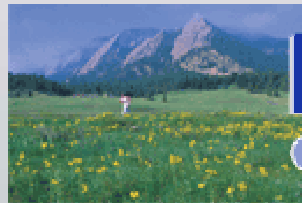


Boulder Convention & Visitors Bureau Web Survey 2005



BOULDER
colorado usa

RRC 4940 Pearl East Circle
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ASSOCIATES 303-449-6558

February 16, 2006

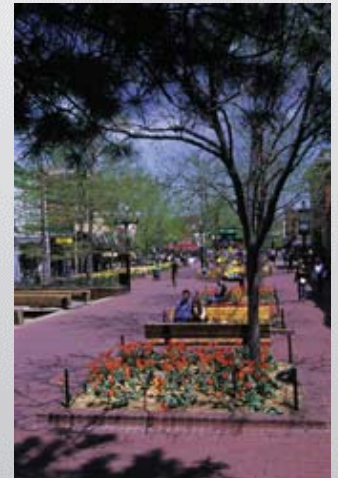


Presentation Overview

- Key Findings and Highlights
- Background and Methodology
- Trip Characteristics
- Impressions of Boulder
- Demographics and Geographic Origin
- Review of 2001 Survey Results
- Observations/Implications

Key Findings and Highlights

- Survey was designed to gather facts about those who requested Boulder information
- 65 percent indicated they did visit Boulder after receiving the information
- Travelers indicated an average length of stay of 3.5 nights, with an average party size of 3.0 people
- Half were first time visitors to the area



Key Findings and Highlights

- Top activities while in town include dining, Pearl Street, shopping, and hiking
- General recreation was the top reason for visiting Boulder, followed by visiting family or friends
- Total spending averaged \$1,191 per party (median of \$725)
- Top states for visitors were California, Wisconsin, Illinois, Colorado, Texas, and New Jersey



Key Findings and Highlights

- Visitors tend to be families or empty nesters, a bit older, and more affluent compared to those who did not visit
- Satisfaction with the experience and intent to return were both very high
- Most inquirers who did not visit either have a definite trip planned or are considering a trip in the next year





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Background and Methodology

- Invitation to web survey sent in October 2005 to CVB database of 5,450 email addresses
- Those in the database had requested information about Boulder via the CVB website or telephone call
- Incentive of one of four \$100 gift certificates to L.L. Bean offered
- 491 valid survey responses received



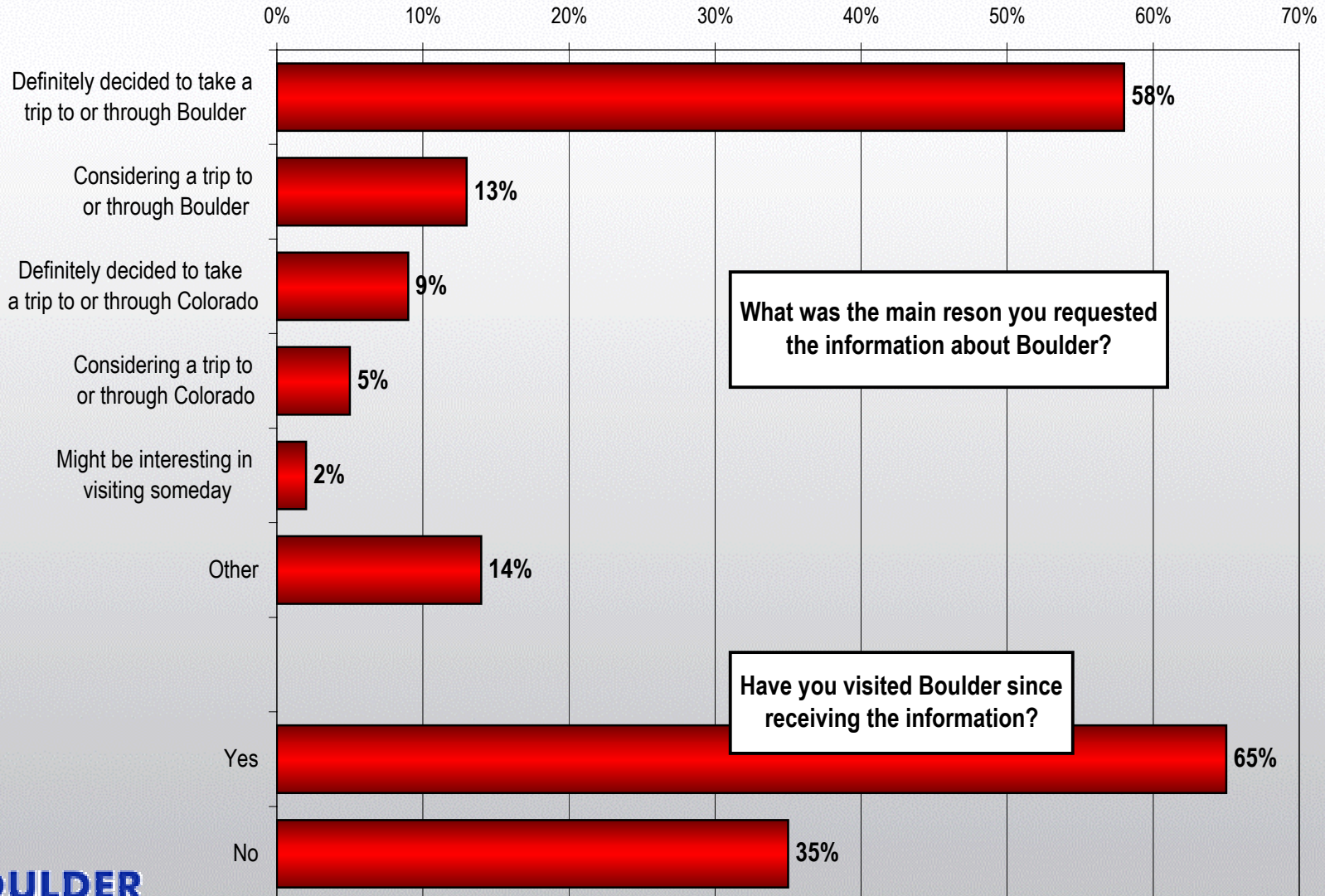


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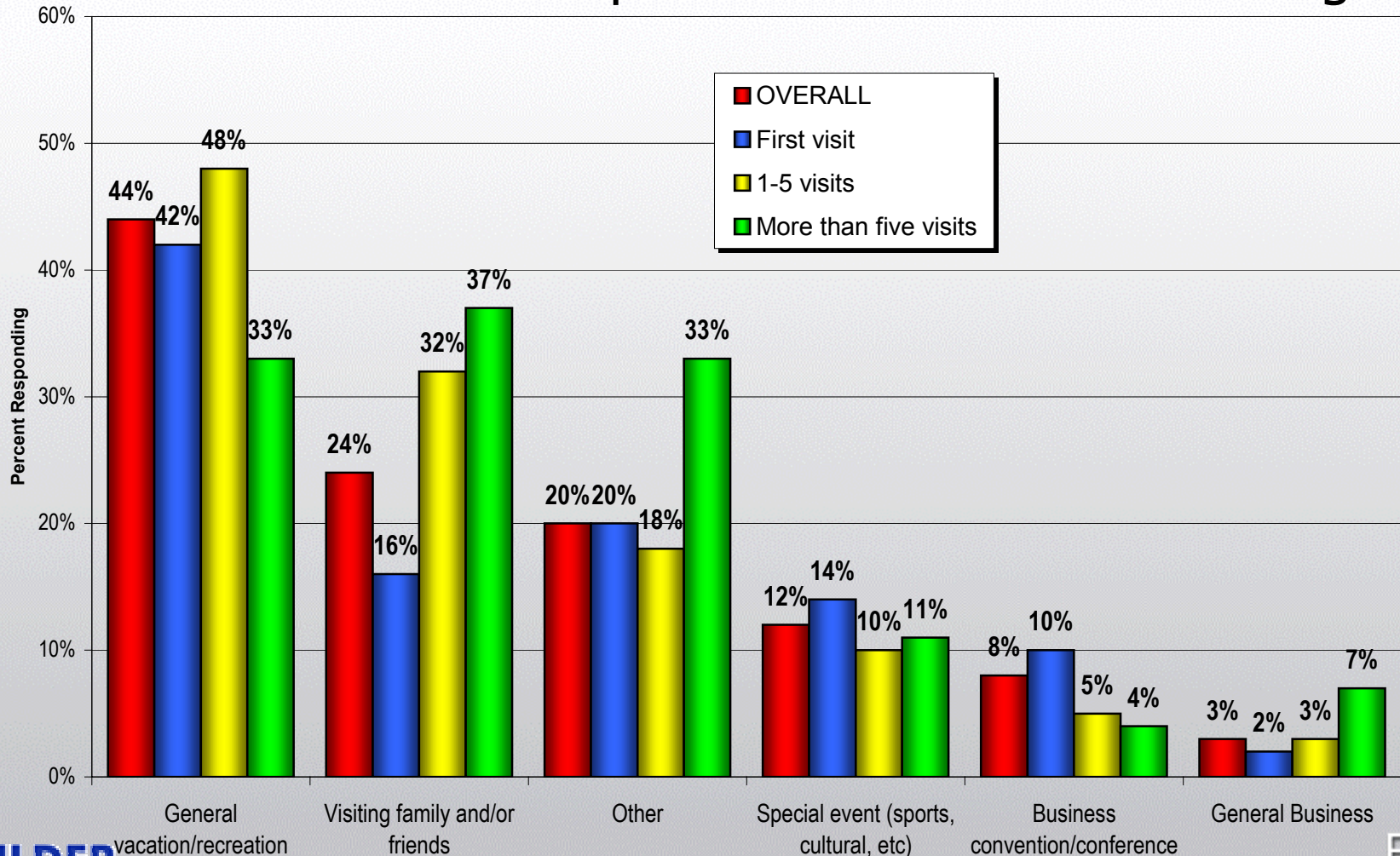
Reason for Information Request

