DOWNTOWN BOULDER SURVEY 2007

Summary of Results

October 2007

Prepared for

Downtown Boulder, Inc.
City of Boulder, Downtown and University Hill Management Division/Parking Services
Boulder Convention and Visitors Bureau

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DOWNTOWN BOULDER USER SURVEY
2007
FINAL REPORT

INTRODUCTION

This report summarizes the results of the 2007 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 765 interviews were completed during the research period between July 18 and September 2, 2007.[1]

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, the quality of the visitor experience, advertising awareness, mode of travel to the downtown area, the impact of panhandlers on the experience, 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 (including the new 29th Street Mall), as well as awareness of downtown parking alternatives and attendance at special events and festivals downtown (and a new question about attendance at such events in other Boulder County communities). Out of town visitors were asked if they were spending the night, information sources they used to plan the trip, total spending during their trip in Boulder, and the primary purpose of their trip to Boulder.

The results of the research are intended to assist Downtown Boulder, Inc, the City Downtown Management Commission, the Downtown Business Improvement District, and the Convention & Visitors Bureau in better understanding the issues and concerns of downtown users (both residents and visitors) and to help set priorities for improving the overall image, branding, and functioning of the downtown area.

Methodology

Interviews were conducted at various times throughout the day, between 11:30 a.m. and 8:30 p.m. along Pearl Street from 10th Street to 16th Streets. Similar to the research conducted in 2006 and prior years, the surveys were concentrated on the pedestrian area of the Pearl Street Mall, though a portion of the research was done both east and west of the mall proper. Again this year, the off-mall surveys were limited to one block east of the mall and one block west of the mall. 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.

[1] For the total sample size of 765 interviews, the margin of error is +/- 3.54 percent (calculated for the 95 percent confidence interval). Note that the margin of error can be different for every single question on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various populations, therefore, should take into consideration these factors. As a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages.

The 2007 survey is the fifteenth downtown mall survey RRC Associates has conducted for Downtown Boulder, Inc., the City of Boulder, and the Boulder Convention & Visitors Bureau. In this report, the 2007 results are compared to results for prior years, particularly the most recent results, to assist in identifying trends over the recent past. Many of the questions on the survey are the same as in previous surveys, allowing for a monitoring of such longitudinal trends; additionally, several new questions were added this year to address current topics of interest. Prior surveys, which utilized a similar survey form and research methodology, were administered in each summer of the years 1996 through 2006; Spring 1995; Christmas 1994/95; and Fall 1994.

A Note on Terminology

Regarding terminology used in the report, unless otherwise noted, references to Boulder County residents *do not include* residents of the City of Boulder. Two of the general classifications of downtown users in this report are City residents and Boulder County (non-City) residents. These groups are generally discussed and profiled as mutually exclusive segments. From time to time, all residents of Boulder County, including City residents, are referenced as Boulder City/County residents.

Again this year, the interviewing area included one block to both the East and West of the Mall Proper to broaden the scope of the research effort. Nevertheless, when referring to the collective survey sample, terms such as "mall visitors" or "mall users" are utilized. It should not be assumed that employing such terminology means only those interviewed on the mall proper; rather, the words serve as a proxy for the entire sample of those interviewed this summer in the Downtown Boulder area. Other terms used to describe the entire sample include "downtown visitors" and "downtown users."

A final clarification of terminology used in the report refers to the usage of the terms "local resident" and "visitor." Local residents are considered to be mall users who live within Boulder County, including City of Boulder residents. Those mall users who reside outside of Boulder County are considered to be visitors. Some of the comments presented in the report are segregated using the local resident/visitor criteria.

EXECUTIVE SUMMARY

This section outlines the most important findings from the research program this summer. Please see the remainder of the report for a more detailed discussion of these and other topics.

- Overall, the ***average amount spent rose slightly***, to an average per person amount of $51.58, up 0.6 percent from $51.26 a year ago. ***Average spending was up for shopping but down for dining***, the opposite of the result from the year prior (when spending on shopping was down and dining was up).
- The proportion of mall users who are ***full time City of Boulder residents*** slipped again to to 35 percent of those interviewed, the lowest percentage recorded for this group in the history of the survey research program. ***Downtown core area residents*** comprise 9 percent of City of Boulder users, with another 30 percent classifying their residence as ***Central/West Boulder***. Residents of ***South Boulder*** rebounded as a user group, up to 20 percent of city residents, a significant finding because of concerns about leakage to the Louisville, Superior, and Broomfield areas among this user group.
- ***Friends and family play a major role in the overnight visitor segment***, as 39 percent said the primary reason for their trip was visiting family/friends. Recreation/sightseeing is also quite important, as 37 percent of overnighters cited it as the primary purpose of their trip. The average overnight party was comprised of 2.6 people spending 4.4 nights in the area. Overall, the ***average overnighter spent $745 (median of $600)***. ***Chautauqua Park*** was by far the top attraction for overnight visitors, with 44 percent indicating that they had or planned to visit there on the trip.
- An ***increase in the proportion parking in a parking structure/garage*** was observed this year, up to 40 percent from 32 percent a year ago. The continued advertising, signage, and public education regarding the parking garages appears to be stimulating a higher proportion to utilize the structures. As a result of this increase, for the first time, ***parking garages surpassed on-street metered parking*** as the preferred parking option for downtown users, 40 percent to 36 percent.
- ***Twenty-three percent of all downtown users have visited the Downtown Boulder website***, up substantially from only 16 percent last summer and 11 percent the summer prior. Of those, 64 percent said they used the website to collect information about events, followed by dining (54 percent), shopping (42 percent), and parking (6 percent). The reorganization of the Downtown web site last year appears to have produced a greater penetration among the key user audience.
- The ***impact of panhandlers on the experience downtown remains low,*** though it is somewhat of a greater concern this year compared to past summers. The proportion saying that the ***behavior of panhandlers has become more of a problem*** over the past two years increased to 14 percent from 10 percent in 2006 and just 6 percent in 2005.
- To evaluate the perception of the Downtown area, a new question was added to the survey this year. Overall, 21 percent said they thought of the Downtown Boulder area as ***primarily a place for dining/eating out***, while only 4 percent thought of it as a place ***primarily for shopping***. Fifty-nine percent conceive of Downtown Boulder as a place for ***both shopping and dining***, while 11 percent mentioned some other primary purpose. The perception of the Downtown area as a place primarily for dining/eating out is particularly concentrated for residents of the City and County, while out of state residents tended to view it as an area for a mix of the two.

SUMMARY REPORT

This section of the report describes in greater detail some of the major findings from the summer research program. Following this narrative discussion, the comments from the surveys are summarized, and then a series of graphs with a visual portrayal of key information is presented.

Visitor Mix

- The proportion of mall users who are ***full time City of Boulder residents*** slipped again to to 35 percent of those interviewed, the lowest percentage recorded for this group in the history of the survey research program. On the other hand, the proportion of users from ***Colorado outside Boulder County*** was up. The second largest group, ***US residents outside Colorado***, was stable at 25 percent of the visitor mix. ***Colorado residents outside Boulder County*** (19 percent, up from 16 percent) and ***Boulder County residents*** (14 percent, stable) account for most of the rest of the downtown user population. ***International visitors*** and ***summer/part time*** City residents and (each 5 and 2 percent, respectively) make up the balance of those interviewed this summer. Interestingly, the proportion of International visitors recorded in the survey this summer was up about one and a half percentage points over last summer.
- When grouped together, all ***Colorado residents*** make up 70 percent of downtown users, while ***out of state visitors*** (including International) represent 30 percent. Despite the proportionate decline in full-time Boulder residents, city residents remain the largest user group and are a critical component of the visitor mix downtown, as they visit with greater frequency and contribute to the vitality and authenticity of the area.
- For the first time, residents of the downtown core area (defined as those living within a 5-minute walk of Pearl Street Mall) were isolated from other parts of town. As such, ***downtown core area residents*** comprise 9 percent of City of Boulder users, with another 30 percent classifying their residence as ***Central/West Boulder***. In total, this group accounts for 39 percent of city users, consistent with last year's results but down substantially from the 47 to 49 percent range recorded in the 2002 to 2005 period. It will be important to continue to monitor this mix, especially in light of the increasing number of (primarily upscale) residences being built in the immediate downtown area.
- This year, residents of ***South Boulder*** rebounded as a user group, up to 20 percent of city residents (up from 14 to 16 percent observed each of the last two summers, but aligned with the figures from the two prior summers). This rebound is significant because of concerns about leakage to the Louisville, Superior, and Broomfield areas among this user group. Despite the gain from South Boulder residents, residents of North Boulder comprise the #2 neighborhood, at 27 percent of city residents.

Spending Patterns

- Overall, the ***average amount spent rose slightly***, to an average per person amount of $51.58, up 0.6 percent from $51.26 a year ago. As seen in prior survey research, the group that spends the most is ***out-of-state residents***, who averaged $80.60 (down 7.8 percent from $86.91). Average per person spending was also down for Boulder County residents and City of Boulder (non-student) residents. Students and Colorado residents spent more per person this year compared to last. These figures correlate with the mixed retail sales tax revenues recorded in the downtown Pearl Street Mall and larger CAGID areas for the 2007 summer period.

TABLE 1A
2007 AVERAGE SPENDING IN DOWNTOWN BOULDER BY VISITOR TYPE

	City of Boulder Resident (Non-student)	City of Boulder Resident (Student)	Boulder County Resident	CO Resident outside BoCo	Visitor living outside CO
Retail	$12.09	$15.10	$8.89	$36.96	$50.90
Restaurant/Bar	$14.99	$16.57	$20.81	$24.25	$29.10
Other	$2.63	$2.30	$0.20	$0.72	$0.50
Total	$29.71	$33.97	$29.90	$61.93	$80.60

- ***Average spending was up for shopping but down for dining***, the opposite of the result from the year prior (when spending on shopping was down and dining was up). Average spending on retail purchases was up 8.9 percent to $28.38 per person, while average spending on restaurant/bar purchases was down 12.5 percent to $21.88 per person. Clearly, the overall spending figure would have been higher without this slip in average dining expenditures.

TABLE 1B
AVERAGE SPENDING IN DOWNTOWN BOULDER BY YEAR, 2004 TO 2007

	2004	2005	2006	2007	Pct. Change
Retail	$19.33	$27.54	$25.84	$28.38	8.9%
Restaurant/Bar	$17.69	$19.46	$24.62	$21.88	-12.5%
Other	$1.18	$1.67	$0.80	$1.32	39.4%
Total	$38.20	$48.67	$51.26	$51.58	0.6%

- Looking more closely at some of the spending patterns by visitor demographics shows that ***women tend to spend about $2 more than men*** (about $4 more on retail and $2 less on dining). Also, ***Empty Nesters are the highest spending household demographic***, averaging just over $71 per visit, followed by families with children at home ($58). Not surprisingly, a ***direct relationship exists between household income and spending amounts***, with those earning under $50,000 spending about $35 per person, while those in the $50,000 to $100,000 range spend approximately $50 per person. The highest income earners (over $200,000) average $88 in purchases in Downtown Boulder, clearly making this group the one with the highest economic impact. Spending is, in general, ***positively correlated with age***, though with a somewhat inconsistent pattern. Those under 35 tend to spend around $30 to $50 per person (median of $35), while users 35 and over generally range from $55 to $60 in total spending (median of $40). These results illustrate the varying spending patterns among the various sub-segments of interest.

Activities Downtown

- In terms of the single primary reason for coming to Downtown Boulder, ***hanging out/enjoying the ambiance/people watching*** continues to grow in importance, with 33 percent of the respondents indicating that it was the single biggest motivator for visiting (up from 29 percent a year ago). Two other reasons, ***eating a meal*** and ***shopping***, were also of strong importance, though not quite to the level of hanging out/people watching. Overall, 25 percent came primarily for a meal (up from 20 percent) and 14 percent came for shopping (down from 18 percent). The decline in shopping as a primary reason for coming appears to be part of a long term trend, with this summer's result representing the nadir for shopping as a primary motivator for visiting.

User Demographics

- The average age of the ***Downtown Boulder user was essentially stable***, at an average age of 39.5, down slightly from 39.8 last summer. The median age was 37, down from 38 the prior summer. Only slight shifts were seen in the age groupings, with 10 percent in the under 21 cohort, 35 percent aged 21 to 34, 18 percent aged 35 to 44, 20 percent aged 45 to 54, and 17 percent in the 55 and over category. Except for students, non-student City residents are the youngest group on average (39.7 years, almost identical to 39.6 years last summer), while the three remaining primary visitor groups (Boulder County residents, Colorado residents outside Boulder County, and out-of-state visitors) are all similarly aged (average of 42 to 43 years old).
- The table below illustrates some of the demographics of the various user groups. The table separates university students from other City residents, providing a profile of these groups separately, instead of collectively as has been done in the past. Not surprisingly, university students are the youngest user group and have the lowest household income (55 percent earn less than $15,000).

TABLE 2
RESPONDENT SUMMARY DEMOGRAPHIC CHARACTERISTICS BY VISITOR TYPE

	City of Boulder Resident – Non-student	City of Boulder Resident – University Student	Boulder Co. Resident	CO Resident outside BoCo	US Resident outside CO
GENDER					
Male	46%	47%	51%	47%	53%
Female	54%	53%	49%	53%	47%
HOUSEHOLD INCOME					
$0 – 14,999	9%	53%	7%	2%	7%
$15 - 24,999	5%	19%	8%	1%	4%
$25 - 49,999	20%	7%	21%	19%	8%
$50 - 74,999	26%	7%	23%	33%	21%
$75 - 99,999	20%	7%	22%	16%	25%
$100,000 – 199,999	15%	5%	15%	23%	26%
$200,000 or more	5%	2%	3%	7%	10%
AGE					
Average age	39.7	24.6	41.3	43.9	43.6
Median age	35	21	42	42	44
HOUSEHOLD STATUS					
Single, no children	39%	0%	33%	25%	22%
Couple, no children	21%	0%	15%	19%	21%
Household w/children at home	30%	0%	31%	37%	36%
Empty Nester	11%	0%	21%	19%	22%
University student		100%			

- The family status of mall users shifted somewhat this summer, with a ***greater proportion of families with children at home*** (30 percent, up from 27 percent) and a declining proportion of singles without children (32 percent, up slightly from a year ago but down compared to long term figures) and empty nesters (17 percent, down from 22 percent last summer but still relatively high compared to historical numbers). Singles still make up a slight plurality, though the family segment appears to be closing in quickly.

