in the downtown core area.*** Corresponding to the increase in residents who reported to live in the core area was a decrease in the proportion residing in the Central/West Boulder (23 percent, 2008 vs. 30 percent, 2007) as well as other areas, noted below.

      An important note when understanding the above, ***previous to 2007, core downtown was not a response option for area of residency within Boulder***. From years 2003-2006, on average, 46 percent of Boulder residents reported living in *Central/West Boulder*. Combining proportions of residents in Core Boulder (26 percent) with Central/West Boulder (23 percent) yields 49 percent of City respondents residing in these two areas, similar to previous years' average.
    - *Other Boulder areas*: City of Boulder respondents reporting to live in the North Boulder area declined to 22 percent (vs. 27 percent, 2007), South Boulder area shifted to 13 percent (vs. 20 percent, 2007) and East Boulder declined to 10 percent (vs. 12 percent, 2007).
- Boulder County residents outside the City of Boulder: From years 2004 through 2007, this segment comprised 14 percent of the total visitor mix, compared to 10 percent this year.
- Colorado residents outside Boulder County: The segment comprised of ***Colorado visitors residing outside of Boulder County has experienced steady growth since 2004*** when this segment comprised 14 percent of the visitor mix, increasing to 23 percent this past summer.

- US visitors residing outside Colorado: The past three years, ***US visitors living outside Colorado has comprised approximately one-quarter of the visitor mix in Downtown Boulder*** (25 percent, 2008 vs. 25 percent, 2007; 26 percent, 2006) although slowly declining year-to-year since 2003 when this segment comprised 34 percent of the mix.
- International visitors and part-time/summer residents: As in previous years, these segments remain under 5 percent of the overall mix and this past summer, 2 percent of visitors reported to live in a country other than the United States or living in Boulder on a part-time basis.

Overnight Visitors

These visitors have a substantial impact on Boulder's economy due to length of stay, hotel, restaurant and retail expenditures. A few key components of this group are presented below.

- Length of stay: Overnight visitors from Colorado (outside Boulder County) comprised 56 percent of those spending one night in Boulder and an additional 25 percent were spending two nights. Visitors living outside of Colorado tended to stay longer in Boulder with only 8 percent spending one night and the majority ***staying 2-5 nights (21 percent stayed 2 nights; 44 percent stayed 3-5 nights).*** An additional 25 percent stayed 6-10 nights.
- Size of travel party: On average, respondents staying overnight traveled with one other person (41 percent, 2008, vs. 44 percent, 2007). Colorado visitors living outside Boulder County tended to travel in groups of three or fewer people; 30 percent were traveling by themselves, 37 percent were with one other person and 17 percent arrived with 2 other visitors. Majority of visitors living outside Colorado and staying the night were in slightly larger groups with 18 percent traveling alone, 44 percent with one other person and 19 percent with 2 other travelers.
- Primary purpose of visit: On average, ***more overnight visitors were in Boulder for recreation/vacation/sightseeing (35 percent, 2008 vs. 37 percent, 2007) than visiting friends and family (24 percent, 2008 vs. 39 percent, 2007)***. Primary reasons for visiting cited by Colorado residents outside Boulder County were recreation/vacation/sightseeing (35 percent) followed by combined business and pleasure (20 percent). Visitors living outside Colorado also cited recreation/vacation/sightseeing as their primary reason (36 percent), followed by visiting friends and family (25 percent) and combined business and pleasure (13 percent).
- Spending patterns: ***Overnight visitors residing outside Colorado spent, on average, $779.52 (median, $574.08) during their trip to Boulder***, compared to Colorado residents living outside Boulder County ($330.61, average; $232.57, median). Visitors living outside Colorado spent an average of $339.37 for lodging ($250.00 median), $233.02 shopping ($200.00 median) and $245.48 for entertainment and dining ($200.00 median). Colorado overnight visitors living outside Boulder County spent an average of $115.47 for lodging ($83.03 median), $117.88 shopping ($44.05 median) and $107.88 for entertainment and retail ($93.93, median).

  Comparing this summer to 2007, average ***hotel expenditures increased 37 percent*** ($295.05, 2008 vs. $215.13, 2007) with 34 percent spending $301.00 or more during their stay (28 percent, 2007). Counter balancing this, to some extent was an 11 percent decline in shopping expenditures (average $210.69, 2008 vs. $237.90, 2007), and a decline of 15 percent in dining and entertainment expenditures ($218.23, 2008 vs. $255.27, 2007).

- Geographic residence: Overnight visitors residing outside Colorado traveled from California (12.7 percent), Florida (9.0 percent), Illinois (5.5 percent), Texas (4.1 percent), Ohio (3.8 percent) and New York (3.3 percent) in addition to several other states.

Accommodations

Only respondents living outside Boulder County were surveyed about their intention to spend the night in Boulder. When compared to 2007, a decline of 6 percentage points was realized in the number of respondents who were ***not spending the night in Boulder*** (54 percent, 2008 vs. 48 percent, 2007).

- Type of accommodations: Overnight visitors staying the night in commercial lodging within the City of Boulder increased 3 percentage points (21 percent, 2008 vs. 18 percent, 2007), those staying in commercial lodging outside Boulder remained steady at 5 percent and fewer respondents stayed with friends and family (18 percent, 2008 vs. 28 percent, 2007).
- Average number of nights: On average, the ***number of nights visitors spent in Boulder declined from 4.4 to 4.0***, a result of more visitors spending only one night (17 percent, 2008 vs. 8 percent, 2007) and fewer spending 2-5 nights (59 percent, 2008 vs. 67 percent, 2007).

Visitor Demographics

- Age: ***The average age remained slightly above 39 years*** (39.4 years, 2008 vs. 39.5 years, 2007). Other than students (average age, 24 years), Colorado residents outside Boulder County were the youngest (38.7 years) followed by non-student City of Boulder residents (40.6 years) and the oldest segment were visitors living outside Colorado (45.1 years).
- Household makeup: On average, ***47 percent of visitors were single or couples without children,*** 27 percent were households with children living at home (vs. 29 percent 2007) and 17 percent with children no longer living at home or *Empty Nesters* (vs. 15 percent, 2007). Finally, the remaining 9 percent were university students.
- Household income: After declining almost $2,000 on average from 2006 to 2007 ($80,718, 2006 vs. $78,974, 2007), ***average household income increased to approximately $84,317 this past summer***. Students residing in the City of Boulder were at the lowest end, with 55 percent earning less than $14,999 annually, and 22 percent earning less than $24,999 annually ($24,067, average). Forty-three percent of City of Boulder residents (non-students) reported to be within the $25,000-$74,999 income bracket, with another 16 percent earning between $75,000 and $99,999 annually ($77,807, average). Boulder Colorado residents living outside of the City of Boulder earn on average $93,323 annually and ***the highest income-earning segment continues to be the visitor residing outside of Colorado; 66 percent earn more than $75,000 and 14 percent earn over $200,000 annually with an average annual income of $111,507.***

Marketing and Media

- Awareness of advertising: Over the years, approximately one quarter (26 percent, 2008 vs. 25 percent, 2007), of the visitor base reported to be ***aware of Downtown Boulder advertising*** prior to visiting. Included in the portion noticing advertising were 16 percent (vs. 21 percent, 2007) who knew of ***general Downtown Boulder information*** and an additional 10 percent (vs. 5 percent 2007) were aware of specific merchant information.
- Source of information prior to visit: Visitors residing outside Boulder County were queried on information sources utilized to plan their trip to Boulder. Compared to 2007, ***word of mouth*** declined 31 percentage points (31 percent, 2008 vs. 62 percent, 2007), ***website*** increased 11 percentage points (43 percent, 2008, vs. 32 percent 2007) and ***experience of prior visit*** declined 12 percentage points (28 percent, 2008 vs. 40 percent, 2007).
- Usage of Boulder website: All visitors were asked whether they had visited the Boulder website (www.boulderdowntown.com or www.dbi.org). The segment with the most prevalent usage were locals with 36 percent of non-students reported to have used the site, followed by 35 percent of Boulder County residents and 31 percent of City of Boulder students. Only 16 percent of visitors residing outside of Colorado reported to use the website. Most frequently, visitors used the site for information on events (47 percent) followed by shopping (40 percent) and dining (35 percent).

Visitation Patterns

- First time visitors: On average, ***19 percent of all respondents reported no previous visit to the downtown area***; an increase of 4 percentage points compared to 2007 and importantly, the highest proportion of first time visitors over the past 5 years. Residents living outside Colorado reported the highest proportion of first time visits (53 percent).
- Number of years visiting Downtown Boulder: The proportion of visitors patronizing downtown for a year or less increased 7 percentage points (14 percent, 2008 vs. 7 percent, 2007) and those reporting 2 to 6 years of visitation declined 10 percentage points (22 percent, 2008 vs. 32 percent, 2007). Long-term visitation trends remain stable with ***a strong 39 percent of all respondents reported having visited the downtown area for 10 or more years.*** Specifically, 55 percent of City of Boulder non-student residents (vs. 27 percent of students), 66 percent of Boulder County residents and 38 percent of Colorado residents living outside Boulder County reported having visited the downtown area for 10 or more years.

Purpose of Visit-All Visitors

Comparing 2008 to 2007, notable shifts occurred in visitors' responses when asked *what was their primary reason for visiting Downtown Boulder.* ***(Note: respondents selected one choice only.)***

- Hanging out/enjoy the setting/people watching: This summer, 24 percent of all visitors reported their ***primary reason to visit Downtown Boulder was to hang out/enjoy the setting/ people watching (24 percent, 2008 vs. 33 percent, 2007).*** Visitors from outside Colorado were more inclined to *hang out* (36 percent) than City of Boulder residents (17

percent, non-student and 20 percent, students).

- Shopping: Compared to previous years, more visitors reported to be in the downtown area primarily to shop (20 percent, 2008 vs. 14 percent, 2007 and 18 percent, 2006). ***Twenty-seven percent of visitors living outside Colorado cited shopping as a primary purpose for their visit*** versus 13 percent of City of Boulder residents (non-student) and 12 percent (students). At the same time, average retail expenditure per person slipped by $2.00 (discussed below).
- Meals-sit down or takeout: Visitors choosing downtown Boulder primarily to enjoy a meal declined approximately 7 percentage points (18 percent, 2008 vs. 25 percent, 2007). Of all segments, ***City of Boulder residents were the most inclined to cite getting a meal as their primary reason for visiting Downtown Boulder*** (20 percent, non-students). However, as noted below, average expenditures in restaurants and bars increased by $6.00 per person.
- Employment/job related/job search: Respondents employed in the downtown area, visiting for employment-related activities or as part of a job search increased a slight 3 percentage points compared to last summer (14 percent, 2008 vs. 11 percent, 2007). Twenty-two percent of non-student Boulder residents and 27 percent of student-residents were in the area for employment-related activities. City of Boulder residents reporting to be a full-time employee of the downtown area increased 4 percentage points (19 percent, 2008 vs. 15 percent, 2007).

Spending Patterns

The proportion of respondents making a purchase declined to 84 percent (2008) from 89 percent during 2007. However, the average amount spent increased by four dollars per person, to an average $55.58, up from $51.58 a year ago. Average spending was up for City of Boulder residents ($35.57, 2008 vs. $29.71, 2007, non-student), Boulder County residents ($45.43, 2008 vs. $29.90, 2007) and visitors residing outside Colorado ($83.07, 2008 vs. $80.60, 2007). Spending remained flat for students residing in Boulder ($33.94, 2008 vs. $33.97, 2007) and declined for Colorado residents living outside of Boulder County ($58.14, 2008 vs. $61.93, 2007).

- All visitors-restaurants and bars: ***Average spending patterns in restaurants and bars increased nearly $6.00 ($27.82, 2008 vs. $21.88, 2007).*** On average, City of Boulder non-student residents spent $20.38 and students, who continued to spend less per trip on food and beverage, spent $18.83 compared to visitors living outside of Colorado who reported $39.80 average restaurant spending.
- All visitors-retail and galleries: Across the entire base, retail and gallery sales decreased approximately $2.00 ($26.55, 2008 vs. $28.38, 2007) per visitor, on average. City of Boulder non-student residents spent $13.36 and $14.31 (student) compared to a ***substantially higher per capita amount among visitors residing outside Colorado reporting $42.31 average retail expenditure.***

Transportation and Parking

- Transportation: Overall, the number of visitors reporting to ***use private vehicles for travel to the downtown area declined 11 percentage points*** (60 percent, 2008 vs. 71 percent, 2007) compared to a 9 percentage point increase in walking (20 percent, 2008 vs. 11 percent, 2007) and a slight increase in biking (9 percent, 2008 vs. 8 percent, 2007). Not surprisingly, City of Boulder residents reported the highest rates of walking (27 percent, non-students and students) and biking, (14 percent, non-students; 20 percent, students).
- Parking: Although slightly lower than the previous 5-year average, the largest segment of drivers used on-street pay stations (38 percent, 2008 vs. 42 percent, average) than parking structures/garages (30 percent, 2008 vs. 40 percent, 2007). Also, compared to last year, more ***drivers took advantage of on street free/adjoining neighborhood parking*** (20 percent, 2008 vs. 13 percent, 2007).
- Satisfaction of parking-related issues: For the first time, respondents were queried on satisfaction of parking related issues. Based on a scale of 1-5, with 5 being v*ery good,* ***sense of safety*** averaged 4.6 points, and remaining three categories all received averages of 4.1 points: overall ease of finding a space, overall ease of use of pay stationsl, and overall satisfaction with parking.
- Parking revenue: Nearly all respondents (91 percent) reported not to know (or were unsure) how the revenue from parking pay stations and parking garages was used.

Transient/Panhandler Issues

All visitors were asked whether the behavior of panhandlers had improved, stayed the same, had become more of a problem or whether they were unaware of any change in behavior.

- Improved: This year, 17 percent of all respondents felt the behavior had improved, exactly the same results as last year. City of Boulder residents, non-students and students, were in line with this average (17 percent and 18 percent, respectively). Boulder County residents felt slightly more positive; 23 percent felt the behavior had improved.
- Stayed about the same: Thirty-eight percent of all respondents felt the behavior of panhandlers had stayed about the same; 52 percent of non-student City residents and 49 percent of student-respondents perceived no change in behavior.
- Becomes more of a problem: Only 9 percent of all respondents perceived the downtown panhandling situation had become more of a problem, an improvement from last year when 14 percent felt the issue had become more of a problem.
- Don't know/not sure: Thirty-six percent of respondents were uncertain or unaware of any change. Specifically, 70 percent of visitors living outside Colorado were unsure or didn't know whether the behavior had changed in any direction.

Hop 2 Chautauqua

This was the first year Boulder offered bus service from Downtown Boulder to Chautauqua Park. Questions related to the service were added to this year's survey, presented below, with survey results:

- *This summer, have you visited (or do you intend to visit) Chautauqua Park for a concert, event or performance*?: On average, 17 percent of users visited Chautauqua during summer months, 2008. City of Boulder non-students reported the highest frequency (30 percent), followed by Boulder County residents (25 percent) and students (19 percent). Fully 71 percent of all respondents did not know or were unsure whether they would visit.
- *Are you aware of the new 'Hop 2 Chautauqua' bus service connecting Downtown Boulder with Chautauqua*?: ***The majority (68 percent) of all respondents were unaware of the new bus service*** from Downtown Boulder to Chautauqua Park. City residents (non-students) were most aware (62 percent), followed by students (47 percent) and only 27 percent of Boulder County residents (outside the City of Boulder) were aware of the new service.
- *(If yes, you are aware of the new service) Have you or do you plan to use the 'Hop 2 Chautauqua' bus service this summer*? ***City of Boulder (students) reported the highest frequency of use with 33 percent responding to have already used the new service*** followed by non-students (28 percent) and Boulder County residents (27 percent).

Activities/ Special Events/ Festivals/ Free Concerts

This year, respondents identified ***events for which they intentionally visited Downtown Boulder*** rather than citing all events enjoyed, planned or not.