➤ Most had already decided to visit Boulder



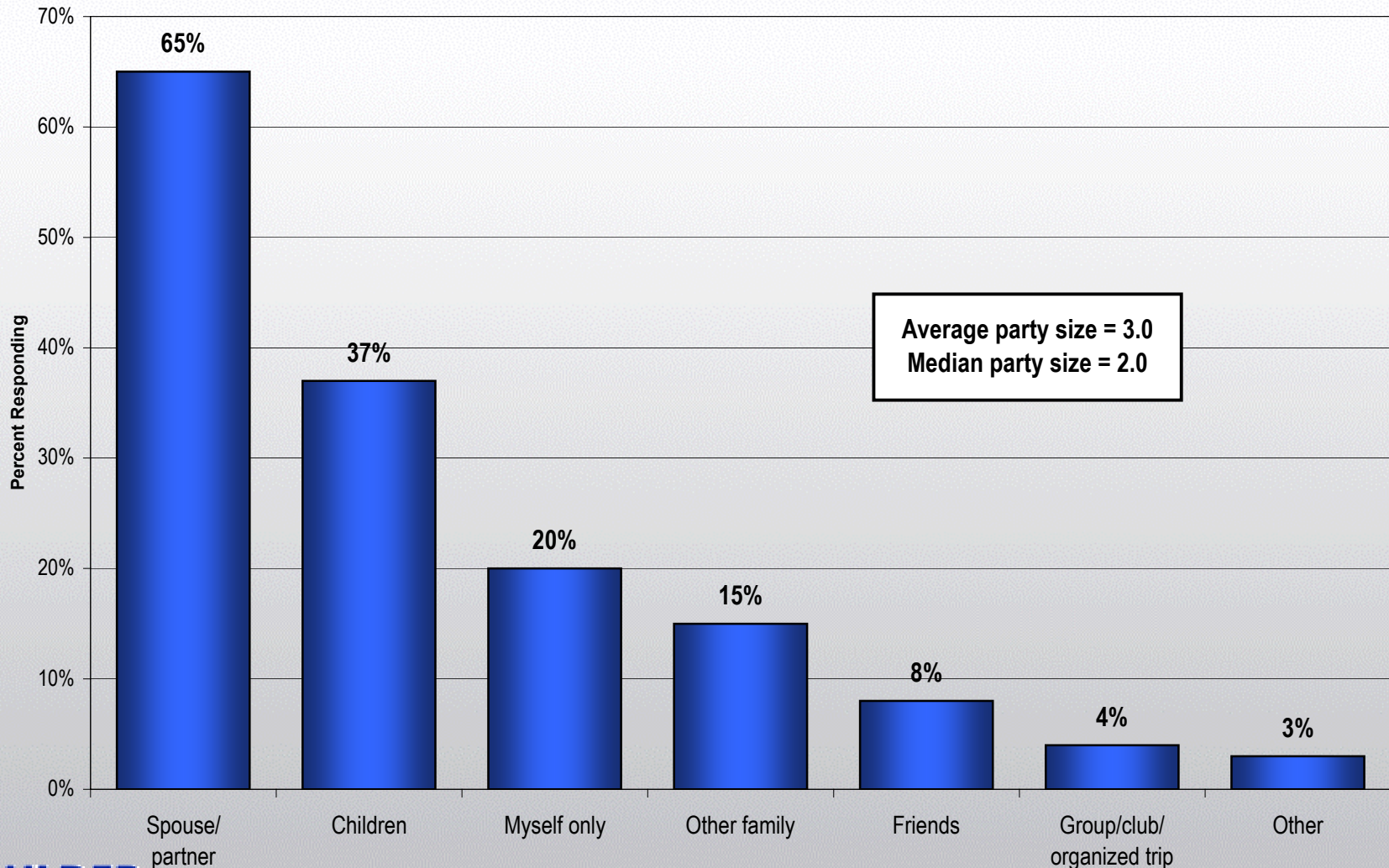
Purpose of Trip to Boulder

- General vacation/recreation and visiting family/friends are most important reasons for visiting