Overnight Visitors

- Visitors spending the night in the area were asked for the reasons for their trip to Boulder (as opposed to the downtown area specifically). ***Friends and family play a major role in the overnight visitor segment***, as 39 percent said the primary reason for their trip was visiting family/friends. Recreation/sightseeing is also quite important, as 37 percent of overnighters cited it as the primary purpose of their trip.
- The average overnight party was comprised of 2.6 people spending 4.4 nights in the area.
- In terms of accommodations, ***half of all overnight visitors were spending the night with family or friends*** (54 percent), indicating that the Downtown Boulder area is a popular place for Boulder residents to bring their houseguests. As well, 35 percent were staying in commercial lodging in the City of Boulder, 10 percent were in commercial lodging outside the City, and the remaining 1 percent had "other" accommodations.
- A series of questions asked for spending patterns of overnight visitors while in Boulder (not just the Pearl Street area, but during their visit in the City as a whole). Overall, the ***average overnighter spent $745 (median of $600)***. The average overnighter spent $208 for lodging (including those who spent nothing on lodging because they stayed with family or friends), $234 on average for shopping, and $251 for dining and entertainment on their trip.
- In a new question this year, overnight visitors were asked which activities and/or attractions they planned to visit. ***Chautauqua Park*** was by far the top attraction, with 44 percent indicating that they had or planned to visit there on the trip. Very few selected any of the other options presented, including Celestial Seasonings (15 percent), Boulder Museum of Contemporary Art (8 percent), and NCAR (8 percent).
- Overnighters were also asked how likely they would be to recommend visiting Boulder to a friend, family member, or colleague. Sixty-seven percent of respondents were classified as Promoters of Boulder (scoring this question a 9 or 10 out of ten), 26 percent were Passive (7 or 8), and the remaining 7 percent were Detractors (6 or lower). The percentage of Promoters minus the percentage of Detractors results in a Net Promoter Score of 60, down from 66 a year ago.

Transportation

- ***Transportation patterns were stable again***, with 71 percent driving a private vehicle downtown; 11 percent walked, 9 percent rode the bus, and 8 percent biked. City of Boulder residents were most likely to use alternate modes of transportation, as less than 50 percent of this group drove a personal vehicle downtown.
- An ***increase in the proportion parking in a parking structure/garage*** was observed this year, up to 40 percent from 32 percent a year ago. The continued advertising, signage, and public education regarding the parking garages appears to be stimulating a higher proportion to utilize the structures. As a result of this increase, for the first time, ***parking garages surpassed on-street metered parking*** as the preferred parking option for downtown users, 40 percent to 36 percent. The survey was taken too early to gauge opinion or usage of the new kiosk parking system; next year's survey will capture feedback related to this new parking technology.

Satisfaction Ratings

- Satisfaction ratings in general remained quite positive again this year; in fact, ***most attributes exhibited stability or improvement over already-high 2006 scores***. The feeling of safety and security, variety of restaurants, overall cleanliness and maintenance, family orientation/kids play areas, and special events/festivals were the top rated attributes. A slight decline was noted for the feeling of safety and security (though it remained the top rated attribute). Increases were recorded for variety of restaurants, family orientation/kids activities, special events/festivals, and directory information/signs. A new category, the Downtown Information Center, was well received.

Competition/Perceptions

- The ***average number of non-work visits to the Downtown Boulder area*** was 12.0 visits in the past two months, down from 14.7 a year ago but within the historical range for this category. The median number of visits in the past two months was 8. Not surprisingly, City residents exhibited higher visit figures (average of 13.0, median of 9) than County residents (average of 7.8, median of 5).
- Within the City, those who live in the ***Downtown core area*** visited most frequently, posting an average of 22 times (median 11) in the past two months. ***Central/West Boulder area*** residents report an average of 14.2 visits (median of 12), and residents of ***East Boulder*** visit an average of 16.0 times (median 10). These results indicate that the downtown users from the City tend to be dedicated, repeat users, particularly those residents of the close-in neighborhoods.
- Other local and regional shopping areas continue to compete with Downtown Boulder. Three-quarters had visited ***29th Street Mall*** in the past two months, for an average of 2.6 visits. Other shopping areas in Boulder are at an average of 6.5 visits in the past two months, followed by ***Louisville/Superior*** (at McCaslin and US36), ***FlatIron Crossing***, and ***Louisville, Lafayette, and Niwot Old Town/Main Street*** areas. Each of these areas offers a different mix of shopping, dining, and entertainment options for area residents.
- To evaluate the perception of the Downtown area, a new question was added to the survey this year. Overall, 21 percent said they thought of the Downtown Boulder area as ***primarily a place for dining/eating out***, while only 4 percent thought of it as a place ***primarily for shopping***. Fifty-nine percent conceive of Downtown Boulder as a place for ***both shopping and dining***, while 11 percent mentioned some other primary purpose (typically hanging out, walking/ strolling, and entertainment/bars), and 4 percent weren't sure. The perception of the Downtown area as a place primarily for dining/eating out is particularly concentrated for residents of the City and County, while out of state residents tended to view it as an area for a mix of the two.

Advertising, Website Usage, and Special Events/Festivals

- Advertising recall increased this year. Overall, ***21 percent said they saw an ad or information source for Downtown Boulder*** prior to their visit (up from 16 percent a year ago); another 5 percent said they saw an ad for an individual downtown merchant (down from 7 percent). In total, 25 percent saw some type of advertising prior to their visit, while the other 75 percent did not see any ads. Awareness of the Downtown Boulder ads was highest among City and County residents, as 29 and 27 percent, respectively, of these segments indicated awareness of Downtown Boulder advertising.
- The most common places to see a Downtown Boulder ad are a ***newspaper*** (67 percent), the ***radio*** (24 percent), a ***web page*** (23 percent), a brochure, and a general/ feature article. In particular,

recall of radio and web page ads was up this year compared to last. Other advertising sources include direct mail and television.

- ***Twenty-three percent of all downtown users have visited the Downtown Boulder website***, up substantially from only 16 percent last summer and 11 percent the summer prior. Of those, 64 percent said they used the website to collect information about events, followed by dining (54 percent), shopping (42 percent), and parking (6 percent). The reorganization of the Downtown web site last year appears to have produced a greater penetration among the key user audience.
- Similar to results seen last summer, the most popular special events and festivals are the ***Boulder Creek Festival*** and the ***Farmer's Market***. The ***Bands on the Bricks*** series and special ***Arts and Crafts Fairs*** are also important in bringing City and County residents downtown. The Boulder Creek Festival is particularly popular among City residents. The festivals and special events are definitely less popular with County residents, though remain important as a primary motivator in drawing people from outside the city to the downtown area.
- New this year, a question asked Boulder City and County residents about their visitation to free concerts, festivals, or events in other Boulder County communities. Overall, ***two-thirds had not been to any such events in other communities***. Not surprisingly, residents tend to patronize events in their own communities, and among County residents, over half have been to such events, with Longmont, Louisville, and to a lesser extent Lafayette, popular locations for festivals and events. Because this was the first year the question was asked, it is unclear if the proportion taking part in these events is increasing or declining, though such events do represent competition for Downtown Boulder.

Panhandlers

- The ***impact of panhandlers on the experience downtown remains low,*** though it is somewhat of a greater concern this year compared to past summers. The proportion saying that the ***behavior of panhandlers has become more of a problem*** over the past two years increased to 14 percent from 10 percent in 2006 and just 6 percent in 2005. While this figure might be expected to ebb and flow somewhat from year to year, the Downtown Management Commission should be aware of these concerns and continue to monitor them through this survey and other feedback mechanisms.

Prior Visits/Experience Improving or Declining

- Those who indicated that they have been visiting the area more than two years were asked if they thought the downtown experience over the past several years has been improving, staying the same, declining, or improving in some respects and declining in others. The results are fairly stable from a year ago, with ***43 percent believing the area is improving***, 39 percent think it's staying the same, and only 7 percent indicating that the area has been declining. This result is quite positive and encouraging for the downtown community. See the comment section immediately following for more feedback from respondents about why they think the area is improving or declining.

COMMENTS

Several of the questions on the survey were asked in an open-ended fashion, and comments were recorded. This section presents a summary of those comments, with a full set of the feedback from all surveys in the appendix section of the report.

General Suggestions for Improving the Downtown Area

A follow up question to the satisfaction ratings asked about any suggestions for improvements to the downtown area. The responses were quite broad in nature, but some common themes emerged in the responses.

Suggestions from Residents

Local residents of the Boulder County area tended to focus their comments on more kids play areas, more events and festivals, improving safety, reducing the number of panhandlers, and more local/ independent stores. Some sample comments include:

A lot more family and kid's areas
Better directory information, more organized
All upscale, needs some lower end
Fewer homeless
Keep the independent stores open
Make the Downtown Information Center more noticeable
Shops are too high end
The events we have are good but I think there should be more
Need actual playground
Specific kid's play areas
More security
More play areas for kids
More kid's events
Increase security, clean out bad elements
Fewer panhandlers

Suggestions from Visitors

Visitors tended to focus on similar issues, including more security, fewer panhandlers, and more local stores. Also, several positive comments noted what a great place Downtown Boulder is to visit.

Better directions
Fewer panhandlers
Less homeless people, control panhandling
More breakfast places
Thanks for the fountains and free parking on Saturdays
The streets seem dirtier, no one takes care of them, some water fountains don't work
Police the panhandlers more
More security, more police
More mid range restaurants, more music venues
More local stores, fewer national chains
Like the kiosk idea
It's great, not much improvement needed
Chase building area is very nice
Better signs from US 36

Is the Downtown Experience Improving or Declining?

As a follow up to the question about whether the downtown experience has been improving or declining, participants were asked why they felt the way they did about the direction of the downtown experience. The results of the open-ended question are summarized below segregated by whether the survey participant is a resident of Boulder County or from outside the county. Again, the reader is encouraged to read the entire list of comments in the appendix section.

Comments from Residents – Quality of Experience is Improving

Comments from residents about the improvements were varied, generally commenting on newer buildings, a diversity of restaurants, trees and landscaping, and new stores and shops. Some comments are included below to give a flavor of the types of things visitors said about why downtown Boulder was improving.

All the new buildings look great
Better shops and restaurants, fewer homeless
Architecture has changed, more upscale
Fewer panhandlers
Looks nicer, flowers, public restrooms
More parking spaces, more restaurant choices, cleaner
Renovations, trees, foliage gets better, bike paths are helpful
The restaurants are very diverse
Lots of new shops, so much variety

Comments from Visitors – Quality of Experience is Improving

Generally, comments from visitors were generally focused on the similar themes as residents, including a better variety of stores and restaurants, fewer panhandlers, and a higher level of cleanliness. Some comments from visitors:

Better maintained
Cleaner, fewer homeless, better restaurants
More developed, grown up, more shops
The west end looks new and nice
Not as many transients
More diversity in the stores, landscaping is great
East and West ends are more developed

Comments from Residents and Visitors – Quality of Experience is Declining

Both visitors and residents who thought the area was declining tended to focus on an increase in panhandlers, crowds, and high end stores and restaurants.

There are too many people now
Too many aggressive transients
Parking is too difficult, too many panhandlers
Drunks at night, too aggressive panhandling
Becoming too commercial
Shops are too expensive, too commercialized
Too built up, too uppity

Suggestions to Improve Parking

Residents of the area were asked for suggestions to improve parking in the downtown area (other than free parking or more parking). Residents focused on a couple of general areas for improvement to parking: longer time limit on meters, an additional parking garage, larger parking spaces, more free periods for meters, and other suggestions listed in the sample comments below.

All day parking
Another parking garage
Do not eliminate free parking that already exists
Enforcement is too strict
Less expensive tickets
Longer time limits on meters
More hours on parking meters
No paying for parking early in the day
No time limit in surrounding neighborhoods
Make lots free on weekends
Don't like the new kiosk parking style, prefer the meters
Confusing signs regarding permit parking behind the courthouse
Bigger parking spaces, I drive a Honda Civic and it gets dented

Information Sources

A new question this year asked where respondents get information about dining, shopping, and entertainment in and around the Boulder area.

Comments from Residents – Where Do You Get Information?

Some of the most common responses were the local print media (Daily Camera, Colorado Daily, Boulder Weekly), word of mouth (co-workers, friends, roommates) and radio stations (KGNU and KBCO). A few mentioned web searches but few cited specific web sites.

Comments from Visitors – Where Do You Get Information?

The Internet was much more popular for visitors. Also important to this group is word of mouth (friends, kids, co-workers), brochures at the hotel, and prior visits

GRAPHS

This section presents a series of graphical illustrations of the survey results from the 2007 Downtown Boulder User Survey.