- Farmers Market: Overall, the Boulder Farmers' Market remains a strong draw to the downtown area among all visitor segments (41 percent). Non-student City residents reported the highest *intentional* visitation to the Farmers' Market (48 percent) compared to Boulder County residents (32 percent) and student-residents (27 percent).
- Boulder Creek Festival: Another strong draw to the downtown area is the Boulder Creek Festival (28 percent, 2008, average). Relatively similar number of local residents reported intentional trips to visit the annual event (30 percent, non-students; 24 percent, students and 22 percent, Boulder County residents).
- Special Arts and Crafts Fairs: City of Boulder residents (non-students) reported the highest frequency of visitation to special arts and crafts fairs (17 percent) compared to students and Boulder County residents (8 percent and 11 percent, respectively).
- Lunchtime Concerts: Thirteen-percent of City of Boulder students frequented these afternoon concerts, compared to only 11 percent (non-students) and Boulder County residents (1 percent).

Satisfaction Ratings

Visitors were asked to rate the Downtown Boulder area on a scale of 1 (poor) to 5 (excellent) throughout 9 categories. Overall, visitors rated their experience relatively positively with average ratings ranging from 4.1 (directory information/signage and customer service in retail stores) to 4.4 (overall cleanliness, feeling of security/safety and special events/festivals). Of particular concern, however, are ratings given by ***City of Boulder residents, both students and non-students, who were much less inclined to rate elements within the downtown experience as "very good"*** when compared to other visitors. Reasons for lower ratings most likely include familiarity due to repeat visitation rather than lack of quality, but further information on residents' perception of *staleness* might reveal valuable insights.

- Variety of retail/galleries: On average, all visitors rated the variety of retail 4.1 points. Only 30 percent of City Boulder residents rated variety of retail and galleries as *very good* compared to 56 percent of visitors from outside of Colorado.
- Customer service in retail: Only 25 percent of City of Boulder residents rated customer service in retail as *very good*, compared to 57 percent of visitors from outside of Colorado. Overall, visitors rated this aspect of their experience 4.1 out of 5 points.
- Variety of restaurants: City residents (non-students) were less favorable of restaurants with 20 percent rating this category as *average* versus only 7 percent of visitors from outside Colorado rating restaurant variety as *average*.
- Overall cleanliness: On average, visitors perceived the downtown area to be fairly clean (4.4 points). Visitors residing outside Colorado rated downtown cleanliness more favorably with 59 percent scoring this element *very good,* compared to 42 percent of Boulder students.
- Feeling of safety and security: Overall visitors felt safe while in Downtown Boulder; City of Boulder (4.3 points, non-students and students), and visitors living outside Colorado (4.6 points) scored ***feeling of safety and security*** slightly different yet still fairly positively with an average of 4.4 points for all visitors.
- Directory and information signs: Surprisingly, all visitors rated this category fairly low, including locals. On average, all scored downtown orientation signage with 4.1 points and City of Boulder students rated it the lowest at only 3.9 points.
- Special events: City of Boulder students rated this category with 4.1 points versus ***visitors from outside Colorado scoring downtown special events slightly higher (4.4 points)***. Forty-four percent of all visitors rated this category as *very good (*5 out of 5 points) and an additional 40 percent scored special events with 4 out of 5 points.
- Family orientation/kids play area: Across all visitor segments, family orientation and kids areas were rated favorably (4.4 points) with 49 percent rating this element as *very good (*5 out of 5 points) and an additional 39 percent rating it with 4 out of 5 points.
- Downtown information center: Overall, this category rated 4.2 out of 5.0 points with locals less favorable (4.1, non students) than visitors from outside Colorado (4.3 points.

Downtown Experience-Improving or Declining

Visitors and residents were asked whether they felt the downtown experience was improving, staying the same, declining or improving in some respects, declining in others. Overall, results were slightly less favorable than the last two years with 38 percent responding the experience was improving versus 43 percent, 2007 and 45 percent, 2006. Both last year and this year, 38 percent of respondents perceived the experience as staying the same, 8 percent responded it was declining and 17 percent felt it was improving in some areas and declining in others. On a very positive note, ***58 percent of visitors living outside Colorado felt the experience was improving***.

Competitive Shopping Areas

Only Boulder City and County residents were surveyed on visitation to regional shopping areas during the previous two months. ***Visitation to the downtown area remained relatively***

steady at 15 visits this year compared to 12 visits, 2007 and 14.7 visits, 2006. Visitation to the relatively new 29th Street Mall increased (5.5 visits, 2008 vs. 2.6 visits, 2007) while visits to Louisville, Lafayette and Erie downtown areas, Louisville/Superior at McCaslin and Flatiron Crossing remained a steady 2-3 visits (approximate) during the same time period.

- Visitation to special events: Boulder City and County residents reported visitation to special events at *other r*egional shopping areas during the previous year. The 29th Street Mall attracted 16 percent of local Boulder users (not reported for 2007); 12 percent attended events in Louisville (7 percent, 2007); 11 percent attended festivals/events at other areas and 9 percent attended events at Flatirons Mall (not reported for 2007).
- Visitation to 29th Street: The proportion of Downtown Boulder users (Boulder City and County residents) who also visited 29th Street shopping area three or more times (during the previous 2 months) increased this year compared to last. ***Specifically, those visiting 6-10 times during the past 2 months increased 10 percentage points (19 percent, 2008 vs. 9 percent, 2007) and those visiting 11 or more times increased 12 percentage points (15 percent, 2008 vs. 3 percent, 2007).*** Of those visiting 29th Street 3 or more times in the past two months, primary reasons cited included entertainment/movies/bars (61 percent) followed by shopping/errands (52 percent).

  In 2007, on average, Boulder residents (City and County) visited Downtown Boulder 13.6 times during the previous 2 months and visited 29th Street 2.9 times during the same timeframe. Residents living in East Boulder reported the highest frequency to 29th Street last year (5.7 visits during previous 2 months) followed by South Boulder residents (3.1 visits). ***This year, average visitation to Downtown Boulder by Boulder City and County resident-respondents was 17.2 (during previous 2 months) compared to 6.2 visits to 29th Street.*** Mall visitors residing in the core downtown area reported the highest average visitation to the downtown area (25.7 visits) followed by Central/West Boulder (17.3 visits) and East Boulder (17.2 visits). ***North Boulder residents reported the highest visitation to 29th Street (7.9 visits),*** followed by East Boulder (7.5 visits) and downtown core residents (6.3 visits).
- Flatirons Crossing: Although increasing slightly, local residents' frequency of visitation to Flatirons Crossing remains relatively low with an average of 2.9 visits during the previous two months (vs. 2.6, 2007 and 2.1, 2006).

Comments

Several of the questions on the survey were asked in an open-ended format allowing visitors the opportunity to expand or define their response.

- Suggestions for improvement-Residents

  Themes emerging from residents' suggestions for improving the downtown area included: lower parking fees, monitor transients' behavior, (return to) more independent retail merchants, improve signage and add additional kids' play areas, to name just a few. A few noteworthy comments are listed below:

  Courthouse area needs to be cleaner, too much panhandling
  Fewer chain stores
  Free parking during the week
  Late night weekends are unsafe
  Make signs more visible

More directories of where things are
More free parking
More play areas for kids
More variety of affordable restaurants
Pay Stations should accept cash
Street signs need to be more visible
Too pricey

- Suggestions for improvement-Visitors

  Visitors suggested improvements similar to residents such as behavior of transients, parking fees and lack of independent stores with a stronger emphasis placed on signage/directory information.

  Better and bigger signage
  Better directory information
  Better signage for parking
  Cheaper parking
  Customer service; we were never addressed in the stores
  Keep aggressive panhandlers in check
  More specialty stores
  Parking stations need to take paper money
  Some of the retail shop's customer service is not friendly

- Downtown experience is improving

  Residents responding ***the downtown experience is improving*** provided comments, some of which are presented below:

  Better store mix
  Better street entertainment
  Clean, pleasant
  Feels safer
  More people and activities
  Nicer restaurants
  The new parking, the parking is getting better

- Downtown experience is improving -Visitors

  Below are visitors' comments on their perception of an improved downtown area, many of which are similar to residents' comments.

  Cleaner
  Friendlier
  It is good that it has expanded
  Landscaping, signs, no vacant buildings
  More and different shops
  More to do
  Seems cleaner
  Street work is finished
  Wider variety of shops, upkeep

- Downtown Experience is declining-Residents and Visitors

  Both residents and visitors commented on general concern regarding behavior of panhandlers, lack of independent stores and parking:

  Aggressive panhandling
  Increase development and chains with a decrease of independent businesses
  Parking rules, pay stations, Sunday is unclear
  Shift toward tourism rather than residents; overpriced
  Stores that made Boulder unique are now replaced by mainstream stores
  Too commercial, not artsy craftsy
  More panhandlers

- Boulder is both improving and declining-Residents:

  Residents and visitors commented on positive and negative aspects of the Downtown Boulder experience.

  Activities and special events are great but shopping is getting less independent
  Food has improved but now it is too expensive
  Less retail store options, new ones are less affordable
  More recycling bins are good; more "elite" stores are killing Boulder's character
  The East of Pearl is better but panhandlers getting worse
  Restaurants are improving and parking regulations are declining
  Too crowded yet more stores
  Traffic is worse but business quality and appearance has improved
  There is more stuff but less independent businesses and it is more expensive

- Parking Revenues

  Ninety-one percent of respondents were unsure or did not know what parking meter and parking garage revenues funded. Parking revenues made the following comments funded those who believed to know which projects/uses.

  General fund
  Downtown improvements
  Eco passes
  Maintenance
  Open space
  Parks
  Road maintenance
  Security