Travel Party Characteristics

➤ Most were with a spouse/partner and/or kids

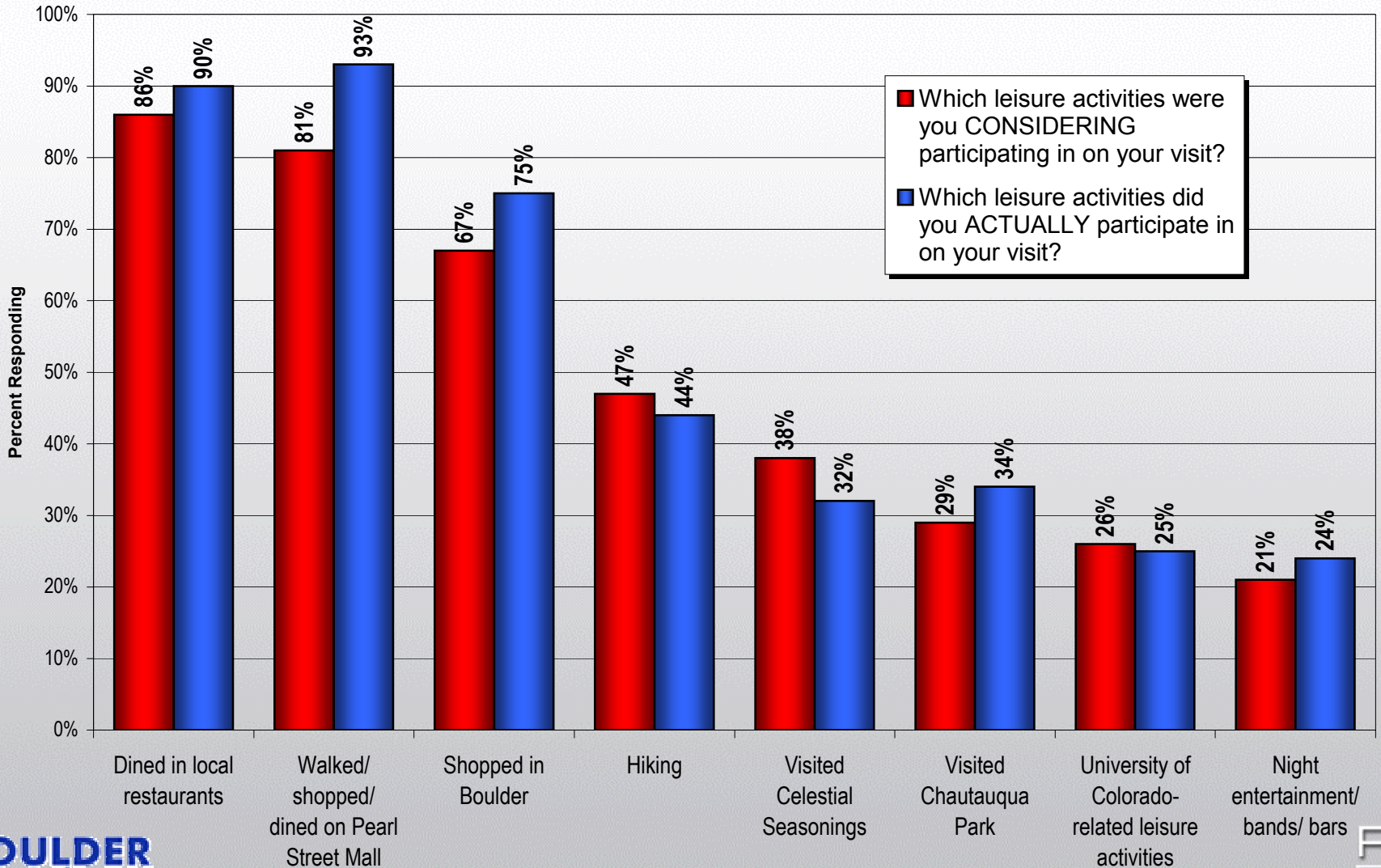


Trip Characteristics

- Average length of stay was 3.5 nights, compared to 4.3 nights recorded on Downtown Mall survey (same median of 3 nights)
- 15% said they passed through on a day trip only
- Average travel party size was 3.0 persons, similar to the 2.8 recorded on the Downtown Mall survey (same median of 2 persons)
- Majority (63%) indicated that Boulder was their primary destination on their trip, with the remaining 37% saying it was a stop on a longer trip
- About half (53%) were making their first trip to Boulder; 21% had made one prior visit

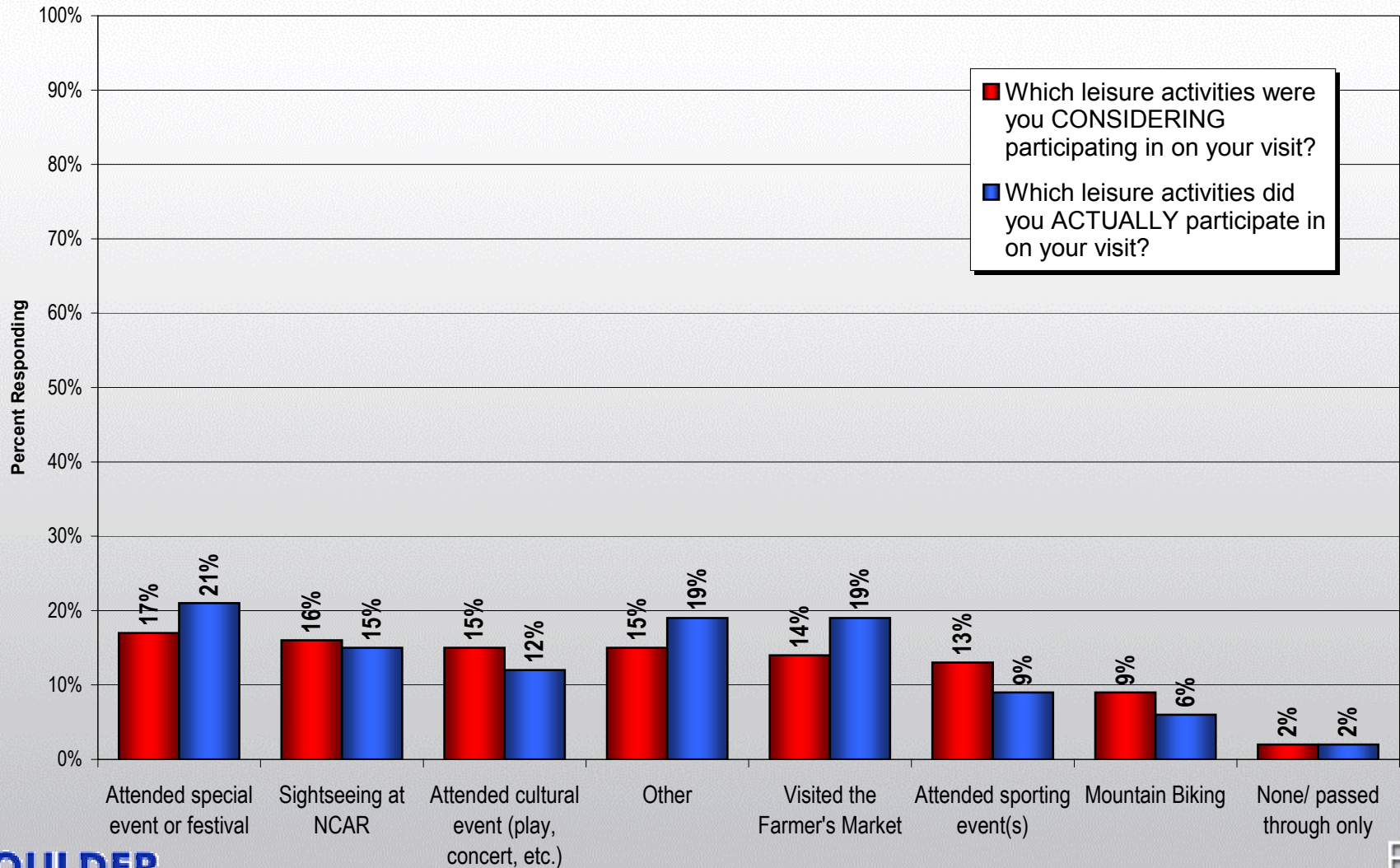
Activities while in Boulder (1 of 2)

➤ Dining, Pearl Street, Shopping most popular



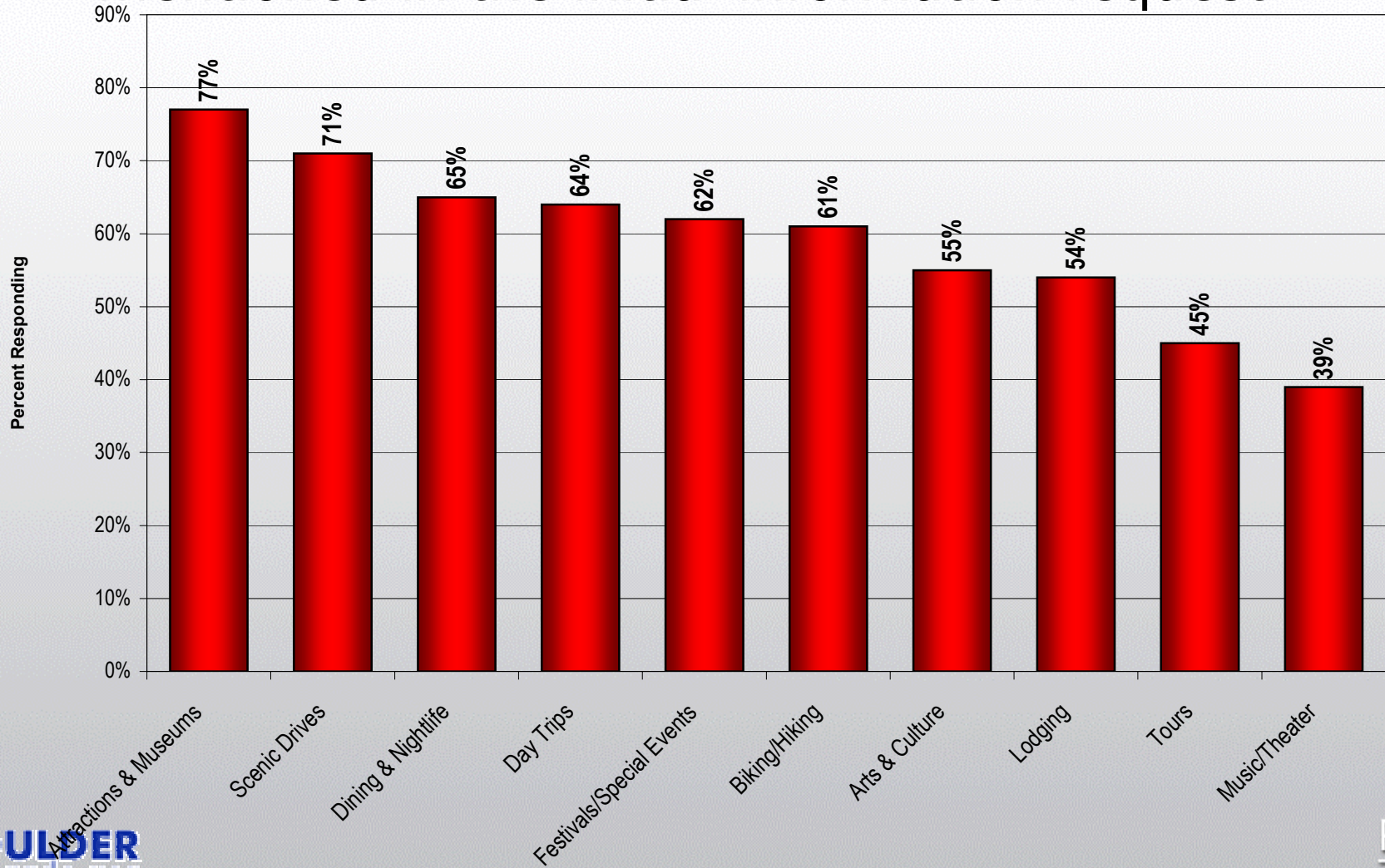
Activities while in Boulder (2 of 2)