FIGURE 1
VISITOR TYPE
2003 TO 2007

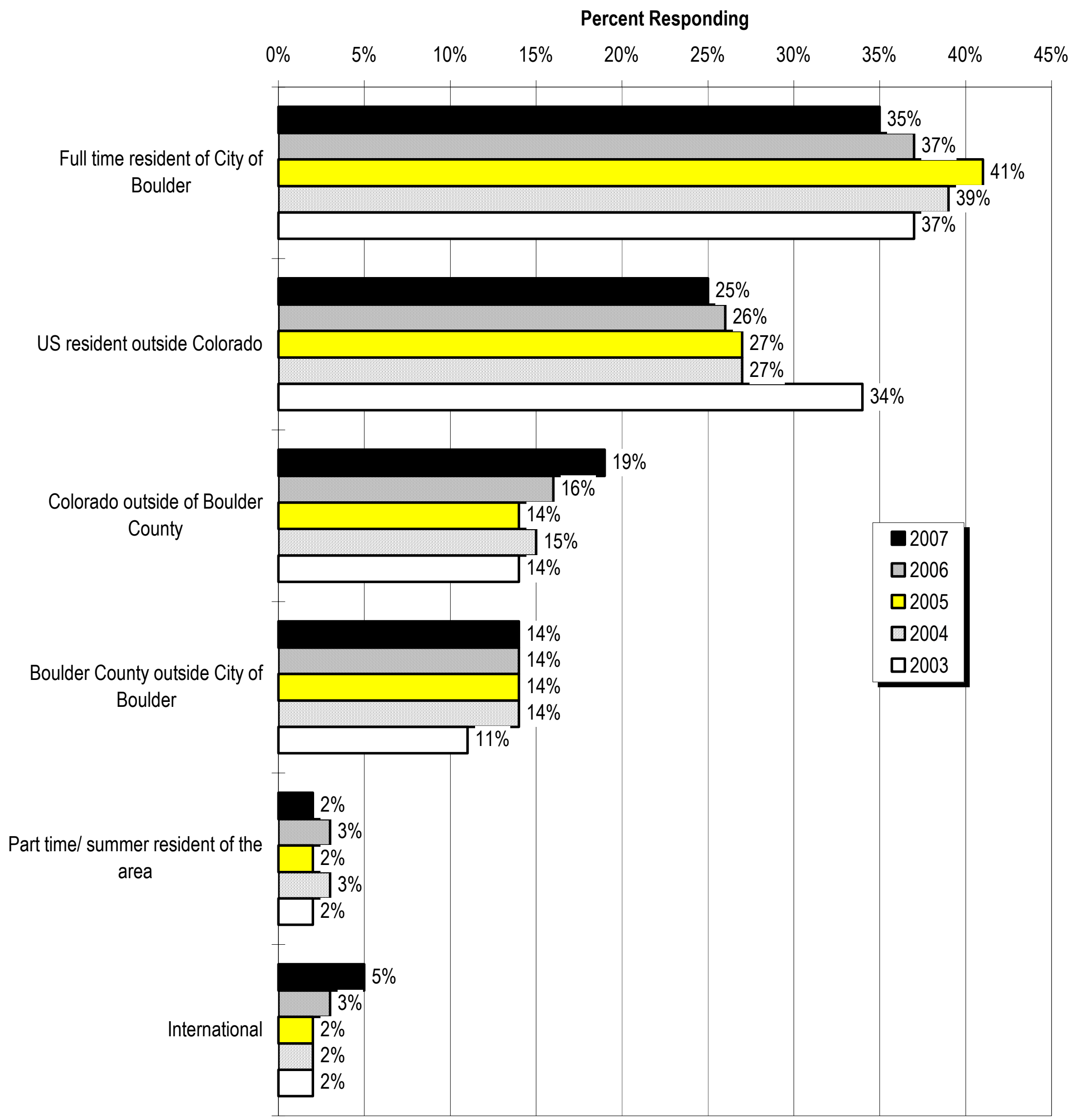


FIGURE 2A
VISITOR DEMOGRAPHICS
GENDER / AGE

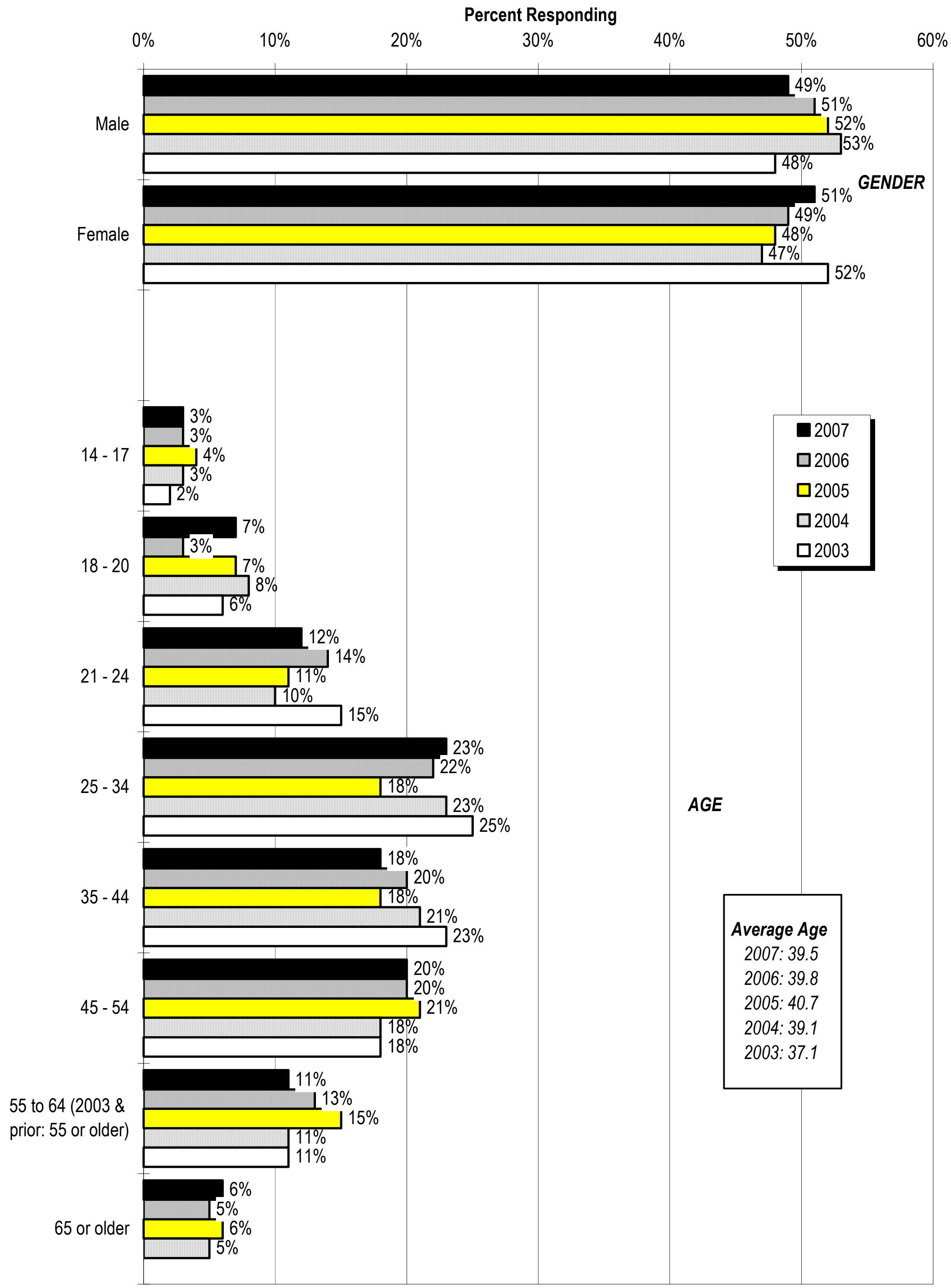


FIGURE 2B
VISITOR CHARACTERISTICS
HOUSEHOLD STATUS / HOUSEHOLD INCOME

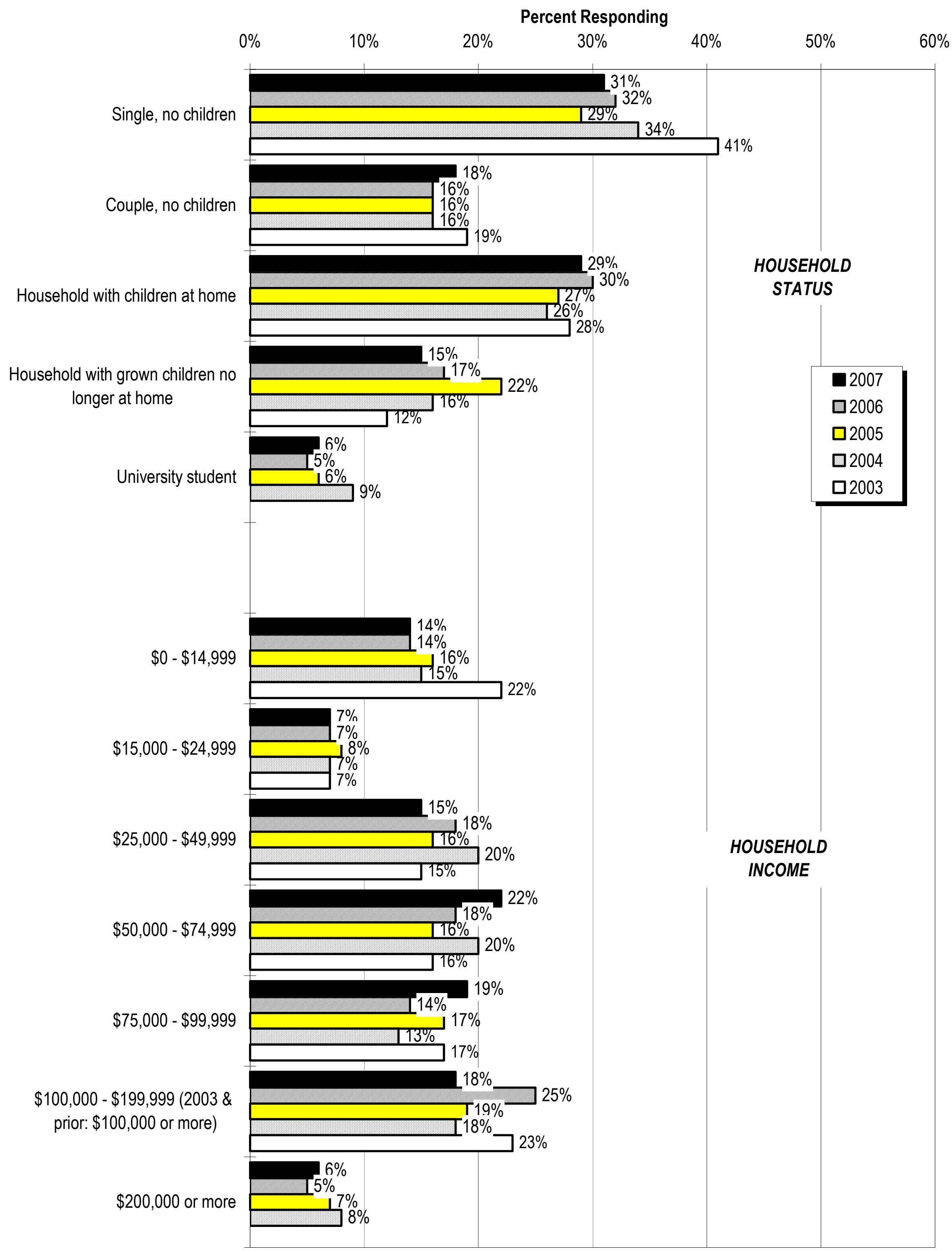


FIGURE 3A
VISITOR CHARACTERISTICS BY 2007 VISITOR TYPE
GENDER / AGE

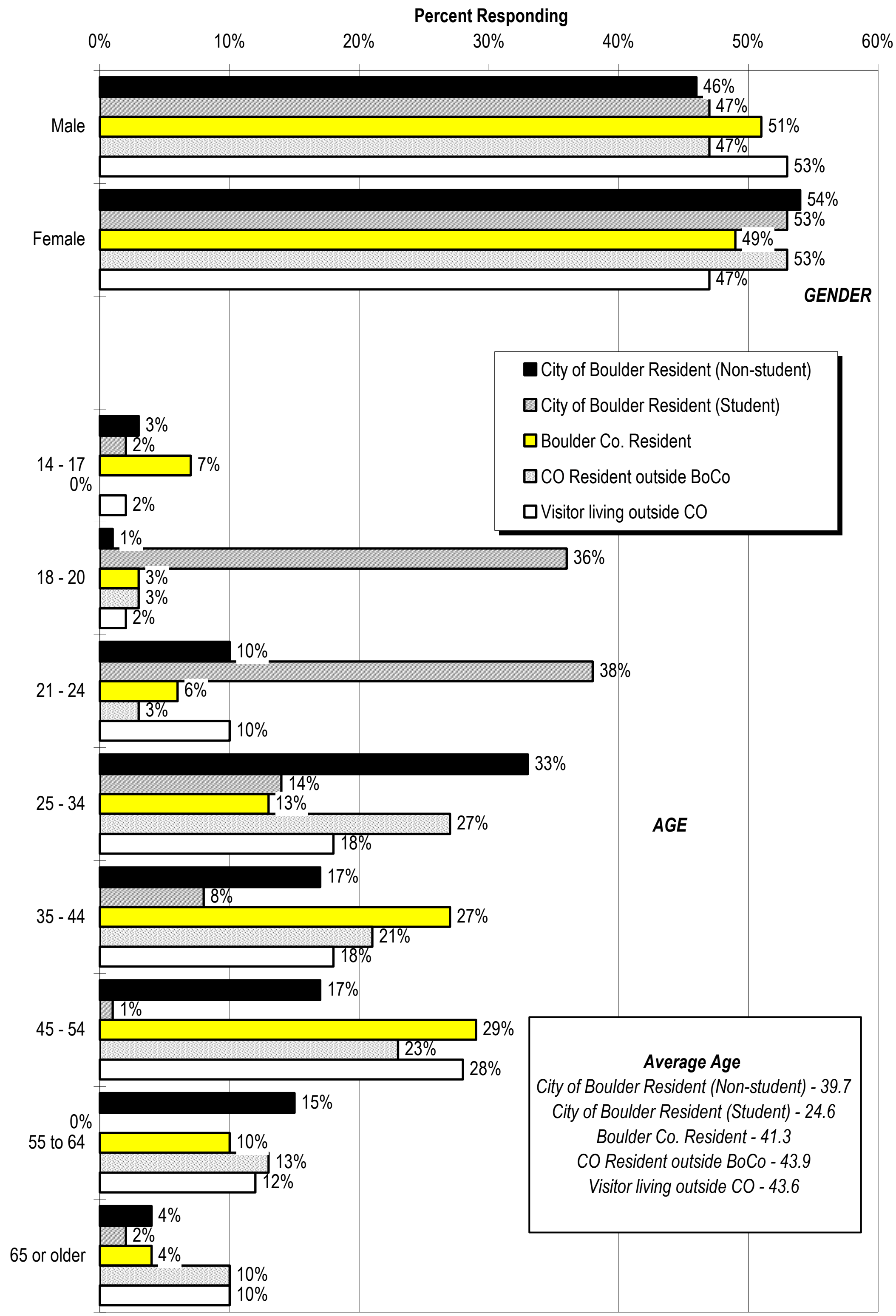


FIGURE 3B
VISITOR CHARACTERISTICS BY 2007 VISITOR TYPE
HOUSEHOLD STATUS / HOUSEHOLD INCOME

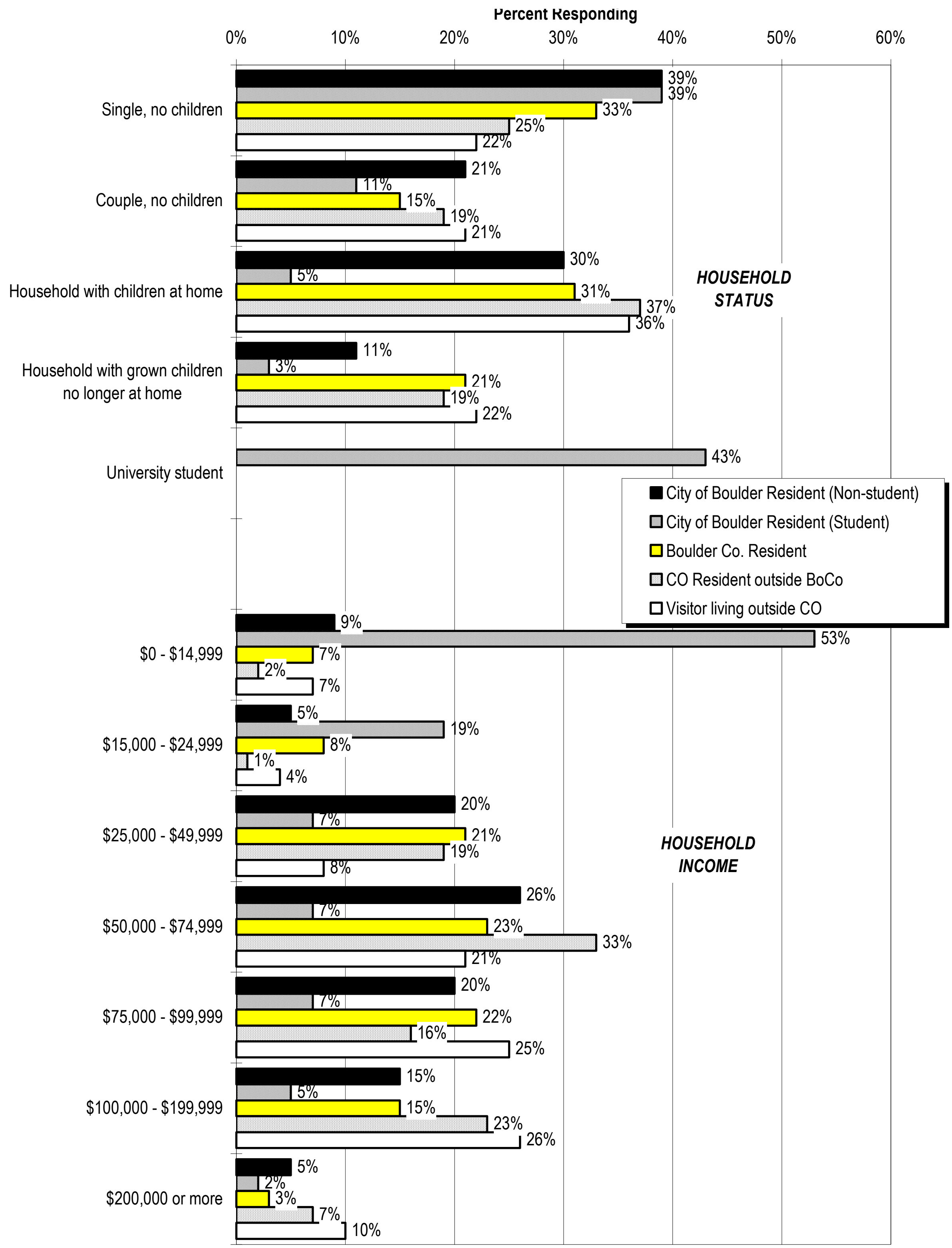


FIGURE 4
IN WHAT PART OF THE CITY DO YOU LIVE?
2003 TO 2007

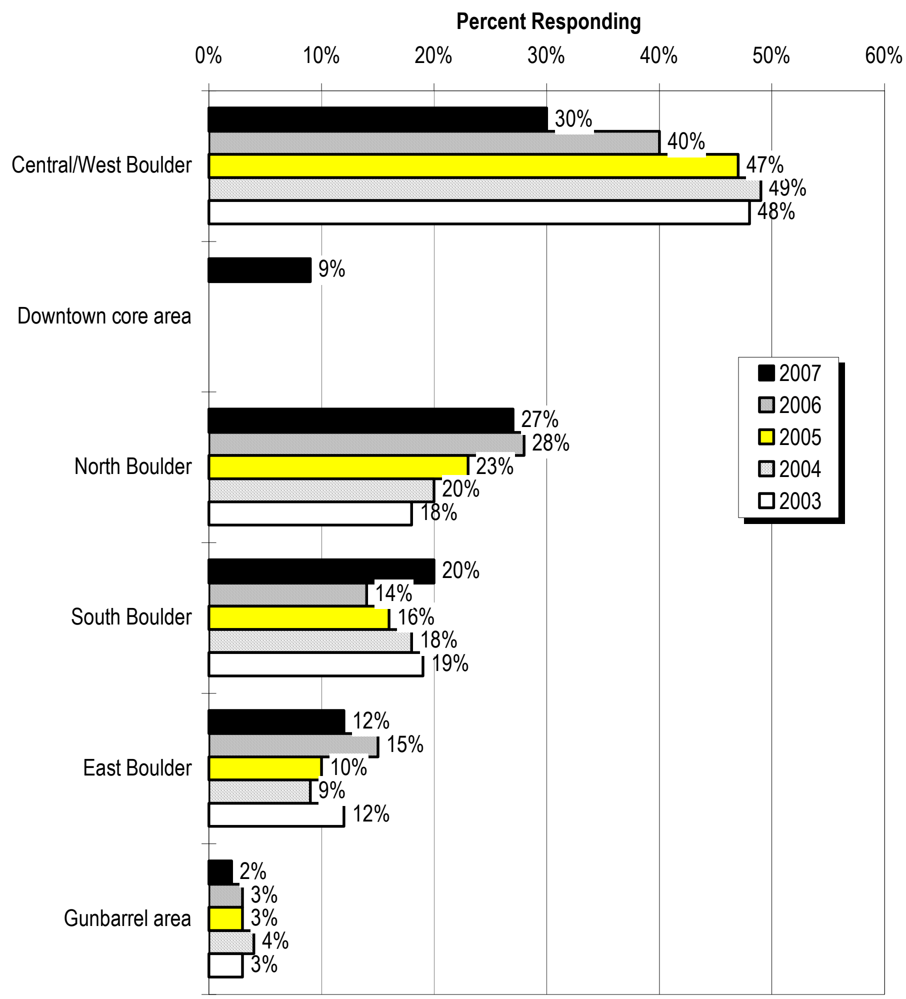


FIGURE 5
