DOWNTOWN BOULDER SURVEY 2005

Summary of Results

October 2005

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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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2005
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INTRODUCTION

This report summarizes the final results of the 2005 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 741 interviews were completed during the research period between July 20 and September 2, 2005.[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, as well as attendance at special events and festivals downtown. Out of town visitors were asked if they were spending the night, information sources they used to plan the trip, spending during their trip in Boulder, and the primary purpose of their trip to Boulder. New topics this summer included the awareness of parking alternatives, opinions about any changes in panhandler behavior in the past two years, and usage of the Downtown Boulder website.

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. Several capital improvements have been completed over the past several years, in part influenced by the feedback from this survey program. Some of these projects include additional parking structures in the downtown area, additional police shifts on the Pearl Street Mall, more flowers and plantings, new rocks and kids play areas, and others.

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 2004 and prior years, the surveys were concentrated on the pedestrian area of the Pearl Street Mall, though a portion

[1] For the total sample size of 741 interviews, the standard margin of error is +/-3.60 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.

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.

The 2005 survey is the thirteenth 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 2005 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 trends over time; 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 2004; 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" are utilized. It should not be assumed that using 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

Visitor Mix

- The proportion of mall users who are ***full time City of Boulder residents*** grew again, to 41 percent this summer, up from 39 percent last summer and a low of 37 percent in 2003. City residents 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. The second largest group, ***US residents outside Colorado***, was stable at 27 percent of the visitor mix. ***Boulder County residents*** and ***Colorado residents outside Boulder County*** (each 14 percent) account for most of the rest of the downtown user population. Summer/part time City residents and International visitors (each 2 percent) make up the balance of those interviewed this summer. When grouped together, all Colorado residents make up about 70 percent of downtown users, while out of state visitors represent about 30 percent.
- Residents of ***North Boulder*** continue to be an increasingly important user group, despite the growing retail and dining options in that part of the City (Uptown Broadway, for example). The total population in North Boulder is increasing, with the Holiday Drive In, Dakota Ridge, and Wild Sage, and other in-fill residential and mixed-use developments all being completed in the past couple of years. Twenty-three percent of downtown users who are city residents live in North Boulder, up from 20 percent last year and 18 percent in 2003. Nevertheless, residents of ***Central/West Boulder*** continue to make up the largest group of City users, at just under half of all City users interviewed downtown this summer.

Spending Patterns

- Overall, the proportion making a purchase rebounded and the ***average amount spent increased substantially***, almost entirely attributable to a recovery in retail spending. The average amount shoppers and diners spent this summer ***increased by 25 percent***, up to $47.88 from $38.33 last year. This average spending figure is the highest recorded since 2000. Additionally, average spending was up in each of the visitor categories (City residents, County residents, out of state visitors). These increases correlate with the increased sales tax revenues recorded in the downtown CAGID area for the 2005 summer period.
- ***Average spending was up for both dining and shopping***, though more substantially so for the latter. Average shopping expenditures were $25.01, up from $18.80 in 2004, an increase of 33 percent. As well, the proportion that said their primary reason for coming downtown was shopping increased to 21 percent from 15 percent a year ago. These results are positive for the retail component of the downtown experience, which has come under some criticism in the past couple of years as stores have gone out of business and Boulder area residents have said they want more local stores and more affordable stores (in effect, indicating that the current retail mix was not particularly attractive to them).
- In terms of the primary reason for coming to Downtown Boulder, three motivations continue to be quite important: ***hanging out/enjoying the ambiance/people watching***, ***shopping***, and ***eating a meal***. Overall, 27 percent said they came primarily for hanging out, 21 percent for shopping, and 18 percent for dining. Compared to results from prior years, the proportion citing shopping as the primary reason for visiting increased, while the percentage that indicated they came for a meal declined.

User Demographics

- The ***Downtown Boulder user group continues to get older***, with an average age this year of 40.7 years, up from 39.1 years in 2004. In the past five years, the average age has increased by 5.1 years, suggesting that the visitor base continues to age by about a year each summer. Except for students, non-student City residents are the youngest group on average (37.7 years average, 35 years median). Overall, the under-35 population has dropped to 40 percent of the user base from 54 percent four years ago, while the over-45 cohort has grown to 42 percent of the total from 27 percent in 2001.
- ***Visitors living outside Boulder County*** exhibit the oldest age profile in the study, with an average age for non-Boulder County Colorado residents of 45.0 years and for non-Colorado US residents of 44.8 years.
- 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 (85 percent earn less than $15,000).

TABLE 1
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	55%	44%	48%	49%	54%
Female	45%	56%	52%	51%	46%
HOUSEHOLD INCOME					
$0 – 14,999	17%	85%	7%	7%	11%
$15 - 24,999	13%	3%	6%	9%	4%
$25 - 49,999	18%	6%	16%	19%	14%
$50 - 74,999	16%	3%	23%	19%	14%
$75 - 99,999	14%	3%	19%	19%	20%
$100,000 – 199,999	15%	0%	23%	21%	27%
$200,000 or more	7%	0%	6%	8%	10%
AGE					
Average age	37.7	21.8	42.6	45.0	44.8
Median age	35	20	41	45	46
HOUSEHOLD STATUS					
Single, no children	43%	0%	19%	26%	21%
Couple, no children	18%	0%	24%	16%	11%
Household w/children at home	27%	0%	40%	23%	27%
Empty Nester	12%	0%	14%	34%	37%
University student	0%	100%	3%	1%	4%

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 48 percent said the primary reason for their trip was visiting family/friends. Recreation/sightseeing is also quite important, as 29 percent of overnighters cited it as a purpose of their trip.
- In terms of accommodations, ***half of all overnight visitors were spending the night with family or friends,*** indicating that the Downtown Boulder area is a popular place for Boulder residents to bring their houseguests. As well, 38 percent were staying in commercial lodging in the City of Boulder, 10 percent were in commercial lodging outside the City, and the remaining 2 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 $735 (median of $527.50)***. The average overnighter spent $240.29 for lodging, $232.80 for dining and entertainment, and $213.45 on average for shopping on their trip.
- Visitors staying in commercial lodging spend considerably more ($984.25 in total during the visit to Boulder) than those staying with friends or family, who do not have any lodging expenses ($472.99 total spending). The differences are not only a function of expenditures on nightly accommodations, but those in commercial lodging also spend more on average for shopping and dining. A more detailed discussion is included in the main section of this report.
- Interest exists in understanding how important visiting Downtown Boulder was in overnighters' overall travel plans. Overall, the results show that the ***Downtown Boulder area was very important in the decision to visit Boulder***. Seventy-nine percent said it was very important or important in their decision to visit.

Transportation

- ***Transportation patterns were stable***, with 68 percent driving a private vehicle downtown; 16 percent walked, 9 percent rode the bus, and 6 percent biked. City of Boulder residents were most likely to use alternate modes of transportation, as only 50 percent drove a personal vehicle downtown. Among students, 29 percent took the bus, and 13 percent of non-students also rode the bus. Additionally, carpooling increased, as the proportion of single occupant vehicles declined to 25 percent from 30 percent in 2004. As well, the proportion who said they parked in a structure or garage increased to 31 percent of drivers, up from 25 percent two summers ago. The continued advertising, signage, and public education of the parking garages appears to be stimulating a higher proportion to utilize the structures. Despite this increase, an ***on-street metered space remains the most popular parking option***, with nearly half of drivers parking at a meter.

Awareness of Parking Alternatives

- Awareness remains high among City and County residents for ***free parking on weekends in parking structures*** and ***free parking at meters after 6pm and all day Sunday***. Lower levels of awareness are observed for the parking validation program and the new parking structure at 10th

& Walnut. Low awareness is seen for the fact that 556 new parking spaces have been added downtown in the past year; only 14 percent overall were aware of this figure and only 14 percent of City residents knew about it. This latter figure may account, at least in part, for lower than expected utilization of the new parking structure, which (due to its design as a below grade structure integrated into the new hotel) may not be as apparent for use by the public as other above ground structures. Perhaps greater efforts to advertise its presence and/or place temporary banners and signage at its entrance would be appropriate.

Satisfaction Ratings

- The ratings in general remained quite positive again this year; in fact, ***most attributes exhibited stability or improvement over already-high 2004 scores***. The feeling of safety and security, family orientation/kids play areas, and overall cleanliness and maintenance were the top rated attributes, while continued improvements were noted for family orientation/ kids activities, ease of getting here, and directory information/ signs.

Competition/Perceptions

- The ***average number of non-work visits to the Downtown Boulder area declined slightly***: 11.8 visits in the past two months, down from 12.8 visits last summer. The median number was stable at 8 visits. Not surprisingly, City residents exhibited higher visit figures (average of 13.6, median of 10) than County residents (average of 7.2, median of 4).
- Within the City, those who live in the ***Central/West Boulder area*** report an average of 14.8 visits (median of 10), and residents of ***North Boulder*** visit an average of 13.6 times (median 9), making these two areas the strongest customer base for the downtown area. 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. Within the City, the ***Arapahoe Village*** area is the most popular, followed by ***FlatIron Crossing***, ***Louisville/Superior*** (at McCaslin and US36), and ***Louisville, Lafayette, and Niwot Old Town/Main Street*** areas. Fifty percent of City and County residents indicated that they had visited the Louisville/Superior area in the past two months, similar to results seen in past years. As well, an increasing proportion of City and County residents have visited the Old Town/Main Street areas of Louisville, Lafayette, or Niwot in the past two months. These areas offer a different experience and mix of stores and restaurants compared to Downtown Boulder, and the competitive environment will continue to grow more intense with the opening of the 29th Street area next fall.

Advertising, Website Usage, and Special Events/Festivals

- Advertising recall slipped slightly this year. Overall, ***22 percent said they saw an ad or information source for Downtown Boulder*** prior to their visit (down from 24 percent a year ago); another 8 percent said they saw an ad for an individual downtown merchant (down from 10 percent). In total, 26 percent saw some type of advertising prior to their visit, while the other 74 percent did not see any ads. Awareness of the Downtown Boulder ads was highest among City and County residents, as 28 to 30 percent of these segments indicated awareness Downtown Boulder advertising.

- The most common places to see a Downtown Boulder ad are in the ***Daily Camera***, the ***Colorado Daily***, and on the ***radio***. Other advertising sources include DIA ads, a brochure, and a general/ feature article.
- A couple of new questions were added regarding the use of the Downtown Boulder website. ***Eleven percent of all downtown users have visited the Downtown Boulder website*** in the past. Of those, 22 percent said they used the website to collect information for this trip downtown. The most popular types of information people collect on the Downtown Boulder website are information about events, followed by dining, shopping, and parking. "Other" information people use the website for include general information, happy hour information, and directional information.
- 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 appear to be popular with County residents as well, with the exception of Bands on the Bricks; the daytime events seem to be more popular with County residents.

Panhandlers

- A question about the impact of panhandlers on the experience downtown was re-added to the questionnaire this summer (it had been asked in 2002 and 2003, and then removed in 2004). The ***impact of panhandlers on the experience downtown is minimal***, and most respondents think the situation has been improving or staying the same over the past two years. Both these findings are very positive and encouraging, given the attention and resources dedicated to managing the homeless situation downtown, not to mention the bad press generated by a few isolated incidents this past spring.

Prior Visits/Experience Improving or Declining

- A question asked all respondents how many years they had been visiting Downtown Boulder. Overall, the ***average number of years visiting is 7.9***, up from 7.2 last year and 6.1 the year prior. The primary difference is in the proportion saying they have been visiting for 10 years or more, which grew to 42 percent of all users this year from 36 percent last year and 28 percent the year before. Clearly, the visitor base continues to boast a strong repeat element, and the number of years visiting continues to increase.
- Those who indicated that they have been visiting 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. A ***higher proportion of respondents said that the overall experience in Downtown Boulder is improving*** – 45 percent versus 41 percent in 2004 and 39 percent in 2003. On the other hand, only 8 percent said they think the area is declining. This result is quite positive and encouraging for the downtown community.

The remainder of this report provides more detailed discussion of these and other topics.

RESPONDENT PROFILE

Visitor/ Resident Mix

The visitor mix of downtown users evolved slightly this summer, as ***full time City residents grew to 41 percent of all users***, up from a low of 37 percent in 2003. This segment represents the largest user group, followed by US residents outside Colorado (27 percent, stable). Boulder County residents and Colorado residents outside Boulder County (each 14 percent) account for most of the rest of the downtown user population. Summer/part time City residents and International visitors (each 2 percent) make up the balance of those interviewed this summer. Despite the slight fluctuations, the distribution of users this year is generally aligned with longer-term trends observed over the past four to five years.

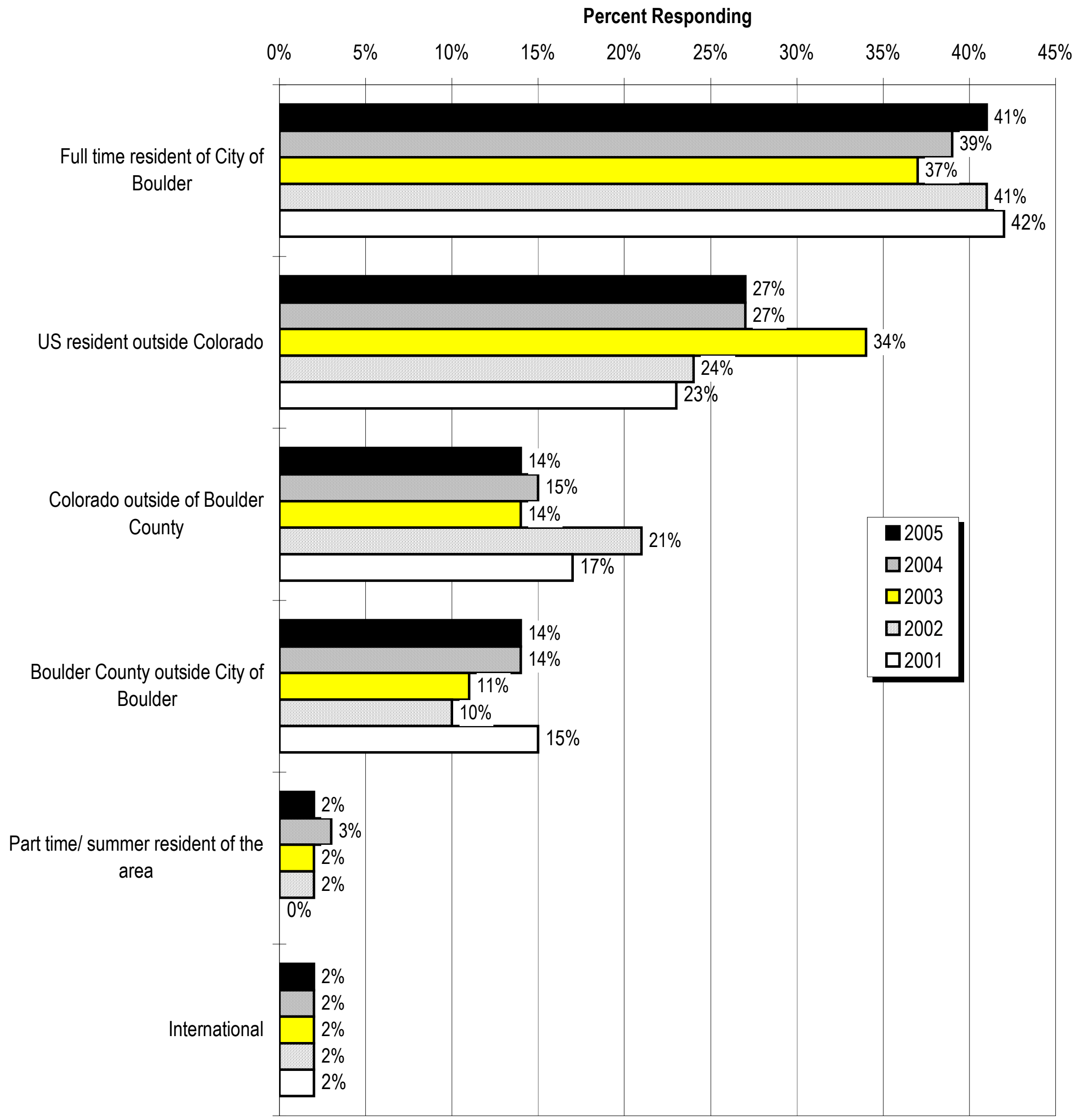
When grouped together, all ***Colorado residents make up about 70 percent of downtown users***, while ***out of state visitors represent about 30 percent*** (again, similar to results seen in prior surveys).

The section below details some of the findings related to these various user groups.

- City Residents. The proportion of downtown users from the City of Boulder increased to 41 percent of all users, up from 39 percent last summer and 37 percent in 2003.
- US Residents outside Colorado. Generally thought of as "out of town-ers," "visitors," or "tourists," US visitors living outside Colorado continue to make up the second-largest user group downtown, at 27 percent, stable from a year ago and aligned with long-term trends. This group tends to be empty nesters, with children no longer at home. Additionally, International visitors accounted for 2 percent of the sample, meaning that out-of-state users were about 30 percent of all those interviewed this summer.
- Boulder County Residents. Residents of Boulder County outside the City of Boulder remained steady at 14 percent of users. Many of these respondents are families with children.
- Colorado Residents outside Boulder County. Fourteen percent of all downtown users are Colorado residents outside Boulder County, stable for the past two years but down from 21 percent in 2002. Similar to US residents outside Colorado, this group tends to be empty nesters, with children no longer at home.

Part time/summer residents of the City (2 percent) and International visitors (also 2 percent) account for the remaining segments of the visitor base. For most of the rest of the report, part time/summer residents of the City are combined with full time residents, and International visitors are combined with US residents outside Colorado. The results for the recent five-year period are illustrated in Figure 1 below.

FIGURE 1
VISITOR TYPE
2001 TO 2005



Demographic Characteristics

Some shifts were noted in the demographic profile of the visitor base. Most notably, ***the age profile continues to increase***. The average age of visitors downtown rose to 40.7 years from 39.1 years last summer, 37.1 years in 2003, and 35.6 years in 2002. The median age (the age at which half the respondents are older and half are younger) leaped to 40 years of age from 37 years last summer. The evolving nature of the visitor and user base has implications for entertainment, services, and retail/restaurant mix.

Looking at the age distribution shows a lower percentage of respondents in the 25 to 44 year old segment and a higher proportion in the over-45 segment.

Overall, the age distribution is spread out from under 25 to 65 and older. Twenty-two percent are aged 24 and under (up from 21 percent last summer), 18 percent aged 25 to 34 (down from 23 percent), and 18 percent aged 35 to 44 (down from 21 percent). Additionally, 18 percent are in the 45 to 54 age cohort, and 16 percent are 55 or over (11 percent 55 to 64 and 5 percent 65 or older). (See Figure 2A)

Singles without children continue to be the largest household status segment in downtown Boulder, accounting for about 35 percent of downtown users (29 percent singles without children and 6 percent university students). However, the percentage of singles without children interviewed this summer is down from 43 percent last summer and the low 40s for several summers prior to that. This decline in singles without children appears to be primarily at the hands of empty nesters, which increased from 16 percent last summer to 22 percent in 2005. The other household types were relatively stable.

These other household types include families with children at home (27 percent, relatively steady over the recent four-year period) and couples without children (16 percent, also relatively stable). Note that ***families with children at home are the second-largest user group***, and constitute a plurality of users from Boulder County, South Boulder, and North Boulder. These patterns are illustrated in Figure 2B and 3B below.

Consistent with the increase in the average age and the higher proportion of empty nesters, ***household income figures were up compared to last summer*** (though not dramatically so). The proportion in the lowest income ranges fell slightly while the proportion in the highest income cohorts rose. Those reporting income of under $50,000 declined to 40 percent of survey respondents (from 42 percent); 26 percent reported earning in excess of $100,000 (including 7 percent earning over $200,000).

The gender split among 2005 downtown users was 52 percent male and 48 percent female, very similar to last year's result.