GRAPHS

FIGURE 1A
2008 VISITOR RESIDENCY
BY YEAR

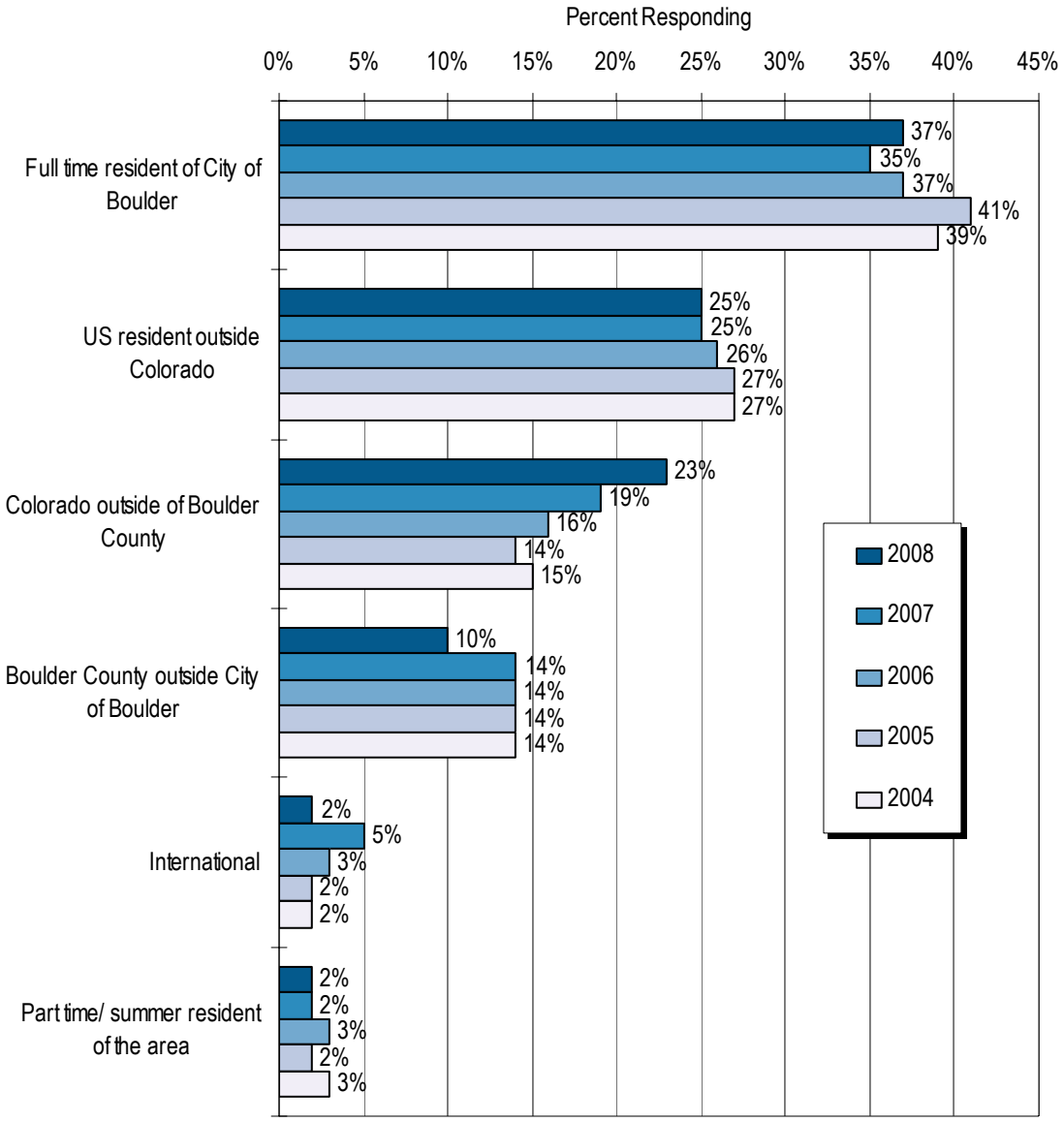

FIGURE 1B
IN WHAT PART OF THE CITY OF BOULDER DO YOU LIVE
By Year

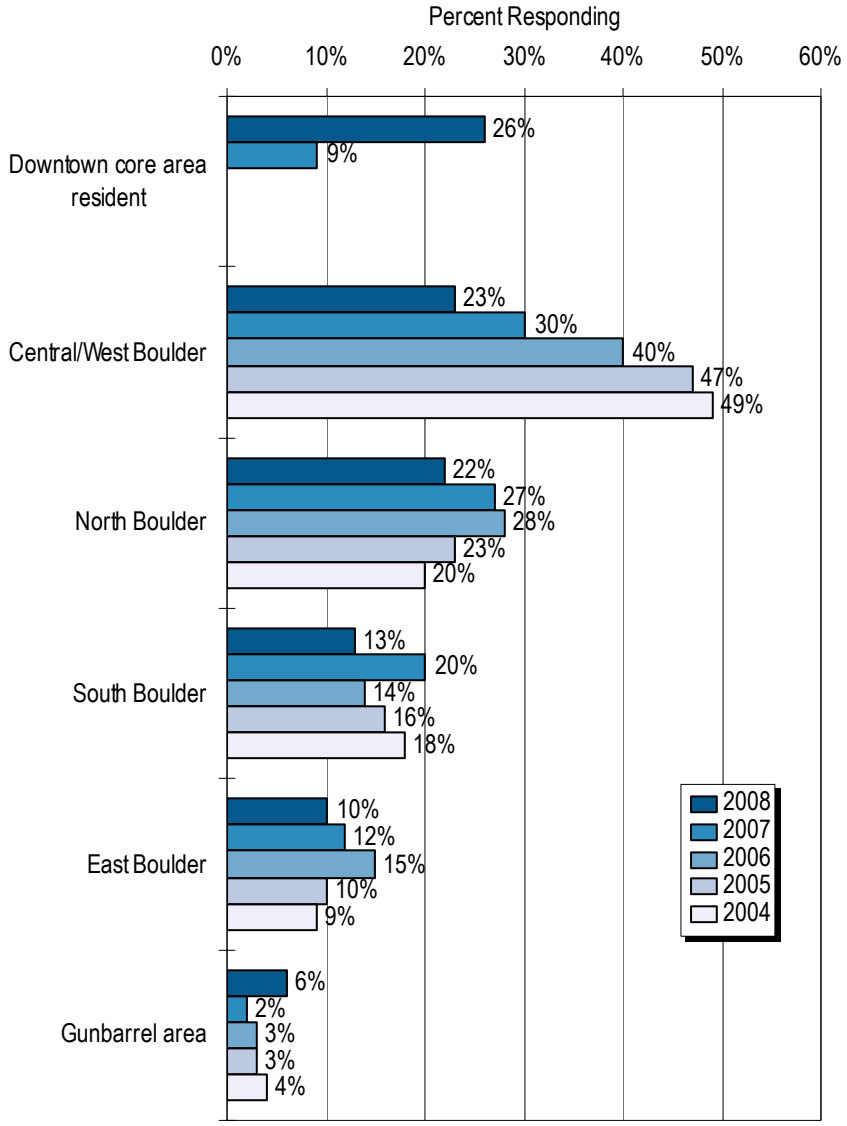

FIGURE 2A
VISITOR DEMOGRAPHICS
GENDER / AGE
BY YEAR

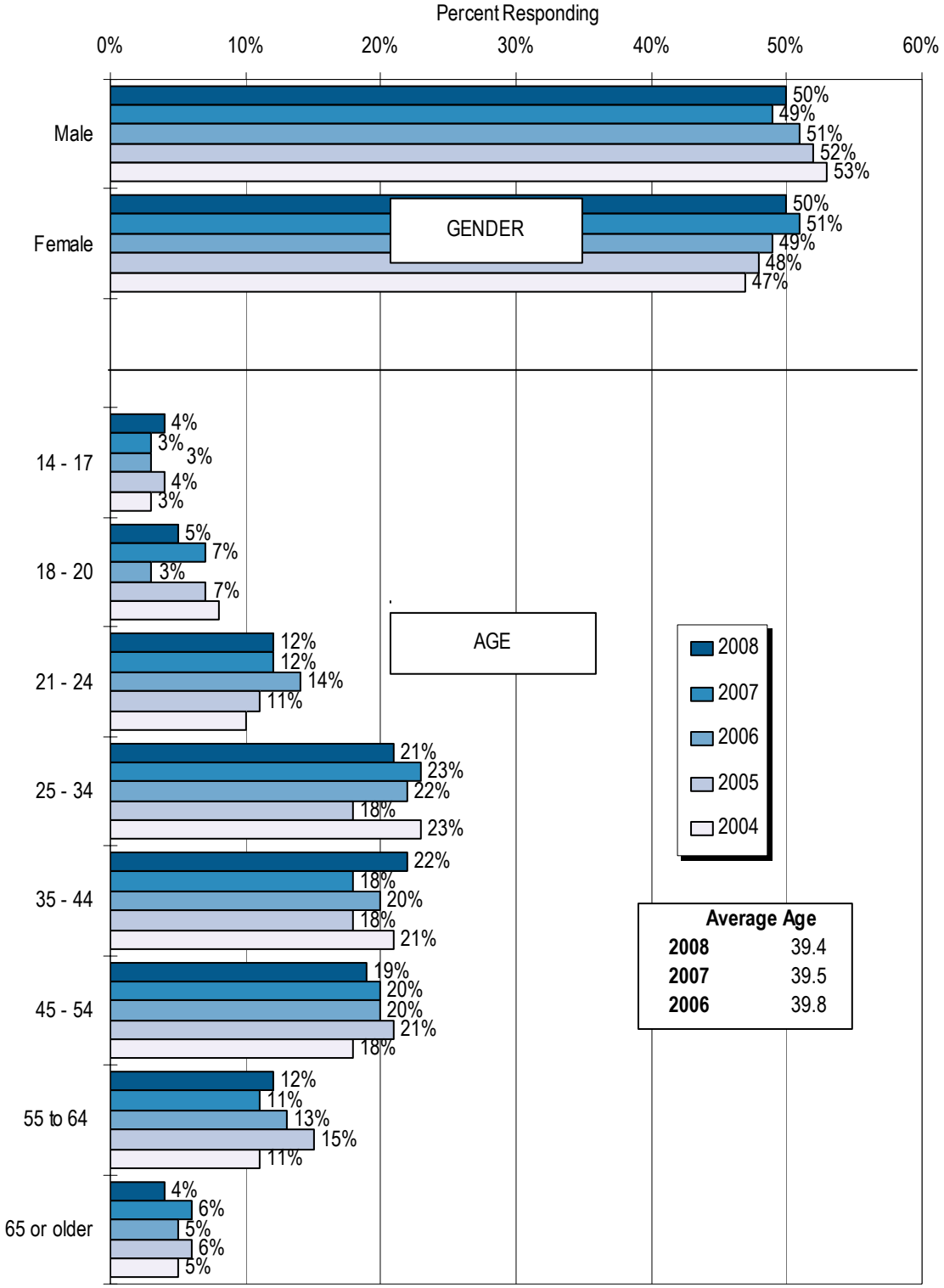

FIGURE 2B
VISITOR DEMOGRAPHIC
GENDER / AGE
BY 2008 VISITOR TYPE

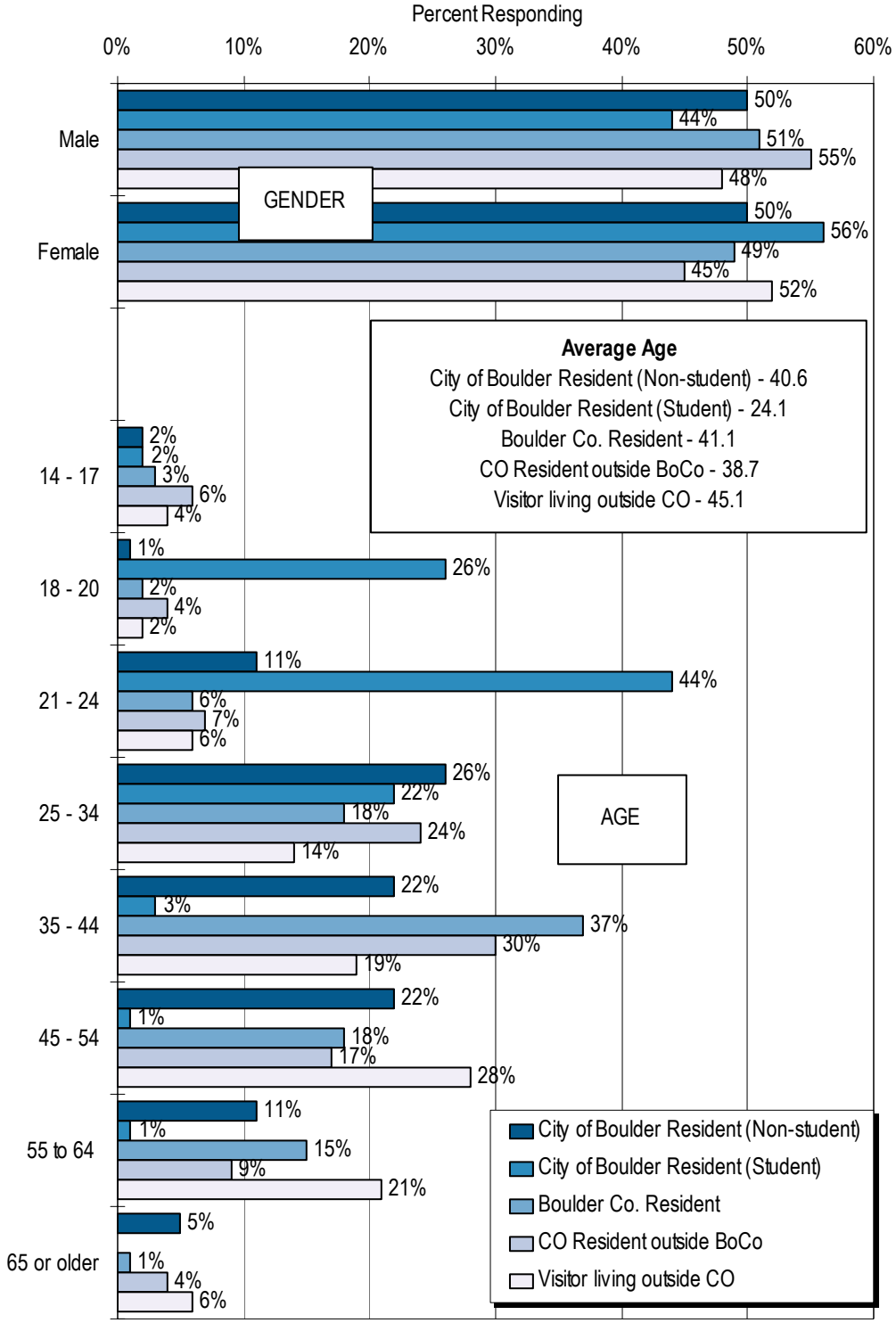

FIGURE 3A
VISITOR CHARACTERISTICS
HOUSEHOLD STATUS / HOUSEHOLD INCOME
BY YEAR

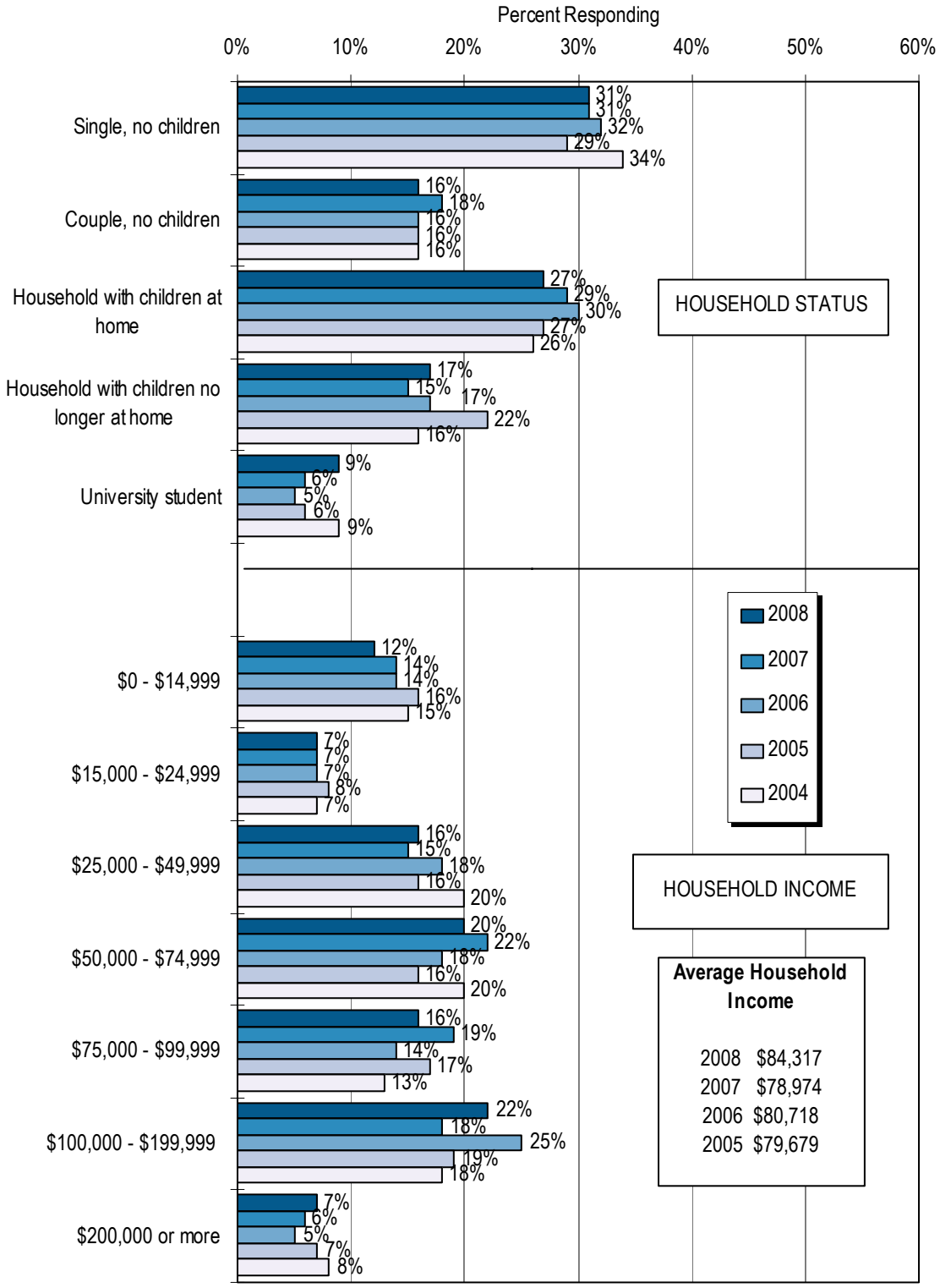

FIGURE 3B
HOUSEHOLD STATUS / HOUSEHOLD INCOME
BY 2008 VISITOR TYPE

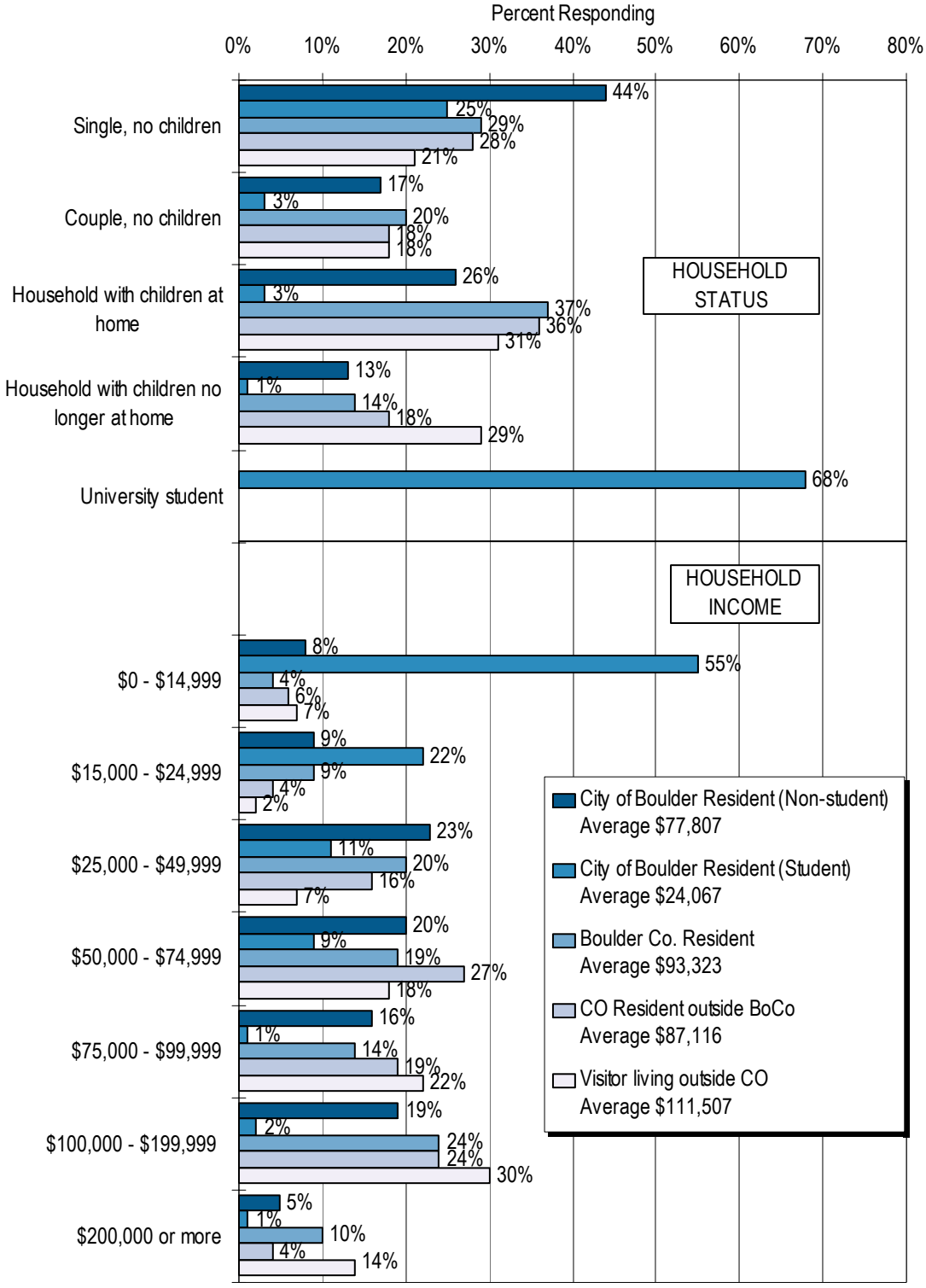