OUT-OF-COUNTY USER QUESTIONS
2004 TO 2007

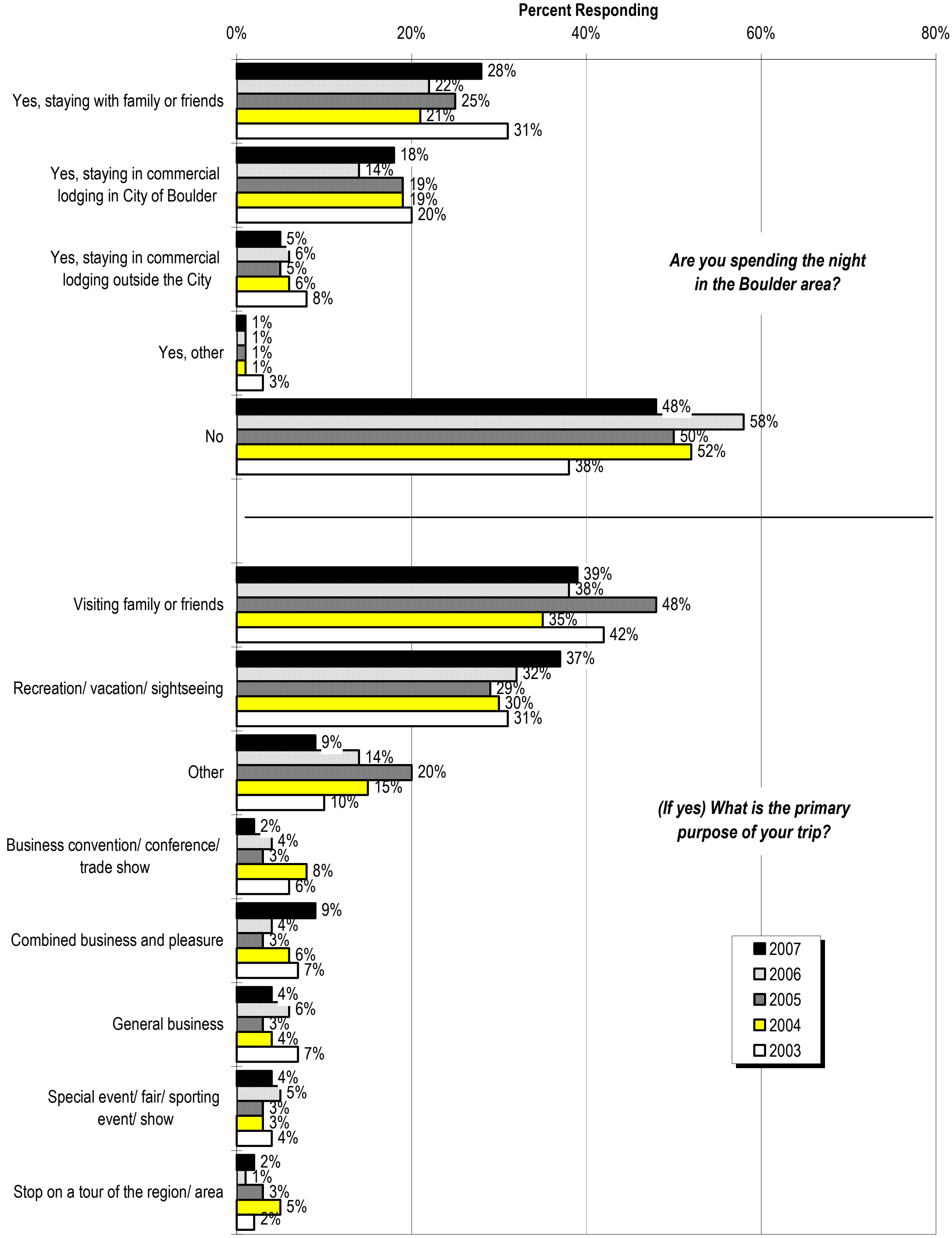


FIGURE 6A
ARE YOU SPENDING MONEY TODAY?
2003 TO 2007

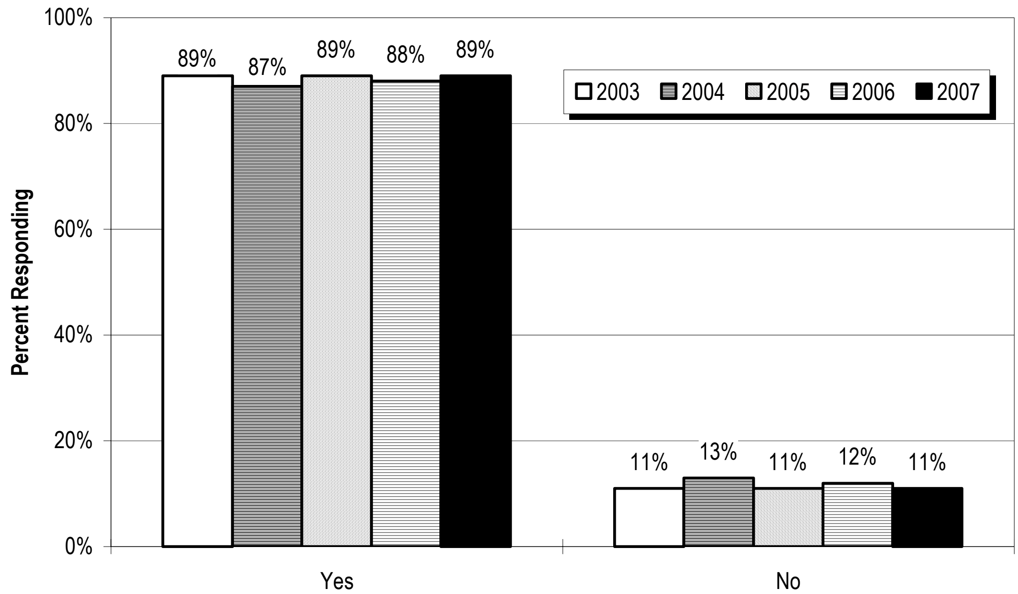


FIGURE 6B
ARE YOU SPENDING MONEY TODAY?
BY 2007 VISITOR TYPE

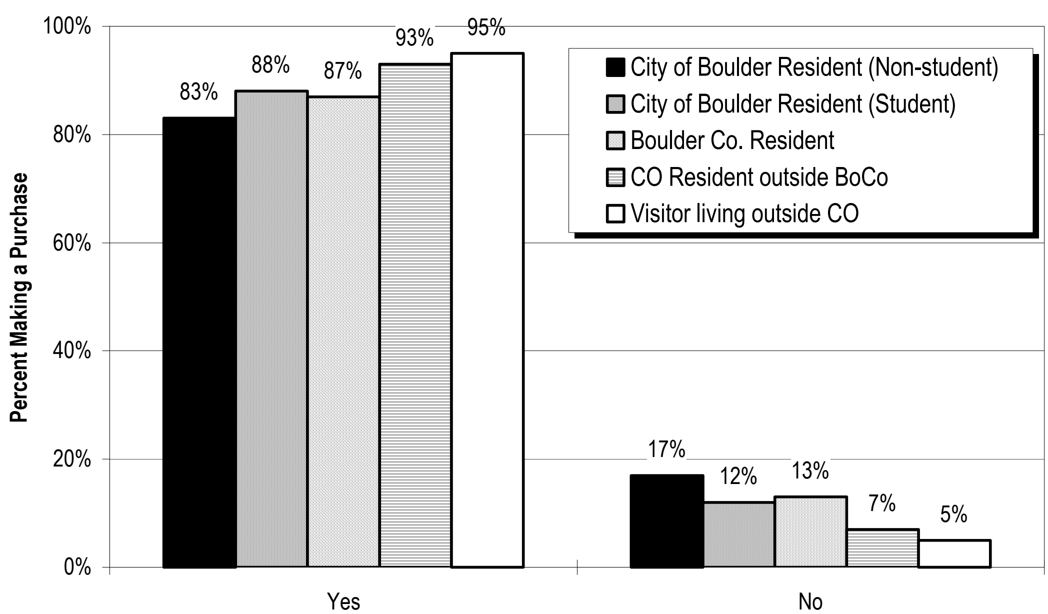


FIGURE 7A
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY SPENDING CATEGORY, 2003 TO 2007

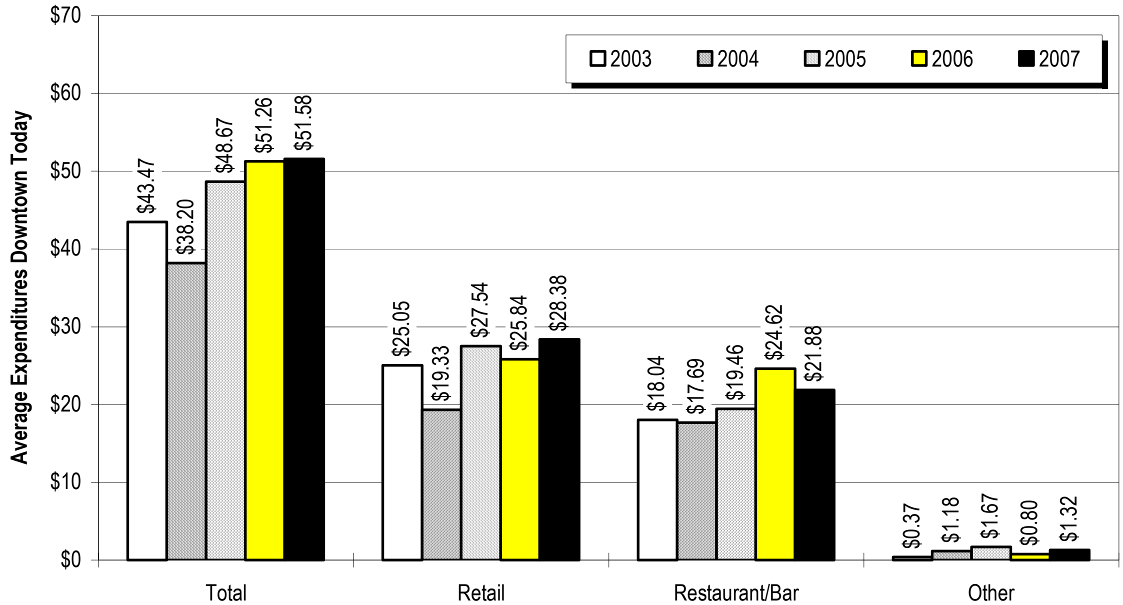


FIGURE 7B
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY VISITOR TYPE BY CATEGORY, 2007 ONLY

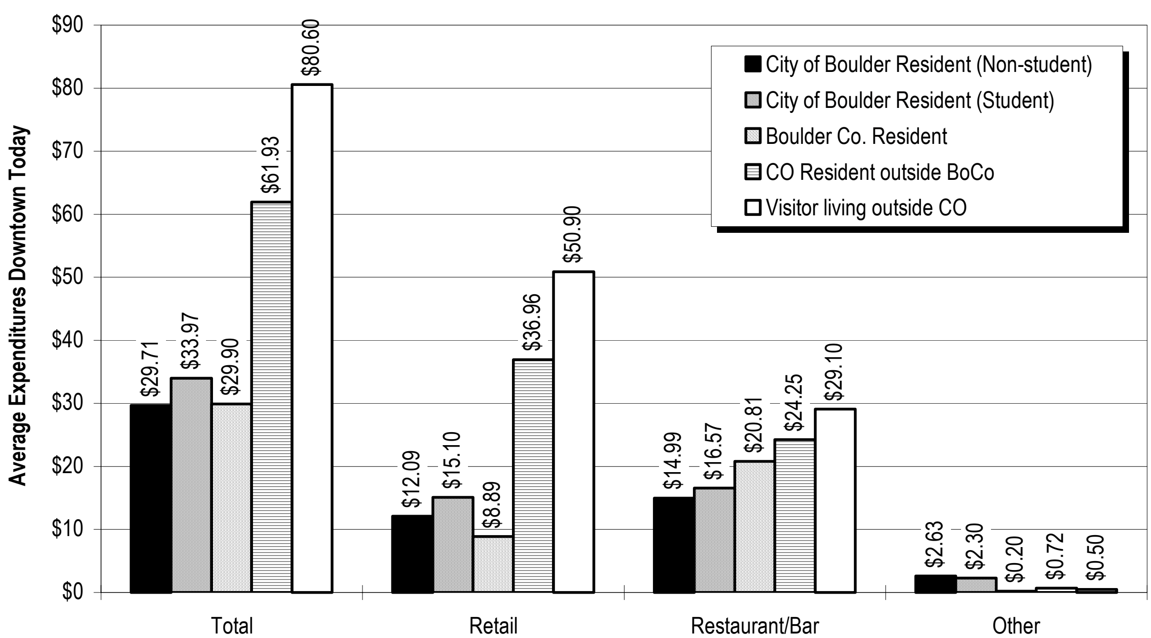


FIGURE 7C
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY YEAR BY VISITOR TYPE