TABLE 2
RESPONDENT DEMOGRAPHIC/ SOCIOECONOMIC CHARACTERISTICS

	YEAR OF SURVEY				2005 visitor type				
	2005	2004	2003	2002	City of Boulder Resident (non-student)	City of Boulder Resident (student)	Boulder Co. Resident	CO Resident outside BoCo	Visitor from outside CO
GENDER									
Male	52%	53%	48%	47%	55%	44%	48%	49%	54%
Female	48	47	52	53	45	56	52	51	46
HOUSEHOLD INCOME									
$0 - 14,999	16%	15%	22%	21%	17%	85%	7%	7%	11%
$15 - 24,999	8	7	7	6	13	3	6	9	4
$25 - 49,999	16	20	15	21	18	6	16	19	14
$50 - 74,999	16	20	16	18	16	3	23	19	14
$75 - 99,999	17	13	17	14	14	3	19	19	20
$100,000 to $199,999 (2003 & prior: $100,000 or more	19	18	23	19	15	0	23	21	27
$200,000 or more	7	8	n/a	n/a	7	0	6	8	10
AGE									
14 - 17	4%	3%	2%	4%	6%	0%	5%	0%	2%
18 - 20	7	8	6	12	5	49	3	3	7
21 - 24	11	10	15	15	15	46	4	8	7
25 - 34	18	23	25	22	22	3	18	23	15
35 - 44	18	21	23	17	21	0	27	15	12
45 - 54	21	18	18	20	17	3	21	16	32
55 – 64 (2003 & prior: 55 or older)	15	11	11	11	11	0	16	27	15
65 or older	6	5	n/a	n/a	4	0	6	8	11
Average age	40.7	39.1	37.1	35.6	37.7	21.8	42.6	45.0	44.8
Median age	40	37	35	33	35	20	41	45	46
HOUSEHOLD STATUS									
Single, no children	29%	34%	41%	43%	43%	0%	19%	26%	21%
Couple, no children	16	16	19	17	18	0	24	16	11
Household w/children at home	27	26	28	26	27	0	40	23	27
Empty Nester	22	16	12	14	12	0	14	34	37
University student	6	9	n/a	n/a	0	100	3	1	4
EMPLOYEE IN THE DT AREA (Colorado Residents Only)									
Yes, full-time	15%	16%	14%	19%	18%	12%	11%	10%	n/a
Yes, part-time	10	10	11	9	12	26	6	1	n/a
No	75	74	75	71	70	62	83	89	n/a
ARE YOU A STUDENT? (Colorado Residents Only)									
Yes, high school	5%	4%	3%	5%	7%	3%	5%	1%	n/a
Yes, college/university	16	21	22	24	14	97	3	4	n/a
No	79	75	76	71	79	0	92	94	n/a

FIGURE 2A
VISITOR CHARACTERISTICS
GENDER / AGE

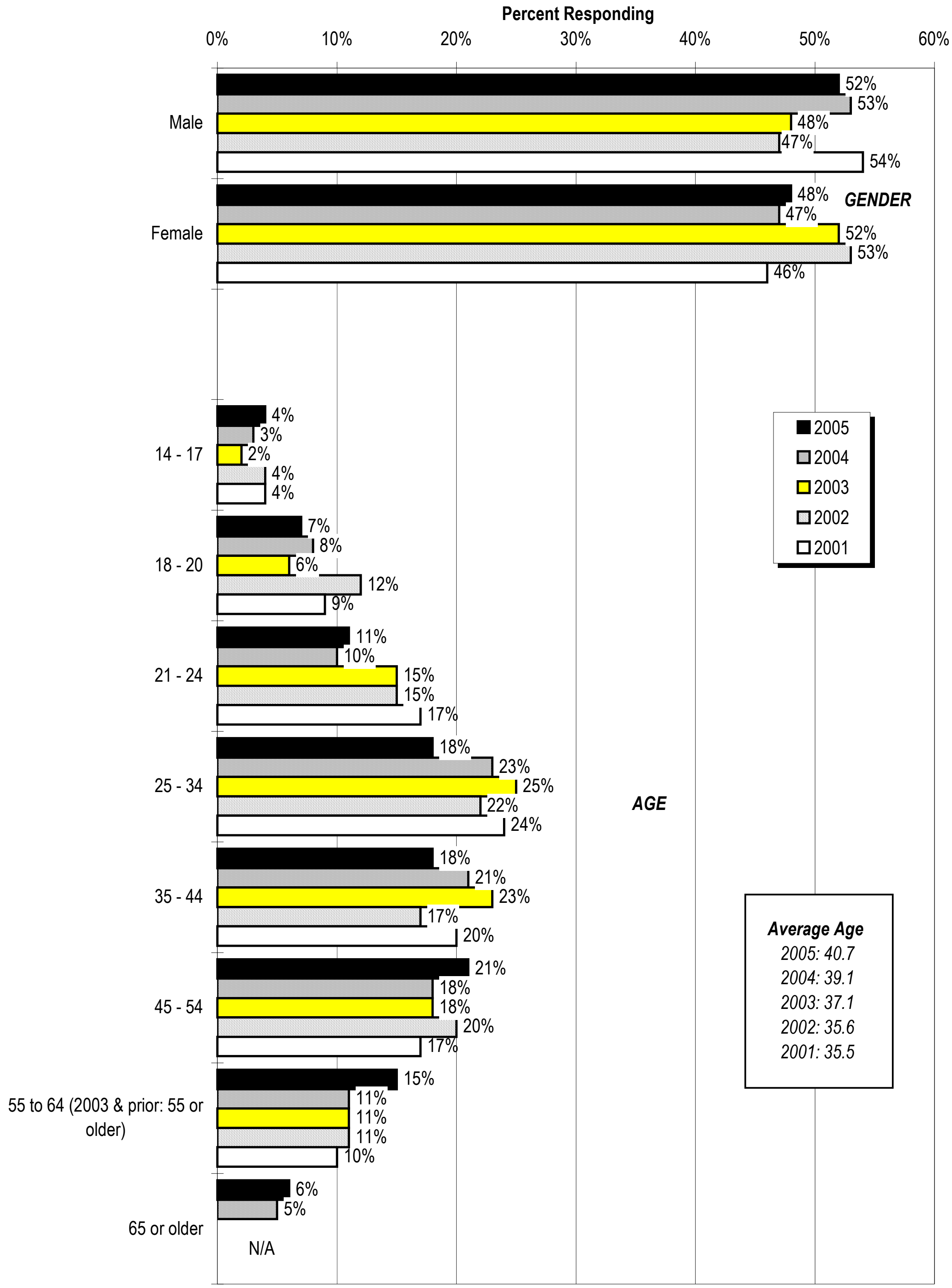
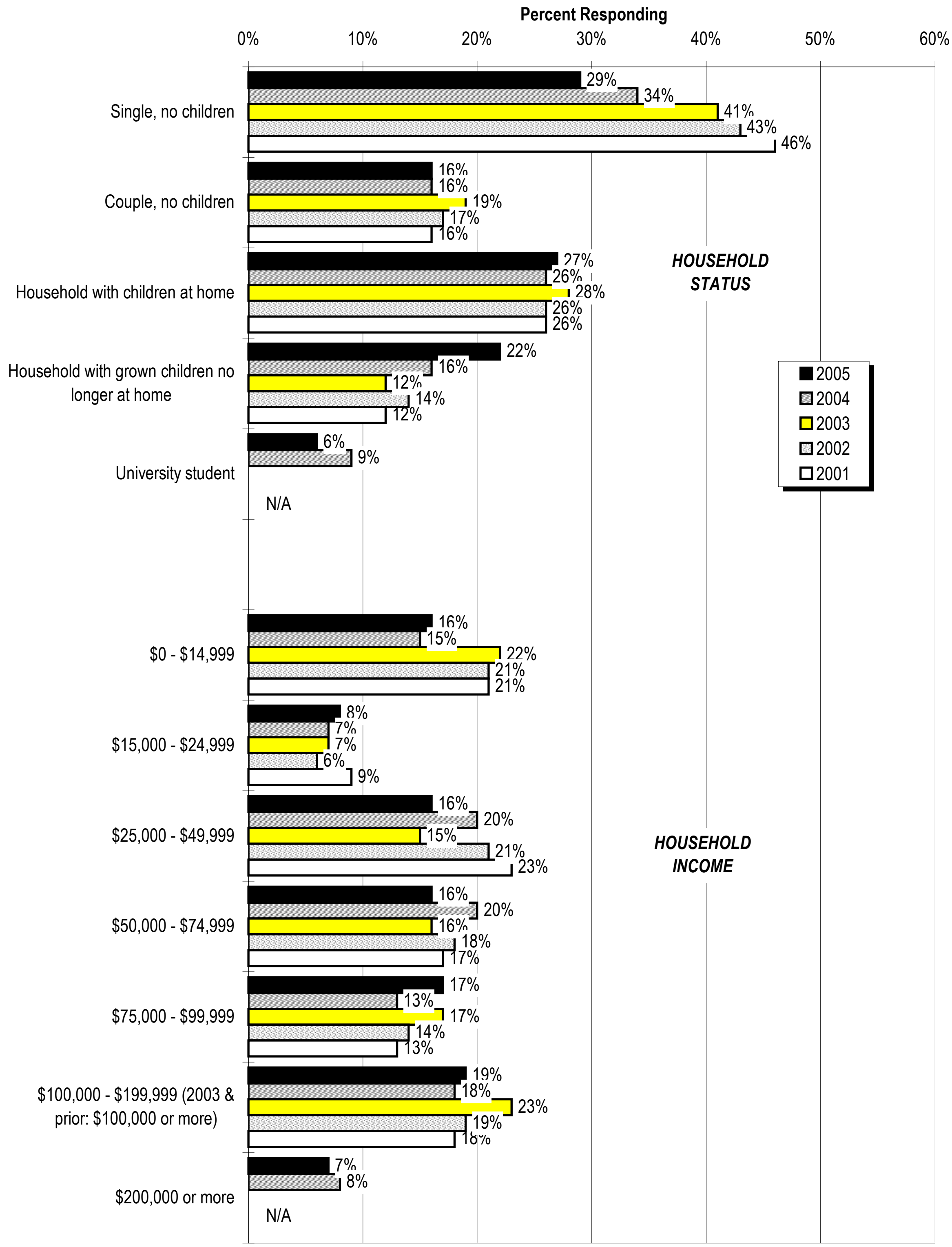


FIGURE 2B
VISITOR CHARACTERISTICS
HOUSEHOLD STATUS / HOUSEHOLD INCOME



Demographics by Visitor Type

The demographic profile of downtown users is presented in this section segmented by the visitor type. Figures 3A and 3B below illustrate the patterns discussed in this section.

Some substantial differences are noted within the various segments of downtown users. Among non-student City residents, 43 percent are singles without children and 30 percent are employees in the downtown area. The average age is 37.7 years, among the younger groups of downtown users. As such, this group tends to exhibit lower household incomes, with 30 percent reporting under $25,000 and nearly half reporting under $50,000 (recall that this group excludes university students).

University students are almost exclusively in the 18 to 20 and 21 to 24 age groups, report less than $15,000 in household income, and are most likely to be employed in the downtown area (12 percent are full time employees, and 26 percent are part time employees).

Out of state visitors tend to be empty nesters and have higher incomes compared to their in-state counterparts. Thirty-seven percent of the out of state segment classified themselves as empty nesters, with an average age of 44.8 years. As well, 37 percent report household incomes in excess of $100,000 (including 10 percent in the $200,000 or more category). While this group represents only about 30 percent of the total user population, their age and higher income ranges are worthy of significant attention by the downtown business community.

Boulder County residents outside the City tend to be families with children at home (40 percent). County residents tend to have incomes over $50,000, and are predominantly in the 25 to 34, 35 to 44, and 45 to 54 year old age ranges (18, 27, and 21 percent, respectively).

Colorado residents outside Boulder County are similar in many ways to visitors from outside Colorado: a high percentage are empty nesters (34 percent), 29 percent have incomes over $100,000, and the average age is 45.0 years. Few in this group are students or employees in the downtown area.

FIGURE 3A
VISITOR CHARACTERISTICS BY 2005 VISITOR TYPE
GENDER / AGE

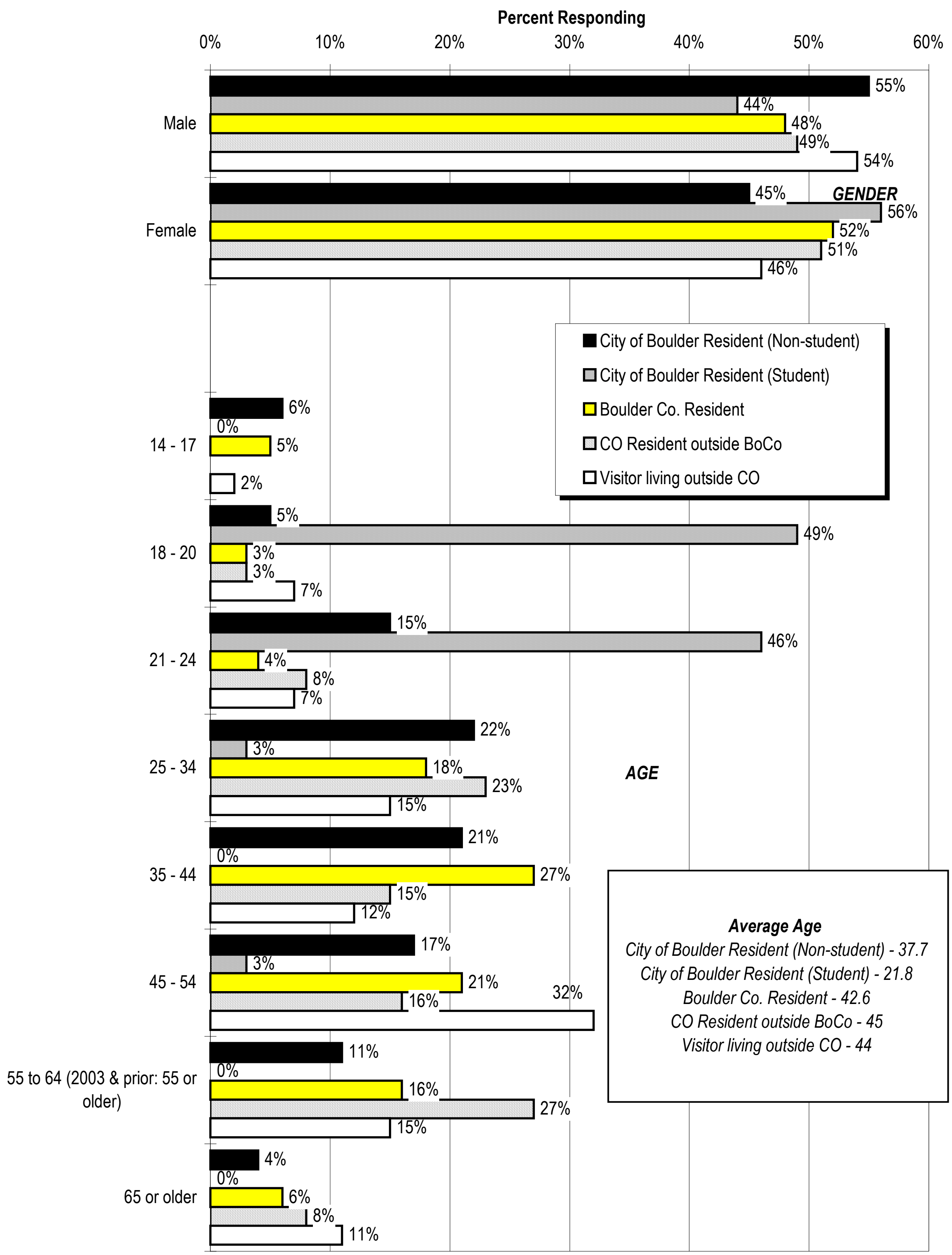
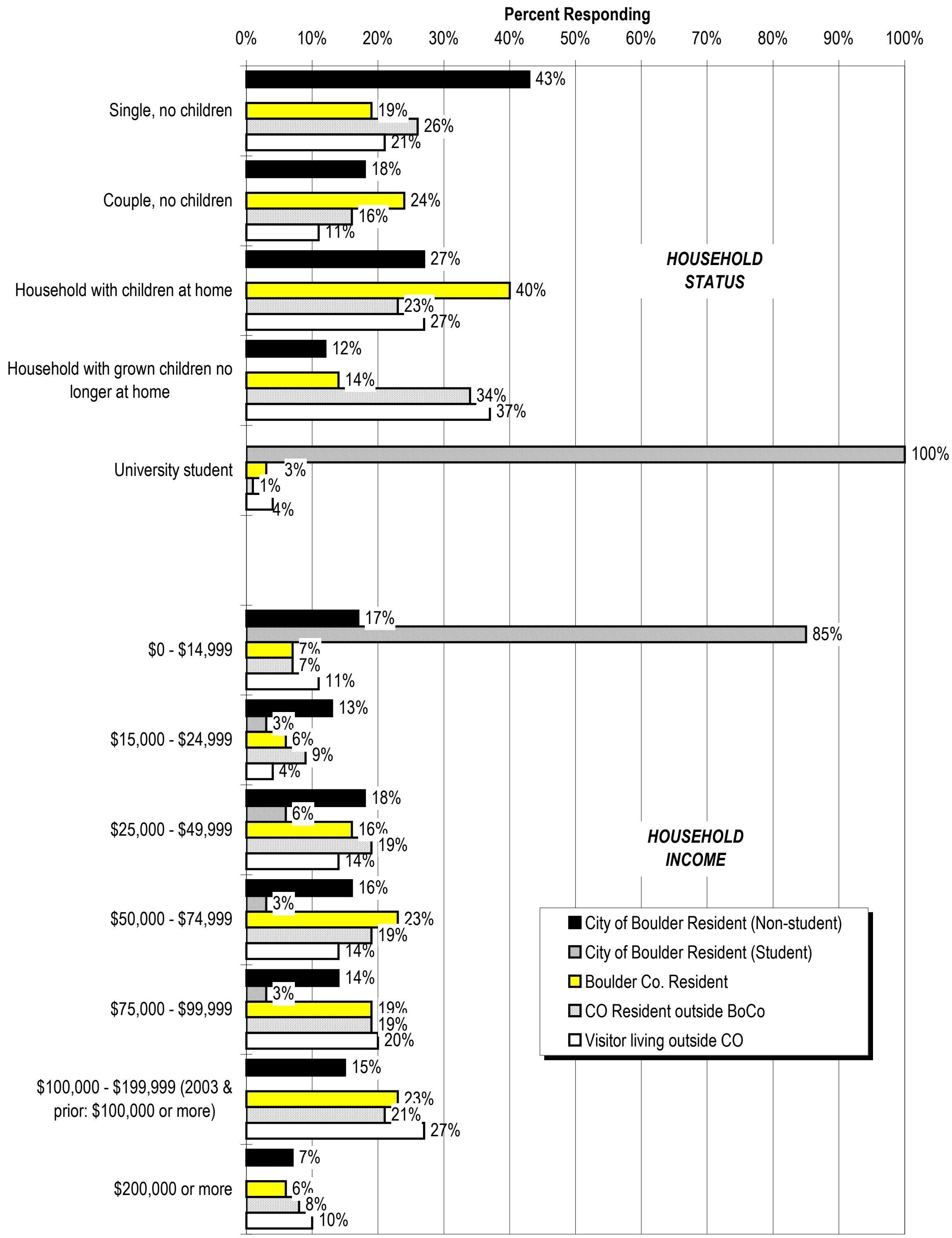


FIGURE 3B
VISITOR CHARACTERISTICS BY 2005 VISITOR TYPE
HOUSEHOLD STATUS / HOUSEHOLD INCOME

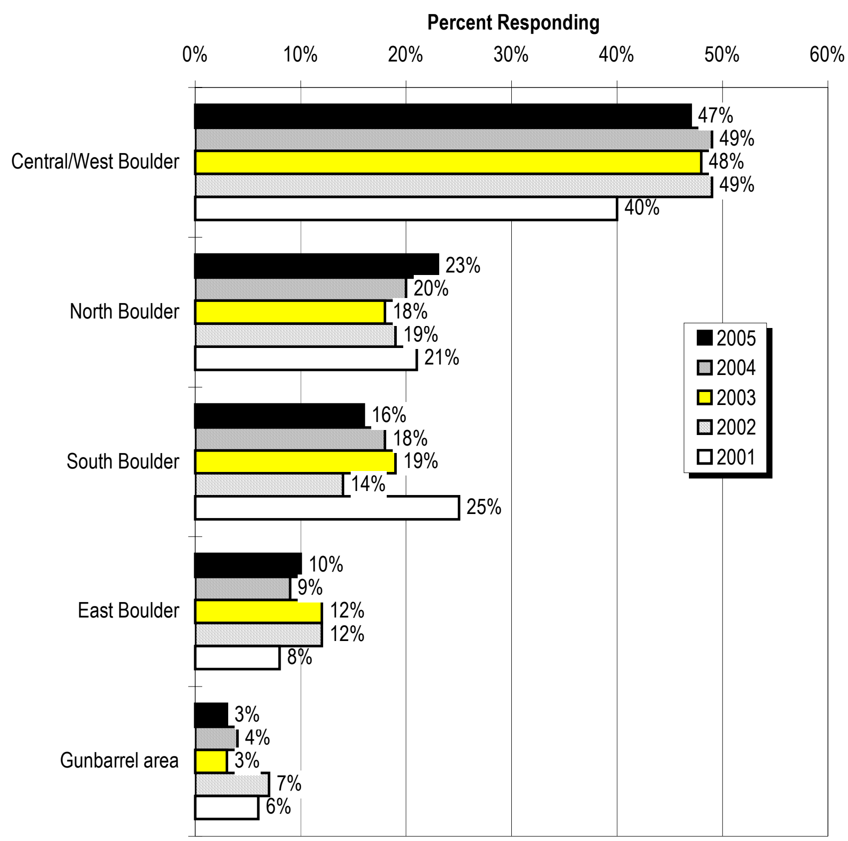


Residence of Boulder City Residents

About ***half of City users live within the Central/West portion of Boulder***, making this group the largest segment of Boulder's downtown users. This group has been the core user group for some time, and it appears that this summer was no different.