➤ Other activities experienced lower participation



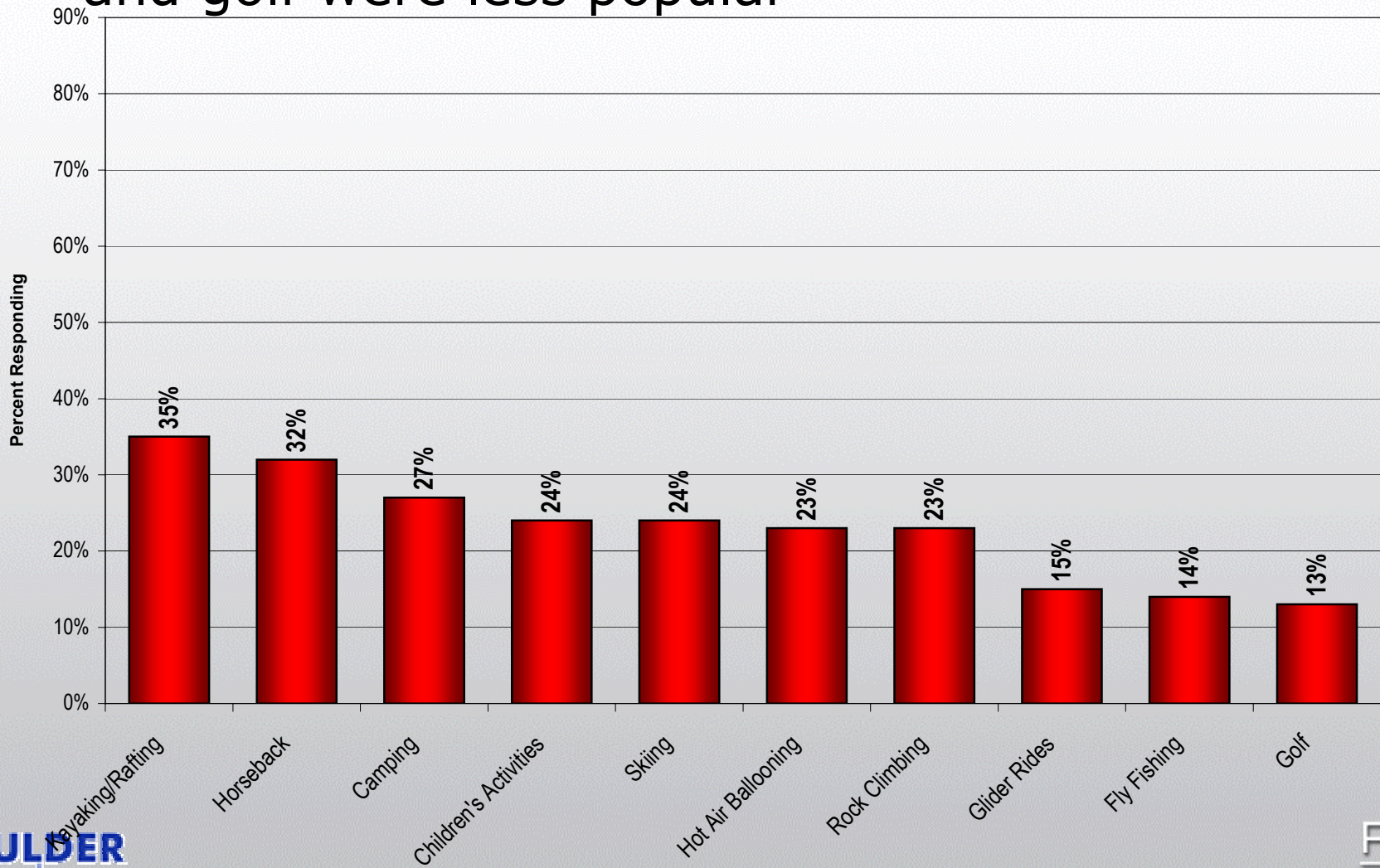
Interest in Activities (1 of 2)

- Attractions/museums was top activity respondents mentioned in the initial information request



Interest in Activities (2 of 2)

- Specific activities like glider rides, fly fishing, and golf were less popular



Spending Patterns

- Average total spending of \$1,191 per party (median: \$725)
- Downtown Mall survey overnight visitors averaged \$735 in total spending (median: \$528)
- A greater proportion of Downtown Mall visitors were staying with friends or family (48% versus 24%), reducing the contribution of lodging expenditures to total expenditures



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Impressions of Boulder

➤ Overall, very positive perceptions of Boulder

Before your visit to Boulder, what words or phrases would you use to describe what you expected Boulder would be like?	After your visit, what would you tell a friend about Boulder?
Relaxing, near out-of-doors areas	Same as above. More nice shopping areas than the last time.
Fantastic scenery, vibrant, artsy, college town, sunny, friendly, environmentally concerned residents	Just a beautiful town - Recommend Pearl Street Mall, great bookstore! The college campus is absolutely beautiful, lots of bicyclers, People of all ages, the Dushanbe Teahouse is a must
Nice college town	One of the best places I have ever been, not to be missed
Beautiful, mountainous, rugged	Quaint college town with so many outdoor things to do
Just a suburb of Denver	Very unique town, very personable.
Very liberal	Not as liberal as I thought it would be. And very pretty place.
A college town	Much more than expected. A great place to visit
Mountain town	Way to busy. The hiking was like a freeway. Shopping (grocery) expensive.
College town	I loved it; very eclectic, artsy, laid back, beautiful setting.