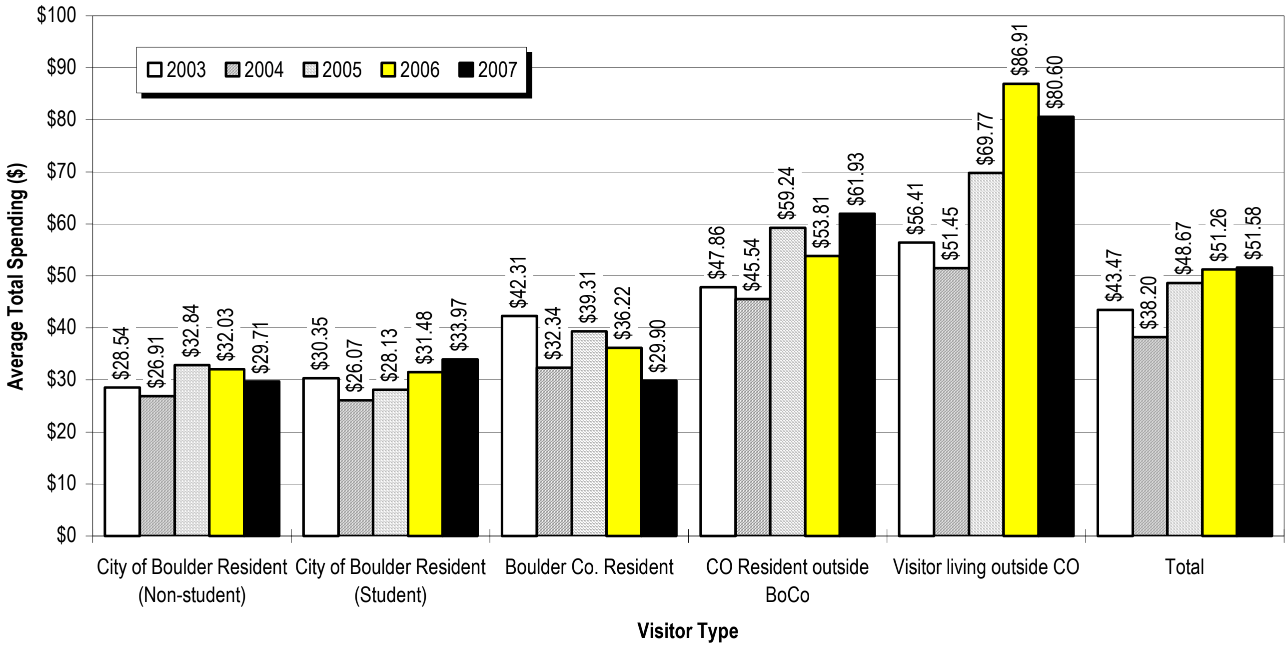


FIGURE 8
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY

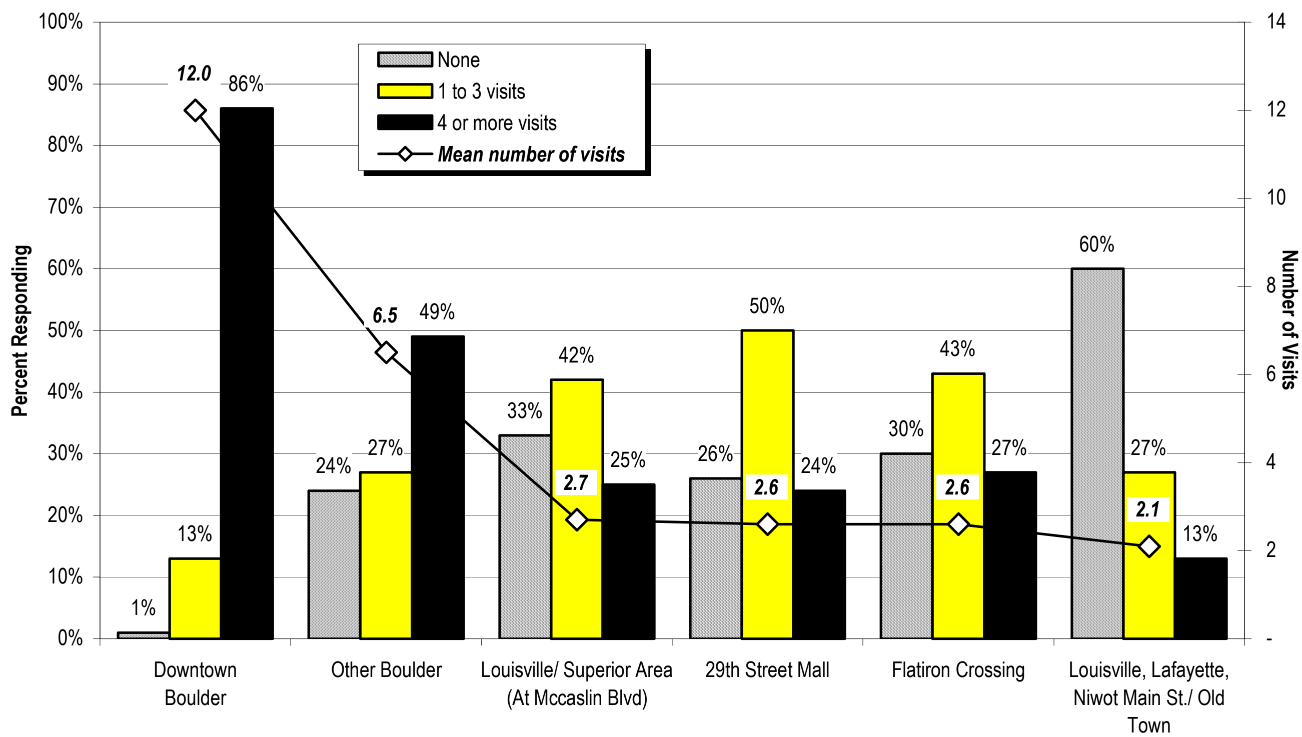


FIGURE 9
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY
2003 TO 2007

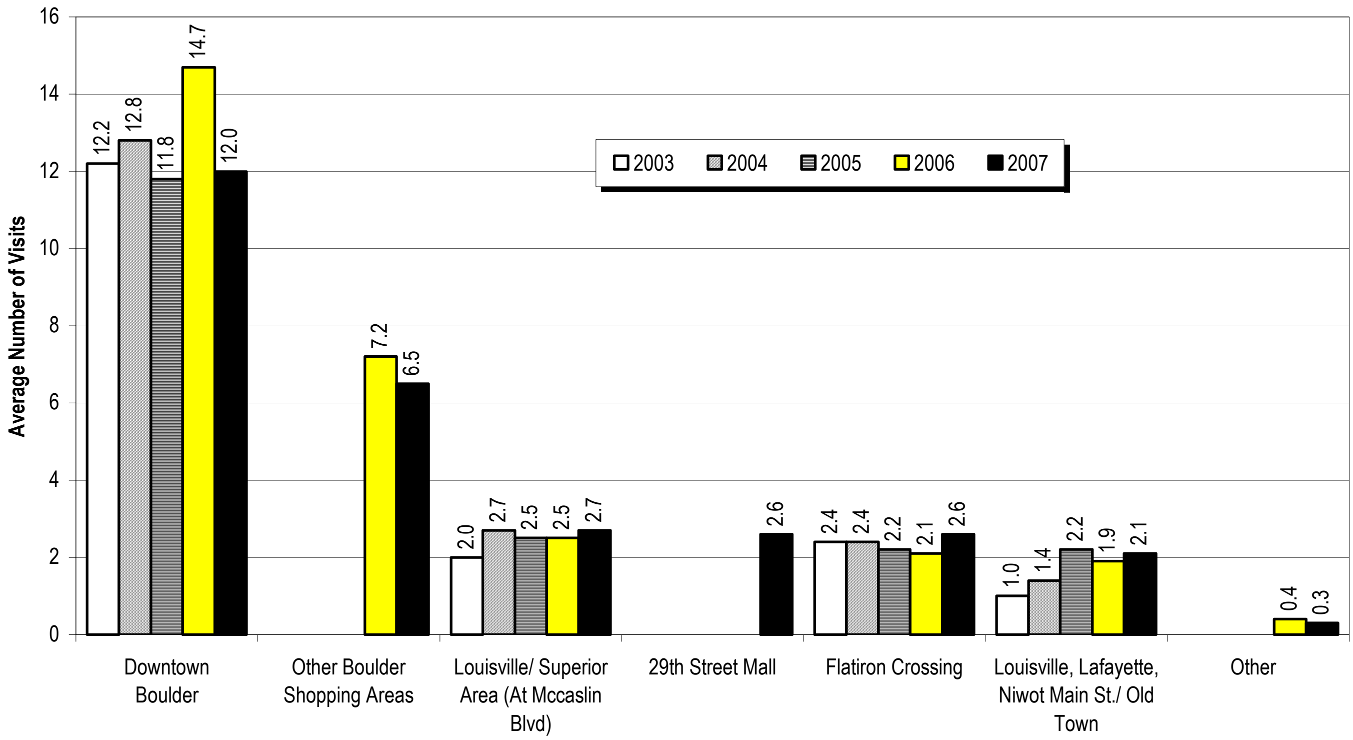


FIGURE 10
WHY DO YOU LIKE TO VISIT YOUR FAVORITE SHOPPING AREA?
BOULDER CITY/COUNTY RESIDENTS ONLY

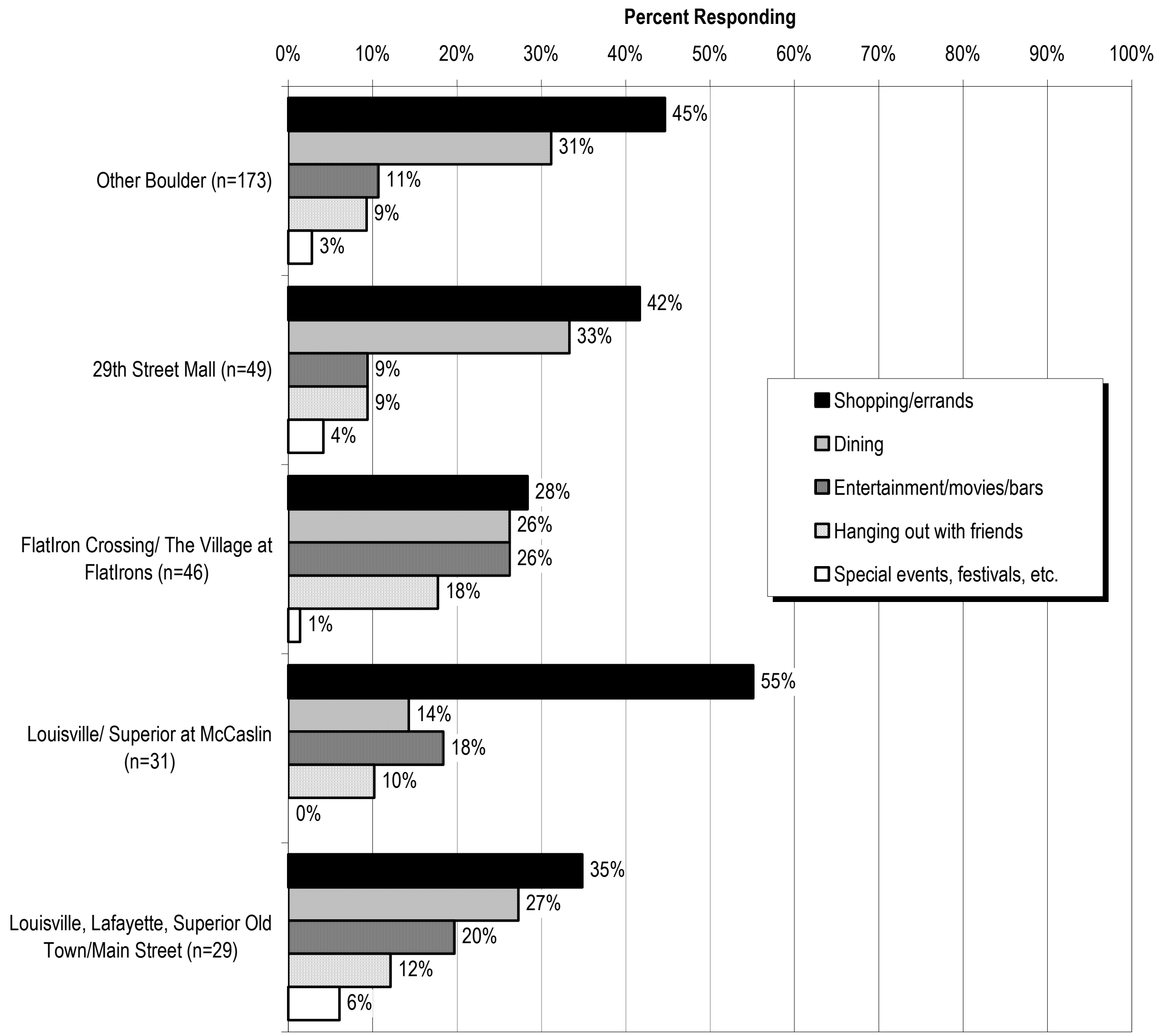


FIGURE 11A