An ***increasing proportion of users who are City residents live in North Boulder***, despite the growing retail and dining options in that part of the City (Uptown Broadway, for example). The total population in North Boulder is increasing, with the Holiday Drive In, Dakota Ridge, and Wild Sage, and other residential and mixed-use developments all being completed in the past couple of years. Twenty-three percent of downtown users who are city residents live in North Boulder, up from 20 percent last year and 18 percent in 2003.

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



Employees and Students

Employees of the downtown area continue to represent a substantial group of users. In 2005, ***25 percent of Colorado residents interviewed work downtown*** (or about 18 percent of all survey participants). Fifteen percent of Colorado residents work downtown full time and 10 percent work part time. The proportion of employees captured in the survey is similar to the past couple of years, though down from percentages in the mid-30s recorded in the late 1990s and early 2000s.

The downtown area employees represent a segment that comes downtown regardless of the time of year or the weather conditions, making them an appealing group during certain traditionally slow periods, such as the winter or other times of inclement weather. They are an important segment to consider when formulating strategies targeted at the various segments of customers of the downtown area. Indeed, many of the popular early evening events on the Mall in the summer, such as the Bands on the Bricks, have a high appeal among the downtown employee base.

The ***proportion of survey respondents who are students was down this year***, to 21 percent from 25 percent last summer. Sixteen percent were college/university students, while 5 percent were high school students. The proportion of high school students is fairly stable, while the percentage of university students is down compared to past years. While not specifically asked, it can be assumed that most of the college students are affiliated with CU, either as summer session students or traditional academic year students who remained in town for the summer. The student population represents another important group of customers that could be segmented for separate advertising messages and promotions.

OVERNIGHT VISITORS

For the second year, a series of questions was added for out of town visitors to help identify and understand some patterns of interest related to this segment. Realize, however, that this information is not representative of all overnight visitors in Boulder; rather, it is descriptive of those overnighters who were intercepted in the downtown Pearl Street Mall area. Downtown Boulder is certainly a popular destination for overnight visitors in Boulder, but by no means do all overnight visitors come to Downtown Boulder. Overnighters in Boulder who did not visit the Mall area on their trip are thus excluded from the information in this report.

Overnight Lodging Patterns

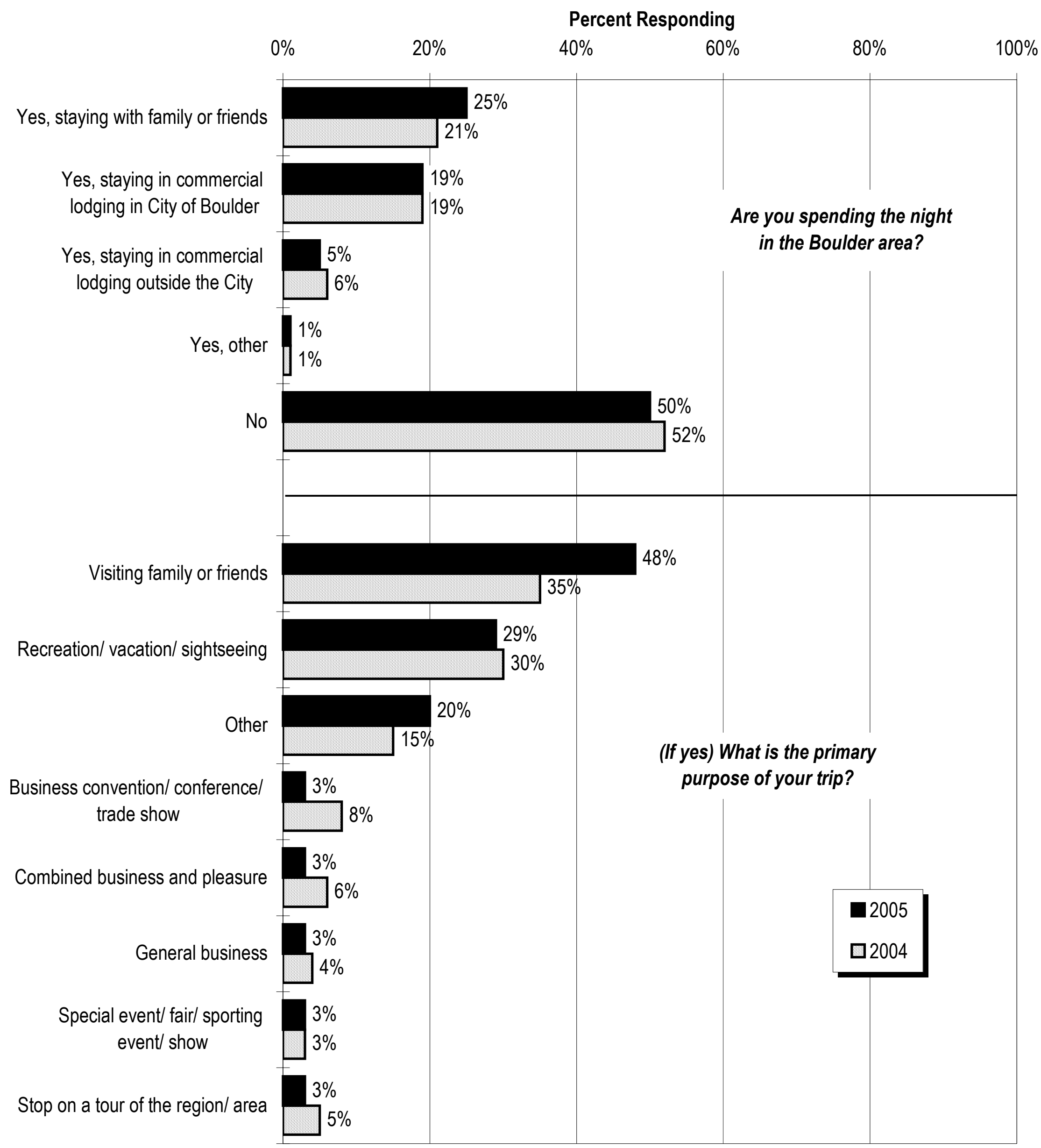
All out-of-county users (including residents of Colorado outside Boulder County) were asked if they were spending the night in the Boulder area. Overall, 50 percent were not; these individuals are primarily out-of-county users from the immediate metro area. The remaining half was spending the night in the Boulder area. Overall, about ***22 percent of all users captured in the survey were overnight visitors***.

Similar to results seen last year, most overnighters were staying with family or friends; 50 percent were spending the night with family or friends, 40 percent were in commercial lodging in the City of Boulder, 10 percent were in commercial lodging outside the City, and the remaining 2 percent had “other” accommodations. In other words, ***half of all overnight visitors were spending the night with family or friends***, indicating that the Downtown Boulder area is a popular place for Boulder residents to bring their houseguests.

Of those individuals spending the night in the Boulder area, the ***average number of nights in the Boulder area is 4.3*** (with a median of 3 nights), signifying relatively long trips in the area for this segment (See Figure 5 below). Perhaps overnighters on shorter stays don’t have time to visit the Downtown Boulder area, and thus are not captured in the research.

The ***average size of the overnight travel party is 2.8 persons*** (up from 2.4 persons last year), with a median travel party size of 2 people. Twenty-eight percent were traveling alone, 35 percent of respondents had one other travel partner, and the remaining 37 percent were in groups of two or more visitors.

FIGURE 5
OUT-OF-COUNTY USER QUESTIONS



Purpose of Trip to Boulder

The ***primary purpose of the trip for overnighters was visiting family/friends***; 48 percent of the overnight segment said this was their primary purpose for visiting the area. The other substantial reason was general recreation/vacation/sightseeing, at 29 percent. Few were in town for business reasons – 3 percent were in town for a business convention, conference, or trade show, and another 3 percent said general business was their primary purpose in visiting Boulder. Three percent were combining business and pleasure. All combined, these represent 9 percent of overnighters interviewed in Downtown Boulder who listed business as one of the reasons for their trip. Probably few business travelers to Boulder stop to hang out in Downtown Boulder on their trip. Three percent noted that Boulder was part of a stop on a trip of the region, and 3 percent said they were in town primarily for a special event, fair, sporting event, or show (See Figure 5 above).

Twenty percent gave an "other" reason for visiting, including dropping a child off at school, attending a wedding, looking for a place to live, and other reasons

Interest exists in understanding how important visiting Downtown Boulder was in overnighters' overall travel plans. Overall, the results show that the ***Downtown Boulder area was very important in the decision to visit Boulder***. Seventy-nine percent said it was very important or important in their decision to visit. Only 11 percent said that visiting Downtown Boulder was "neither important nor unimportant" in their travel plans, and 11 percent said that it was not important. The average importance of Downtown Boulder was 4.1 out of five. Comparisons to prior year's results should be conducted with caution, as the wording of the question was changed from "How important was the Pearl Street Mall area of Boulder in your travel plans?" to "How important was visiting Downtown Boulder in your travel plans?"

Overnight Visitor Spending in Boulder

The question about overnight visitor spending in Boulder was modified this summer; rather than asking for spending on a per-person, per-day basis, the question was changed to ask about total spending on the trip. Note that overnighters were asked for their total spending in Boulder (not specifically the Pearl Street area, but the City as a whole). Overall, ***the average overnighter spent a total of $735.17*** (median of $527.50).

This total spending figure can be broken down into categories: the average overnighter spent $240.29 for lodging (including 47 percent who said they spent nothing for lodging because they were staying with family or friends), $232.80 for dining and entertainment, and $213.45 on average for shopping. An additional $29.67 on average was spent on other sundry items.

As might be expected, visitors staying in commercial lodging spend considerably more per person per day than those staying with friends and family, especially for lodging and shopping expenditures. Those staying in commercial lodging spent an average of $984.25 in Boulder, including $435.36 for lodging, $251.84 on shopping, and $249.63 for dining. In contrast, those staying with friends and family spend $472.99 per person per day, including only $22.93 for lodging, and an average of $171.92.14 for shopping and $214.36 for dining.

Information Sources Used

Overnighters were also asked about the information sources they used to plan their trip to Boulder. An increasing proportion used a website, and a declining proportion said they used the experience of a prior visit, suggesting that more overnighters intercepted Downtown this summer were first time visitors to Boulder.

Given that visiting family and/or friends was the top purpose of the trip, it is not surprising that ***word of mouth/talked to family or friends was also the top information source***, with 39 percent of overnighters citing it. Thirty-three percent used a website to plan their trip (up from 23 percent last year and only 15 percent in 2003). Some of the websites mentioned include Expedia, City of Boulder, Colorado.edu, hotel websites, and downtownboulder.com. Only 14 percent said they used the experience of a prior visit as an information source (down from 30 percent two summers ago), suggesting that 86 percent were first time visitors to Boulder. Other information sources were less commonly used, such as a brochure (9 percent), a travel agent (2 percent), and a magazine article (4 percent). Twenty percent of overnighters said they did not use any information sources in planning their trip.

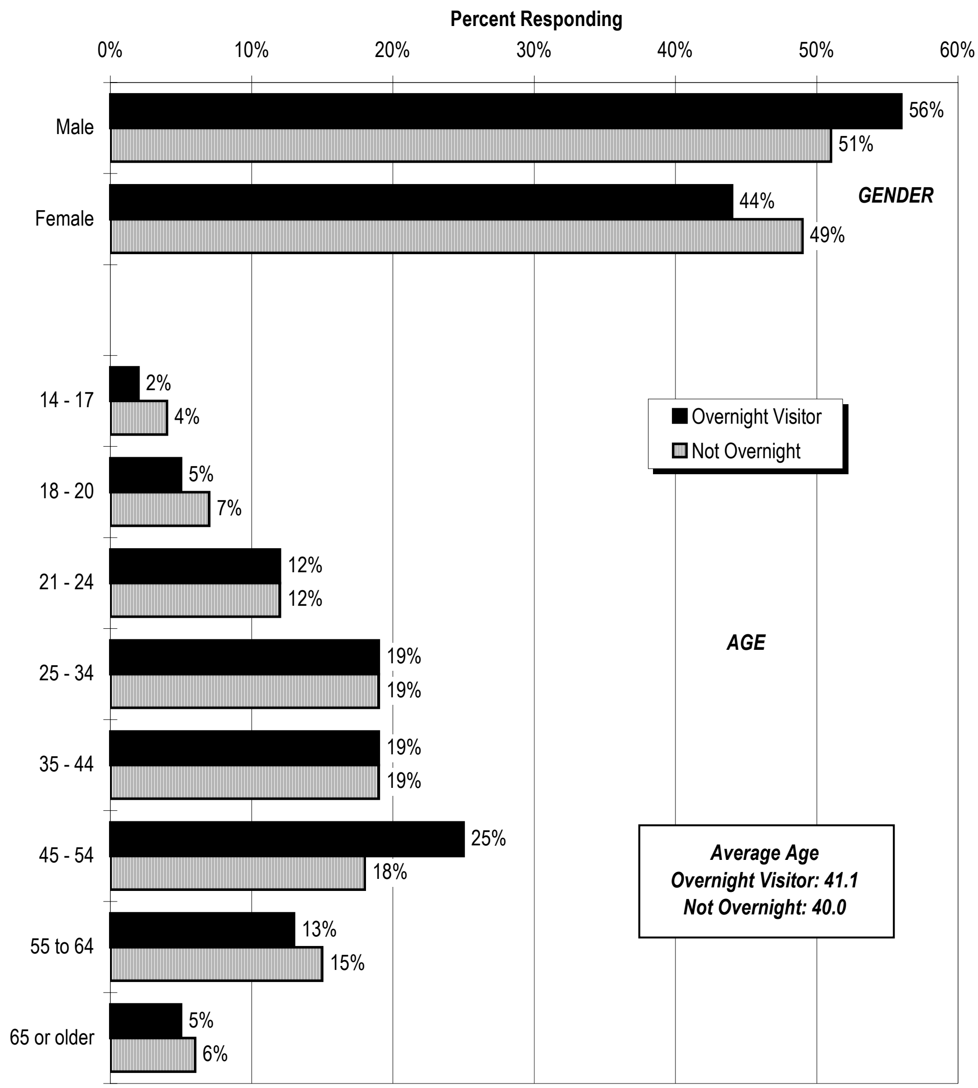
Awareness of signage for the downtown area was stable compared to last summer. Forty-two percent saw signs for parking; 27 percent saw signs directing them to the downtown area in general. It seems that the existing signage is not adequate for informing out-of-county residents how to get to the downtown area in general and where to find parking downtown.

Overnight Demographics

Comparing the demographics of overnight visitors on the mall to non-overnight users (or day users) show some interesting contrasts. Figures 6A and 6B below illustrate graphically the patterns discussed in this section.

Overnight visitors are, on average, ***a bit older than their day user counterparts*** – 41.1 years versus 40.0 years. The distribution of the age groups are similar, with the exception of the 45 to 54 year old cohort; 25 percent of overnight visitors fall into this age category, while only 18 percent of day visitors do. Overnight visitors also tend to be male more frequently (56 percent male, versus 51 percent male for day visitors).

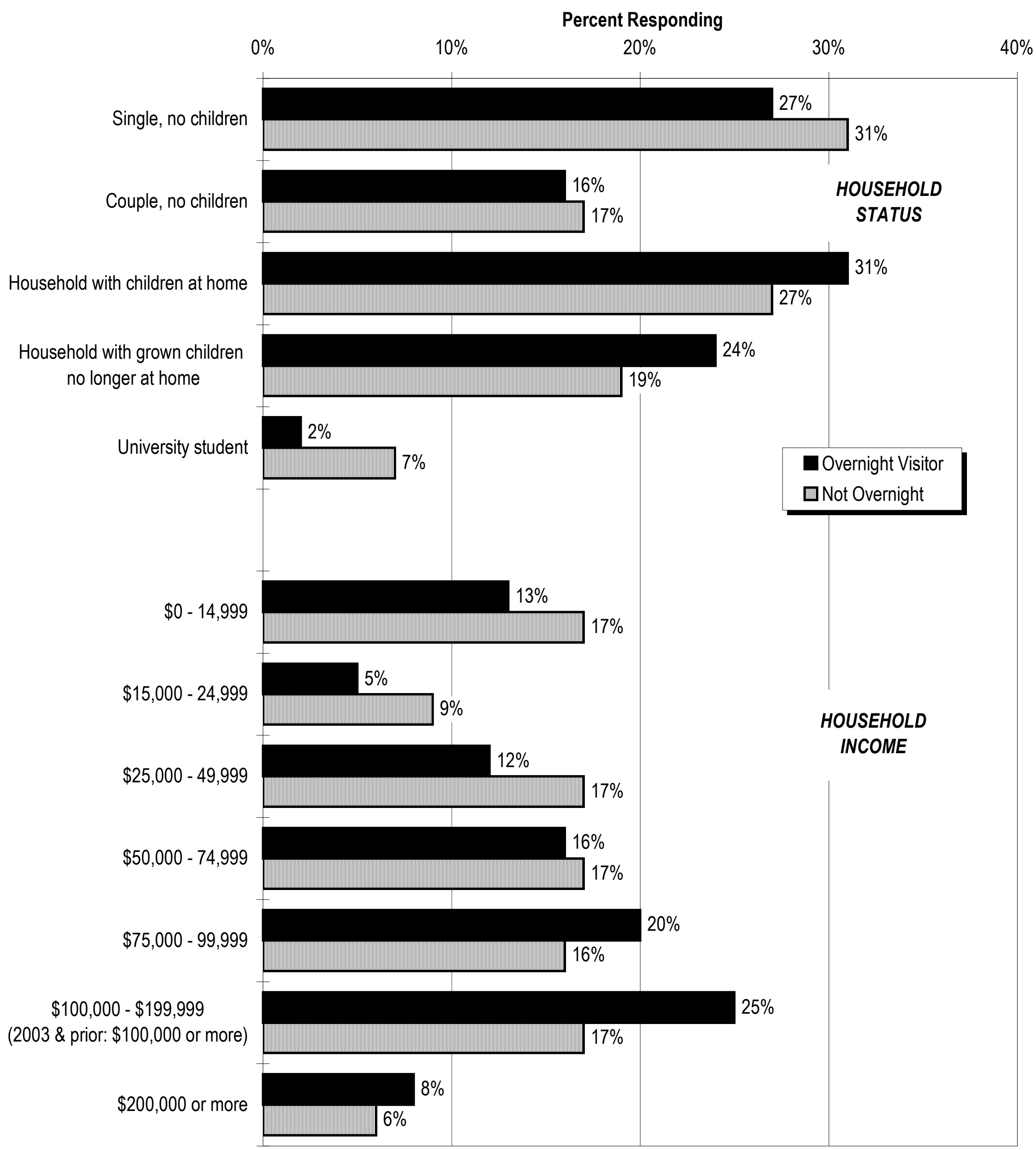
FIGURE 6A
VISITOR CHARACTERISTICS BY OVERNIGHT/DAY VISITORS
GENDER/AGE



Overnight visitors tend to be families with children at home or empty nesters, whereas day visitors are more apt to be singles without children or university students.

Some clear differences also emerge in the comparison of household income; ***overnight visitors clearly report a higher level of affluence***, with 32 percent earning in excess of $100,000, compared to 23 percent of day users. As well, 20 percent of overnighters earn $75,000 to $99,999, compared to 16 percent of day users. (See Figure 6B.)

FIGURE 6B
VISITOR CHARACTERISTICS BY OVERNIGHT/DAY VISITORS
HOUSEHOLD STATUS / HOUSEHOLD INCOME



SPENDING PATTERNS

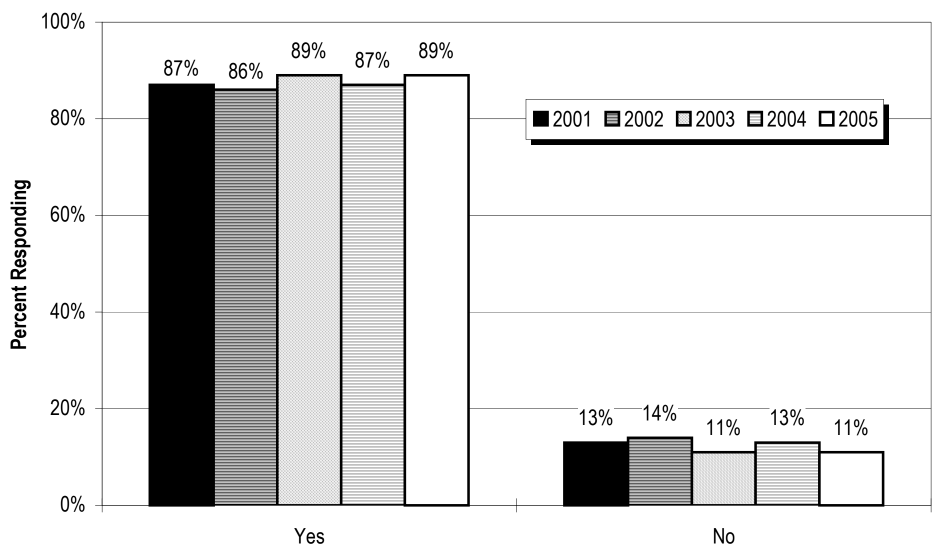
Hanging out/people watching, dining, and shopping remain the top activities of downtown users. Overall, the ***proportion making a purchase rebounded*** and the ***average amount spent per capita increased***, almost entirely attributable to a recovery in retail spending.