Impressions of Boulder

➤ Some comments about expense and crowding

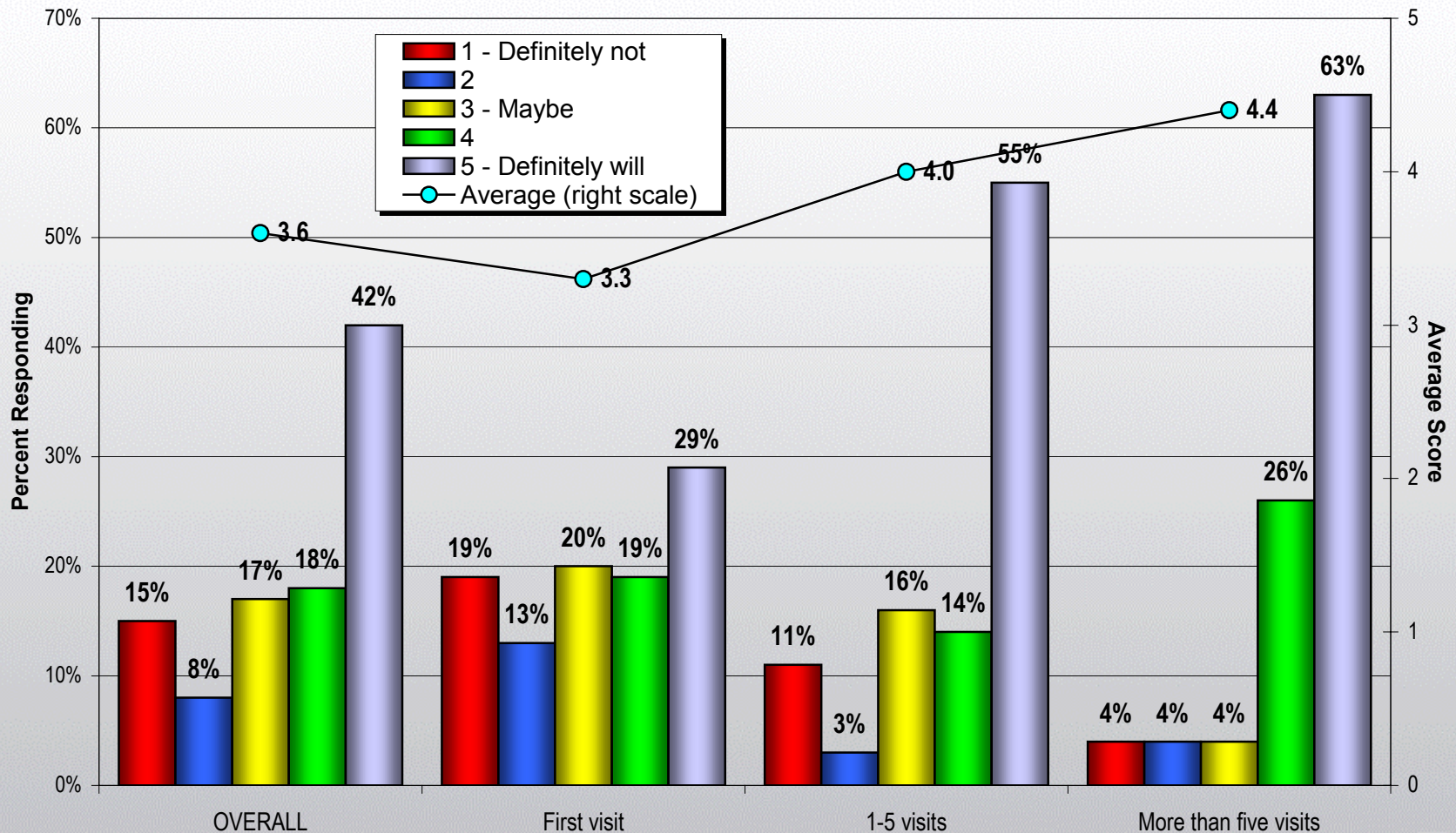
Before your visit to Boulder, what words or phrases would you use to describe what you expected Boulder would be like?	After your visit, what would you tell a friend about Boulder?
Western type town, old buildings, quaint	Modern town, very busy, huge market
Skiing town	There are multiple varieties of things to do.
Cold and snowy	Absolutely beautiful
Knew nothing.	Awesome!!!!
I expected Boulder to be beautiful	Boulder and the vicinity were awesome, beyond words. Many things to see and do
Earthy Nature	Expensive Healthy Fun
Mountainous, beautiful, outdoor oriented	Pretty much the same thing - it was exactly as I expected.
Fun, exciting	Words or pictures cannot describe just how breath taking it is. You have to see it to believe it.
front door to the mountains	Many exceptional trails, but be aware of parking usage fees and overcrowding. Very clean and good organic food stores.
Expected upbeat college town atmosphere with beautiful scenery	Very friendly, interesting place. Would be a wonderful place to live

General Comments

- Various comments from visitors
 - ▶ *Would love to visit again and have told many others about the city and area*
 - ▶ *If we had the money, we would definitely visit our friends and stay in Boulder again*
 - ▶ *People could be friendlier to visitors. My general experience was that most people didn't care enough to help or guide a visitor*
 - ▶ *Boulder was a very comfortable place to visit and we felt very healthy there*
 - ▶ *Great city!*
 - ▶ *Fittest people in any city I've been to*
 - ▶ *Just such a wonderful experience that I wish to return*