FIGURE 4
OUT-OF-COUNTY USER QUESTIONS
BY YEAR

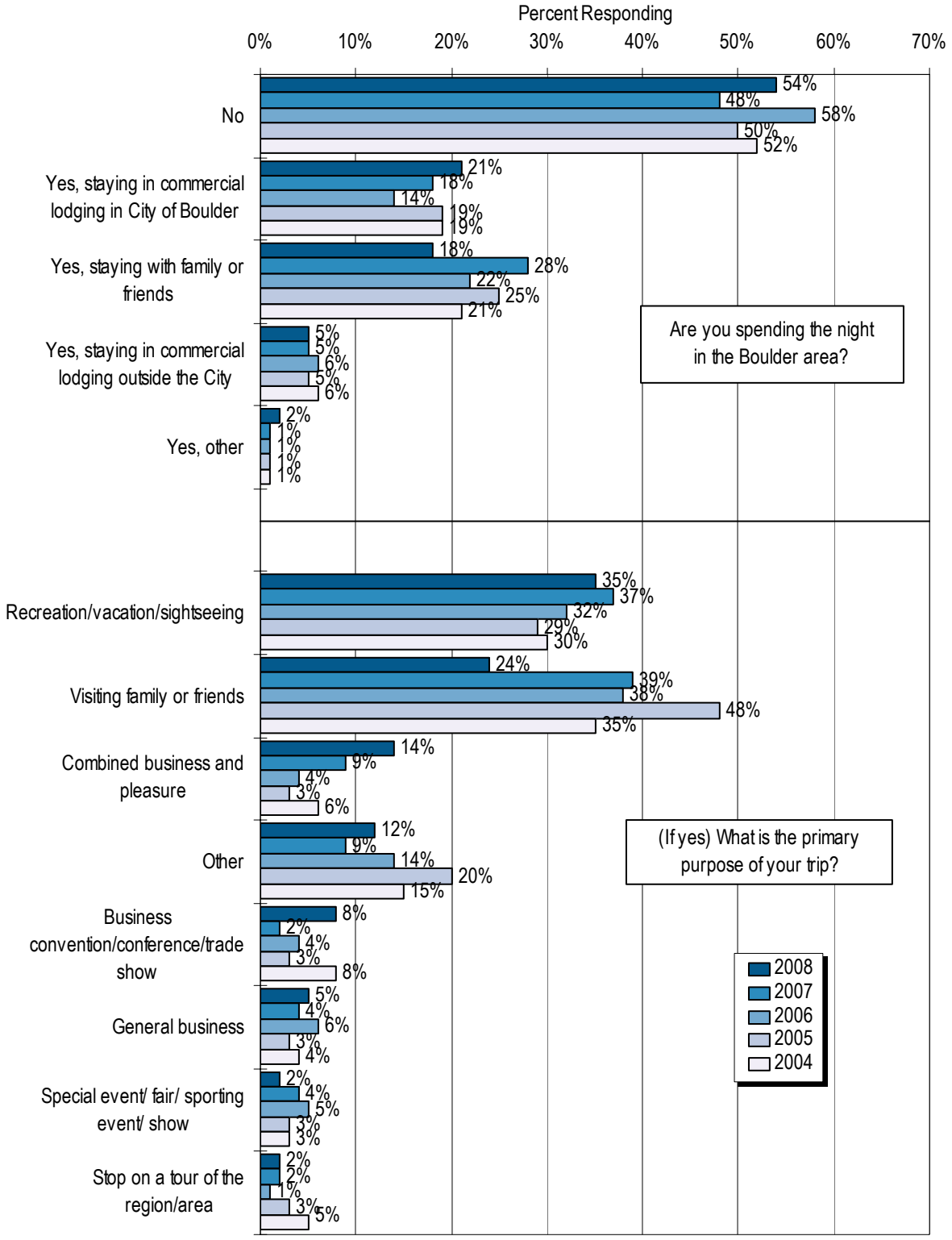

FIGURE 5A
ARE YOU SPENDING MONEY TODAY?
BY YEAR

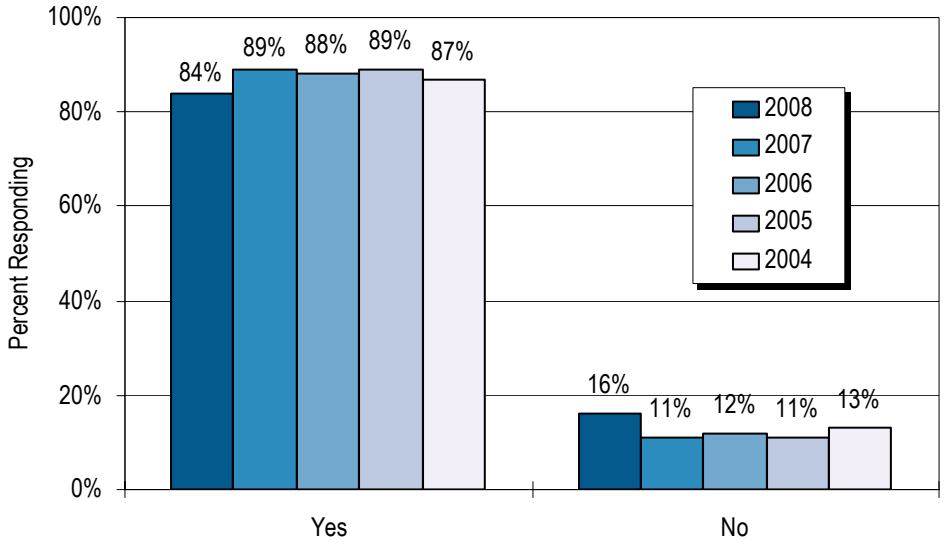

FIGURE 5B
ARE YOU SPENDING MONEY TODAY?
BY 2008 VISITOR TYPE

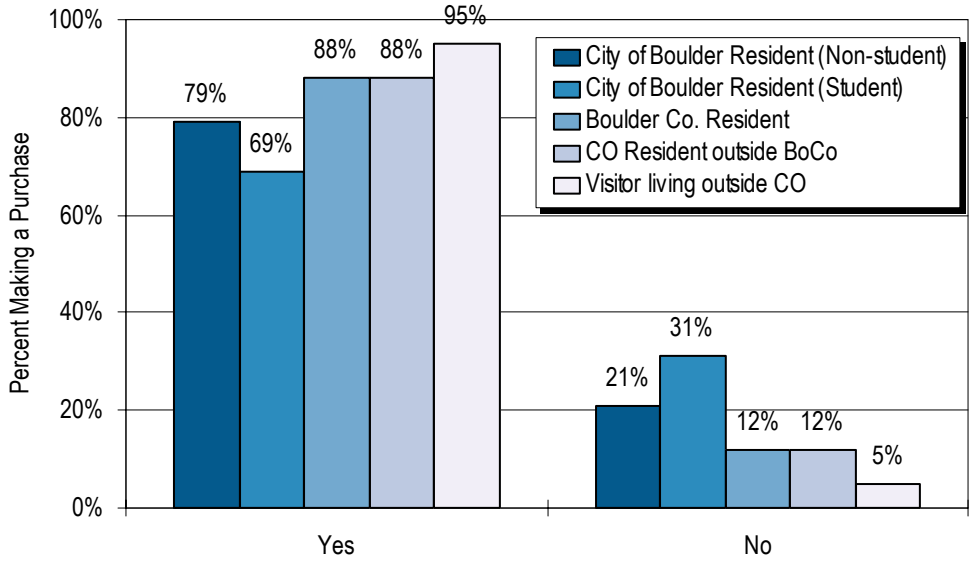

FIGURE 6A
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY SPENDING CATEGORY, BY YEAR

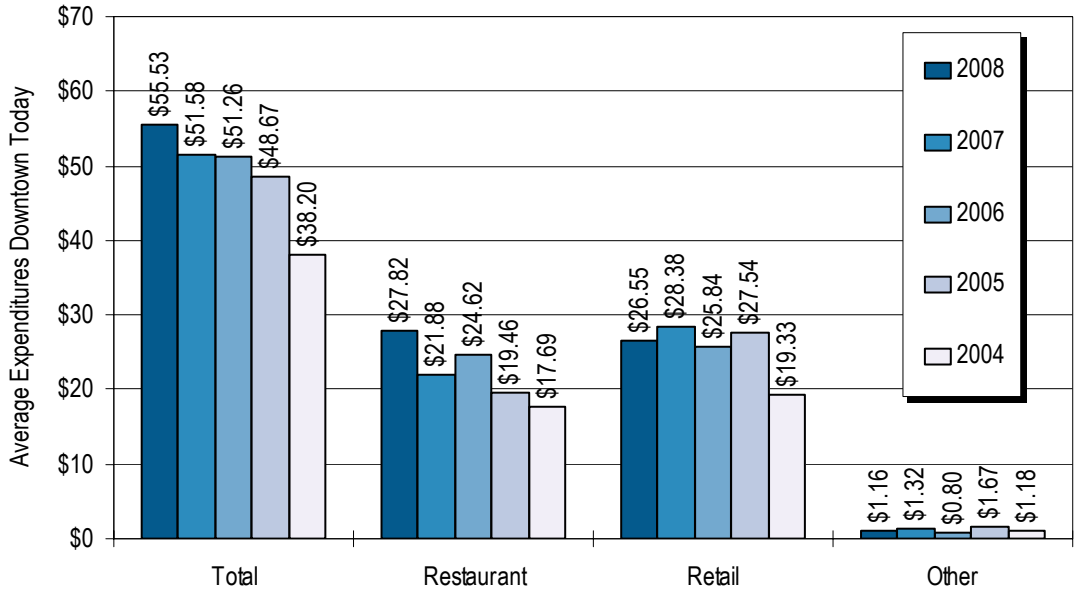

FIGURE 6B
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY 2008 VISITOR TYPE

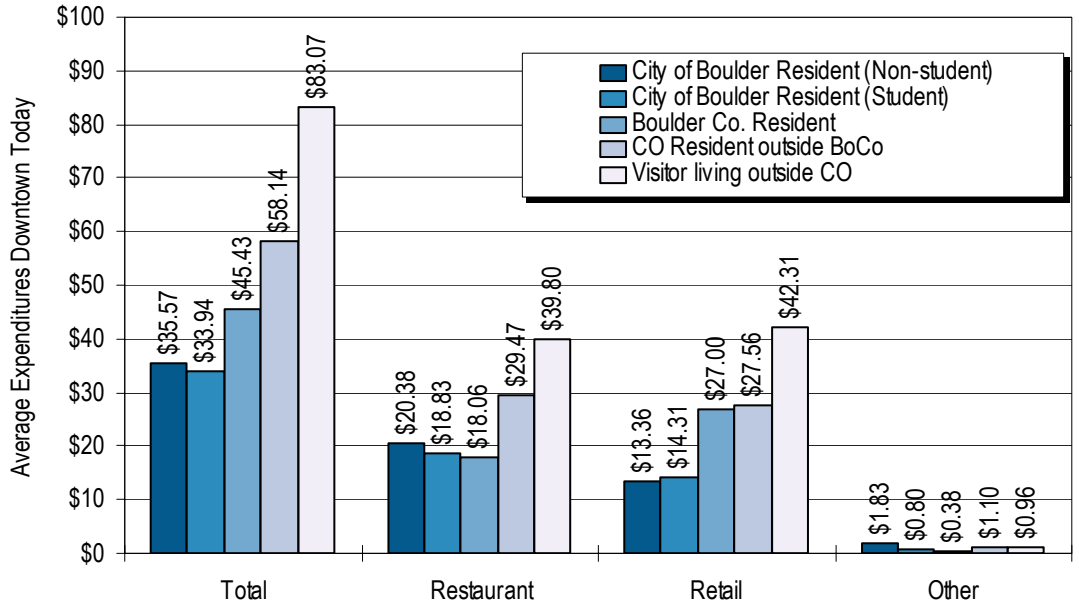

FIGURE 6C
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY YEAR, BY VISITOR TYPE