The ***average amount shoppers and diners spent this summer increased by 25 percent,*** up to $47.88 from $38.33 last year. This average spending figure is the highest recorded since 2000.

Spending Penetration

Figure 7A illustrates shopping penetration among the downtown user segment for the past four years. This year, ***89 percent of all users said they would be making a purchase downtown" today***," up from 87 percent a year ago and level with the result from 2003.

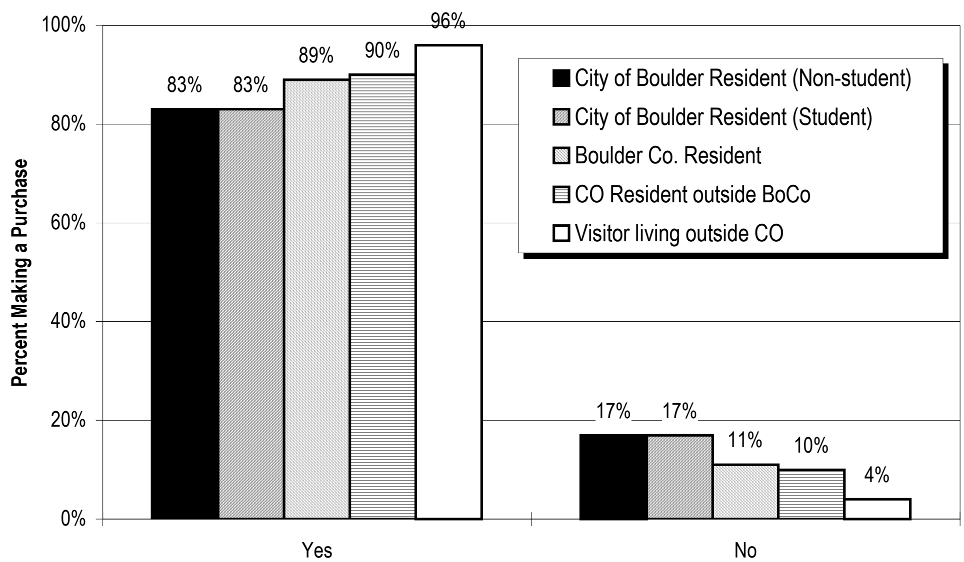
FIGURE 7A
ARE YOU SPENDING MONEY TODAY?
2001 TO 2005



Ninety-six percent of out-of-state visitors said they would make a purchase downtown (up from 93 percent a year ago), the highest penetration level of the four visitor segments. Ninety percent of Colorado out-of-county visitors were also making a purchase (down from 95 percent last summer). Eighty-nine percent of Boulder County residents indicated their intention to make a purchase (up from 88 percent).

City of Boulder residents exhibited a lower propensity to spend money, though still quite high at 83 percent, respectively. Both students and non-students indicated the same level of spending penetration – 83 percent. Because of their more frequent visits to the downtown mall area, the lower penetration percentages for these two segments are less of a concern. The more frequent trips to the downtown area tend to compensate for the lower frequency of making a purchase.

FIGURE 7B
ARE YOU SPENDING MONEY TODAY?
BY 2005 VISITOR TYPE



Of those spending, 48 percent were making a retail purchase, up from 40 percent last year. Most spenders – 89 percent – were spending in a restaurant/bar. Even fewer – only 12 percent – spent money on any other services.

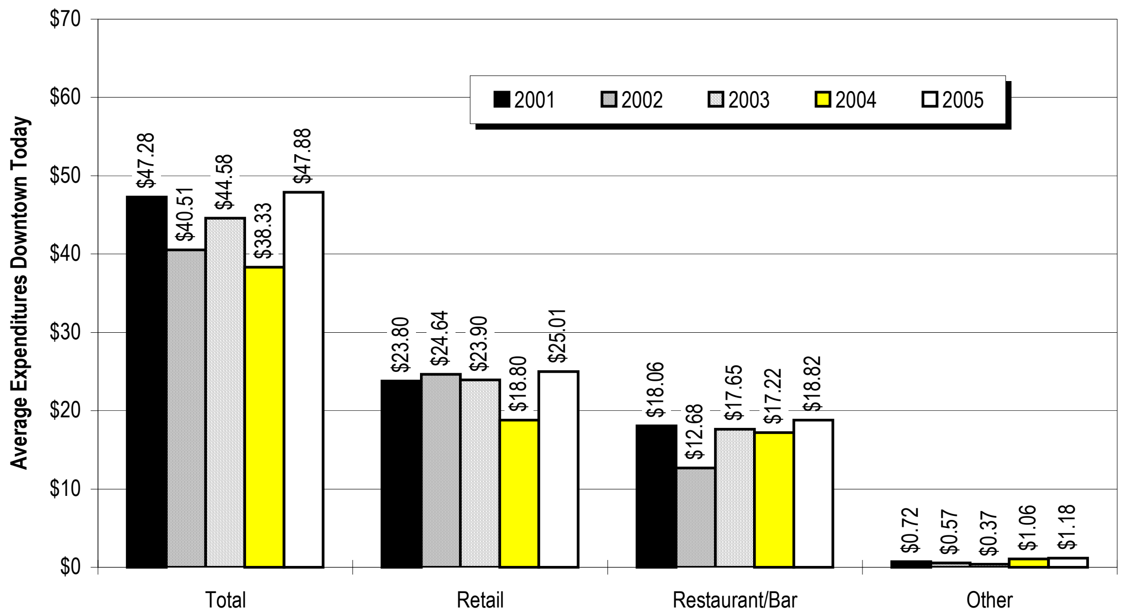
Spending Amounts

Spenders were asked to indicate the types of purchases they made (or were planning to make), while non-spenders skipped the specific spending pattern question. The three categories of spending were: 1) restaurant/bar/coffee shop; 2) retail store/art gallery/shop; and 3) "other" spending.

The ***average amount shoppers and diners spent this summer rose by 25 percent, to $47.88 from $38.33 last year***. This average spending figure is the highest recorded since 2000. The rebound is attributable almost entirely to a recovery in retail spending, which averaged $25.01, up 33 percent from $18.80 recorded last summer. Restaurant/bar spending was up about a dollar, at $18.82, up from

$17.72, while "other" spending remained minor ($1.18, up from $1.06). The median figure for total spending is $30, up from $21.50 last summer.

FIGURE 8
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY SPENDING CATEGORY, 2001 TO 2005



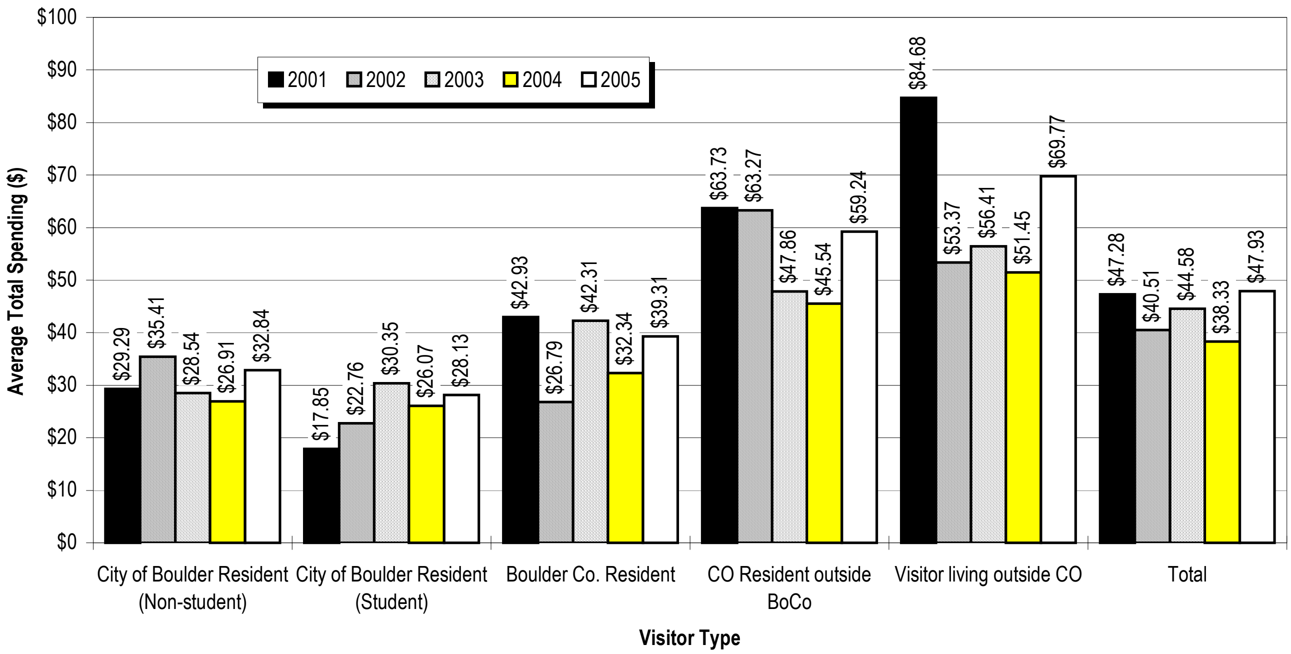
Looking at total per capita spending figures by visitor type shows continued patterns from past years – the farther from Boulder the user lives, the greater the spending. However, this year, each of the four major visitor segments experienced a decline in average spending, meaning that the overall drop was not attributable to any one visitor segment, but rather to the general user population as a whole.

- As seen in Figure 9, City of Boulder students spent the least, on average, at an average of $28.13 per spender, up from $26.07 a year ago.
- City non-students are next in the spending hierarchy, averaging $32.84 in spending on their visit, up from $26.91.
- Boulder County residents exhibited an increase in average spending, to $39.31 per spender from $32.34 in 2004. This figure is aligned with the long-term average for this segment, which has typically been in the $35 to $40 range.
- Non-Boulder County Colorado visitors averaged $59.24 in spending downtown, up substantially from $45.54 a year ago.
- Similarly, substantial increases in average spending were seen for out of state visitors ($69.77, up from $51.45). Again, this group spends the most on average, and is the second largest group in the survey. Thus, their contribution to the downtown economy is critical.

Figure 9 illustrates the pattern of total average spending by visitor type over the past four years. It is clear from this graph that the decline in overall spending was attributable all visitor segments.

The median spending number was also up to $30 from $21.50 a year ago. This means that half of spenders were spending $30 or more, and half were spending $30 or less.

FIGURE 9
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY YEAR BY VISITOR TYPE



VISITS TO DOWNTOWN BOULDER AND OTHER SHOPPING AREAS

An area of ongoing concern of the downtown merchants is the shopping patterns of downtown customers to competing shopping locations. All Boulder County residents were asked how frequently in the past two months they had visited the Downtown Boulder area, as well as a list of other regional shopping centers.

The ***average number of non-work visits to the Downtown Boulder area was down slightly***: 11.8 visits in the past two months, down from 12.8 visits in the past two months recorded in 2004. The median number was stable at 8 visits. Not surprisingly, City residents exhibited higher visit figures (average of 13.6 for non-students and 11.6 for students; median of 10 for non-students and 5 for students) than County residents (average of 7.2, median of 4).

Within the City, those who live in the ***Central/West Boulder area*** report an average of 14.8 visits, down from 16.9 visits (median of 10, stable), and residents of ***North Boulder*** visit an average of 13.6 times, down from 14.3 times (median of 9, down from 10). These results indicate that the downtown users from the City and County tend to be dedicated, repeat users, particularly those residents of the close-in neighborhoods. Given the high number of repeat visits, much of this segment is clearly the strongest customer base for the downtown area. It is clear that the downtown area enjoys a loyal segment of local visitors who provide vitality and character to the area through their continued patronage and participation, something few other rival shopping areas can boast.

However, as the population of the County has grown, especially in towns to the east of Boulder, the retail shopping and dining/entertainment offerings in those areas have become more robust and more competitive. This growth in the diversity of retail and dining options has had a dual effect: it tends to retain residents of those towns (who once came to Boulder for some of their shopping needs); and to a certain extent it lures City residents to these areas. One good example of this trend is FlatIron Crossing, which offers extensive shopping, dining, and entertainment options. FlatIron Crossing draws residents of Broomfield, Louisville, Superior, Lafayette, and even residents of South Boulder, and continues to represent a competitive threat to Downtown Boulder. Similarly, the 29th Street shopping area will offer many attributes that the Downtown Boulder area lacks: free parking, a movie theater, and a more central location for many residents of the City and County.

The sum of three primary competitive shopping areas outside the City – ***FlatIron Crossing***, ***Louisville/Superior at McCaslin***, and ***Old Town Lafayette/Louisville/Niwot*** – quantifies the magnitude of the competitive threat to the Downtown Boulder area. Adding the trips to these three areas together, the average City/County downtown user made 6.9 trips (2.5 to the McCaslin area of Louisville/ Superior, 2.2 to FlatIron Crossing, and 2.2 to Louisville, Lafayette, and Niwot Main Street/Old Town areas). This figure is up from 6.5 trips last year and 5.7 trips in 2003. ***Boulder County residents averaged 14.3 visits to these three areas*** in the past two months (up substantially from 8.7 visits last year), while City residents averaged 4.2 trips (down from 5.1 trips).

Visits to FlatIron Crossing and Louisville/Superior at McCaslin appear to have stabilized in the past two years; the ***growing threat appears to be coming from the Old Town Lafayette/Louisville/Niwot*** areas, which average 2.2 visits in the past two months overall and 6.3 visits from County residents. Overall, 33 percent of City/County residents made at least one visit in the last two months to these areas, and 59 percent of County residents had patronized those areas. More summer events like the

Street Fair in Louisville have probably contributed to the increase in the proportion making a visit to these traditional Main Street sections of these East County towns.

Other shopping areas people mentioned visiting include Longmont, 28th & Pearl, Ideal Market, The Hill, Twin Peaks, and Whole Foods/Barnes & Noble.

Figure 12 below illustrates the number of visits and the average number of visits to the shopping areas queried on the survey form.

FIGURE 10
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY

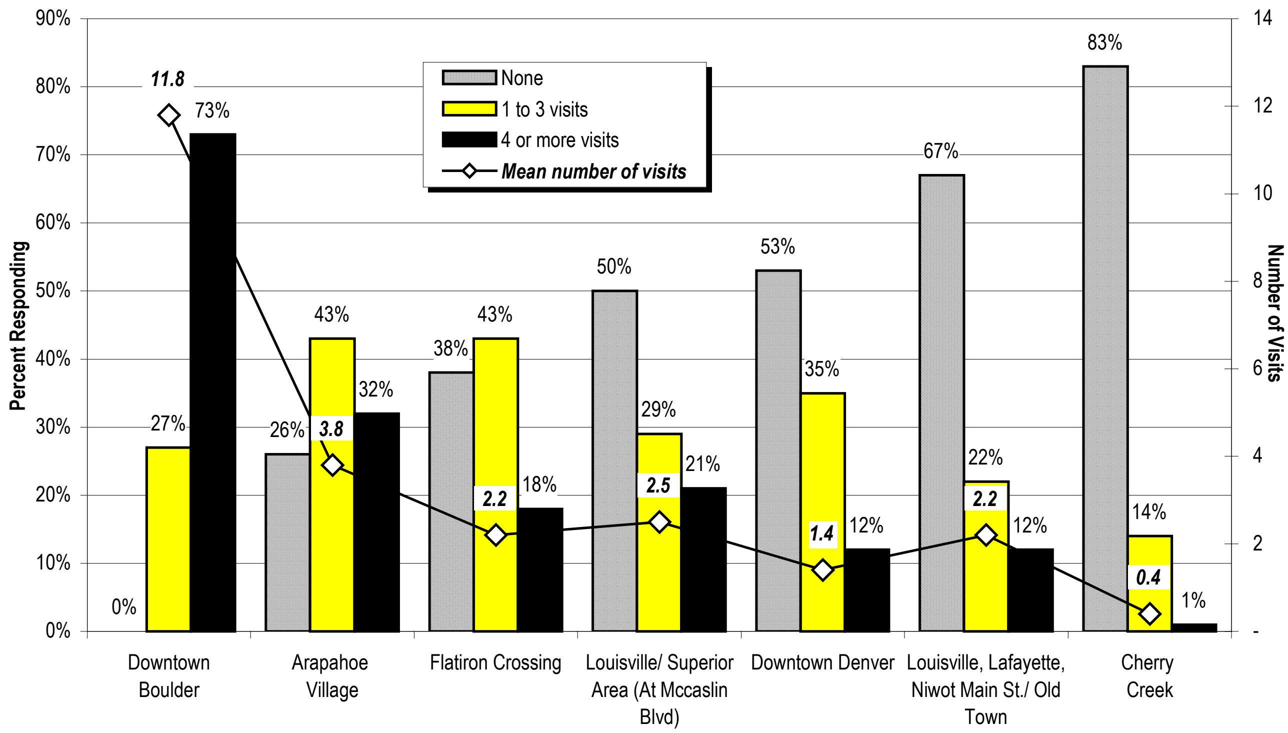
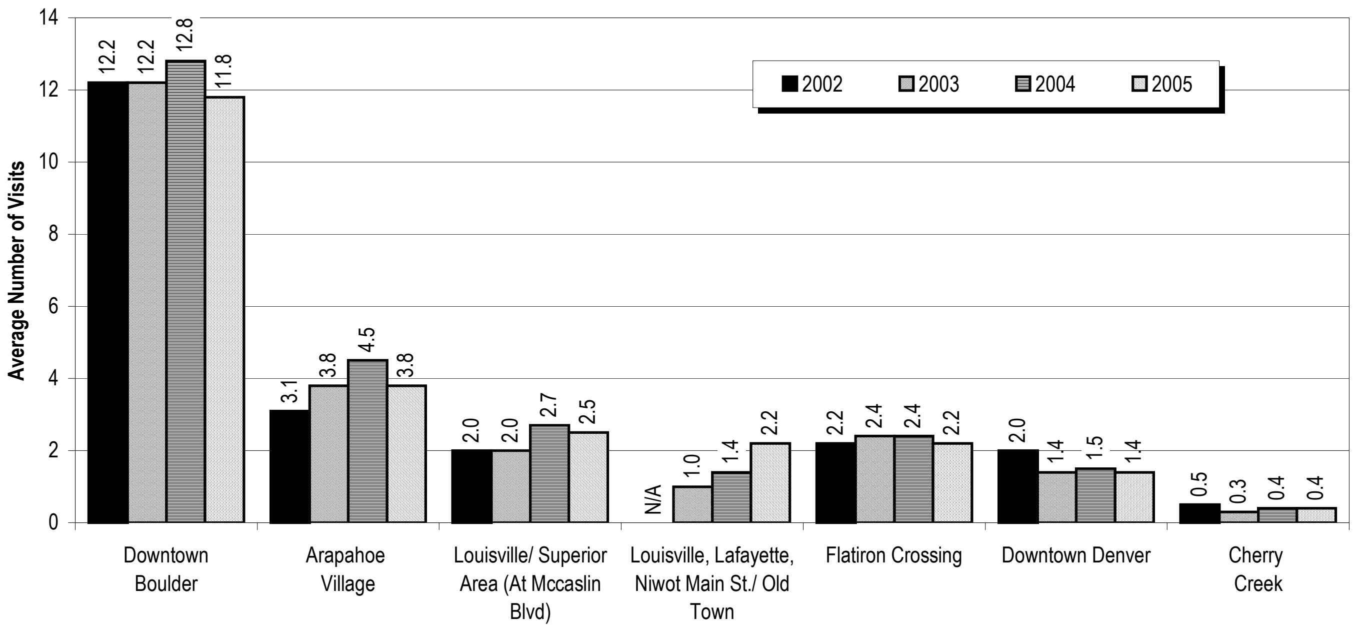


Figure 13 illustrates the historical pattern in terms of average visits to each of the shopping areas discussed on the survey. Note the upward trend at Louisville, Lafayette, Niwot Main Street/Old Town areas over the past three years.