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY
2003 TO 2007

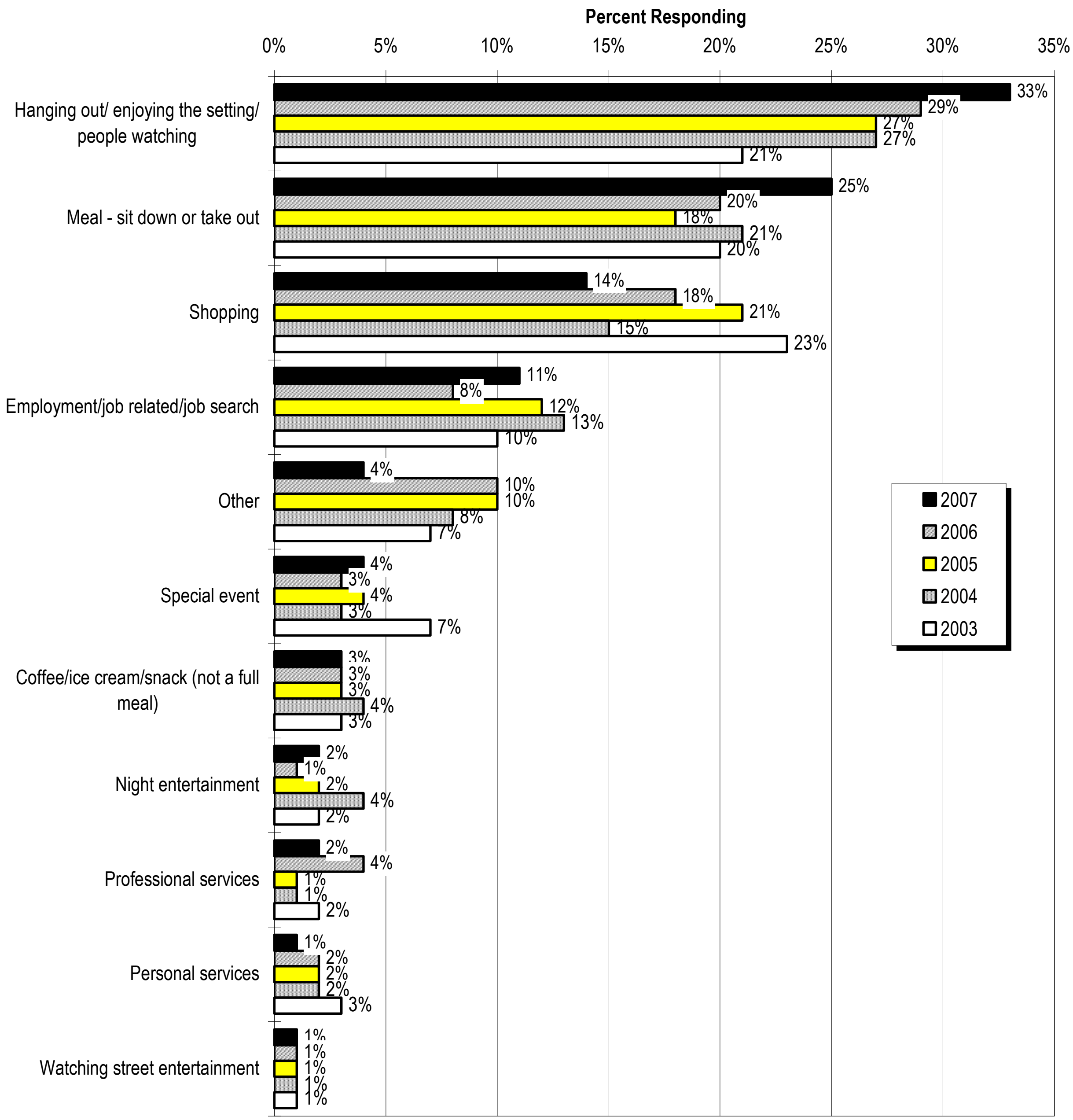


FIGURE 11B
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY
BY 2007 VISITOR TYPE

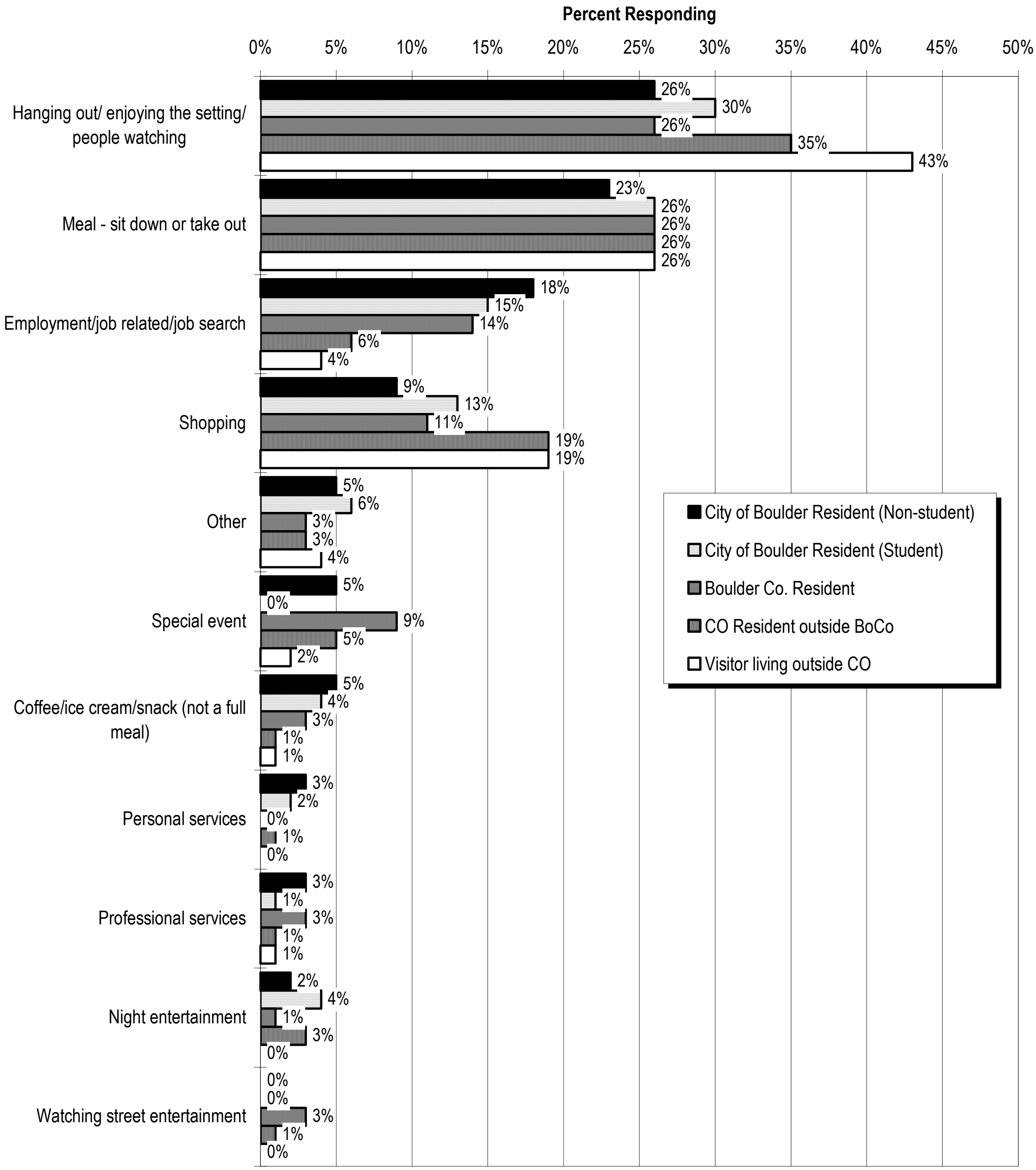


FIGURE 12A
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
2003 TO 2007

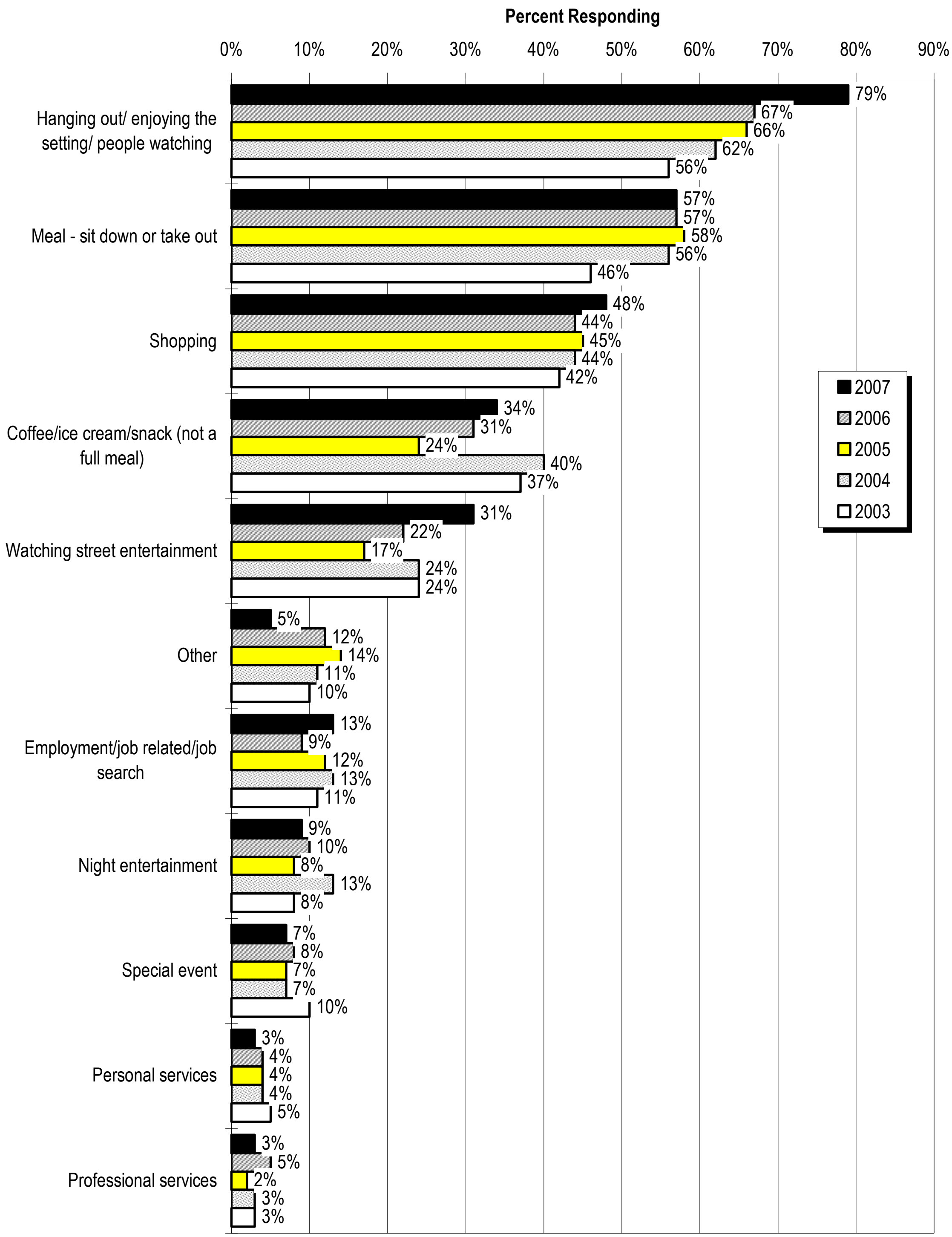


FIGURE 12B
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
BY 2007 VISITOR TYPE