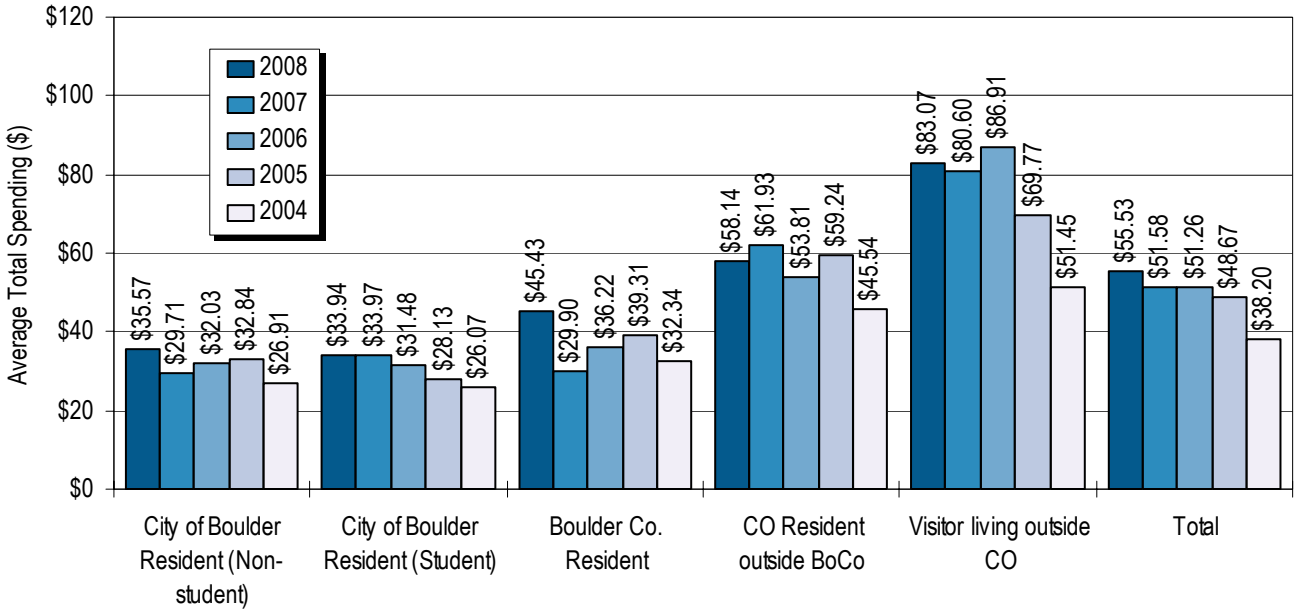

FIGURE 7A
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY

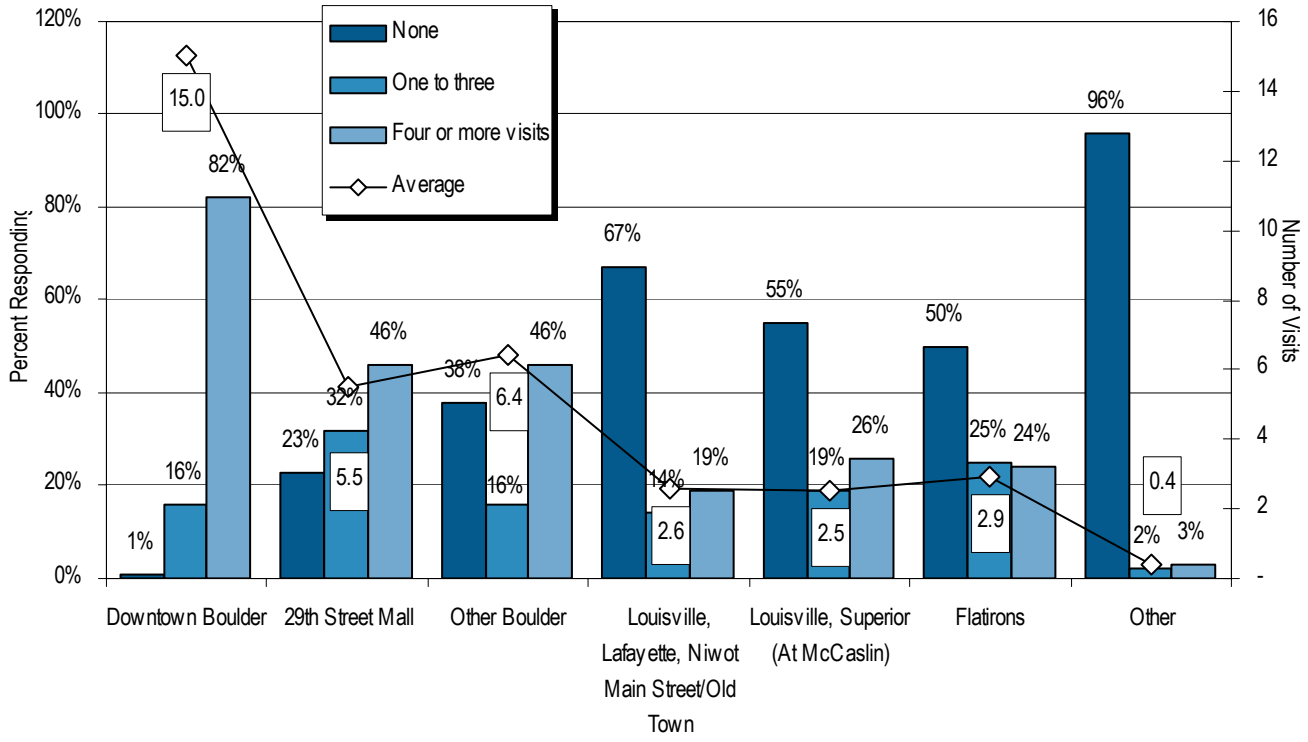

FIGURE 7B
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY, BY YEAR

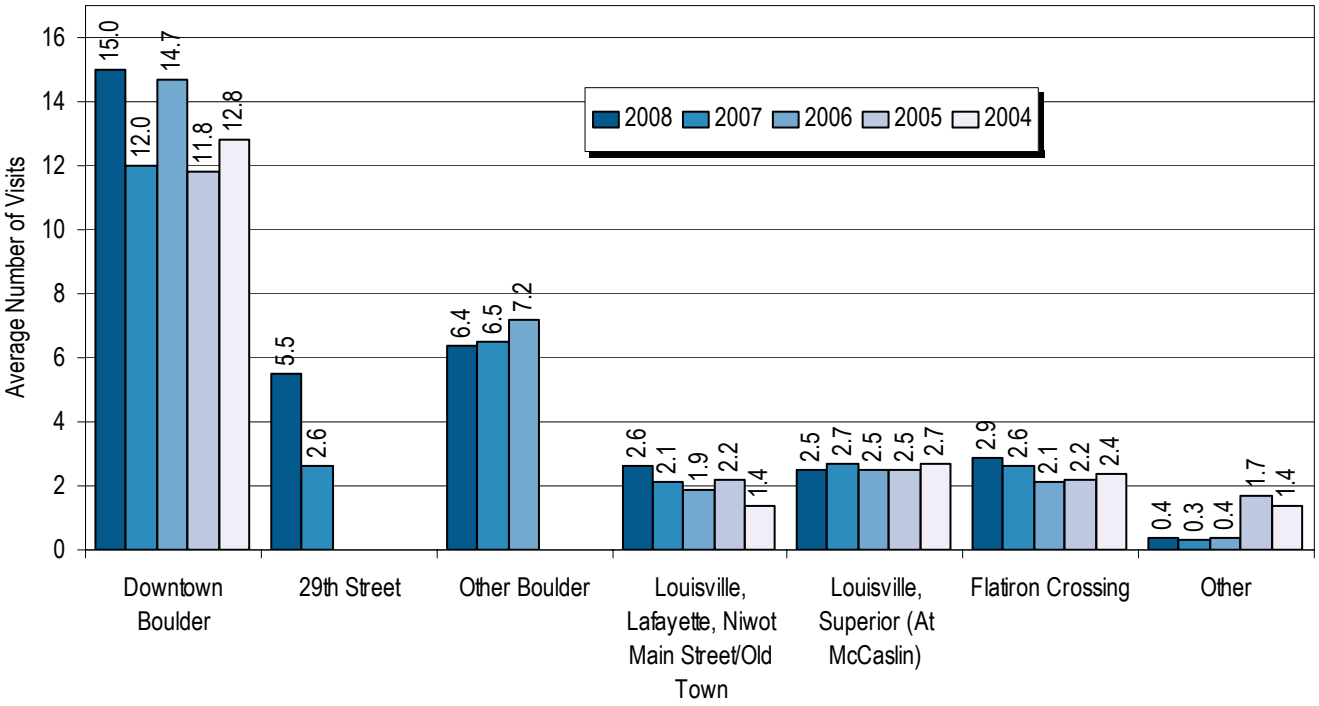

FIGURE 8A
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY
BY YEAR

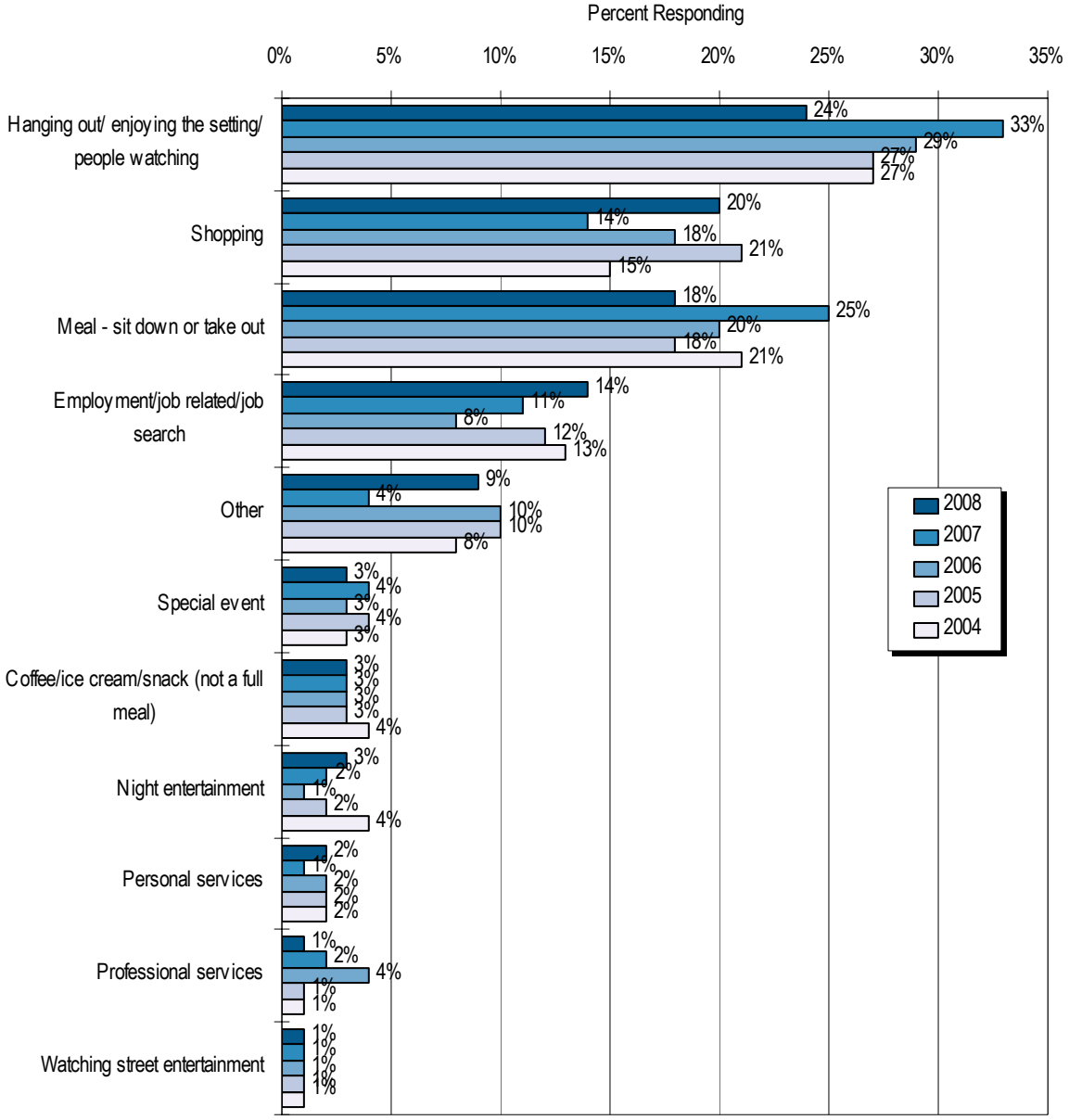

FIGURE 8B
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY
BY 2008 VISITOR TYPE

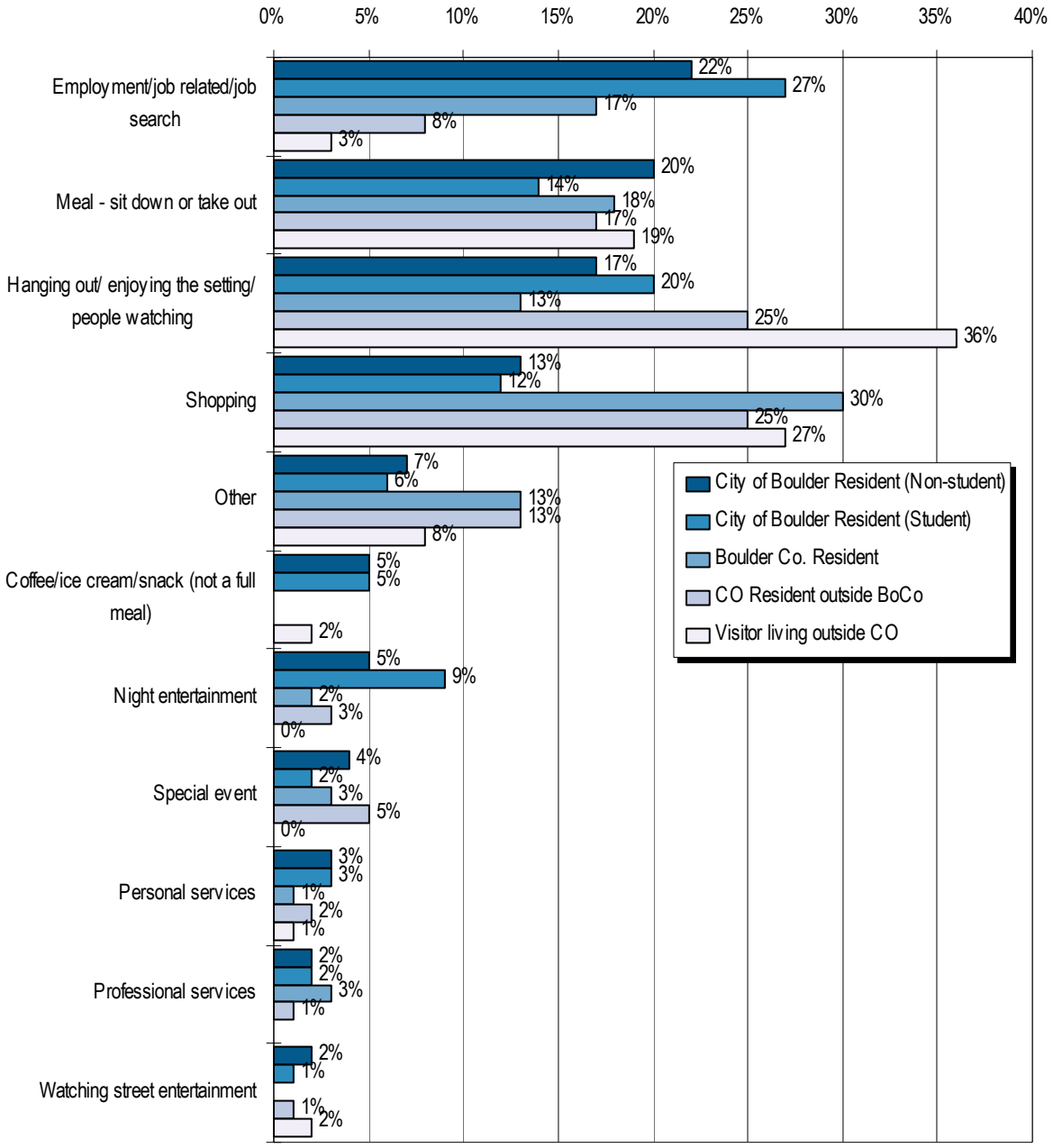

FIGURE 9A
ALL ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
BY YEAR

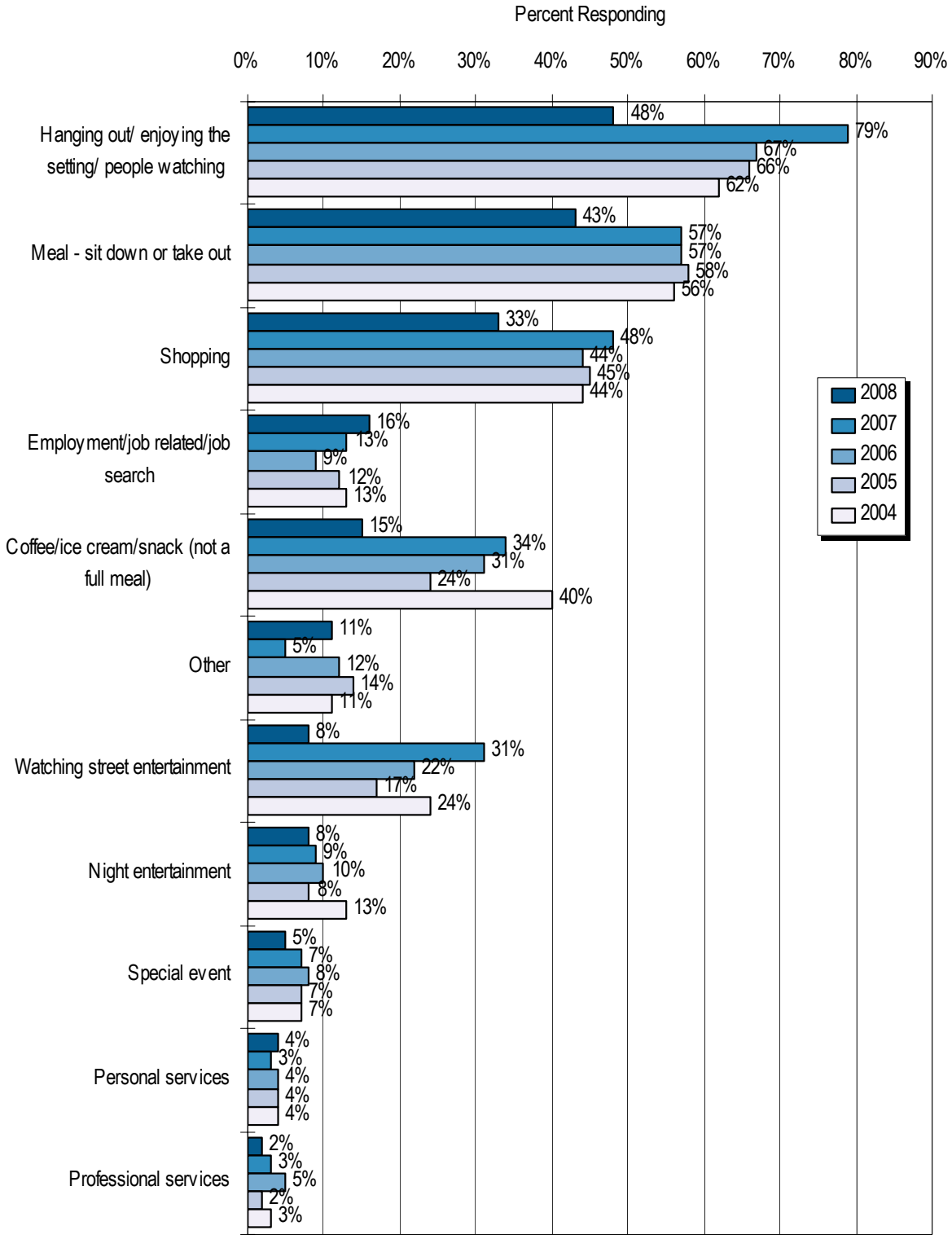

FIGURE 9B
ALL ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
BY 2008 VISITOR TYPE