FIGURE 11
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY



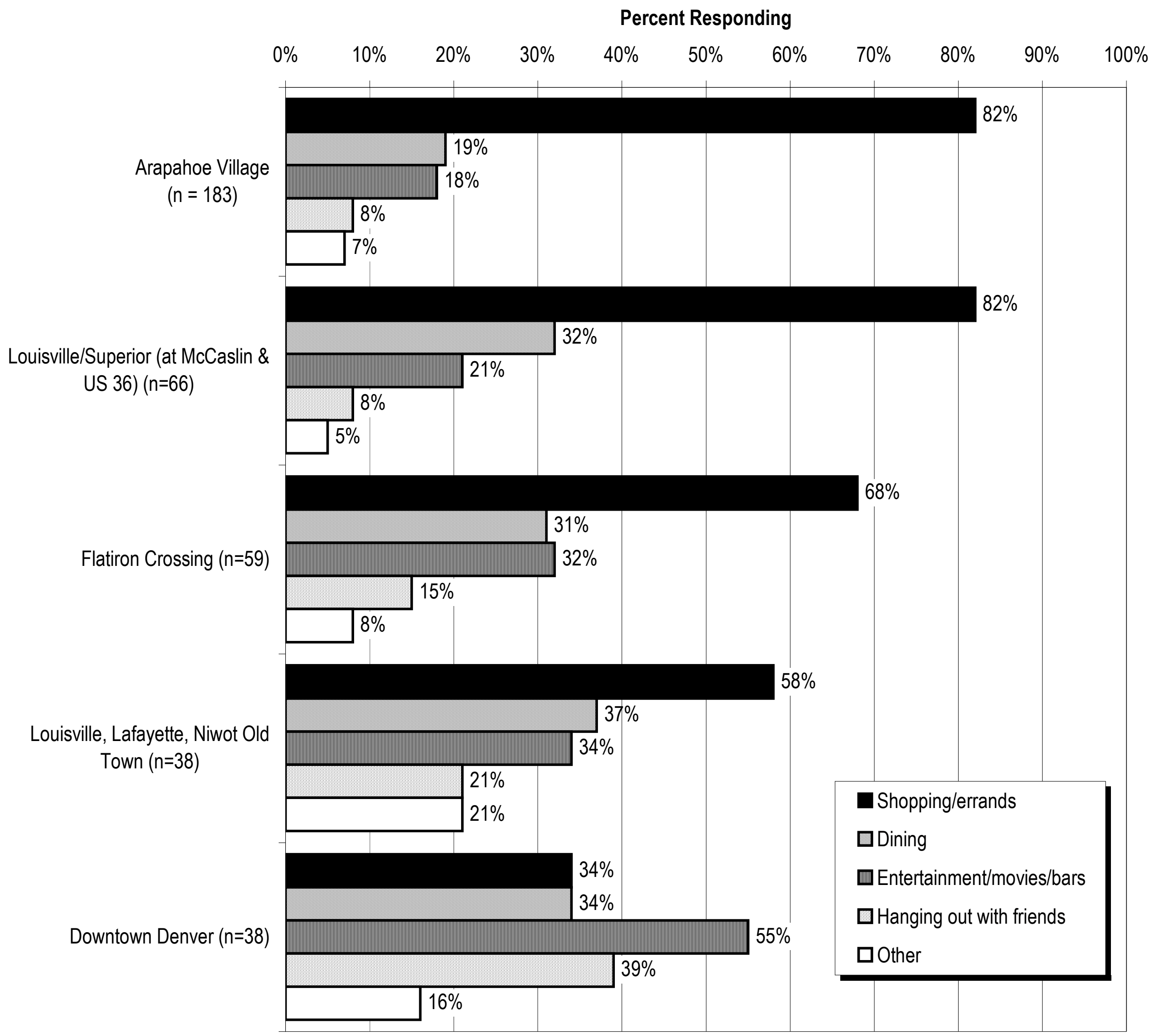
Reasons For Visiting Other Shopping Areas

Respondents were asked in a closed-ended manner the reasons they like to visit their (non-Downtown Boulder) most frequently patronized shopping area. Some of the response patterns, illustrated in Figure 14, are quite interesting and reveal the reasons people go to certain shopping areas.

Shopping/errands tends to be the most popular reason for patronizing most areas, with the notable exception of Downtown Denver, which people frequent for entertainment/movies/bars (probably primarily bars).

Shopping/errands dominated Arapahoe Village, Louisville/Superior (McCaslin & US36), FlatIron Crossing, and Louisville, Lafayette, Niwot Old Town. Arapahoe Village appears to be primarily one-dimensional, with few citing it for anything other than shopping. FlatIron Crossing and Louisville, Lafayette, Niwot Old Towns, on the other hand, tended to offer the most diverse mix of activities, from shopping to dining to entertainment to hanging out with friends.

FIGURE 12
WHY DO YOU LIKE TO VISIT YOUR FAVORITE SHOPPING AREA?
BOULDER CITY/COUNTY RESIDENTS ONLY



The results of this question show that several other shopping and entertainment centers – notably ***FlatIron Crossing/The Village at FlatIrons***, ***Old Town areas of Louisville, Lafayette, and Niwot***, and ***Downtown Denver*** – offer a diversity of options. Thus, these shopping areas are the most directly competitive with Downtown Boulder, which also offers a diversity of activities and shopping.

PARTICIPATION IN DOWNTOWN BOULDER ACTIVITIES

Downtown users were asked about the primary motivation for coming downtown, as well as any other activities they would be participating in on their visit downtown. In the discussion below, the primary reason is presented alone, and then the primary reason is combined with the other reasons to paint a complete picture of the mix of activities the downtown user group enjoys as a whole.

In terms of the primary reason for coming to Downtown Boulder, three motivations continue to be quite important: ***hanging out/enjoying the ambiance/people watching, shopping, and eating a meal***.

A particular shift from last year was an ***increase in the proportion that said their primary reason for coming downtown was shopping***, up to 21 percent from 15 percent a year ago. Hanging out remained the most popular primary reason, at 27 percent, while coming downtown for a meal slipped to 18 percent.

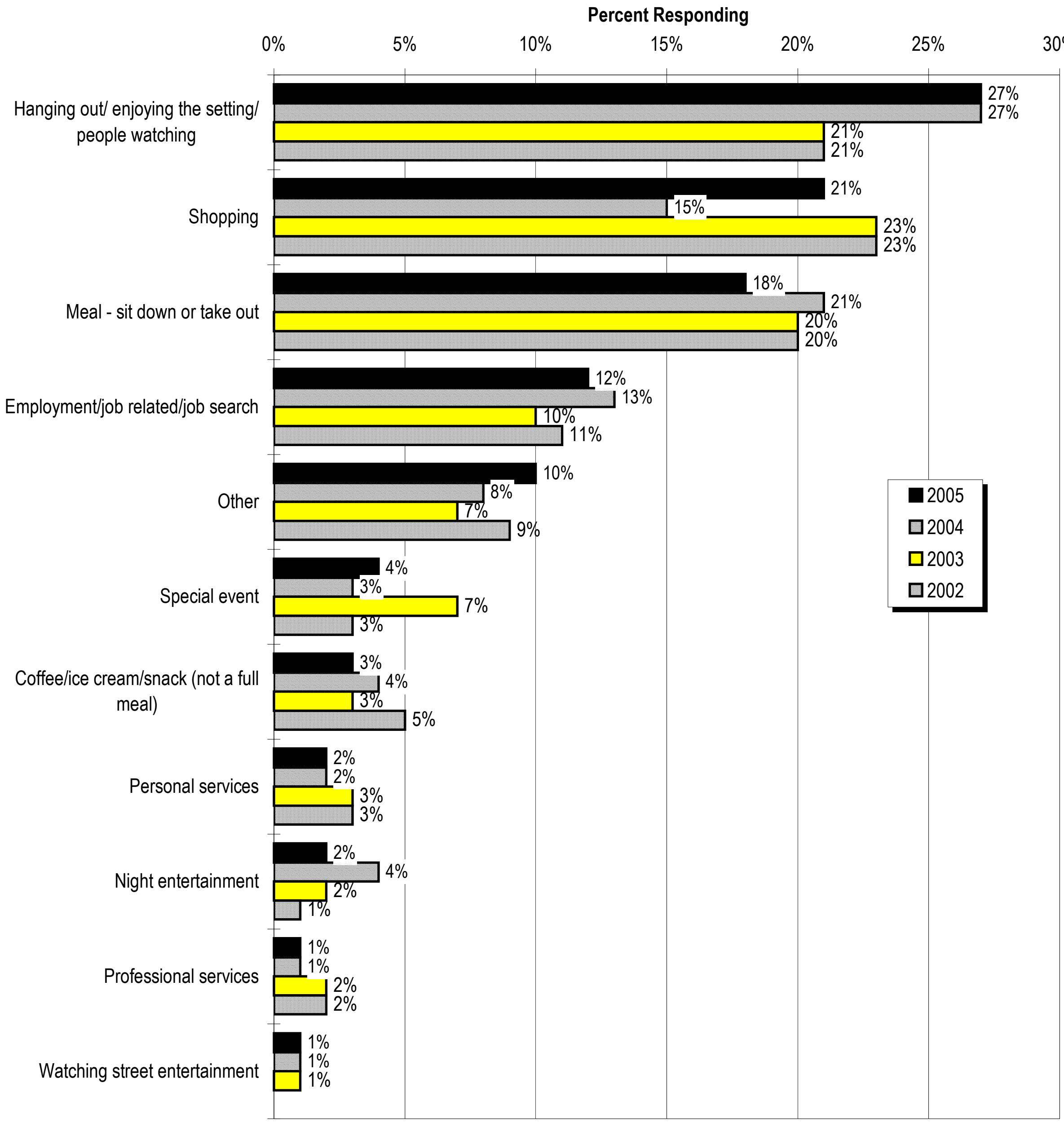
A fourth primary motivation was employment or job related reasons, which declined slightly to 12 percent, within the range of 10 to 13 percent observed in the last couple of years. Clearly, employees downtown represent an important user group.

Other less important ***primary*** reasons include a special event (4 percent, up from 3 percent last summer), coffee/ice cream/snack (3 percent, down from 4 percent), personal services (2 percent, flat), night entertainment (2 percent, down from 4 percent a year ago), professional services (1 percent, flat), and watching street entertainment (1 percent, flat). Some of these activities are important reasons to come to Downtown Boulder, but are not typically cited as the ***primary*** reason for coming.

Ten percent cited an "other" reason for coming downtown today. These responses were quite varied, and, among residents, included reasons such as meeting friends, bringing out of town guests, playing in the kids area/fountain, watching the Jennifer Garner movie, and other personal reasons. Out-of-county visitors also had diverse "other" reasons, such as seeing the downtown area, letting the kids play in the fountain, reading a book, and other reasons.

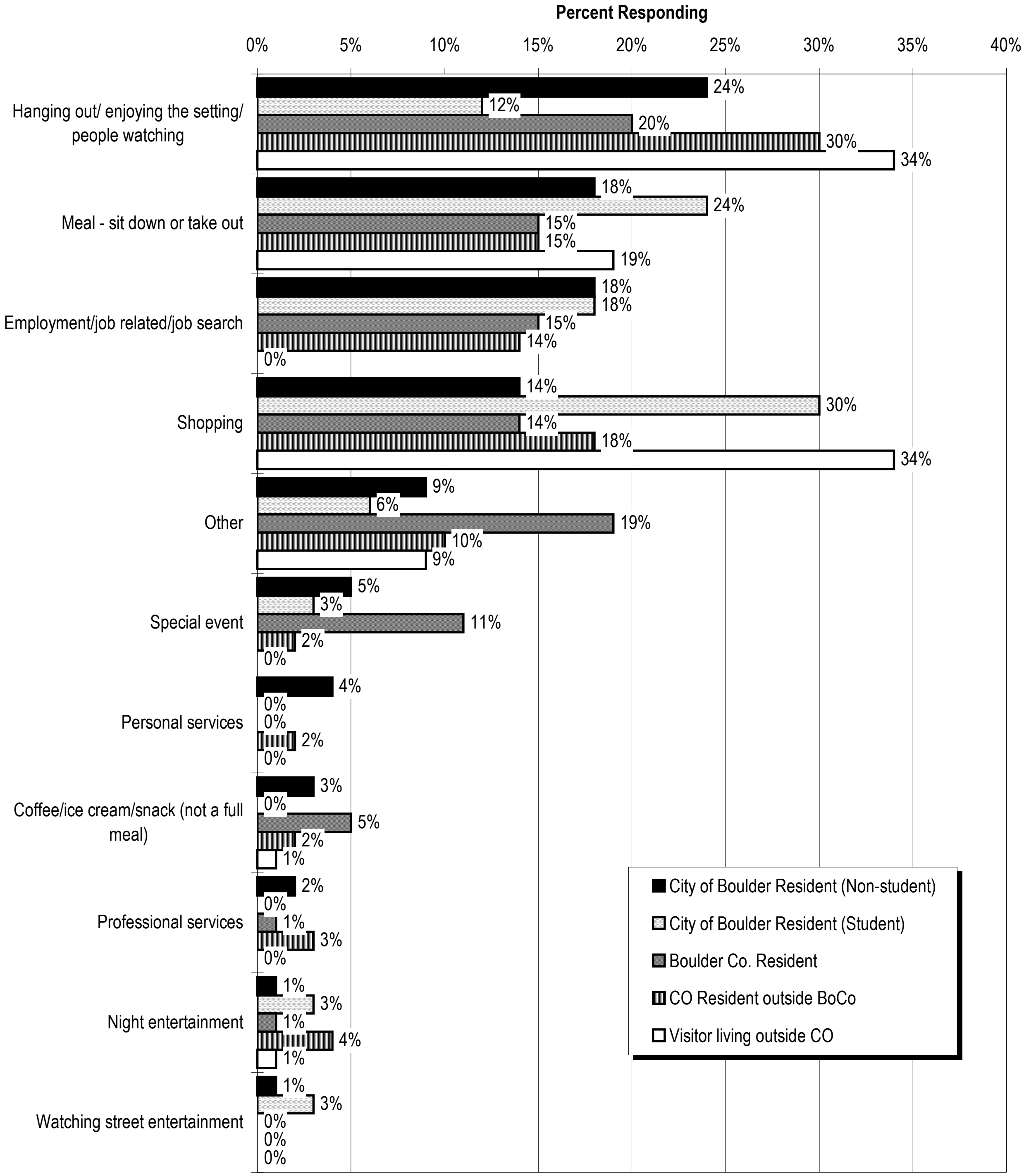
The chart to follow illustrates the patterns of response over the past four years for the ***primary*** reason people gave for coming downtown.

FIGURE 13A
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY



Some distinct difference are noted when local residents and out-of-county visitors are segmented in response to the primary reason for coming downtown today. In particular, out of state visitors are much more likely to say that shopping and hanging out/enjoying the setting were the primary reason for visiting. Job/employment reasons were important for City and County residents; in fact, for both these user groups, work-related reasons outpaced shopping as the primary reason for coming downtown (34 percent each). Students are most likely to come downtown for shopping, and less likely to be primarily hanging out and enjoying the setting. County residents are particularly likely to be visiting primarily for a special event.

FIGURE 13B
PRIMARY REASON FOR COMING TO DOWNTOWN BOULDER TODAY
BY 2005 VISITOR TYPE

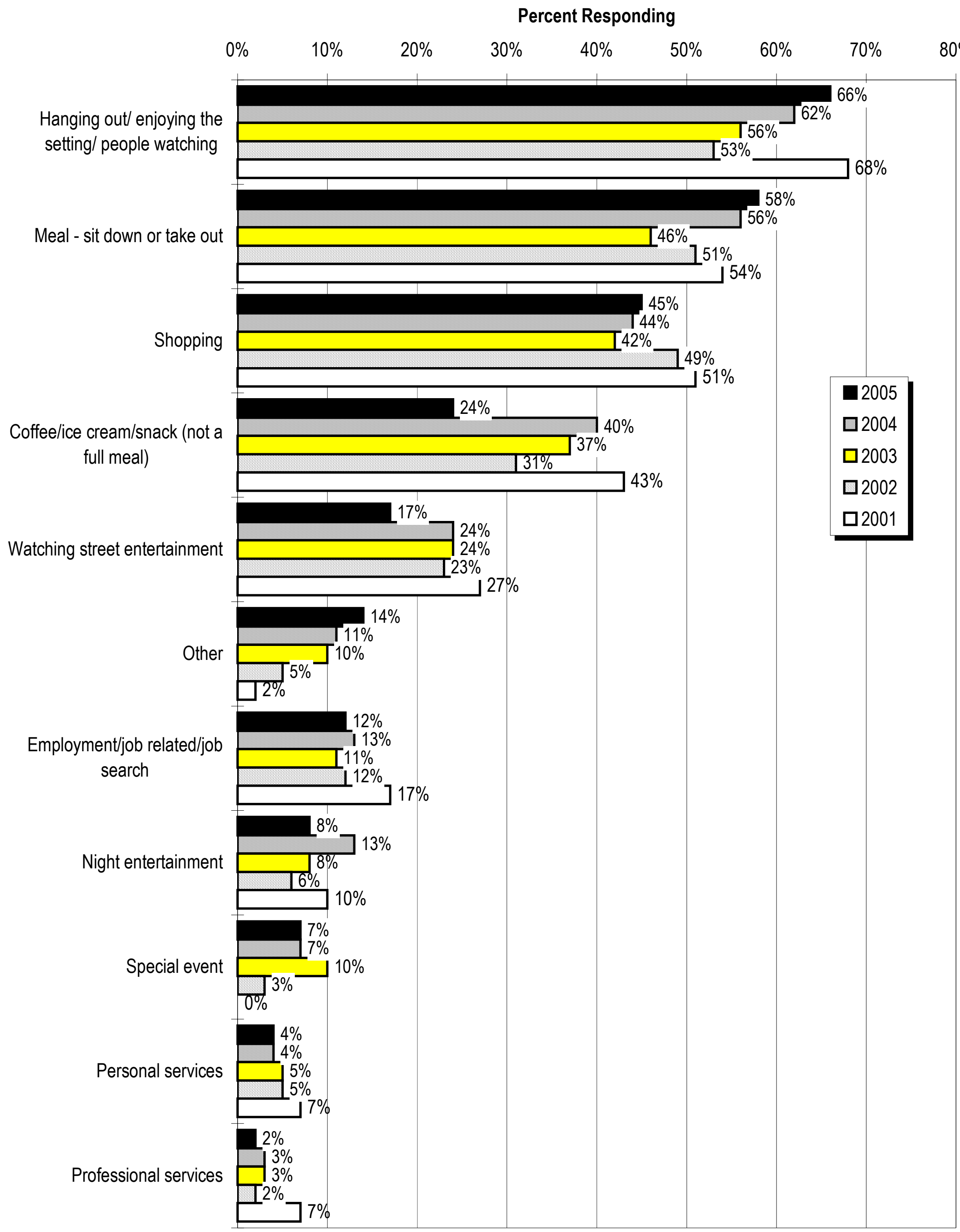


A follow-up question asked what ***other*** activities (besides the primary reason for visiting) the interviewee was doing while downtown. When the responses to this question were added to the primary reason question, the results show ALL the activities the respondent was doing downtown.

Hanging out/ enjoying the setting was the top overall activity, with 66 percent of all respondents indicating that they were hanging out during their visit. Eating a meal was also widely popular (58 percent), followed by shopping (45 percent). Only 24 percent indicated they were saving a coffee/ice cream/snack, down noticeably from 40 percent last year. Overall, 17 percent said they were watching street entertainment, and 12 percent were participating in employment or job-related activities. No other activity captured more than ten percent of the user mix in terms of participation.

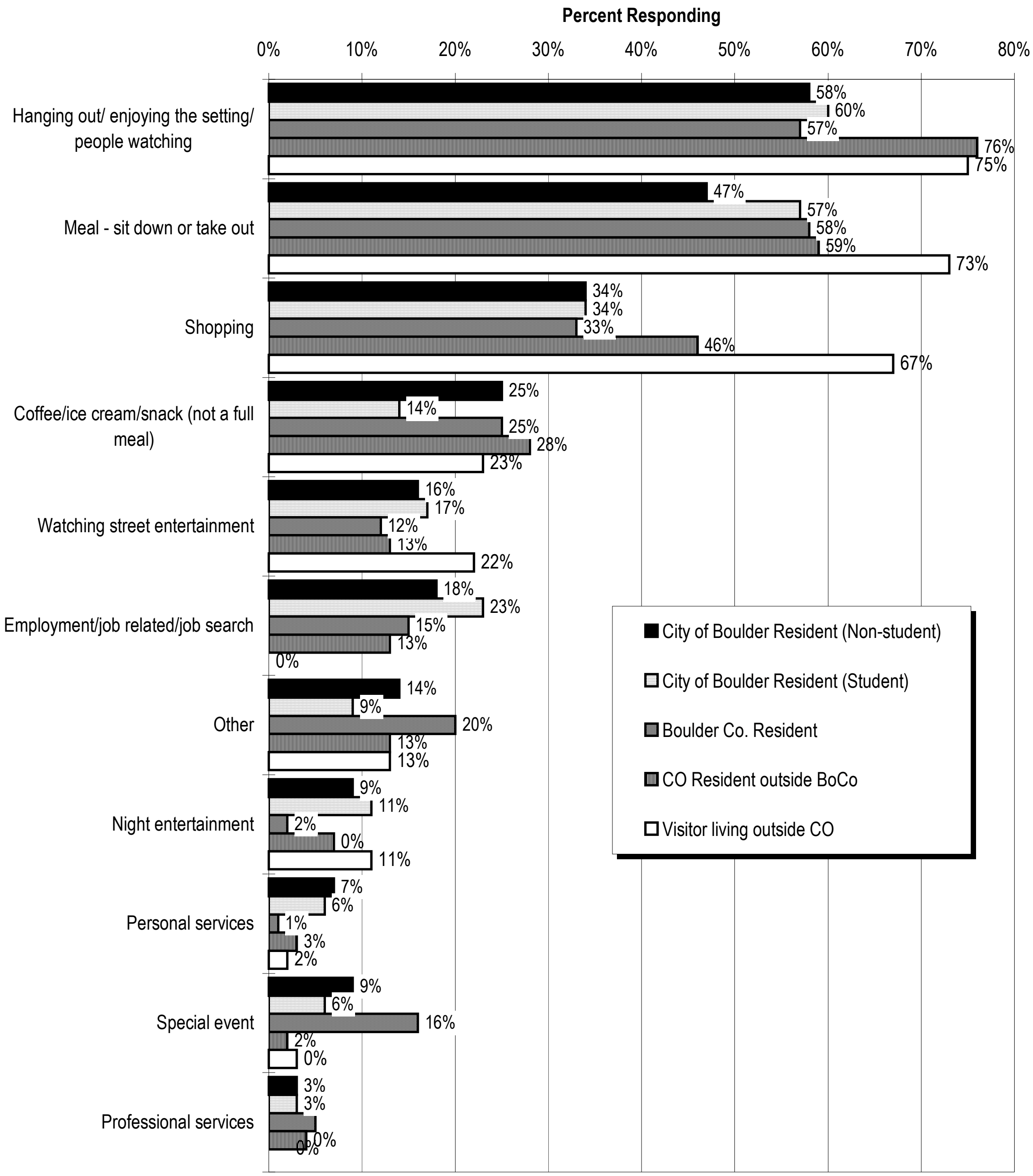
Overall, 8 percent were downtown for night entertainment, 7 percent for a special event, 4 percent for personal services, and 2 percent for professional services.