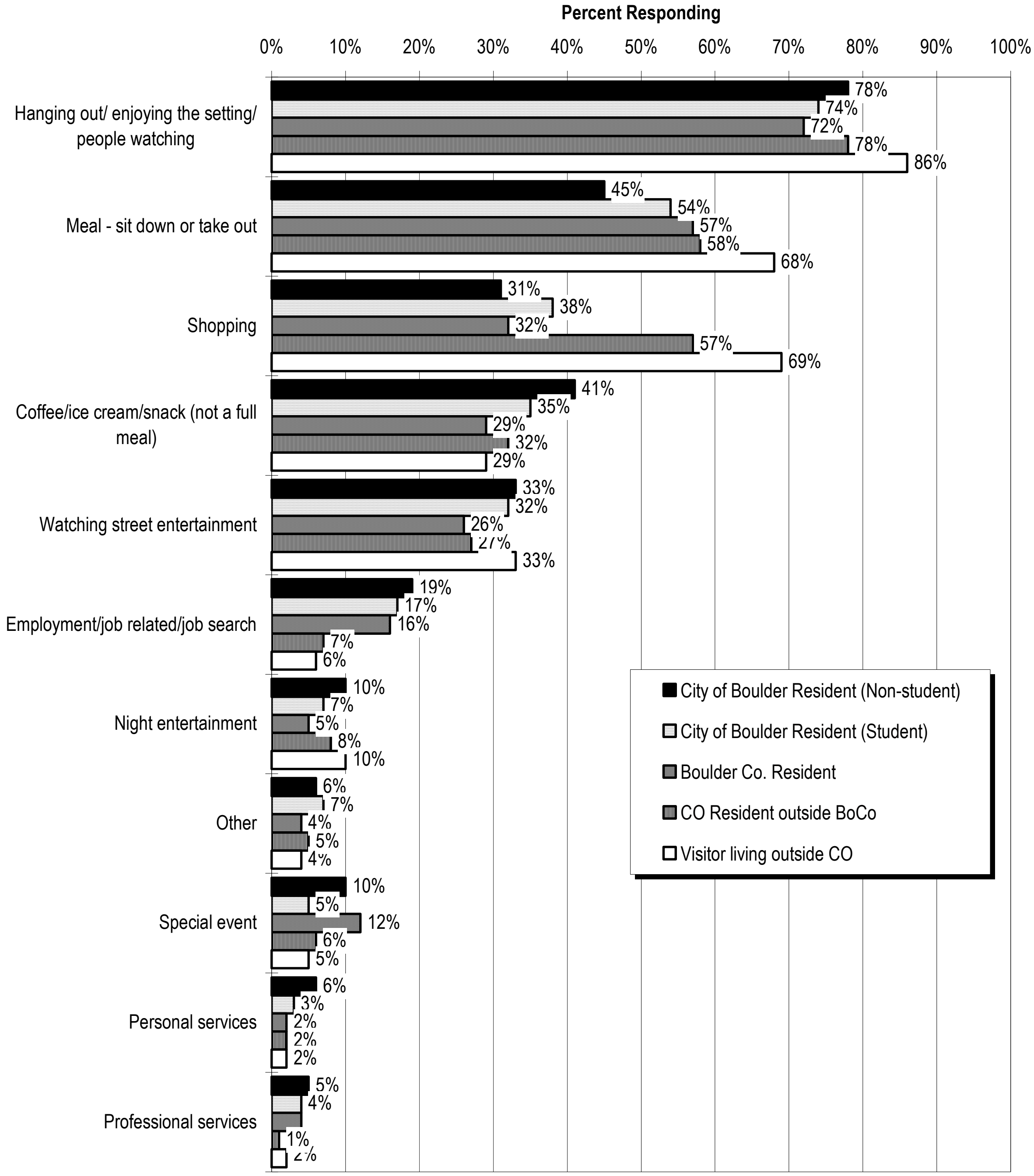


FIGURE 13
GENERAL RATINGS OF THE DOWNTOWN EXPERIENCE
2003 TO 2007

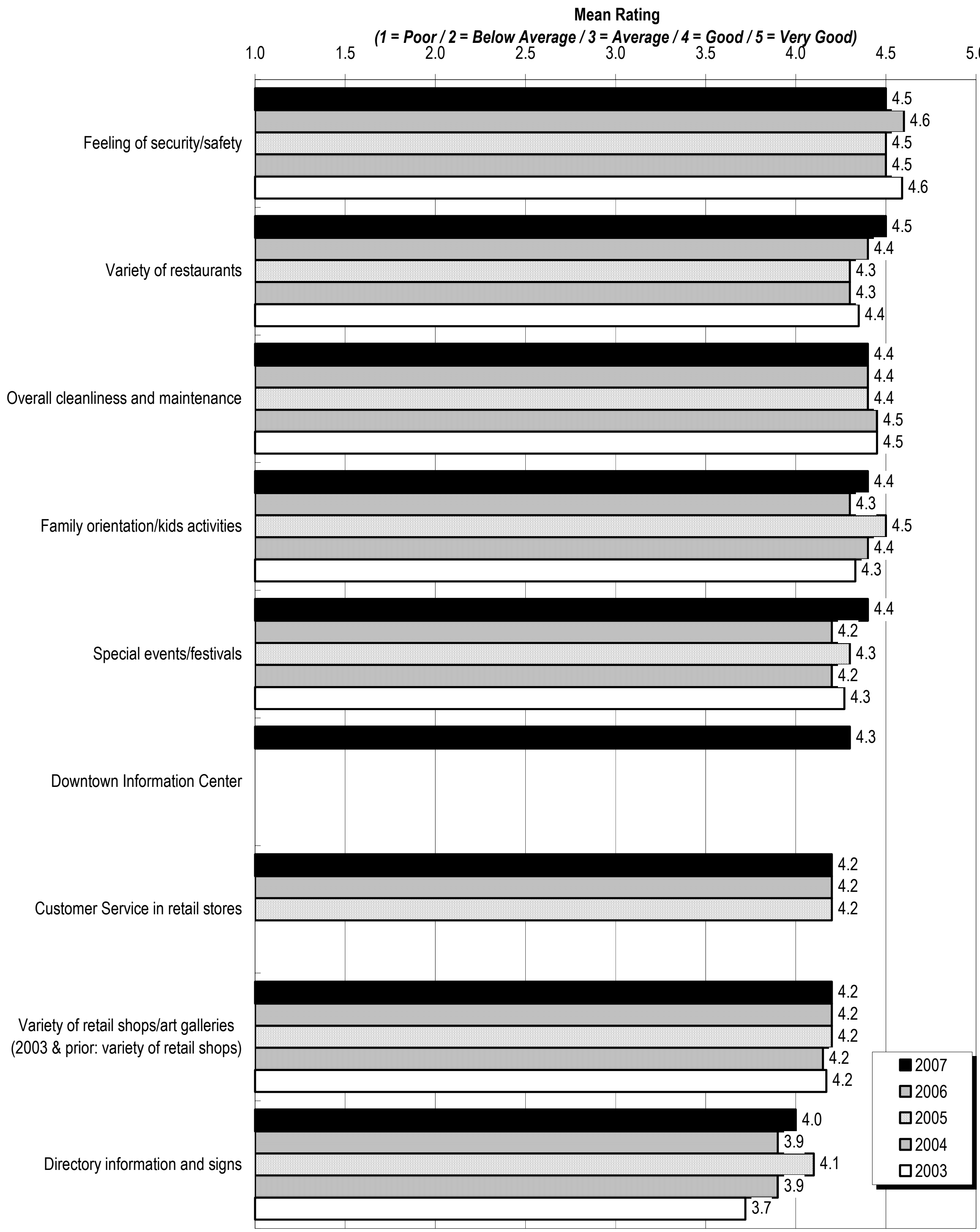


FIGURE 14A
OVER THE PAST TWO YEARS, HAVE THE ACTIVITIES/BEHAVIORS OF PANHANDLERS IN DOWNTOWN BOULER: ?

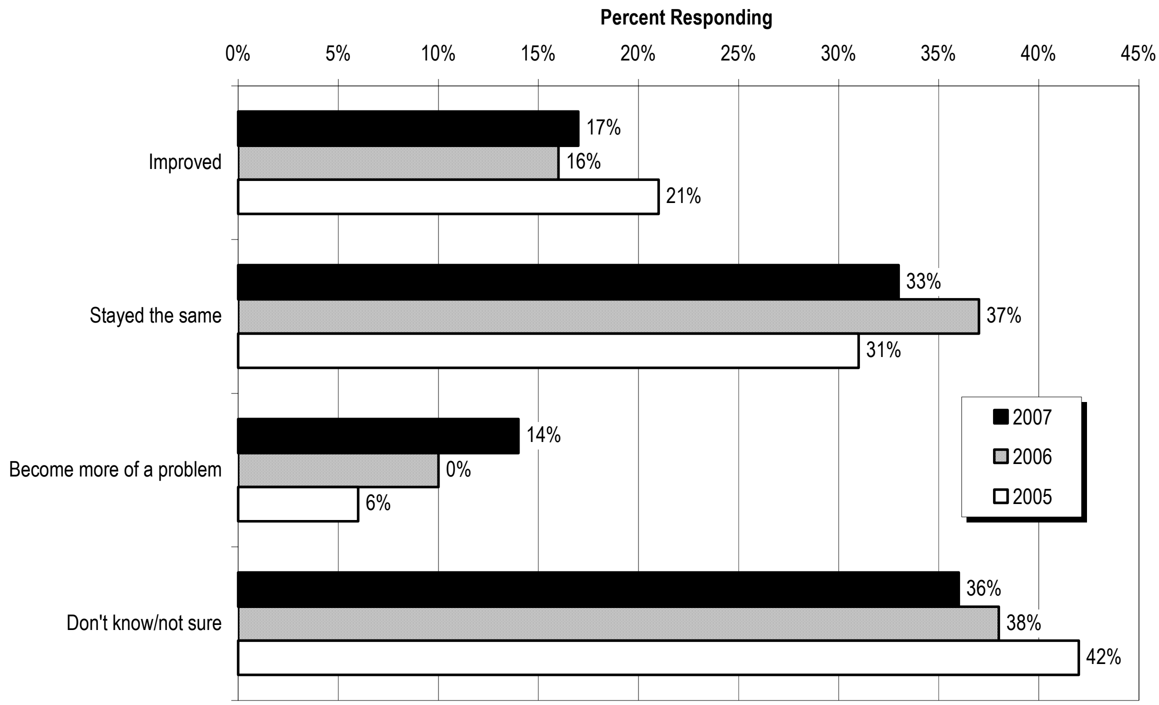


FIGURE 14B
OVER THE PAST TWO YEARS, HAVE THE ACTIVITIES/BEHAVIORS OF PANHANDLERS IN DOWNTOWN BOULER: ?
BY 2007 VISITOR TYPE