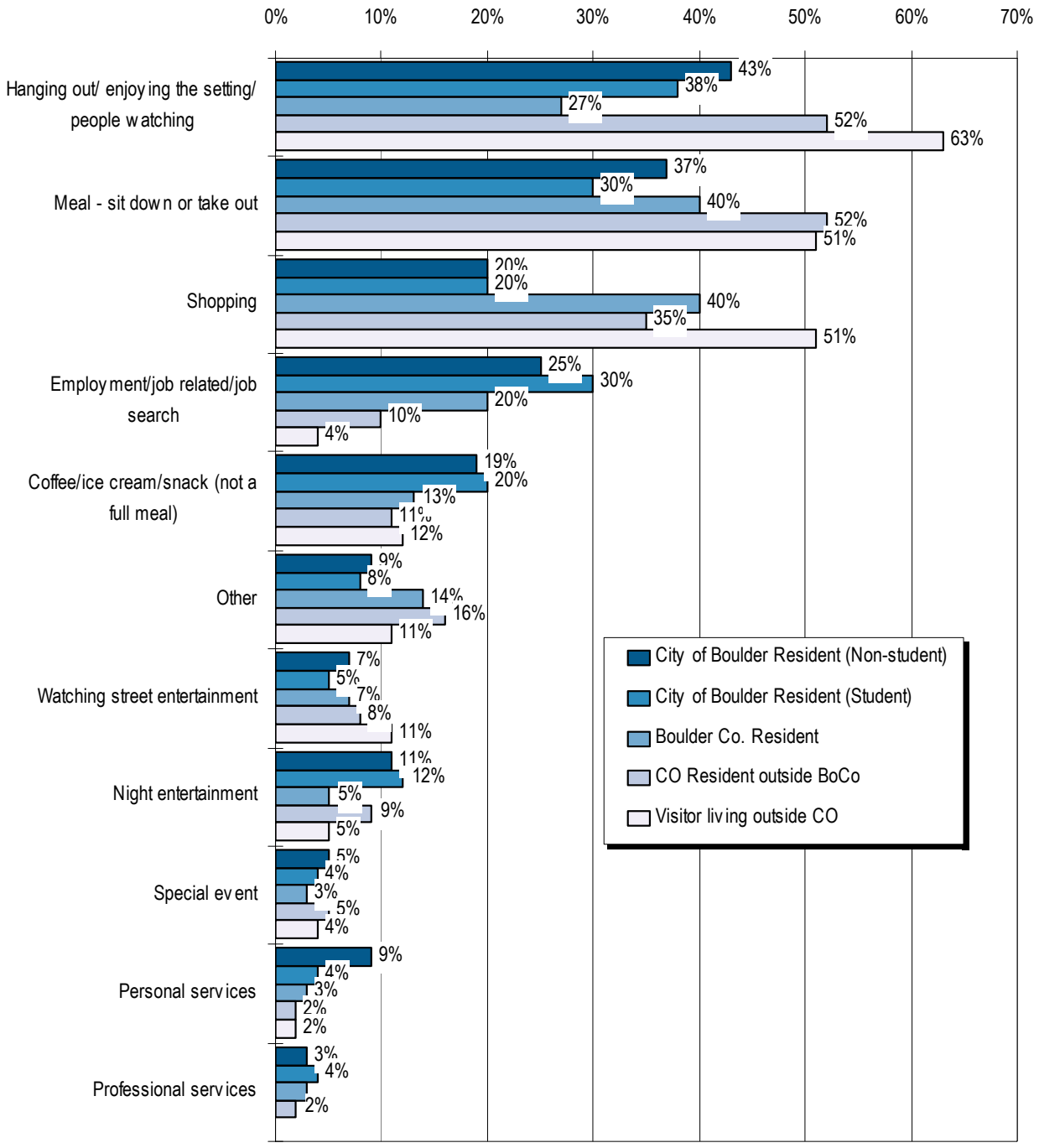

FIGURE 10A
GENERAL RATINGS OF THE DOWNTOWN EXPERIENCE
BY YEAR

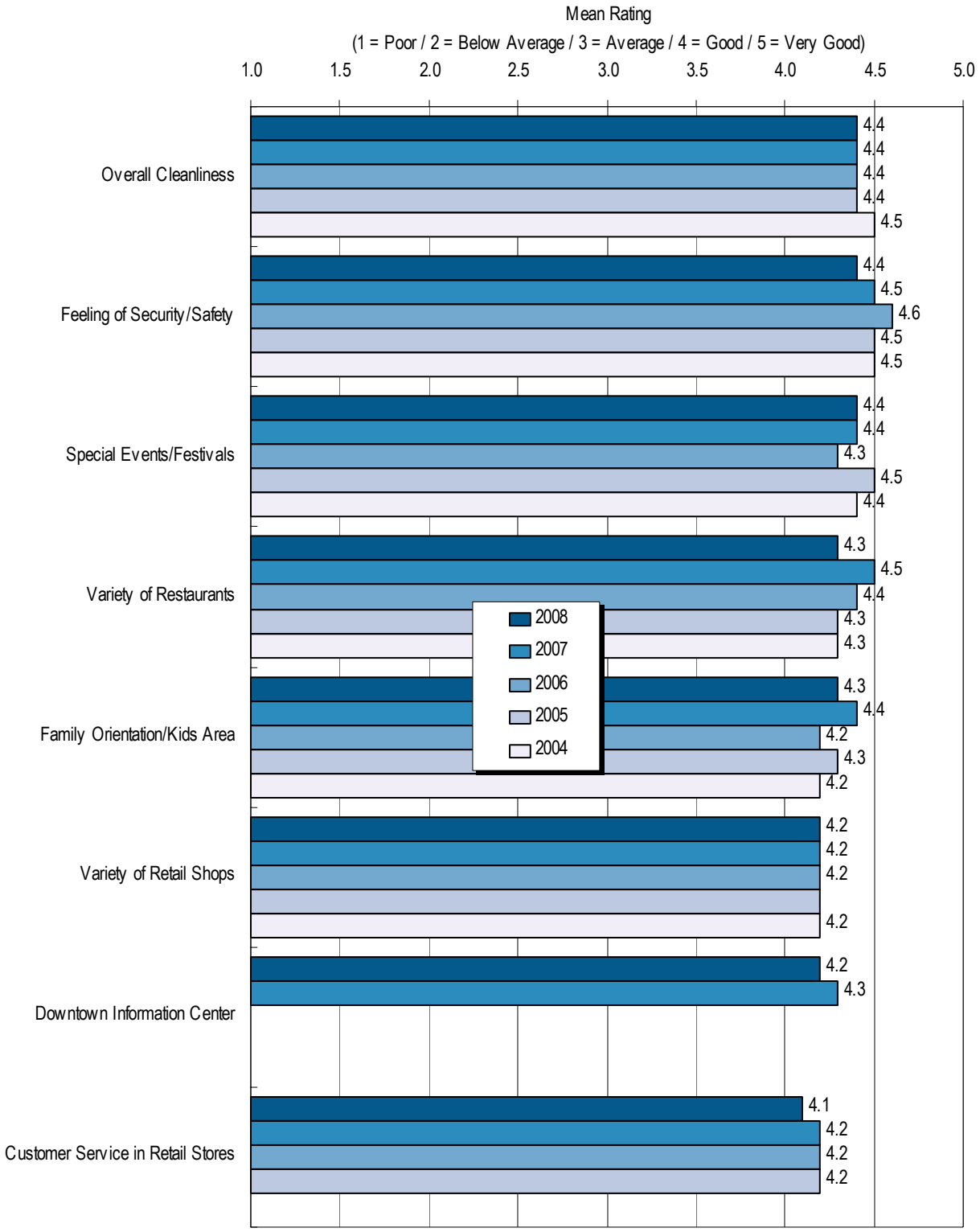

FIGURE 10B
"VERY GOOD" RATINGS OF THE DOWNTOWN EXPERIENCE
BY 2008 VISITOR TYPE

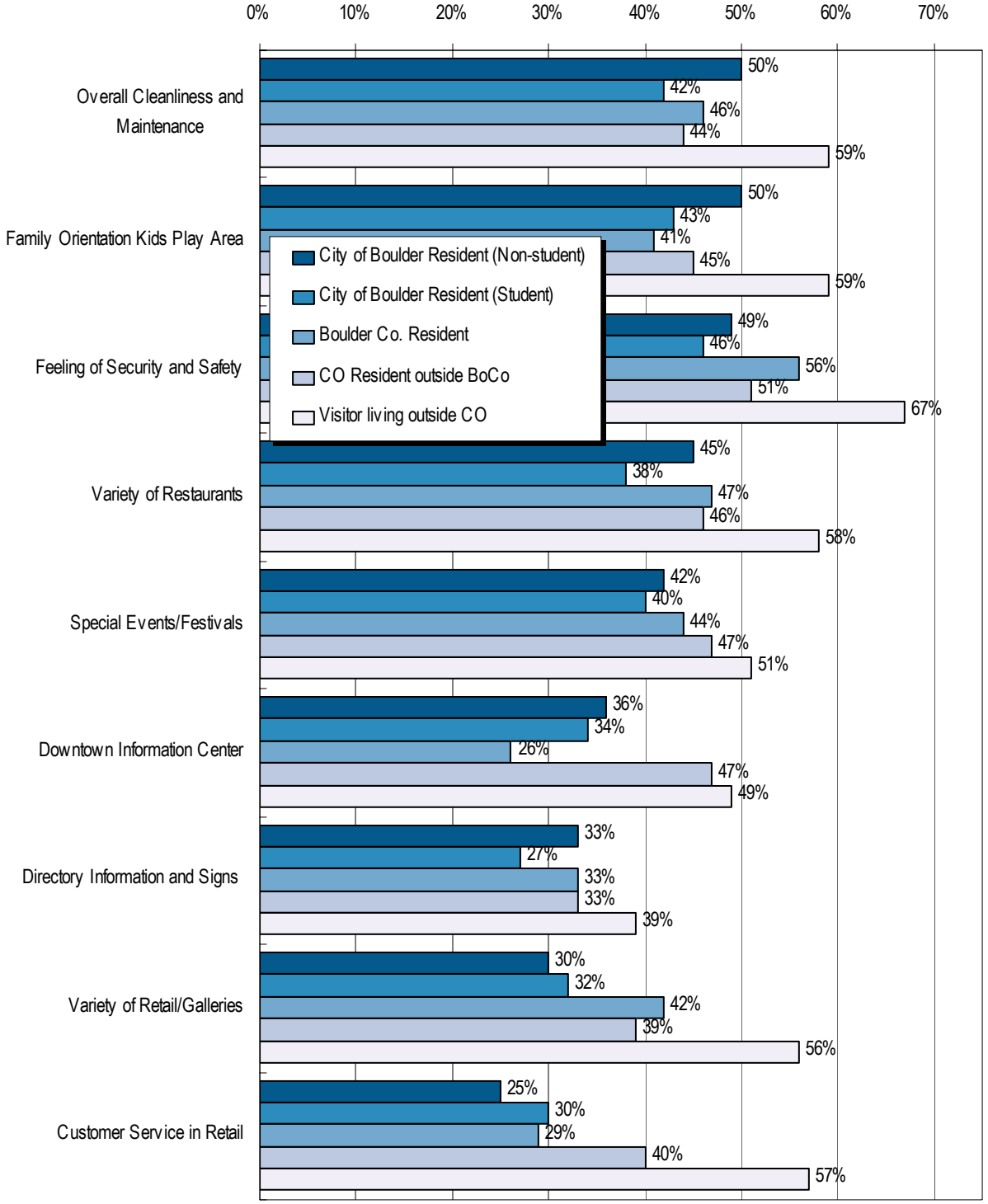

FIGURE 11A
CHANGE IN ACTIVITIES/ BEHAVIORS OF
PANHANDLERS IN DOWNTOWN BOULDER
BY YEAR

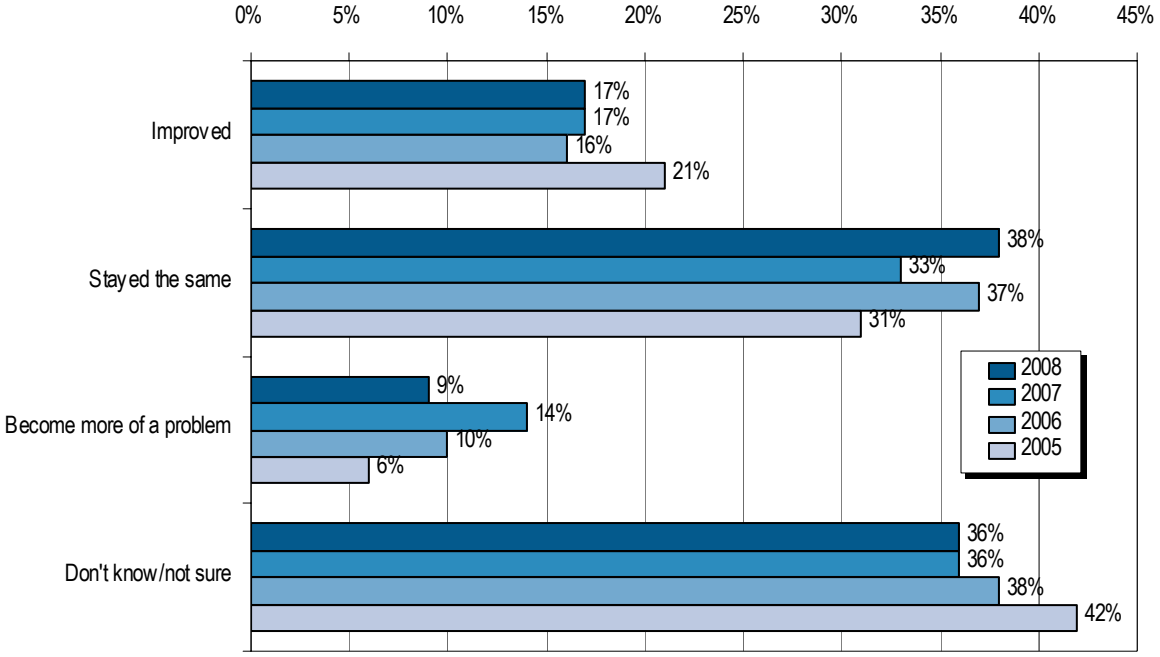

FIGURE 11B
CHANGE IN ACTIVITIES/ BEHAVIOR
OF PANHANDLERS IN DOWNTOWN BOULDER
BY 2008 VISITOR TYPE

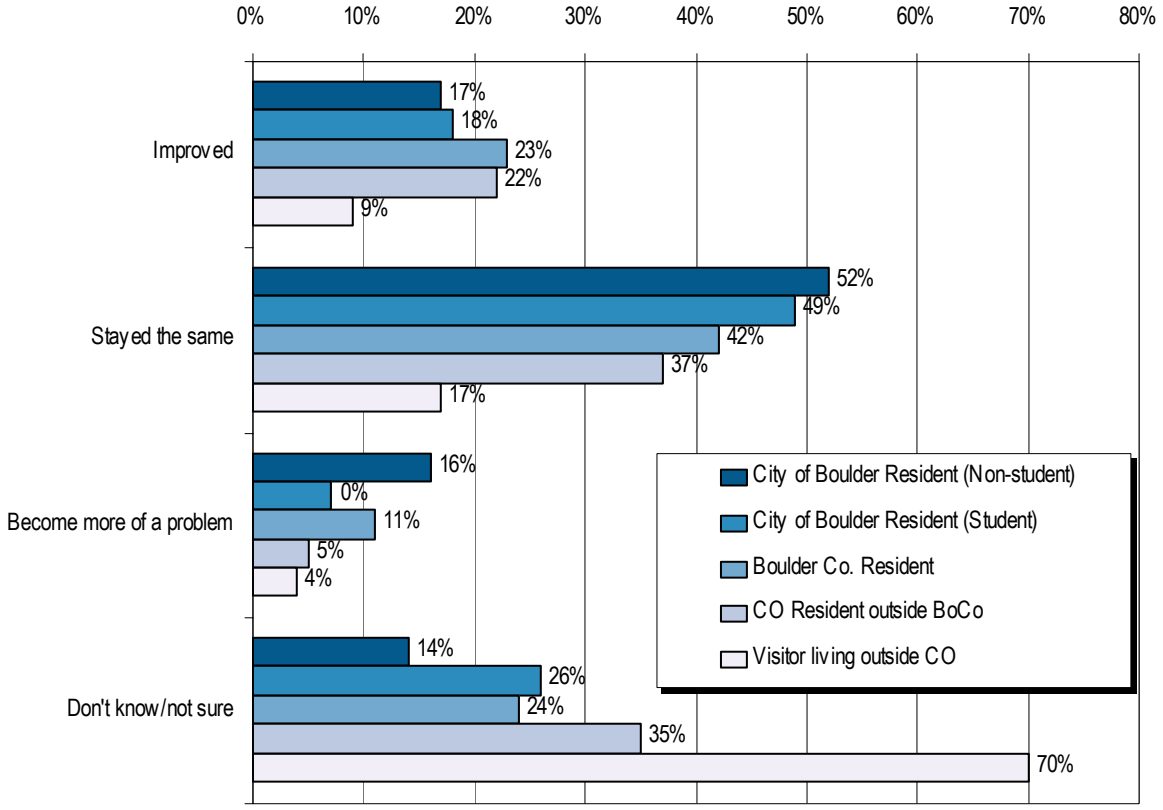

FIGURE 12
CHAUTAUQUA VISITATION