FIGURE 14A
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
2001 TO 2005



The participation in ALL activities was also segregated by visitor type. This segmentation allows for an understanding of what the various visitor groups are doing downtown; the results generally parallel the primary reason for visiting Downtown Boulder discussed above. That is, visitors outside Colorado are more likely to be participating in a greater number of activities, especially hanging out/ enjoying the setting, eating a meal, and shopping. Boulder City and County residents are much less likely to be shopping, but eat a snack with about the same frequency as out-of-town visitors.

FIGURE 14B
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
BY 2005 VISITOR TYPE



GENERAL RATINGS OF THE DOWNTOWN EXPERIENCE

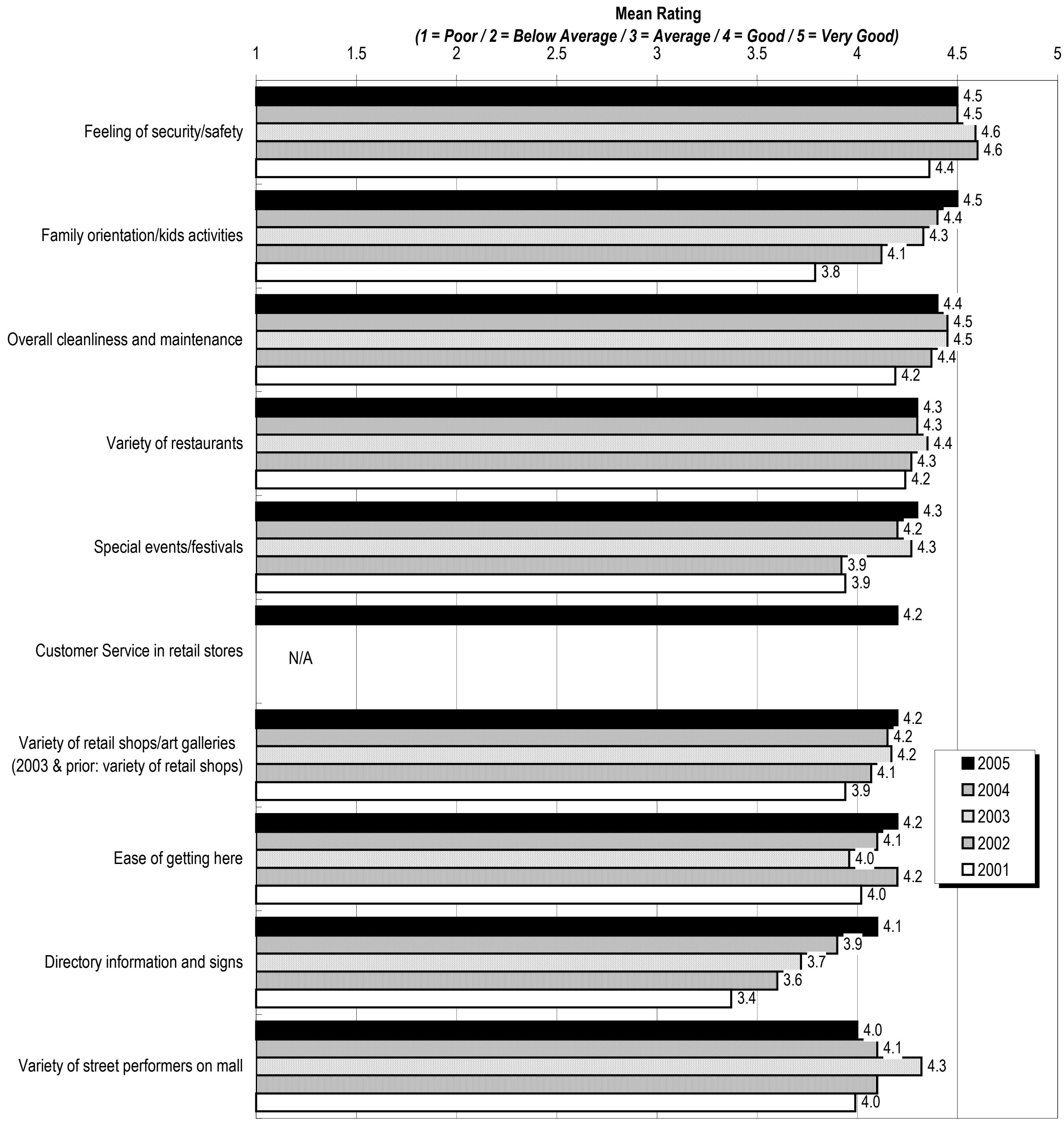
An important and ongoing part of the research downtown is rating the level of satisfaction with various aspects of the experience. The monitoring and tracking of the satisfaction with the downtown experience is important to understand the strengths and weaknesses of the area, and to identify trends over time related to user satisfaction. It also provides a sense of the overall impression of the downtown and of how users perceive the downtown, which allows for an effective and cohesive marketing plan for the downtown area.

These satisfaction ratings have been tracked each year in the research program. Respondents were asked to rate the aspect on a five-point scale, with one representing “poor,” three representing “average,” and five representing “very good.” A few ratings attributes were dropped from the survey this year in an effort to streamline the flow of the questionnaire.

The ratings in general remained quite good again this year; in fact, ***most attributes exhibited stability or improvement over already-high 2004 scores*** (some did decline, however). The feeling of safety and security, family orientation/kids play areas, and overall cleanliness and maintenance were the top rated attributes, while continued improvements were noted for family orientation/ kids activities, ease of getting here, and directory information/ signs. Some other patterns or findings of note are mentioned below.

- ***Feeling of safety and security*** was stable at 4.5, making it tied for the top rated attribute. The importance of safety and security for the downtown user group is very high, and the result of this question indicates that the users feel positively about this issue.
- Continued improvement in ***family orientation/ kids activities*** helped this attribute leapfrog to the number two spot, replacing overall cleanliness and maintenance. Averaging 4.5 in 2005, this category has shown steady improvement over the past four years.
- ***Overall cleanliness and maintenance*** dropped slightly, to 4.4 from 4.5 each of the past two years. This minor decline should be noted, but is probably not a major cause for concern.
- The satisfaction with the ***variety of restaurants***, long a strength of Downtown Boulder, was stable at 4.3.
- A new category on the ratings section, ***customer service in retail stores***, averaged 4.2, a very good score. This attribute will continue to be monitored in future downtown surveys.
- Also averaging 4.2 was the ***ease of getting here***, a slight improvement from last year’s 4.1 and 4.0 two summers ago.
- Continued improvement in ***directory information/signs*** is seen in the results, with an average score of 4.1, up from 3.9. In the past, this report has suggested that directional signage and maps be improved downtown, and the Downtown Boulder Inc group should be lauded for placing focus on this aspect of the experience.
- The ***variety of street performers*** on the mall averaged 4.0 out of five, down slightly from 4.1 a year ago. Because of improvements in other categories, the variety of street performers is now the lowest rated attribute on the survey.

FIGURE 15
GENERAL RATINGS OF THE DOWNTOWN EXPERIENCE
2001 TO 2005



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 free entertainment, better family-friendly events, more street performers, and more local stores. Some sample comments include:

Bring in more shops!
Continue to promote it, keep up the nice landscaping
Encourage street performers to continue - a very big attraction
I would like to see more family friendly events
Would love Trader Joe's to be here, more independent stores, add an Ikea, unique stores
Try to keep nostalgic look. Keep old facades, like locally owned businesses.
Stronger regulations against loud drumming; give jobs to homeless people cleaning up parking lots/garages
Signage to surrounding streets around Pearl. Expanding the landscaping to include Walnut & Spruce.
Public restrooms on west end of mall would be nice. Love downtown, makes it nice to live in Boulder. Always bring visitors here.
Poor social dynamic - lack of vitality, movement, action between people. Lack of variety and diversity of people. Penny Lane closed - sad - represented Boulder flavor now gone.
More space for entertainers plus awnings for them
More locally owned stores, more unique stores, fewer chains
More free concerts with local bands, drinking fountains, free transportation, encourage outdoor seating areas, less construction
Miss the local stores that have been pushed out
Landscaping is excellent. Art galleries all out of business.
Hard to drive downtown
Don't like traffic so don't come
Continue to keep it clean and secure
Clean up potential violence, drunkenness and panhandlers. Would like to see performers in addition to music.

Suggestions from Visitors

Visitors tended to focus on slightly different issues, including providing better directional signage to the downtown area for those driving into town, more street performers, and improving the cleanliness of the area. Also, several positive comments noted what a great place Downtown Boulder is to visit.

A little more safety within the restrooms
Don't have enough signs directing people to downtown Boulder (Pearl St.)
Keep police officers by the kids' play areas
More special events, esp. art fairs; better information on restaurants for people outside of Boulder - I listen to restaurant shows, but they only deal with Denver (1460 radio station)
Put price cap on parking garages
Would like to see more local stores. It retains flavor.
Water fountains, sinks more available
Not that many street performers this time. Younger crowd of homeless around.
More cuisine options - African, Spanish, Thai, Brazilian

Improve public transport; more upmarket stores
Courthouse area, lots of transients. Art galleries leaving area.
Clean the mall better. Need more street performers during week especially during tourist season.
Big improvement in restaurants, feels safer and more pleasant for families
Always enjoy visiting Boulder
More international restaurants, high quality fresh food, seafood
Need signs to show way to downtown and to parking

PANHANDLER QUESTIONS

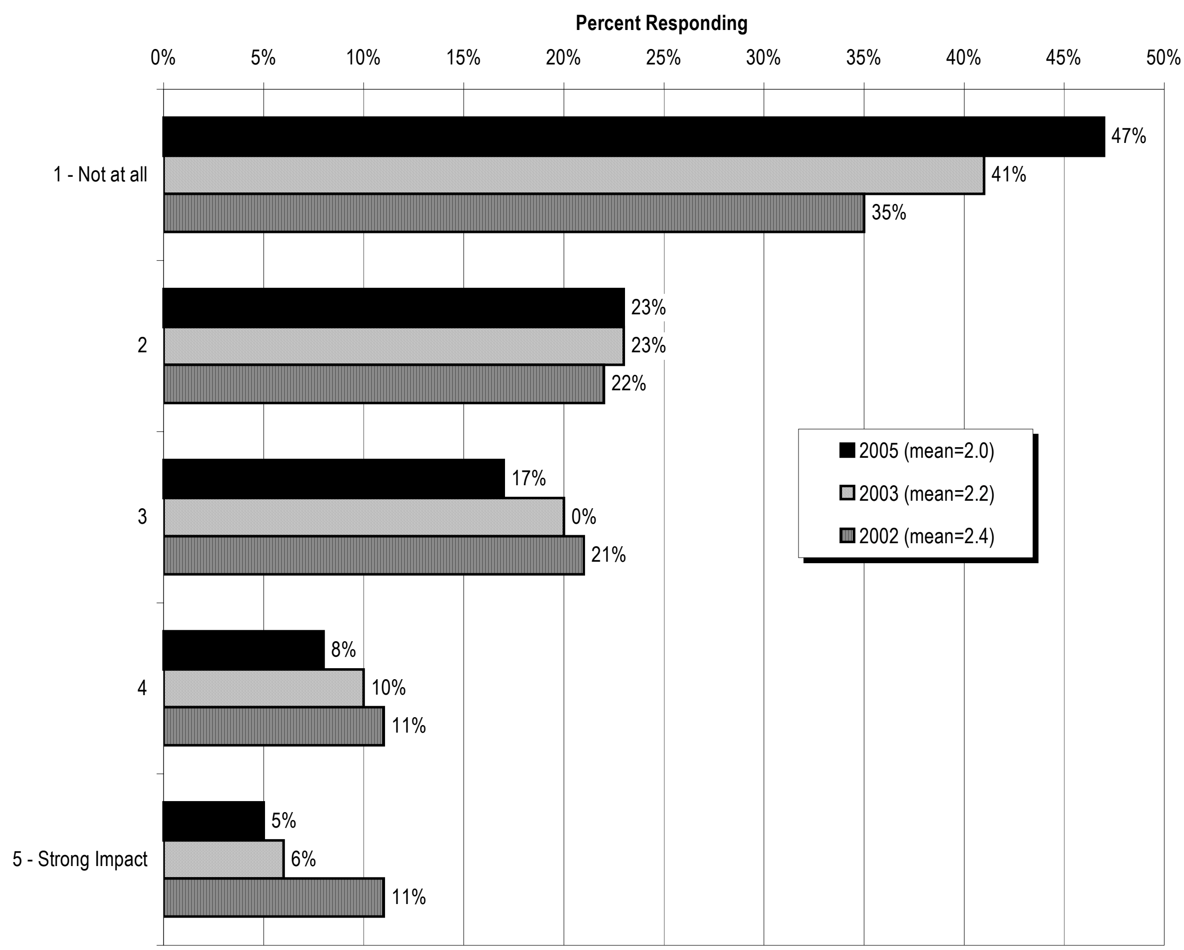
Two questions were added to the survey this summer to gauge the public's reaction to the situation with panhandlers and homeless people in Downtown Boulder.

Impact on Your Experience

A question that was asked in 2002 and 2003, but dropped in 2004, was re-introduced to the 2005 survey form. The objective was to try to measure the impact that the behaviors of these individuals have on the downtown users. The question was phrased, "On a scale from one to five, to what degree to the activities or behaviors of panhandlers or transients impact your experience or enjoyment downtown?" The scale used was one meaning, "Not at all" and five meaning, "Severe impact."

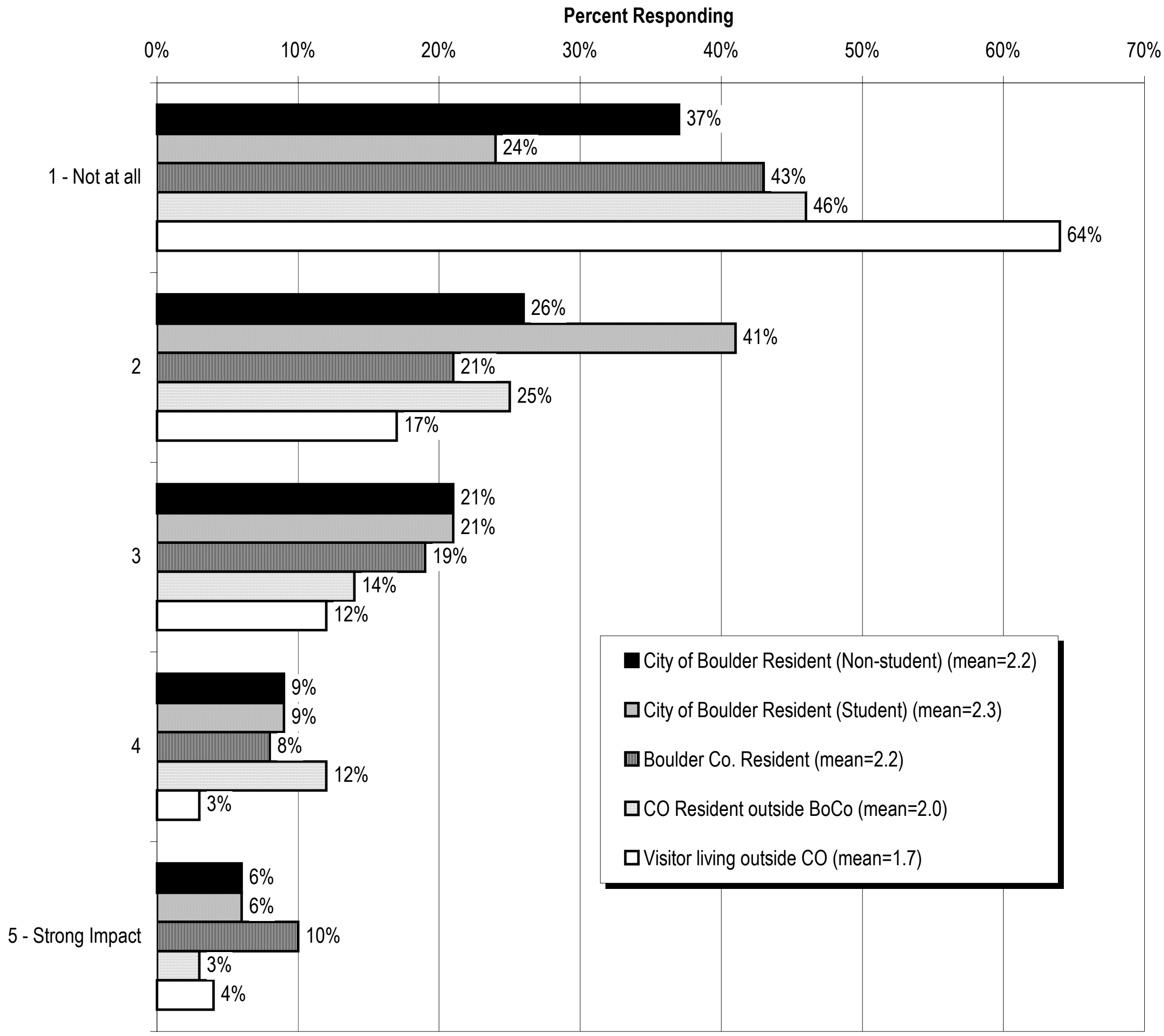
The results clearly showed that the behaviors have little or no impact on the enjoyment of the experience, and also show a much-improved result compared to 2002 and 2003. This year, 47 percent indicated that the behaviors and activities had no impact at all on the enjoyment of their experience, up from 41 percent in 2003 and 35 percent in 2002. The average has fallen from 2.4 in 2002 to 2.0 this year.

FIGURE 16
IMPACT OF PANHANDLER ACTIVITIES/BEHAVIORS ON YOUR ENJOYMENT DOWNTOWN
2002, 2003, 2005



Looking at the results by the residence of the visitor, a pattern that was observed in past years is again true in 2005: out of town visitors indicate far less impact on their experience from panhandlers compared to residents of the area. Overall, 64 percent of out-of-state residents indicated that there was no impact on their experience. Still, even local residents appear to have little problem with the behaviors and activities of panhandlers in the downtown area.