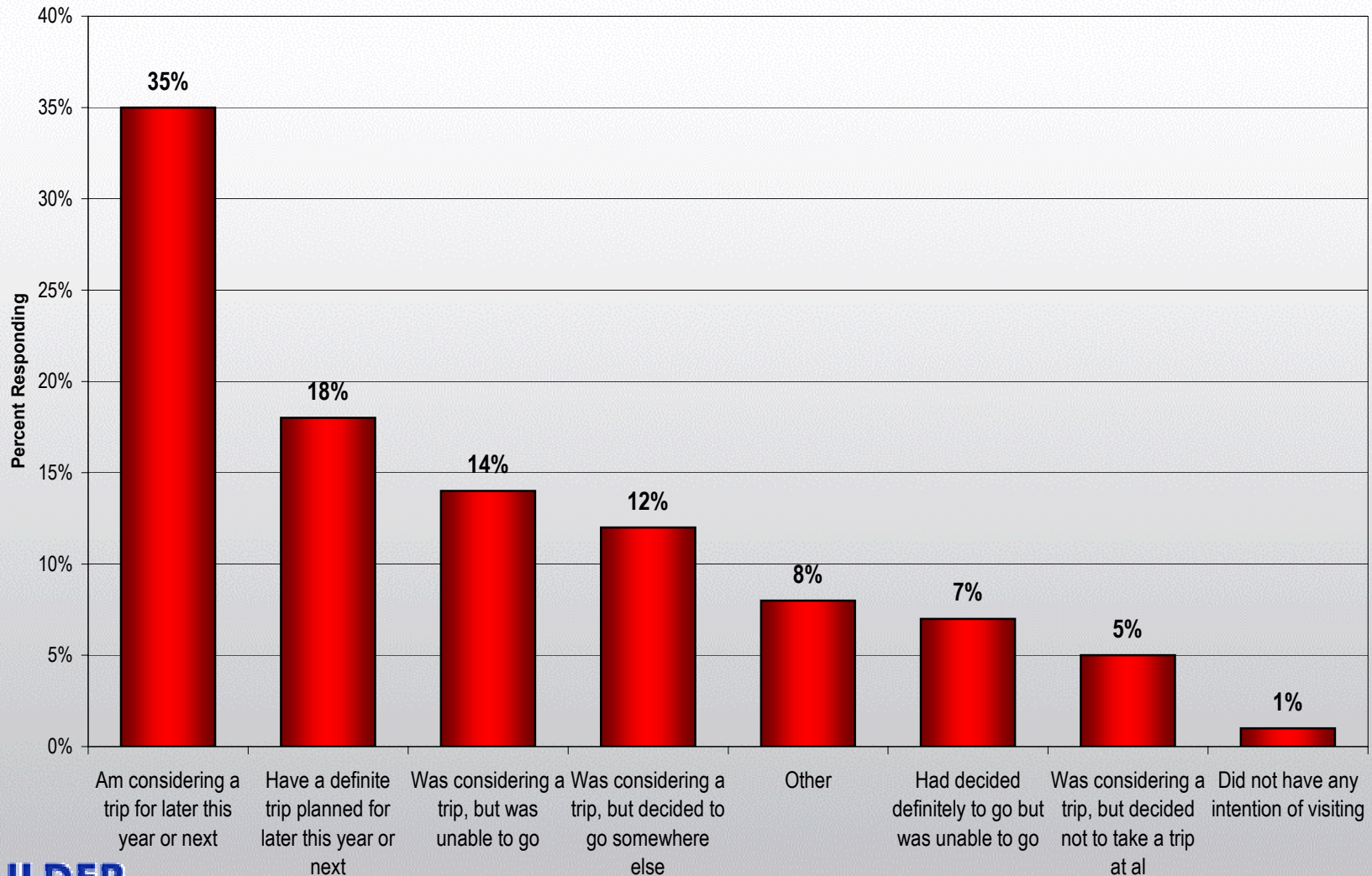
Likelihood of Return in Next Year

- Likelihood of return high, particularly for those who have visited before



Non-Visitor Questions

➤ 35% are considering a trip in the next year



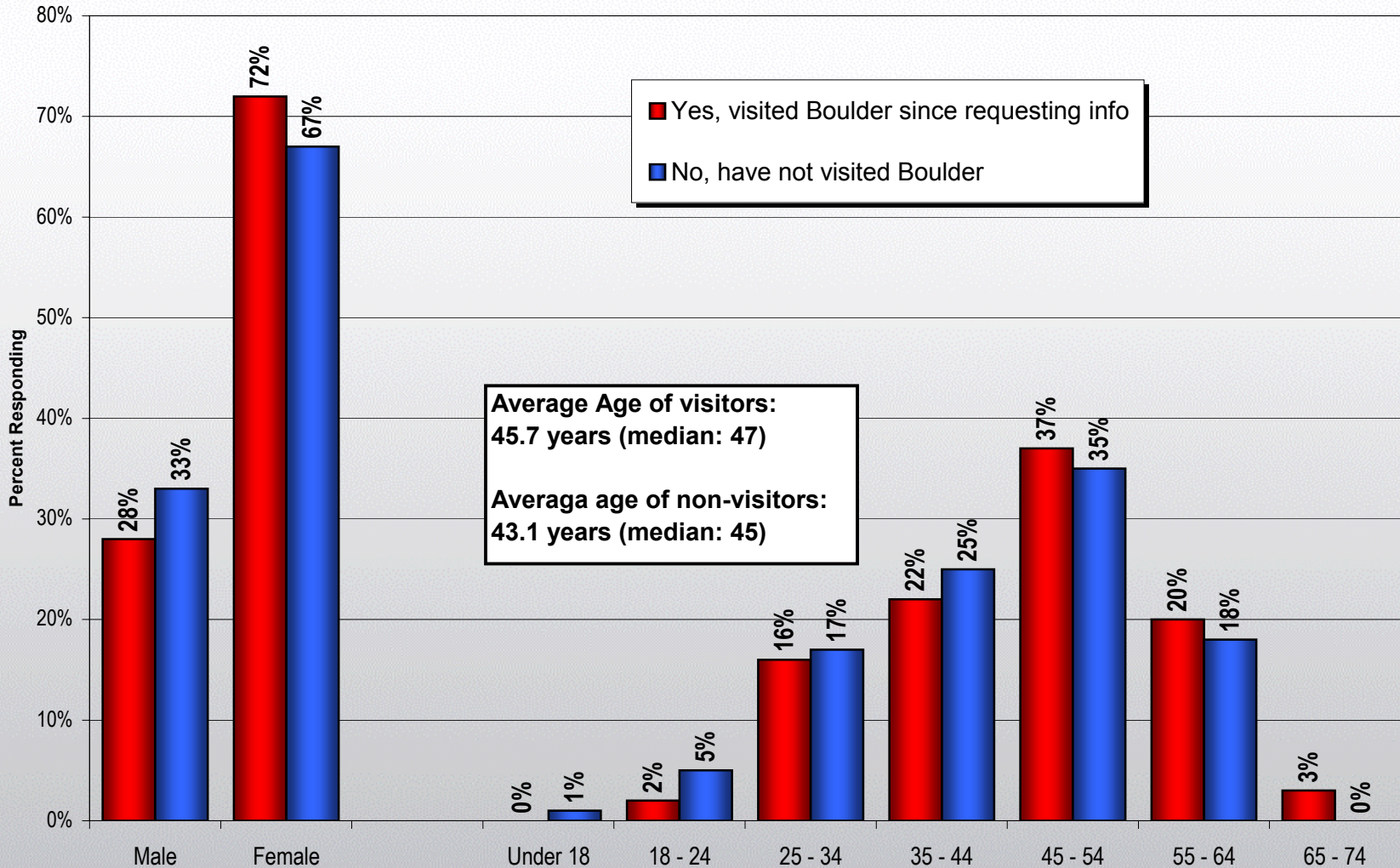


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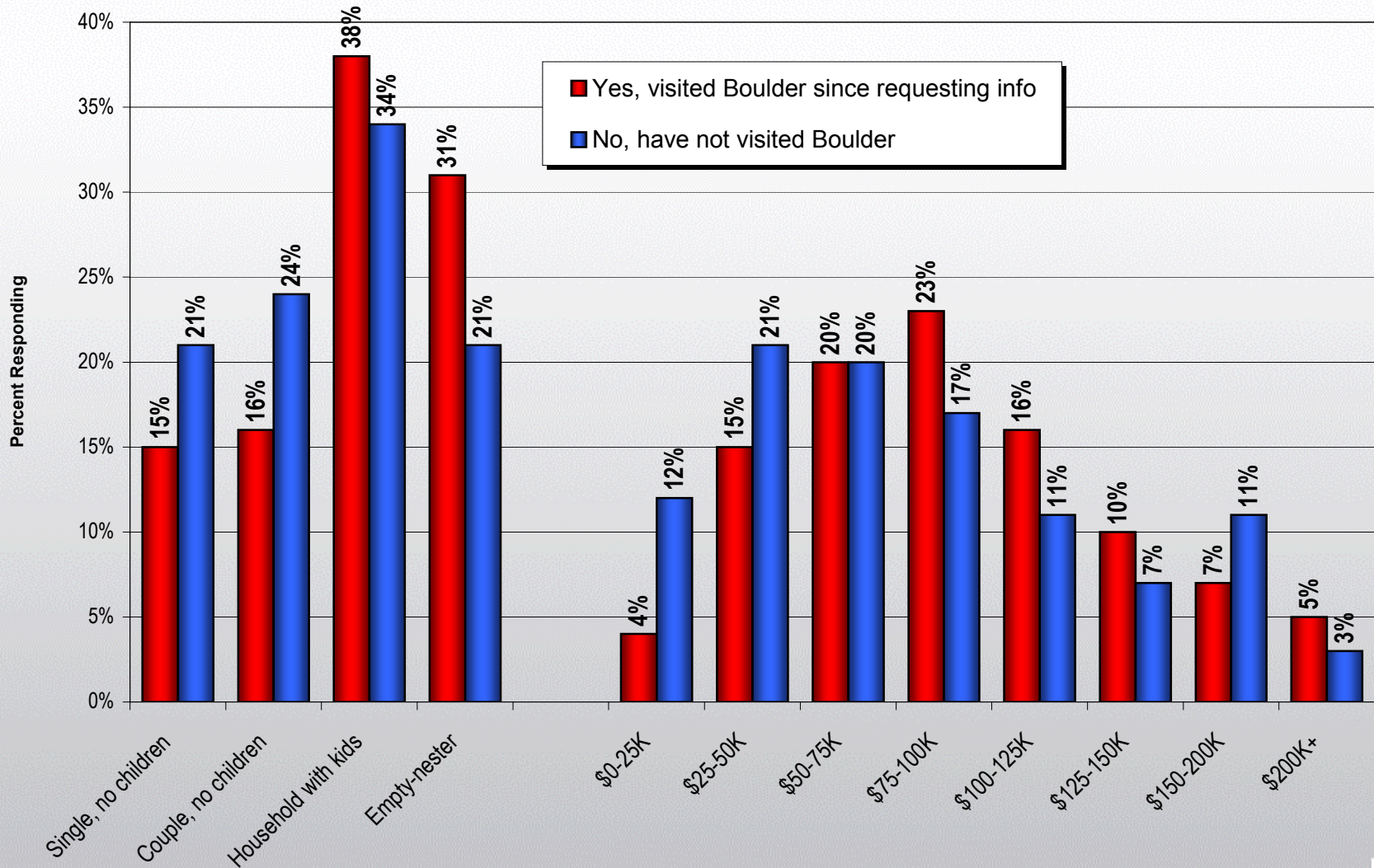
Respondent Demographics