BY 2008 VISITOR TYPE

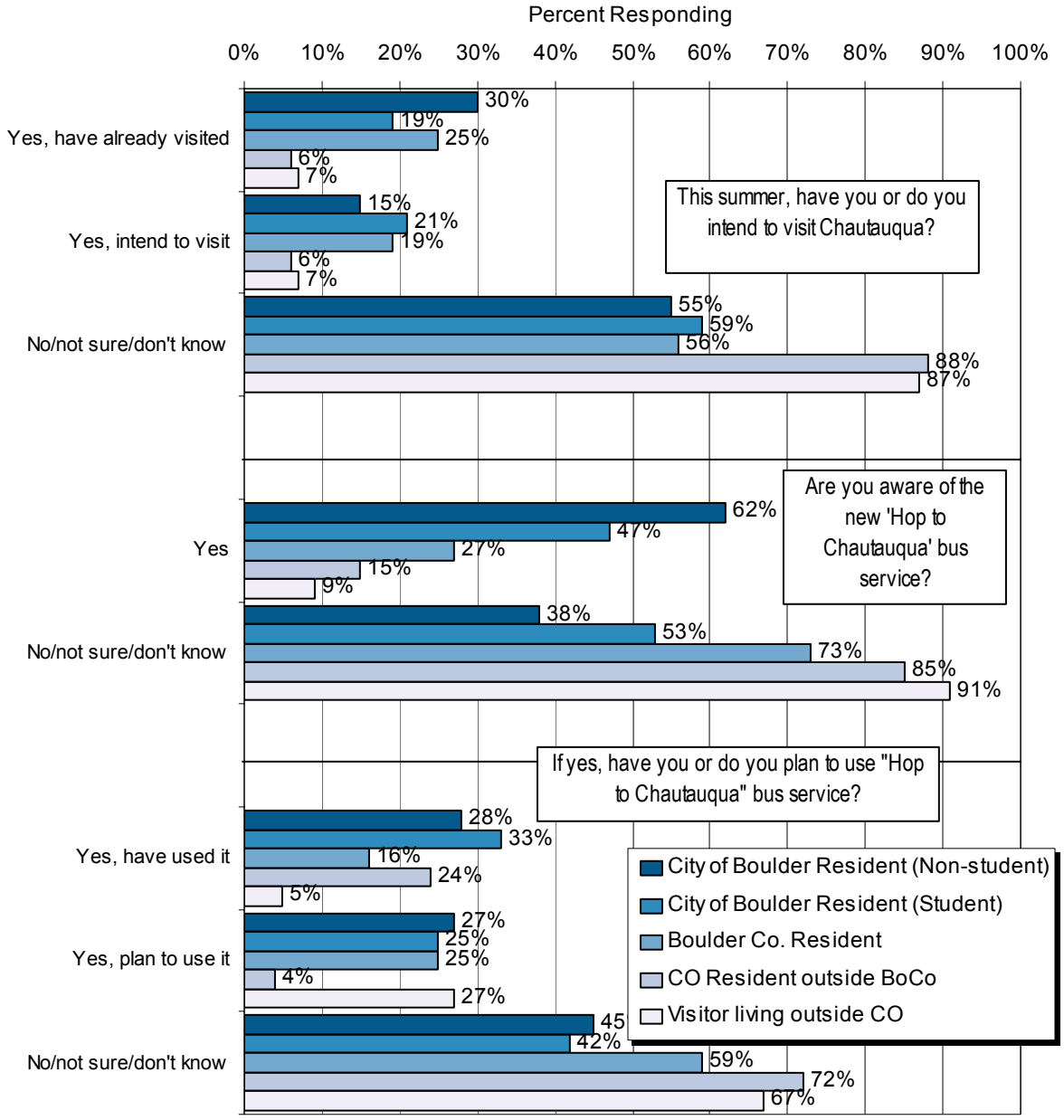

FIGURE 13A
MODE OF TRANSPORTATION DOWNTOWN
BY YEAR

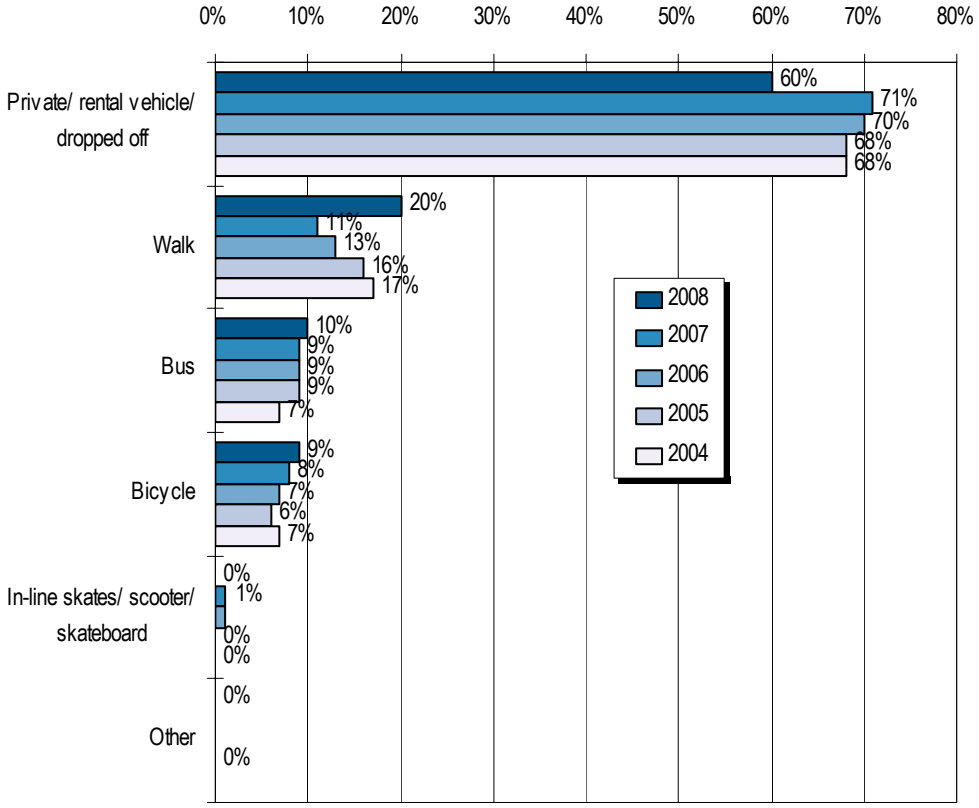

FIGURE 13B
MODE OF TRANSPORTATION TO DOWNTOWN
BY 2008 VISITOR TYPE

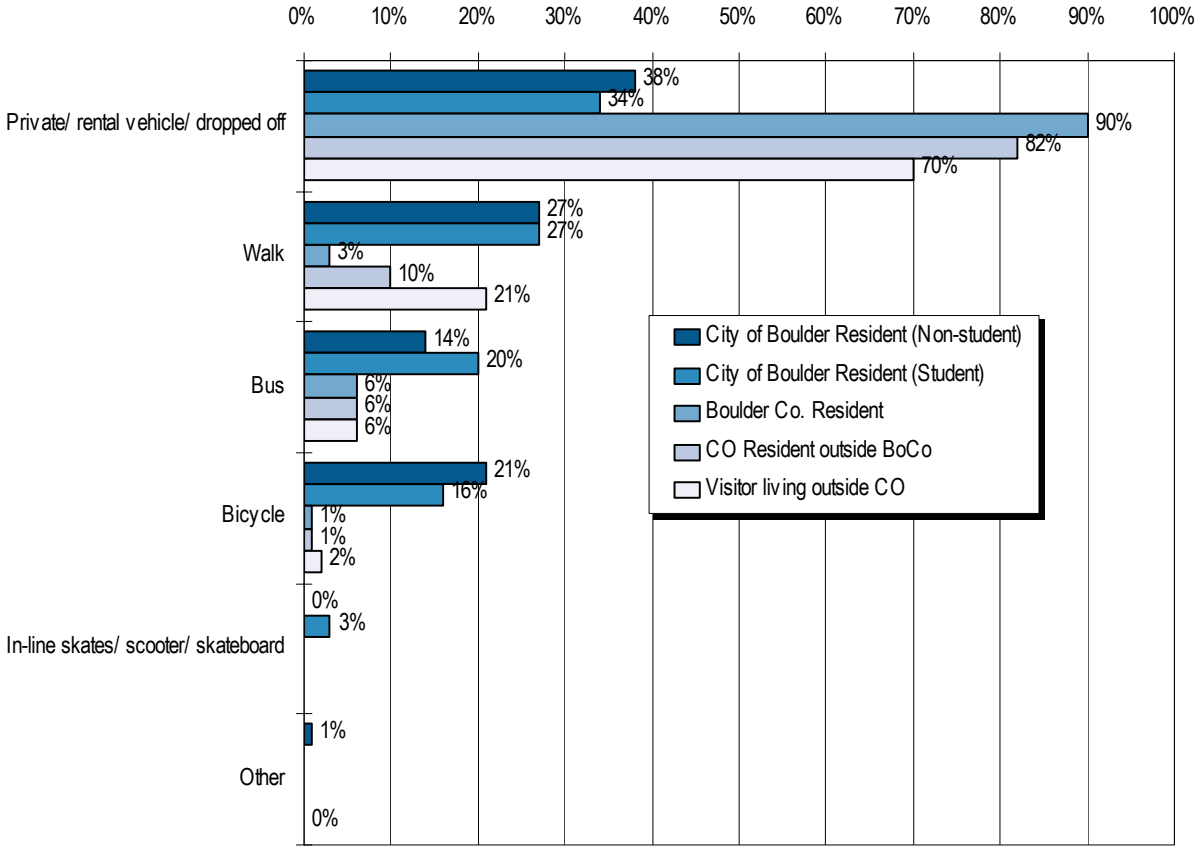

FIGURE 13C
LOCATION OF PARKED VEHICLE
BY YEAR

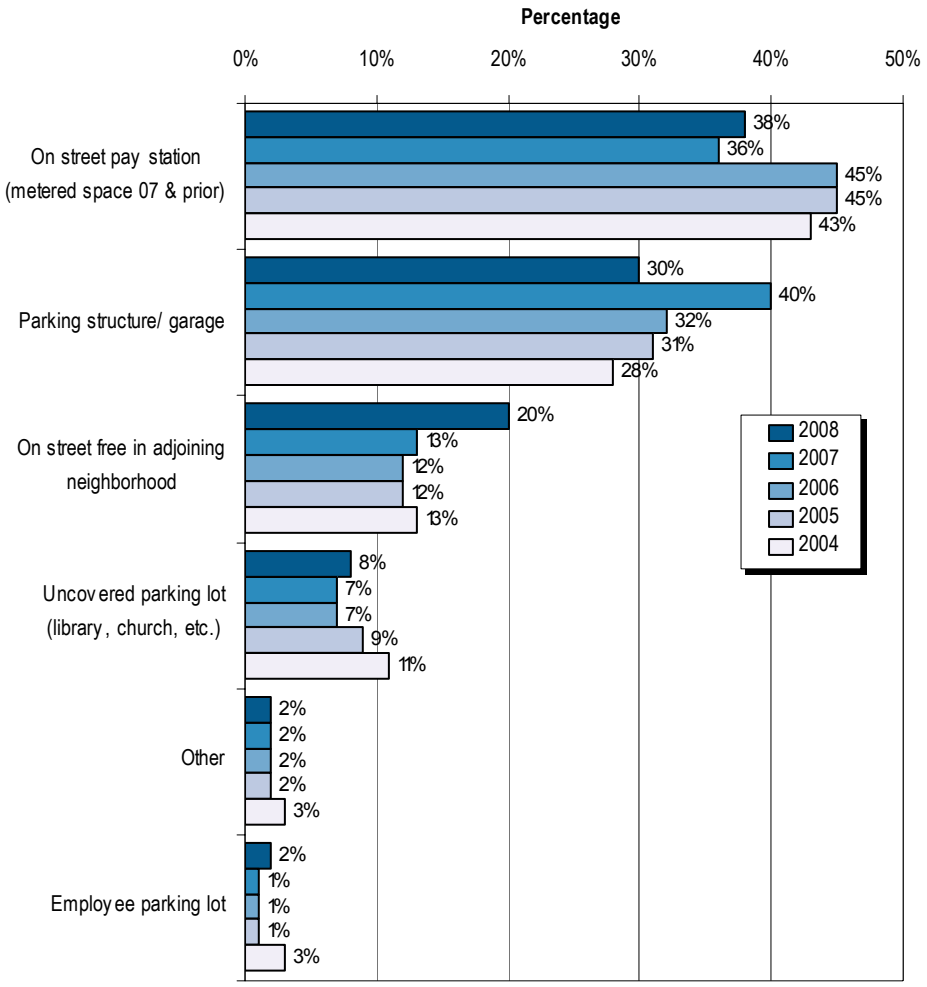

FIGURE 13D
RATING FOR PARKING-RELATED ISSUES
2008 ONLY, BY VISITOR TYPE

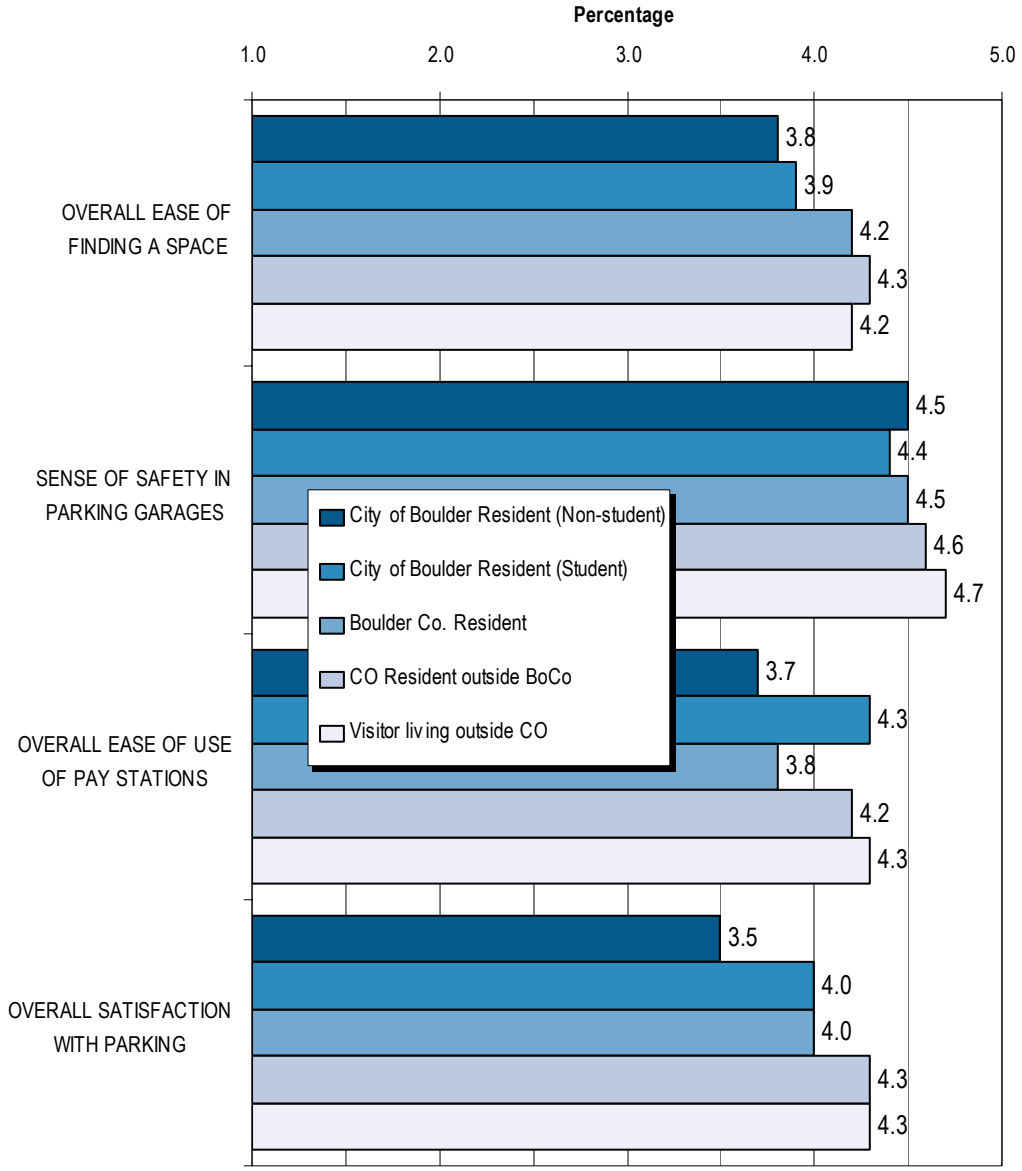

FIGURE 14A
ADVERTISING AWARENESS
BY YEAR

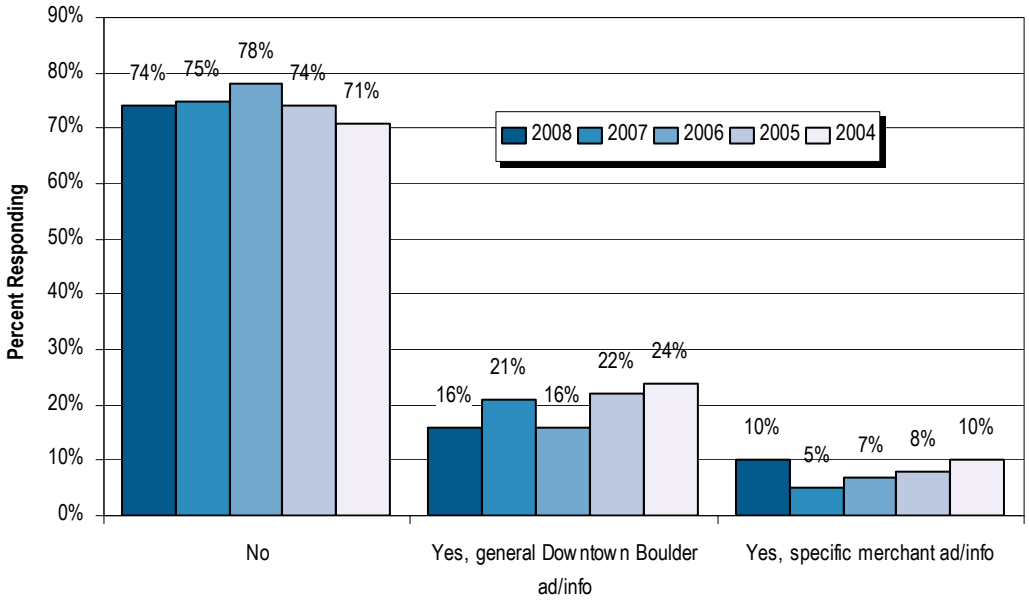

FIGURE 14B
ADVERTISING AWARENESS