FIGURE 17
IMPACT OF PANHANDLER ACTIVITIES/BEHAVIORS ON YOUR ENJOYMENT DOWNTOWN
BY 2005 VISITOR TYPE



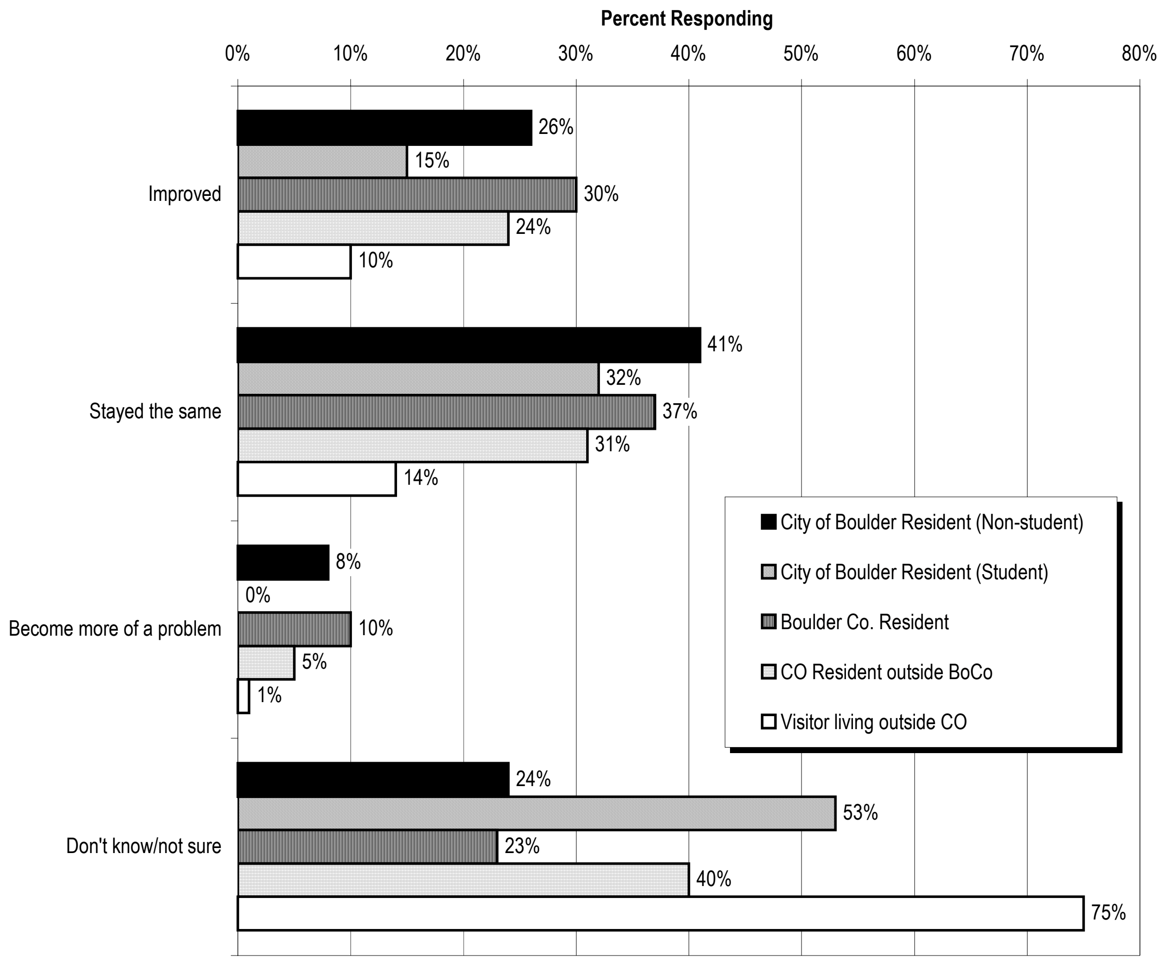
Situation Improving or Declining

A new question was added this year that asked about the situation over the past several years. Overall, most people say the behaviors and activities of panhandlers have either stayed the same or improved over the past two years, while only a few say that it has become more of a problem.

Thirty-one percent said they think the panhandler situation has stayed the same over the past two years, while another 21 percent indicated that the situation has improved over that timeframe. Only 6 percent feel that the panhandler issue has become more of a problem over the past two years. The remaining 42 percent said they didn't know or had no opinion. It seems clear from this feedback that the situation is stable or improving, a finding that is an important one from this research project.

In the graph below, the patterns of response are presented by the user group. The City (non-student) and County resident groups are most likely to say that the issue has improved over the past two years – 26 and 30 percent, respectively.

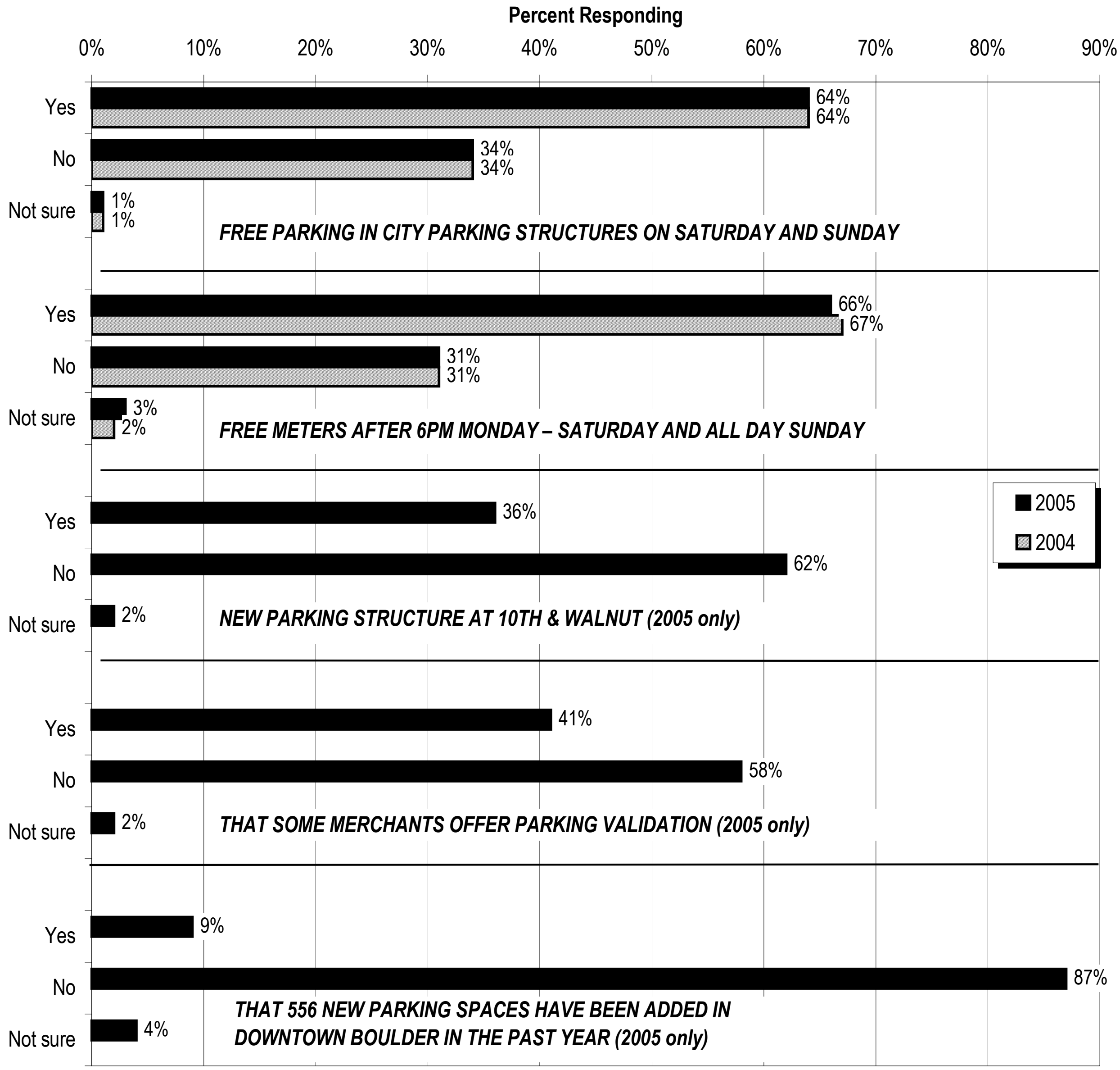
FIGURE 18
OVER THE PAST TWO YEARS, HAVE THE ACTIVITIES/BEHAVIORS OF PANHANDLERS IN DOWNTOWN BOULER: ?
BY 2005 VISITOR TYPE



PARKING ISSUES

Respondents were asked about their level of awareness of a variety of parking alternatives and parking-related facts. In general, the awareness is relatively high for free parking in City structures on the weekends and free parking at meters after 6pm Monday to Saturday and all day Sunday. The graph below illustrates the patterns of response for all respondents, including out of towners.

FIGURE 19
AWARENESS OF FREE PARKING ALTERNATIVES IN DOWNTOWN BOULDER



Suggestions to Improve Parking

Respondents were asked for suggestions to improve parking in the downtown area (other than free parking or more parking). Results are presented below by whether the survey participant was a Boulder City/County resident or from outside the county.

Comments from Residents

Residents focused on a couple of general areas for improvement to parking: more free hours for parking (such as Friday nights in the garages or two hours free), enforcement that is too strict, more security in the garages, and other suggestions listed in the sample comments below.

Cheaper meters
At parking structures offer free parking to carpoolers
Discount at stores for having Eco Pass
Hard to find spaces, enforcement is too strict, rates too high
First 2 hours should be free
Too many tickets - where is the grace period??
Seems better than 5 years ago
Parking structures should be free Friday nights too
More larger vehicle parking spaces needed
Need security in parking structures so you feel safe parking there
Maybe a shuttle to mall

Comments from Visitors

Input from visitors included suggestions to improve the signage to the parking areas and to do a better job of advertising and merchandizing the parking validation program.

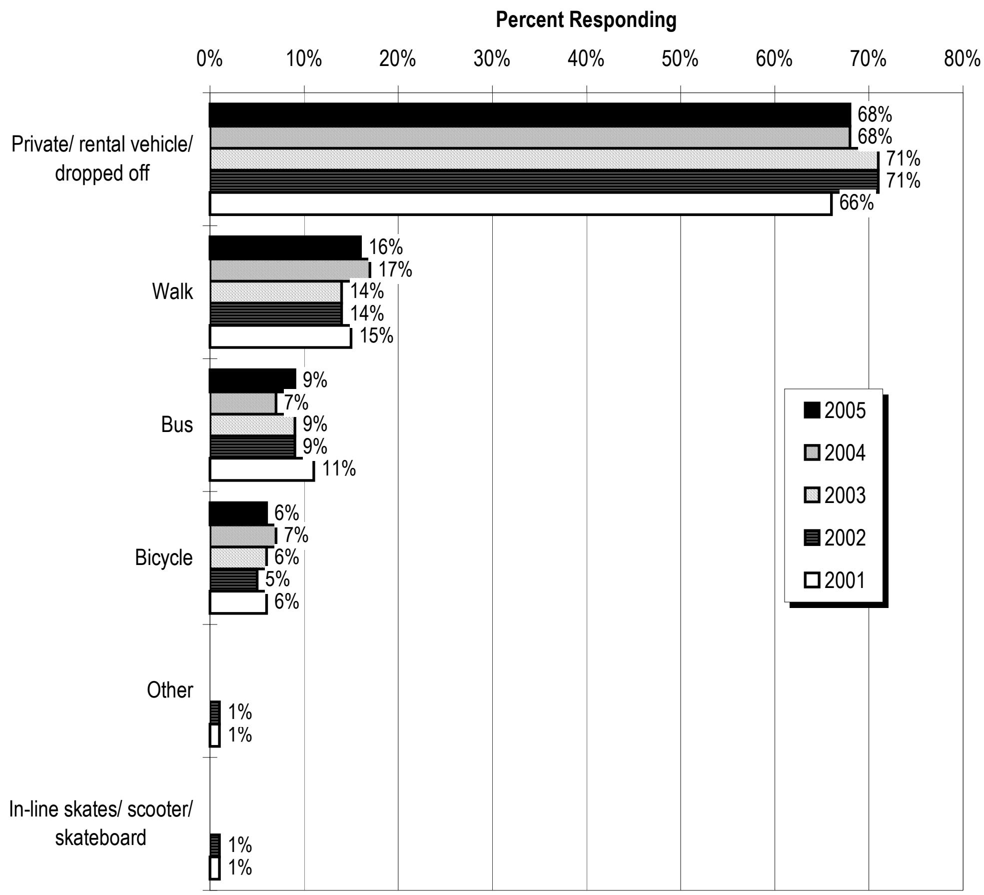
Always spends a lot of time looking for a spot
Wouldn't like to see any more parking lots
Signs are hard to see, trees overgrown
Set up shuttle buses from parking lots on outskirts
Pricing for parking is bizarre - gets expensive if you want to spend more than 3 hours - (which you do) if a tourist!
Parking not a problem on Sunday
More specific directions to parking facilities
Make parking validation better known and signage more visible for parking structures
More liberal meters
Finding the parking entrance was confusing, automated change machines
Don't like meters - have to run back to plug them
Didn't have a problem parking. Meters too expensive.
City bikes that people could use
Better signage
Advertise merchant validation

TRANSPORTATION DOWNTOWN

The proportion of mall users who used a personal vehicle to get downtown was stable at 68 percent. This stability is partly reflective of the stability in the makeup of the various user groups (city residents, county residents, visitors, etc).

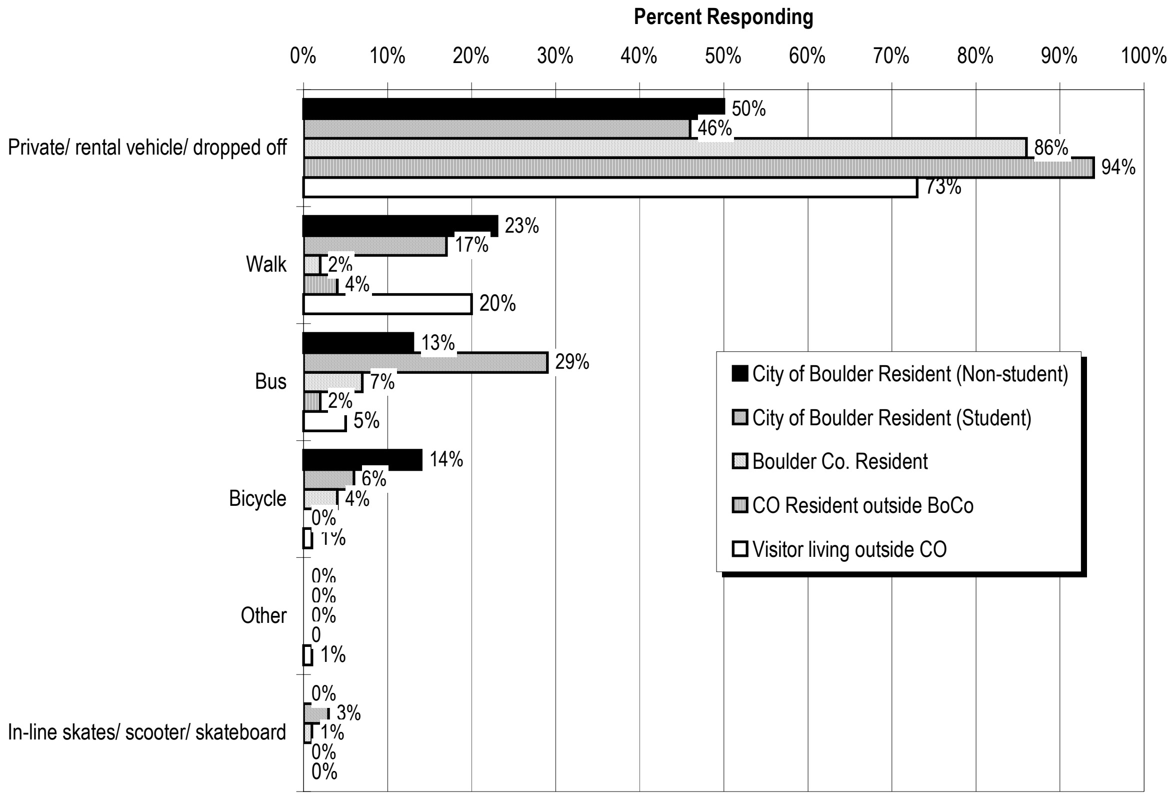
Other modes of transportation downtown include walking (16 percent, down from 17 percent), riding a bus (9 percent, up from 7 percent), and riding a bike (6 percent, down from 7 percent). Each of these modes of transportation has been relatively stable over the past five years, as seen in the graph below. The proportion taking the bus had been slipping, but rebounded this year after a low of 7 percent in 2004.

FIGURE 20A
MODE OF TRANSPORTATION DOWNTOWN
2001 TO 2005



When the results are segmented by the visitor type, some more interesting patterns emerge. Only half of City residents (non-students) reported driving to the downtown area, while the majority of students used non-personal car transportation. These two groups are the most likely to utilize alternate modes of transportation to reach the downtown area. Overall, among City non-students, 50 percent drove, while 23 percent walked (down from 25 percent), 14 percent rode a bike (down from 15 percent), and 13 percent took the bus (down from 11 percent). Forty-six percent of City students drove a car, while 29 percent took the bus, 17 percent walked, and 6 percent rode a bike. Those who live outside the City tend to drive their car to reach the downtown area.

FIGURE 20B
MODE OF TRANSPORTATION DOWNTOWN
BY 2005 VISITOR TYPE



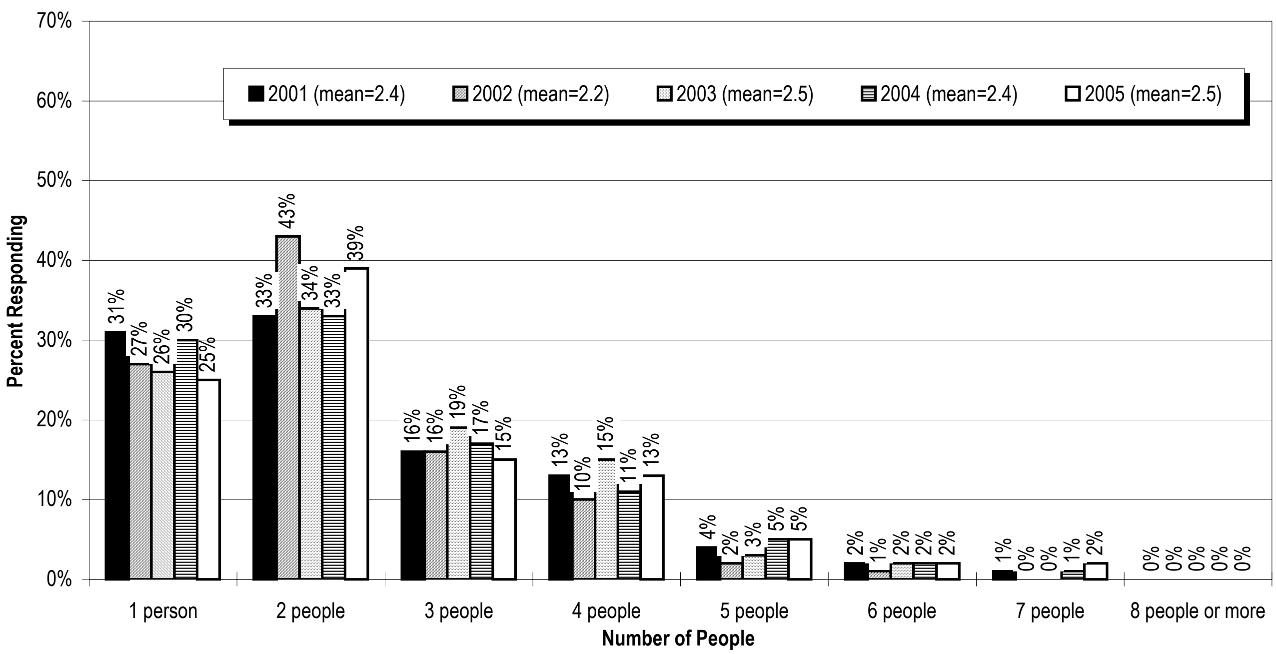
Personal Vehicle

Those who drove a personal vehicle were asked how many people came in their car, where their car was parked, and if they owned a parking permit. The proportion that said they drove alone dropped this year to 25 percent, the lowest percentage of single car vehicles recorded in the ten-year history of the research. As a result, the average number of people in the car increased to 2.5 this year from 2.4 last year.

As well, 39 percent drove with one other person (two total), up from just 33 percent last year. A smaller proportion than in the past was driving with three people total (15 percent, down from 17 percent), though the percentage with four people in the car increased (13 percent, up from 11 percent). Nine percent said five or more came in their car, up from 8 percent last year.