➤ Females dominate the respondent group



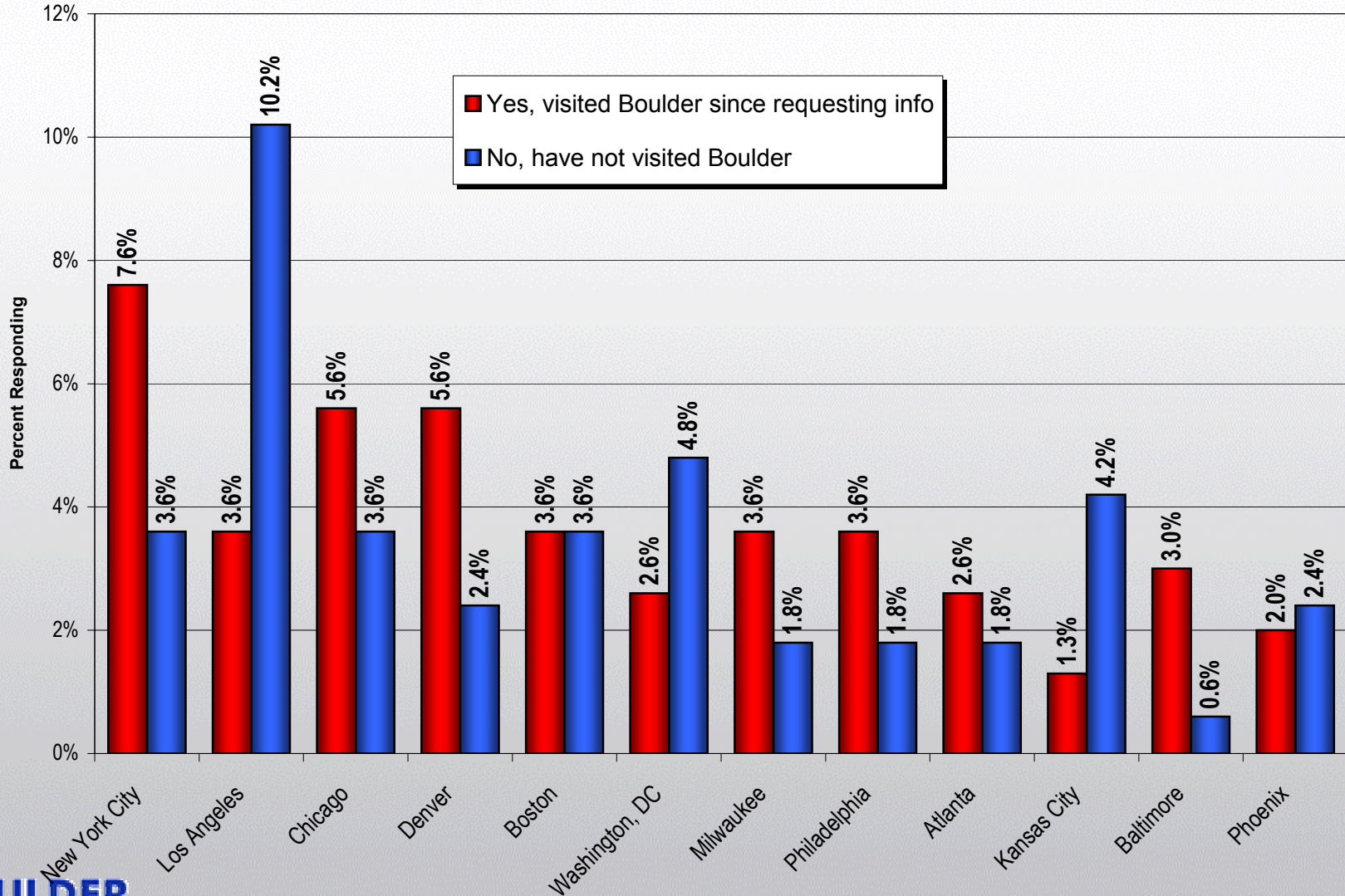
Respondent Demographics

➤ Families are largest group, though less than half



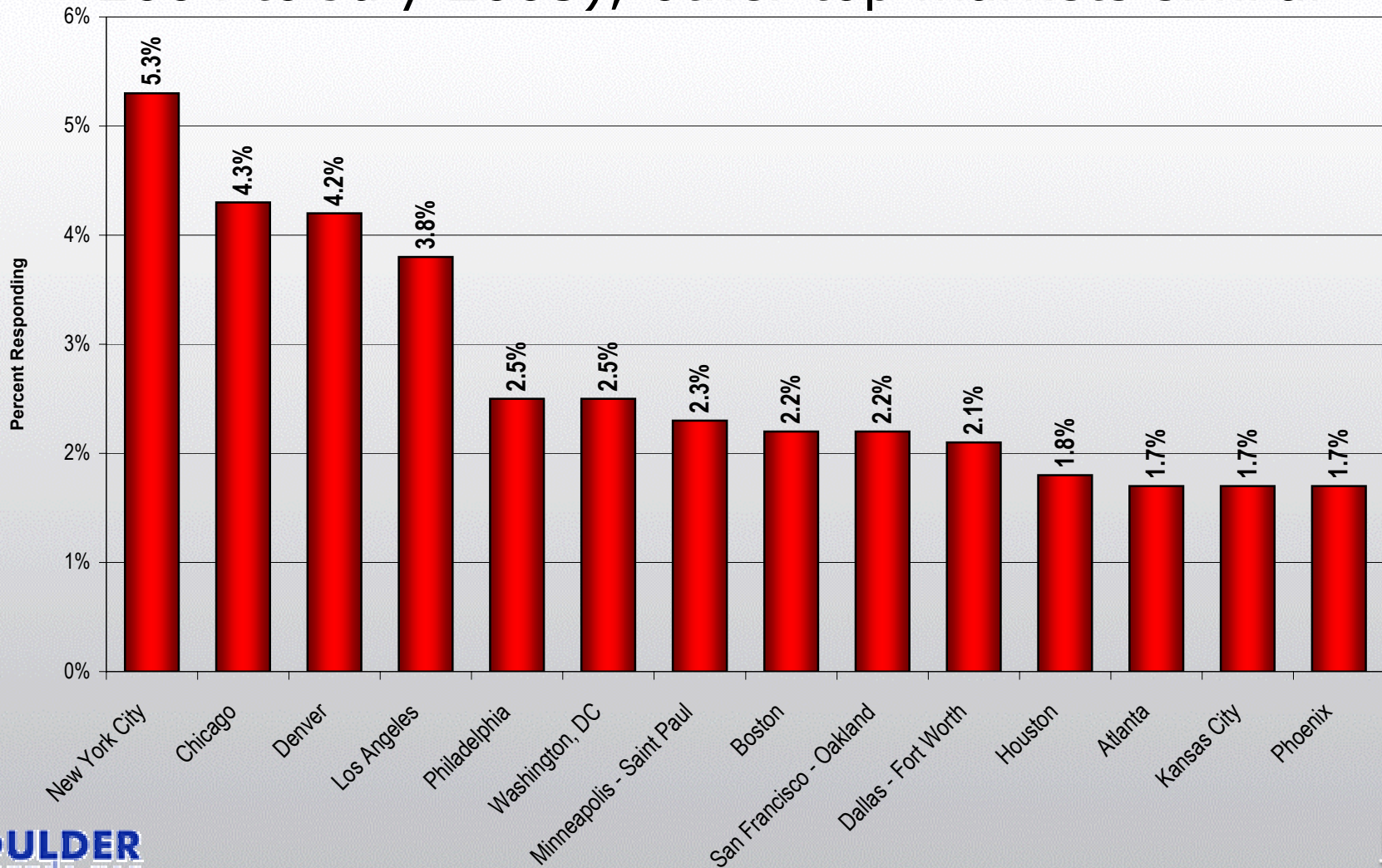
Geographic Origin

➤ NYC is biggest market for visitors



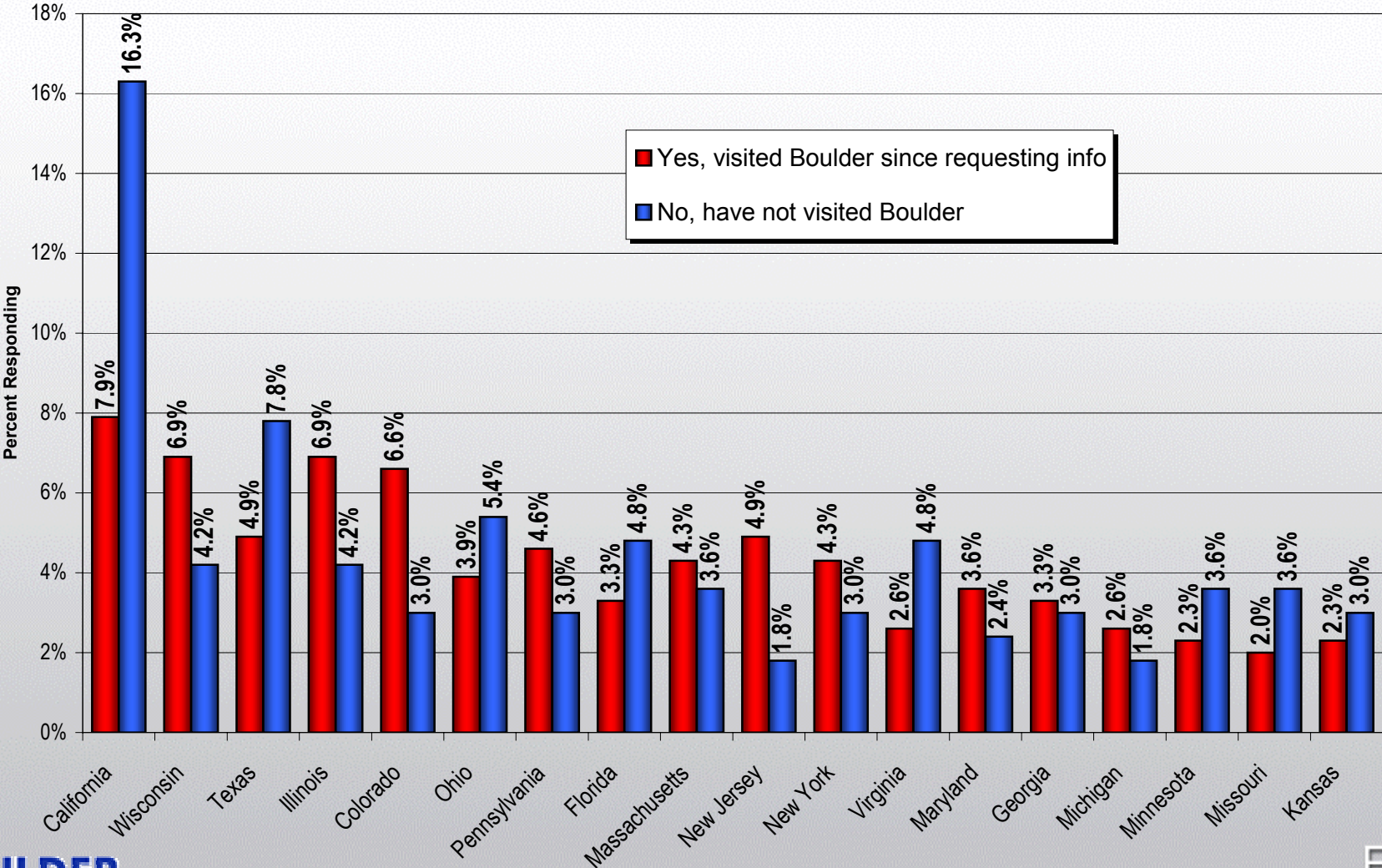
Geographic Origin (all inquiries)

- NYC is also largest market for all inquirers (Feb 2004 to July 2005); other top markets similar



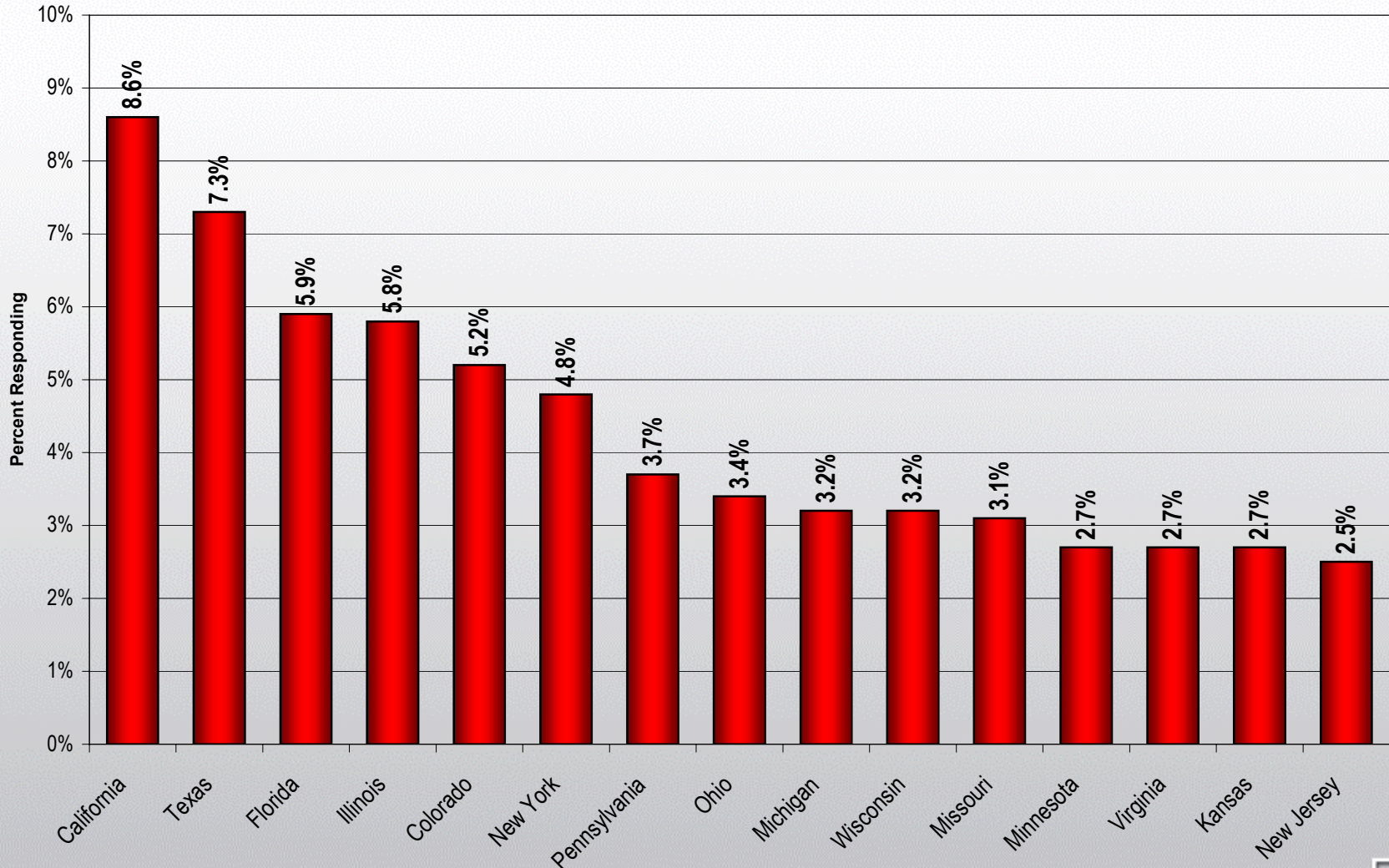
Geographic Origin

➤ California is the biggest potential market



Geographic Origin (all inquiries)

➤ California is also the largest source for all inquirers





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2001 Survey Results

- A different, two-tiered methodology was employed
 - ▶ Brief survey administered at hotel front desks to guests checking in
 - ▶ Survey mailed to lodging guests after their trip
- 40% were visiting for business reasons, 24% for general vacation/recreation
- Average party size was 2.1 persons, including 28% traveling alone (median: 2 people, same as web survey)
- Average number of nights was 3.6 (median 2 nights, same as web survey)
- Primary activities included dining (97%), Pearl Street Mall (84%), and shopping (65%)



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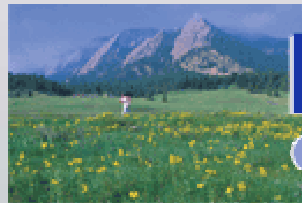
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Observations/Implications

- Web inquiries tend to have strong conversion and positive feedback on their experience
- Ideas to motivate longer stays include targeted mailings, creative packaging, and powerful collateral information
- First time visitors represent an opportunity for continued visits
- Leveraging visits to family and friends could also be an opportunity
- Visitor spending is a critical component of Boulder's economy



Thank You



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