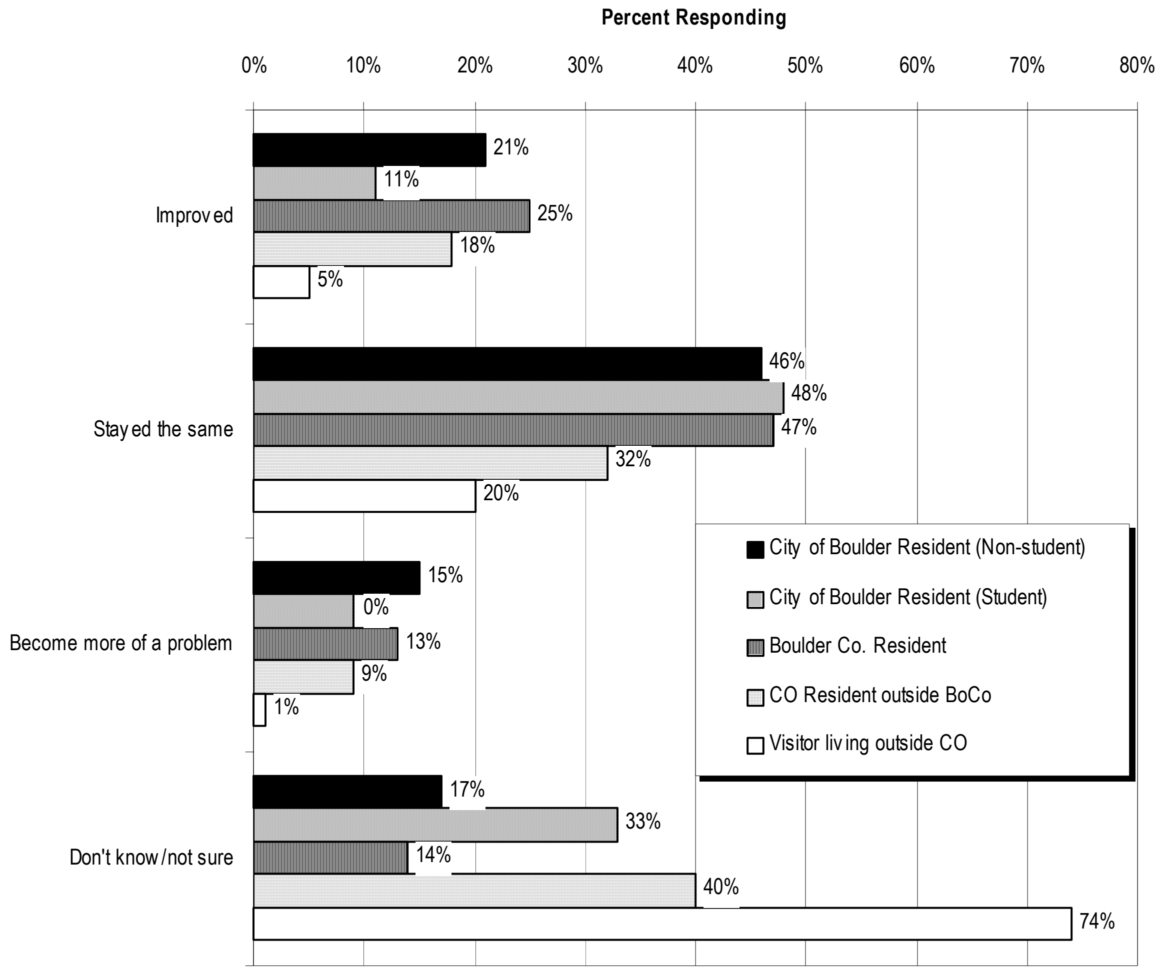


FIGURE15A
MODE OF TRANSPORTATION DOWNTOWN
2003 TO 2007

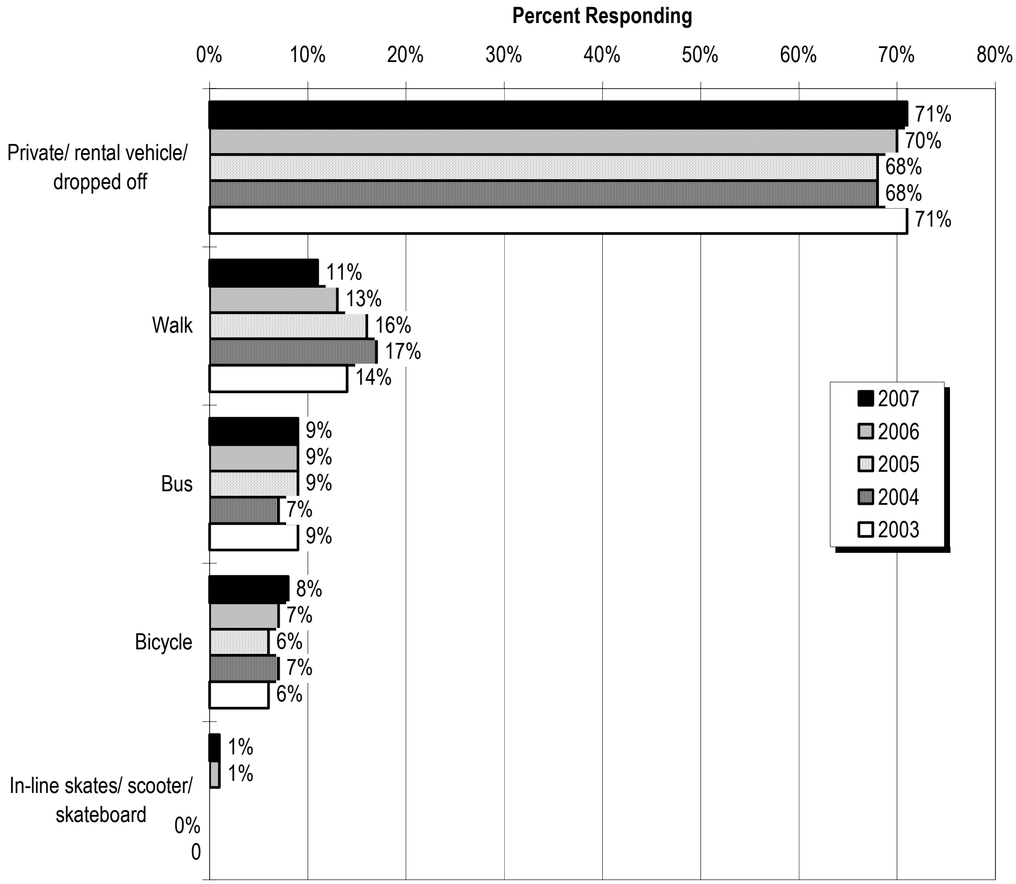


FIGURE 15B
MODE OF TRANSPORTATION DOWNTOWN
BY 2007 VISITOR TYPE

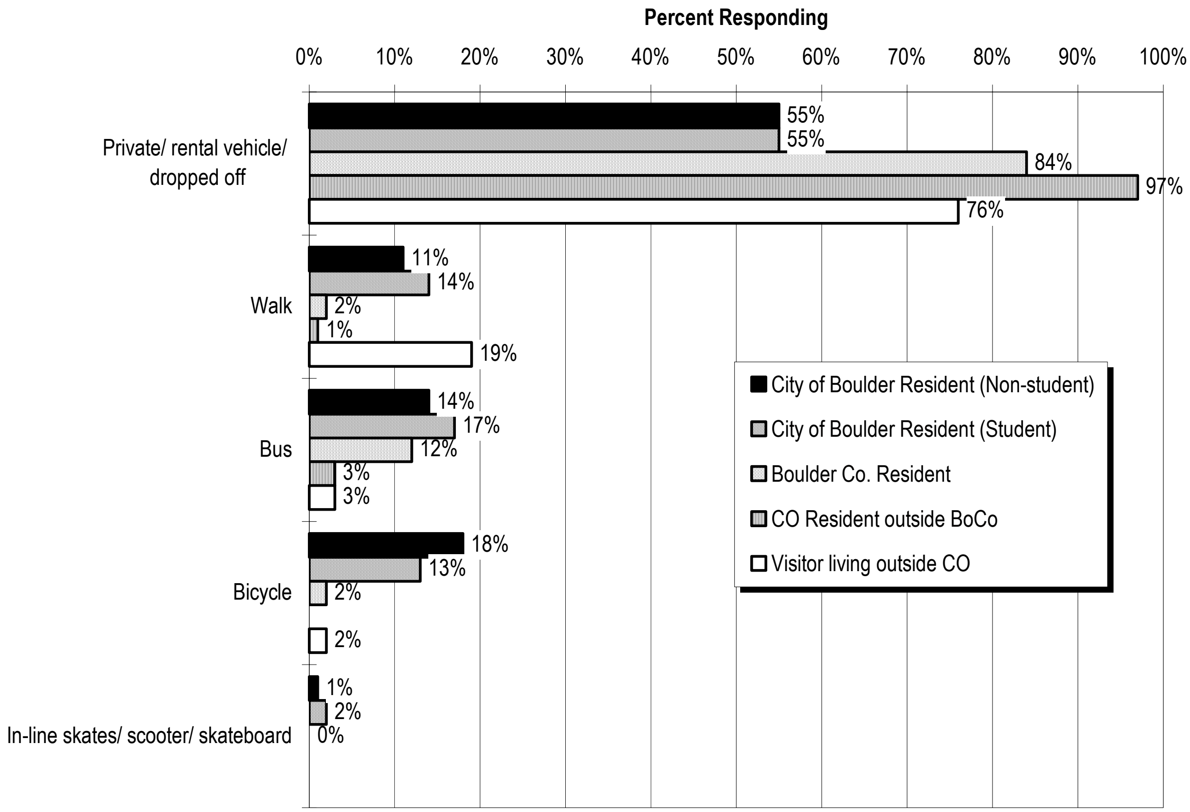


FIGURE 16
LOCATION OF PARKED VEHICLE
2003 TO 2007

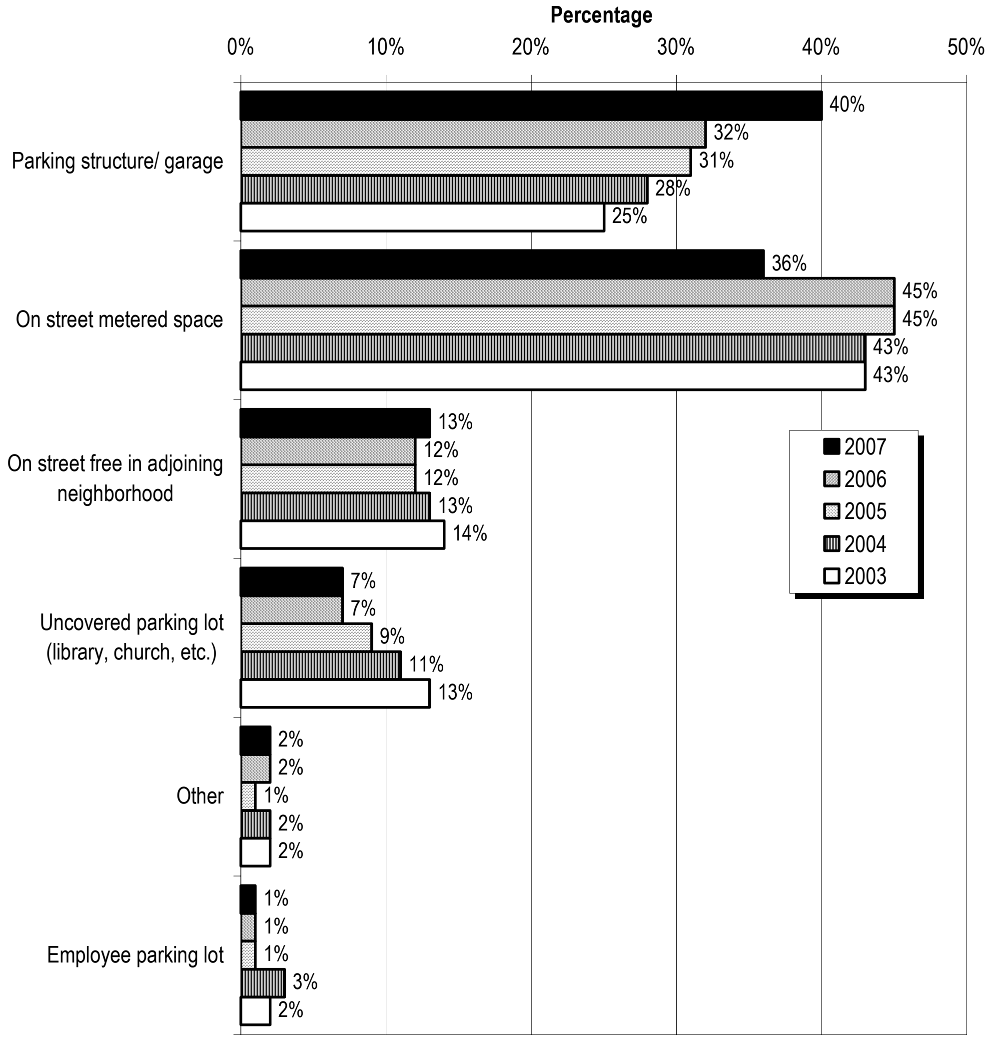


FIGURE 17A
ADVERTISING AWARENESS
2003 TO 2007

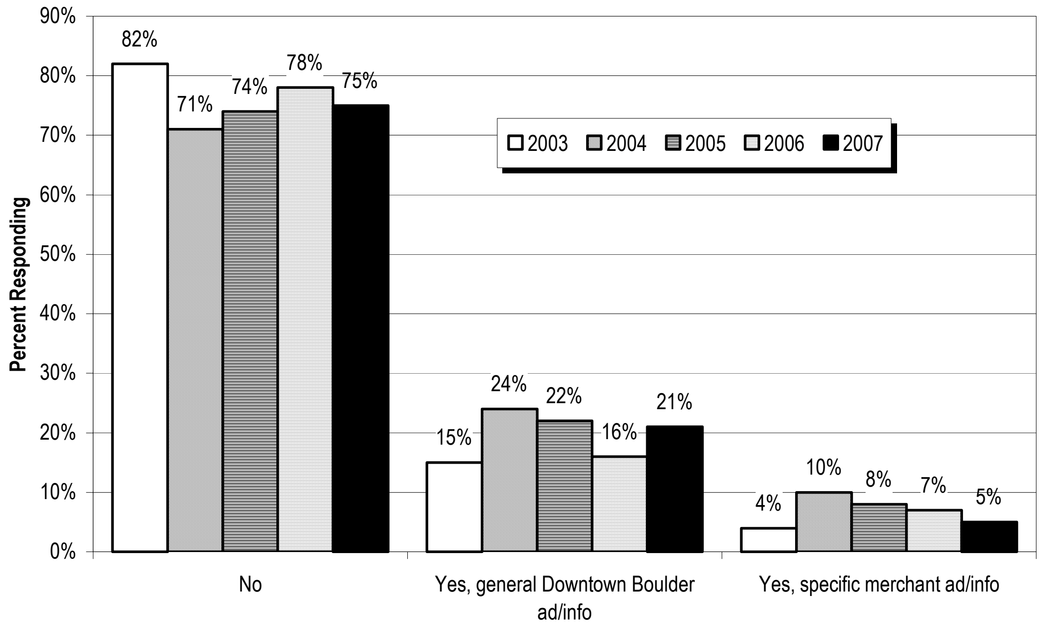


FIGURE 17B
ADVERTISING AWARENESS
BY 2007 VISITOR TYPE

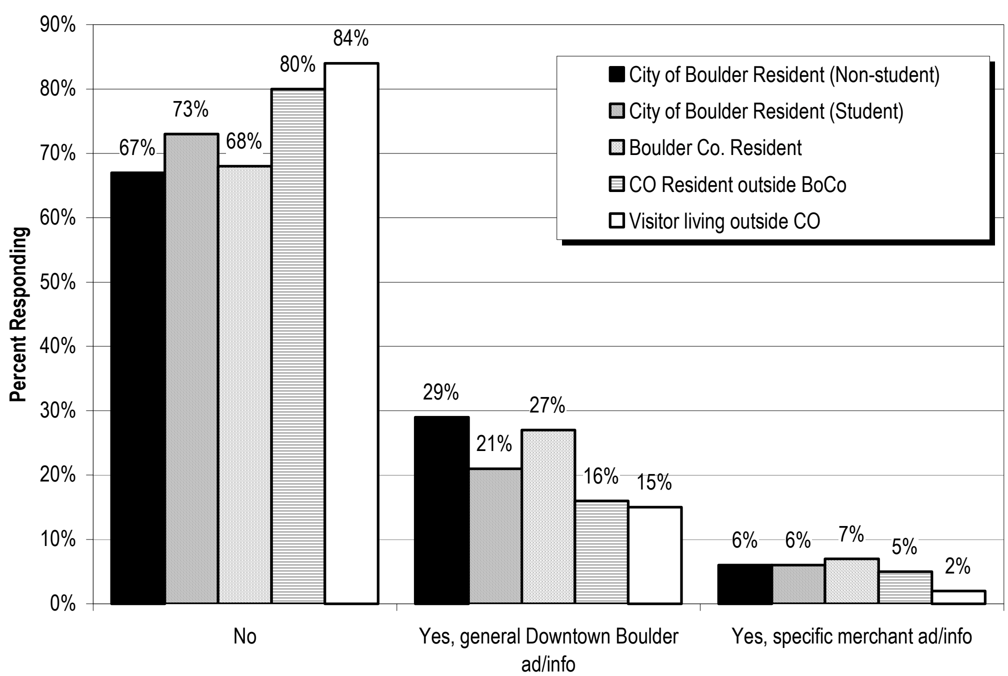


FIGURE 18
WHICH ACTIVITIES, CONCERTS, SPECIAL EVENTS, FESTIVALS, ETC. HAVE YOU ATTENDED IN DOWNTOWN BOULDER IN THE PAST YEAR?
2004 TO 2007

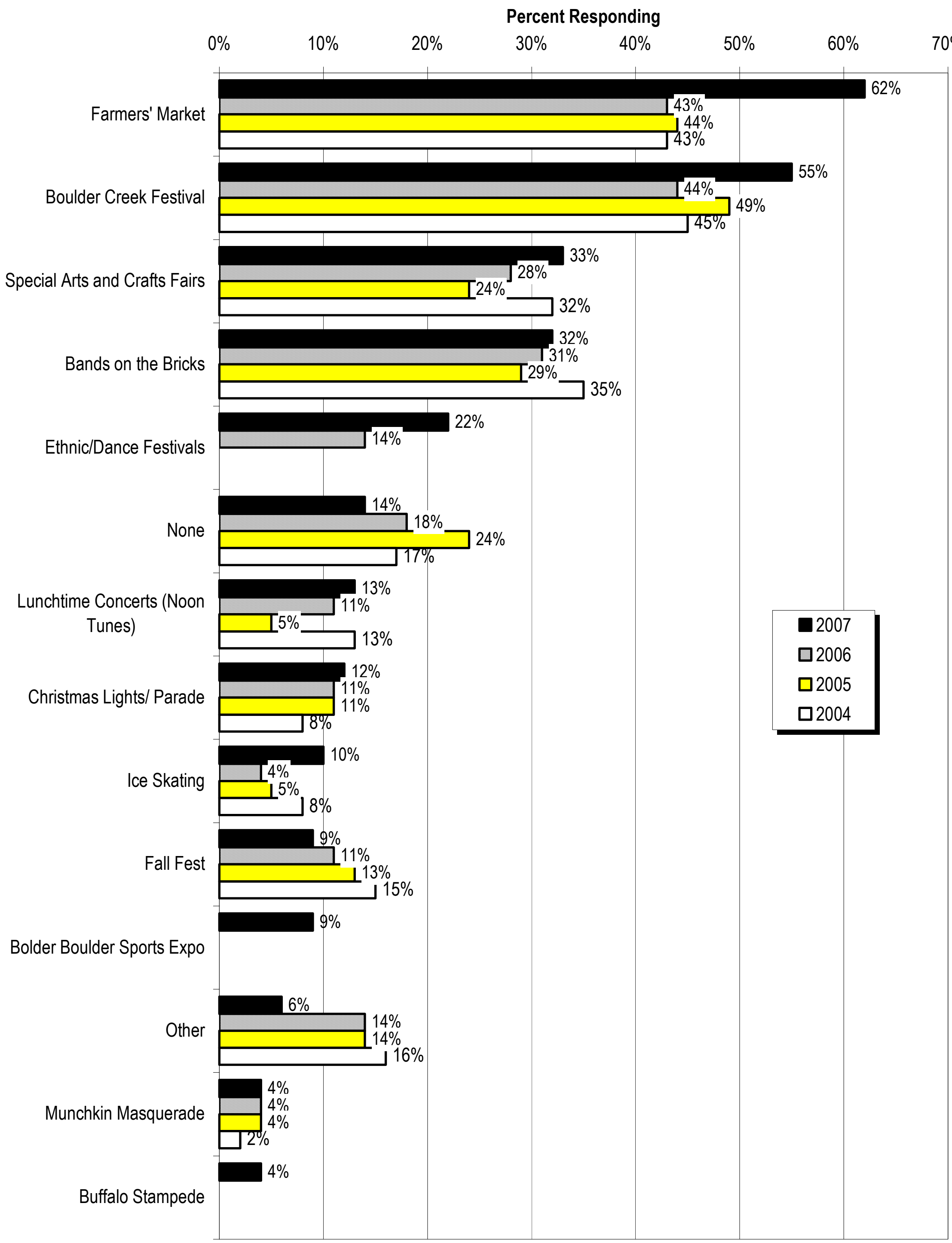
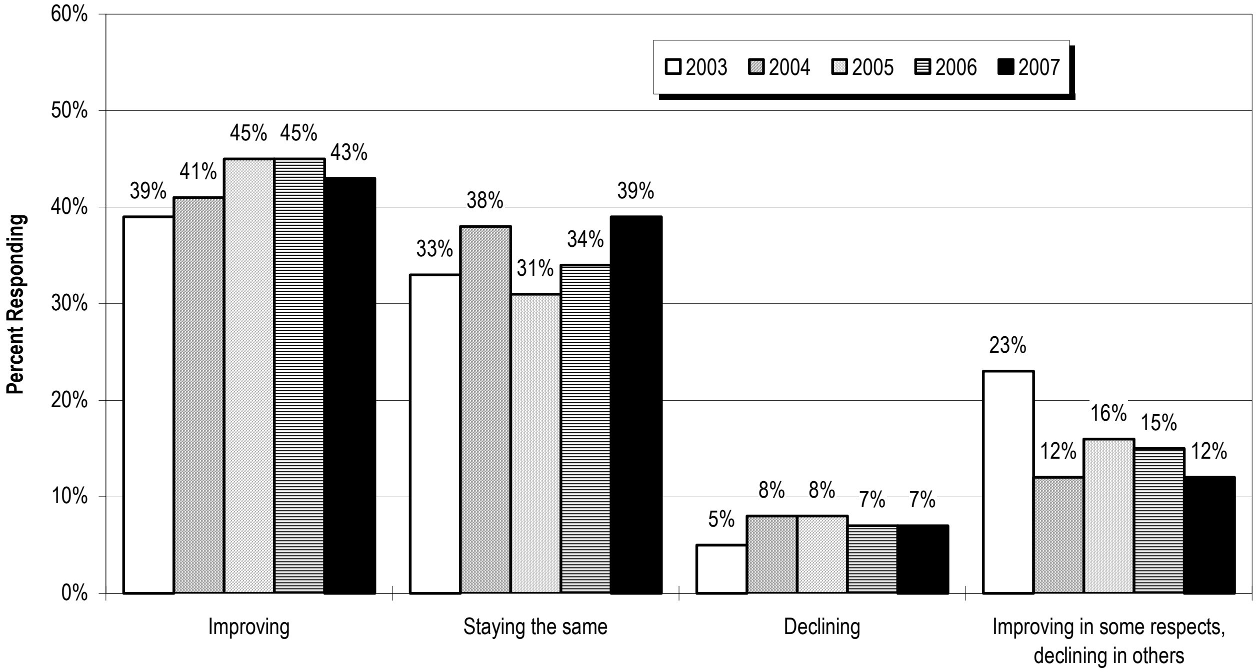


FIGURE 19
OVER THE PAST FEW YEARS, HAS THE DOWNTOWN BOULDER AREA BEEN IMPROVING, STAYING THE SAME, DECLINING, OR IMPROVING IN SOME RESPECTS AND DECLINING IN OTHERS?
2003 TO 2007



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