BY 2008 VISITOR TYPE

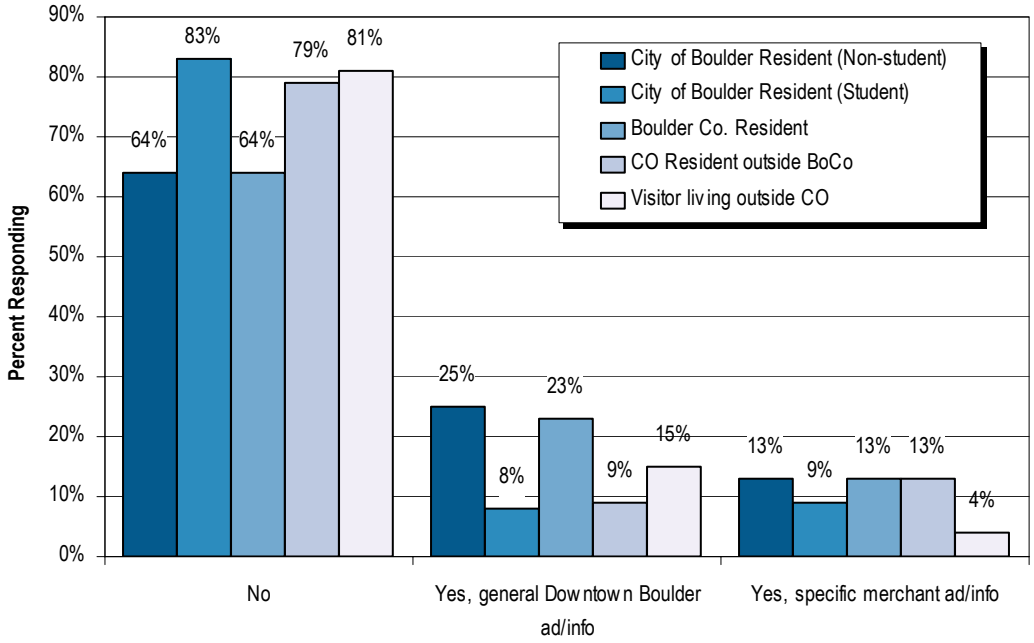

FIGURE 14C
USE OF WEBSITE
BY YEAR

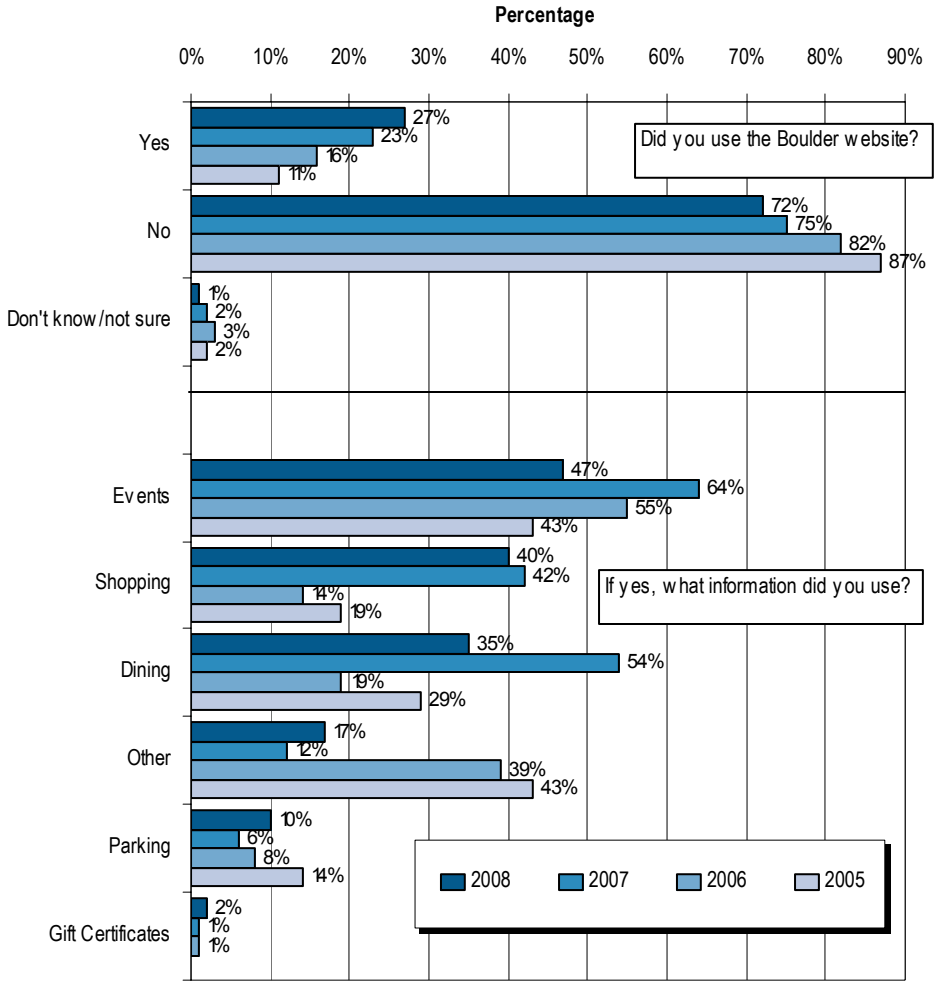

FIGURE 15A
OVER THE PAST FEW YEARS, HAS THE DOWNTOWN BOULDER AREA BEEN IMPROVING, STAYING THE SAME, DECLINING, OR IMPROVING IN SOME RESPECTS AND DECLINING IN OTHERS?
BY YEAR

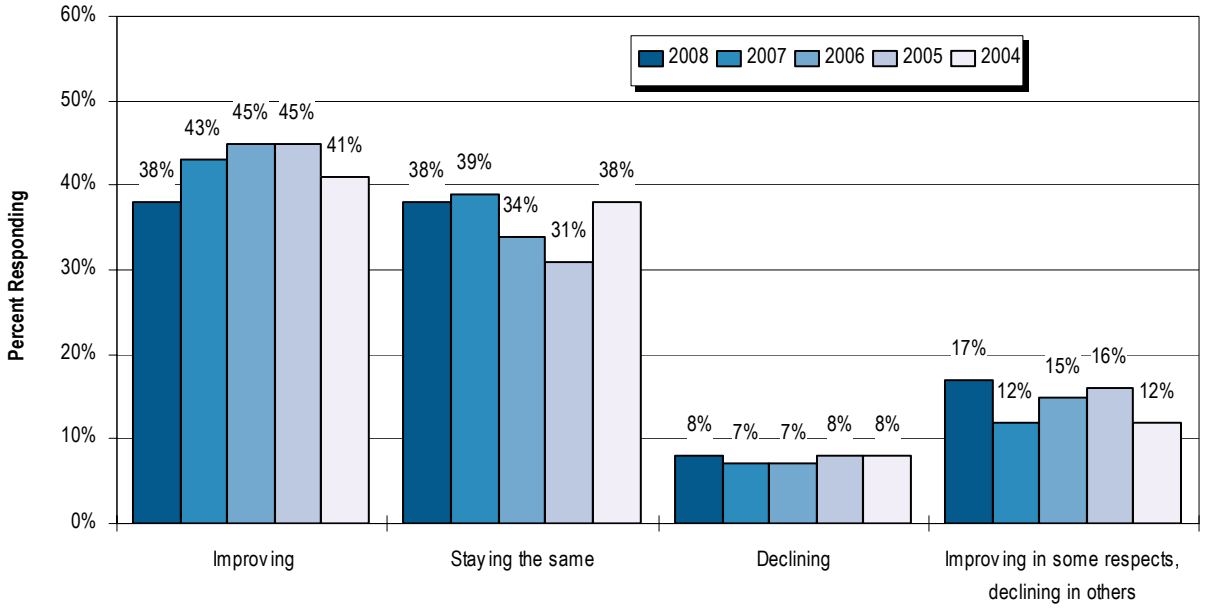
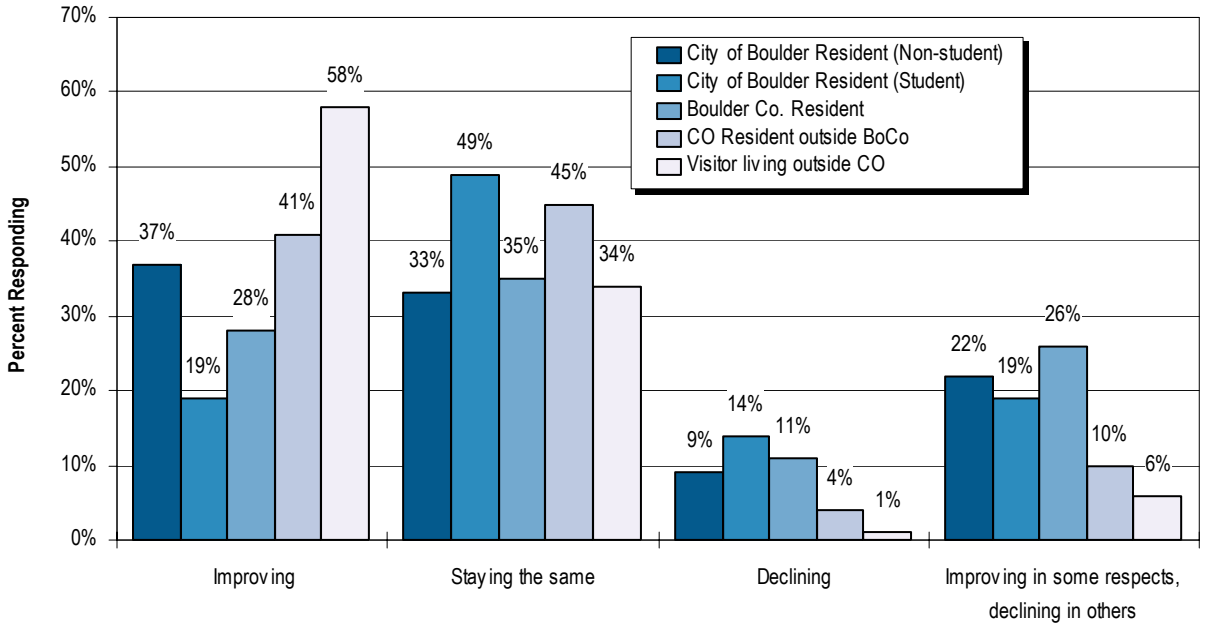
FIGURE 15B
OVER THE PAST FEW YEARS, HAS THE DOWNTOWN BOULDER AREA BEEN IMPROVING, STAYING THE SAME, DECLINING, OR IMPROVING IN SOME RESPECTS AND DECLINING IN OTHERS?
BY 2008 VISITOR TYPE