The median number of people per car remained 2, consistent the past

FIGURE 21
INCLUDING YOURSELF, HOW MANY PEOPLE CAME IN YOUR CAR? (CARPOOLING PATTERNS)
2001 TO 2005

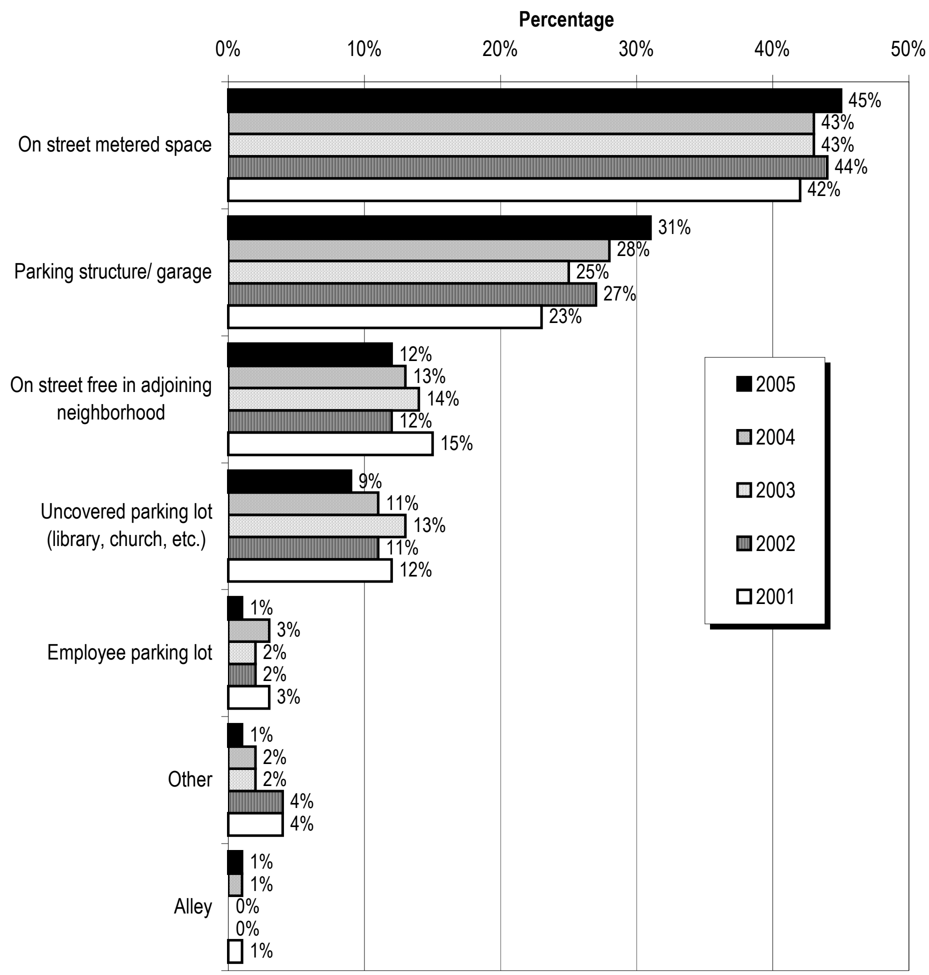


In terms of where people parked when they drove downtown, more people are parking in metered spaces and garages, and fewer are parking in alternate locations. The on-street metered space remains the most popular place to park, with 45 percent of drivers indicating that they parked at a meter (perhaps this popularity helps to explain some of the complaints about the aggressive enforcement at the meters – the more people that park there, the more complaints will be generated). Also, parking structures continue to increase in popularity, with 31 percent of drivers parking in a garage.

Compared to past years, fewer indicated that they parked in other locations, including on street free in an adjoining neighborhood, at an uncovered parking lot (such as a church or library), or an employee parking lot.

The following graph shows the historic patterns of parking in the downtown area.

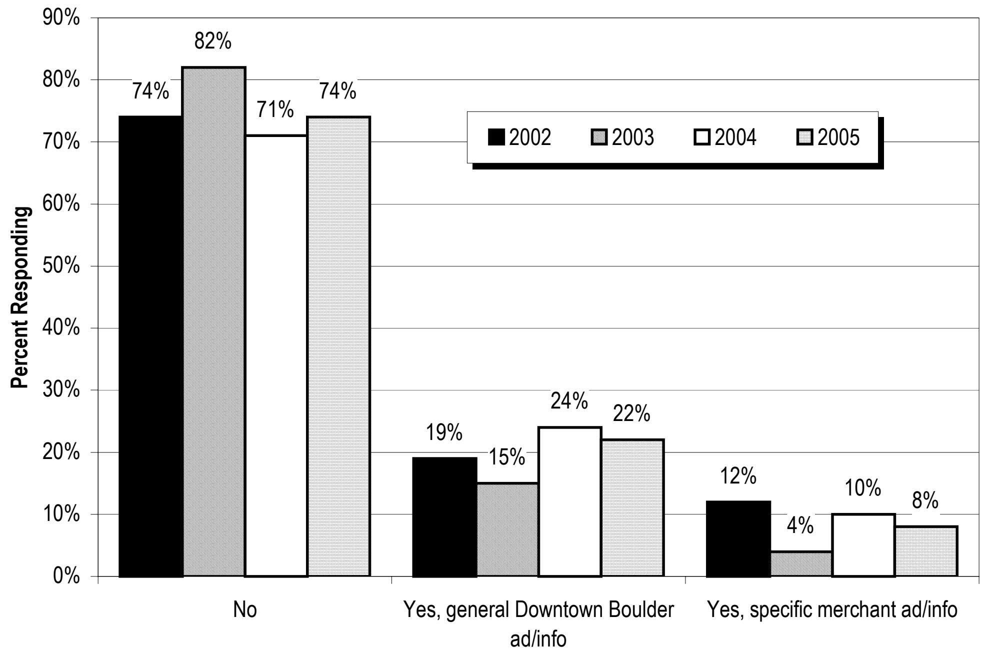
FIGURE 22
LOCATION OF PARKED VEHICLE
2001 TO 2005



ADVERTISING AWARENESS / WEBSITE USEAGE

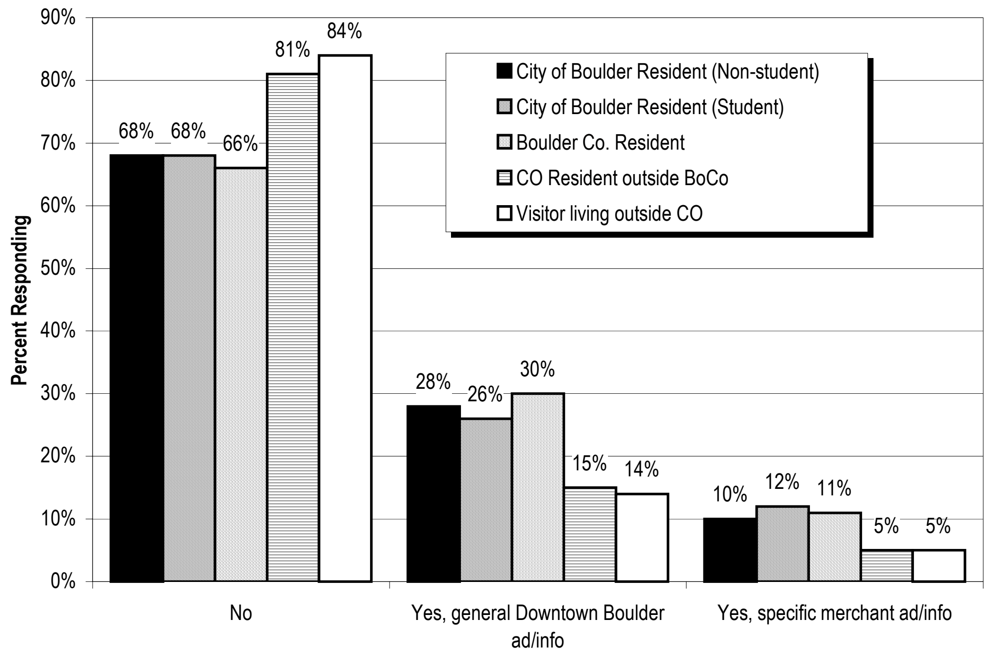
Advertising recall was off slightly this year. Overall, ***22 percent said they saw an ad or information source for Downtown Boulder*** prior to their visit (down from 24 percent a year ago). Additionally, another 8 percent said they saw an ad for an individual downtown merchant (down from 10 percent). In total, 26 percent saw some type of advertising prior to their visit, while the other 74 percent did not see any ads.

FIGURE 23A
ADVERTISING AWARENESS
2002 TO 2005



Awareness of the Downtown Boulder ads was highest among City residents (both non-student and student), with about three in ten indicating that they saw an advertisement prior to their visit. Similar recall is observed for residents of the County. On the other hand, out of towners are less likely to have seen an ad for either Downtown Boulder in general or for a specific downtown merchant.

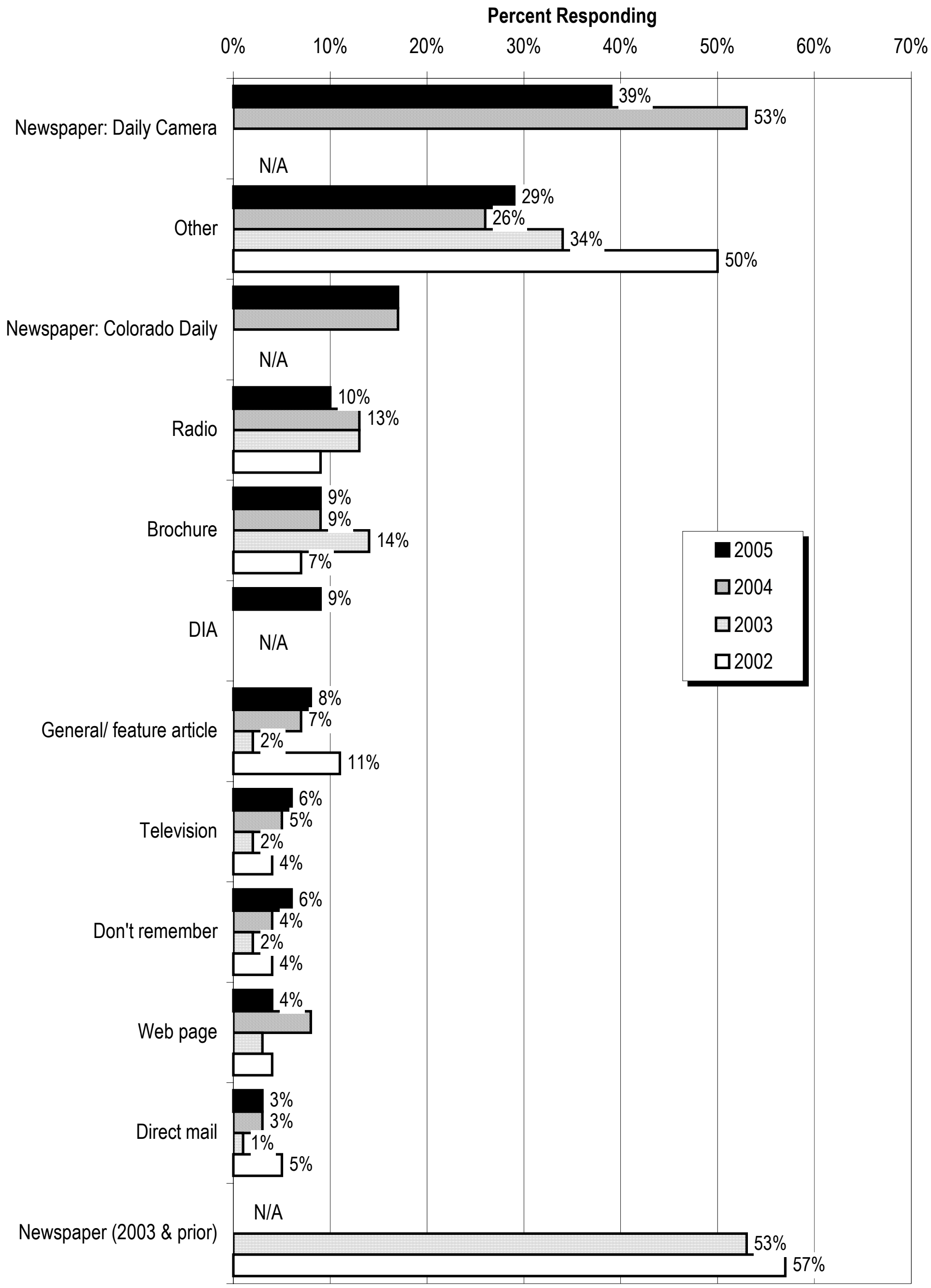
FIGURE 23B
ADVERTISING AWARENESS
BY 2005 VISITOR TYPE



Among those who saw an ad or information source for Downtown Boulder, ***39 percent saw a Daily Camera ad and 17 percent saw an ad in the Colorado Daily***. As well, 10 percent heard an ad on the radio, 9 percent saw a brochure, and 9 percent saw the ads at DIA. Another 8 percent indicated seeing a general or feature article about Boulder, whereas 6 percent saw a television ad

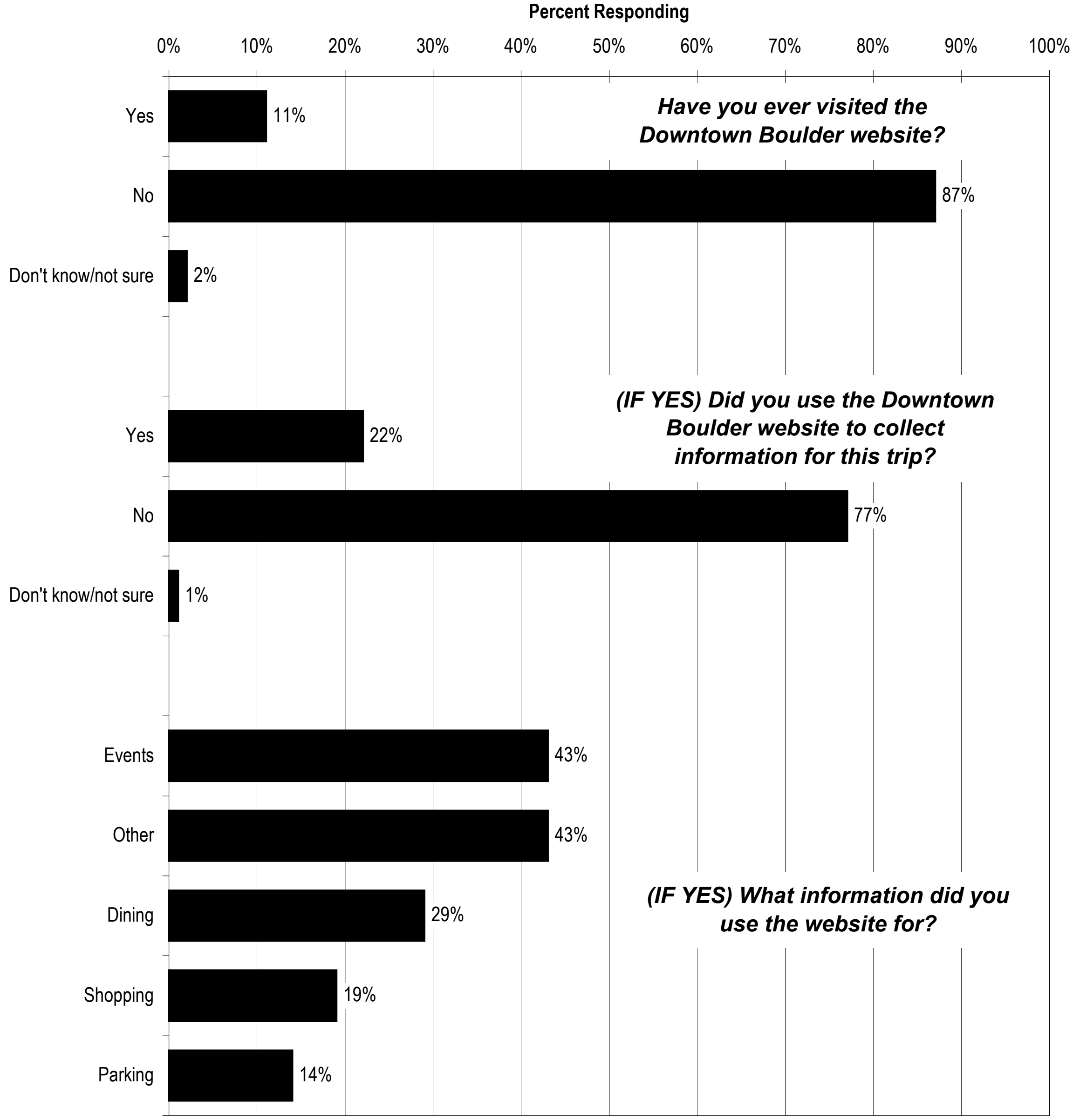
Twenty-nine percent cited an “other” advertising source. Examples types of advertising people mentioned from this question include the Boulder Weekly, bus panels, Dirt, Boulder Magazine, Rocky Mountain News, and other sources.

FIGURE 24
RECALL OF SPECIFIC ADVERTISING SOURCES



A couple of new questions were added regarding the use of the Downtown Boulder website. Eleven percent of all downtown users have visited the Downtown Boulder website in the past. Of those, 22 percent said they used the website to collect information for this trip downtown. The most popular types of information people collect on the Downtown Boulder website are information about events, followed by dining, shopping, and parking. "Other" information people use the website for include general information, happy hour information, and directional information.

FIGURE 25
DOWNTOWN BOULDER WEBSITE INFORMATION



SPECIAL EVENTS/ CONCERTS/ FESTIVALS DOWNTOWN

For the second year, a question was asked to measure participation in Downtown special events and festivals: "Which activities, concerts, special events, festivals, etc have you attended in Downtown Boulder in the past year?" This question, asked only of City and County residents, was asked in an un-aided manner; in other words, the ***respondent was not prompted or shown the list*** of special events. Rather, respondents had to recall which special events in Downtown Boulder they had attended in the past year. This style of questioning exhibits not only participation patterns, but also how memorable the event actually was.

Results were relatively stable from last year. Overall, the Boulder Creek Festival again had the highest recall, at 49 percent of City and County respondents saying they had attended the festival (up from 49 percent). It seems that if the DBI can attract people to the Boulder Creek Festival in May, there is a high likelihood that they will return to the downtown area later in the summer.

The Farmer's Market was close behind, at 44 percent, making it a very popular event that brings people back to the downtown area later in the summer.

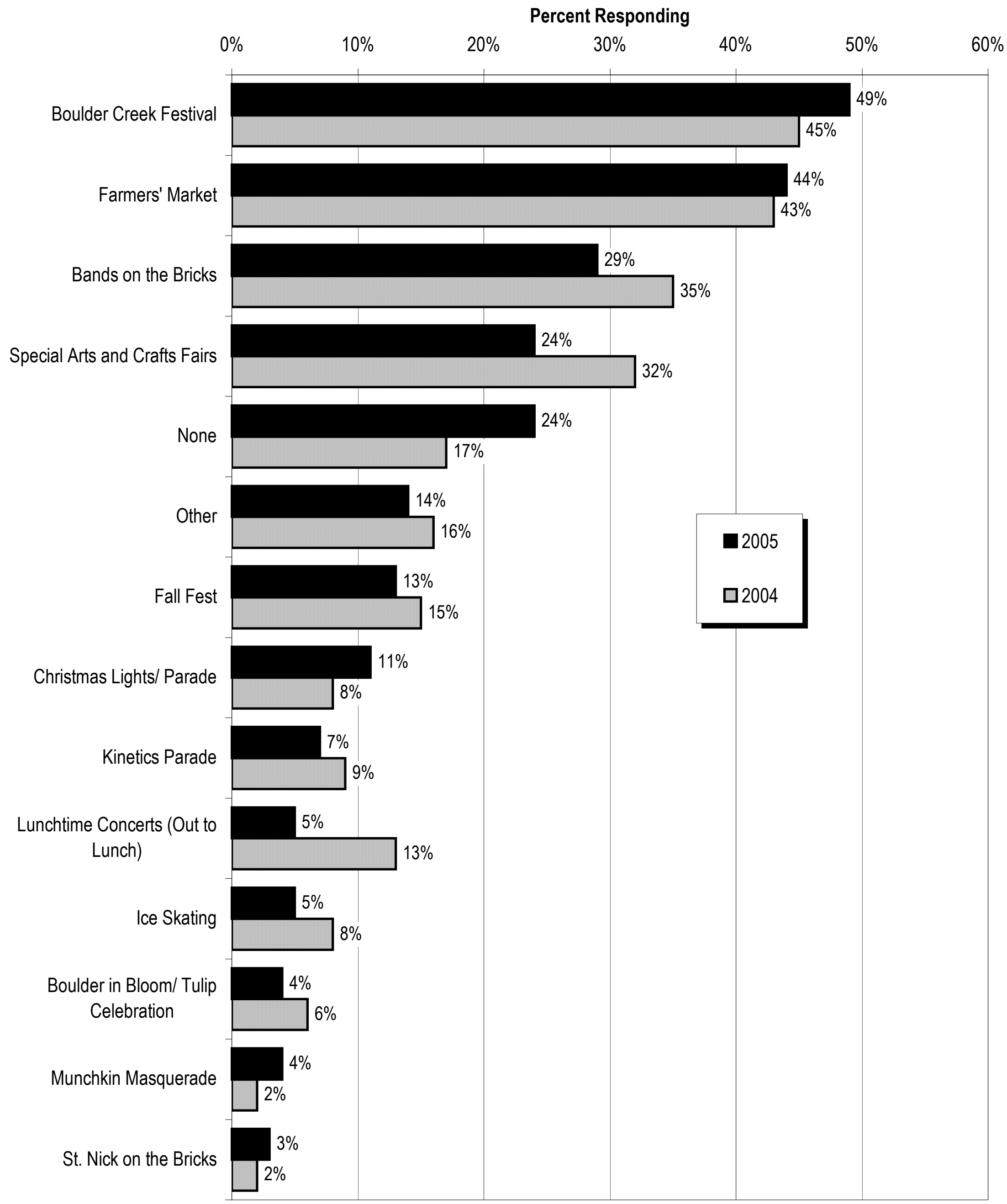
Other important festivals and events include Bands on the Bricks (29 percent had attended, down from 35 percent) and special Arts and Crafts Fairs (24 percent, down from 32 percent).

Much lower recall was observed for Fall Festival (13 percent, down from 15 percent), Christmas Lights or Christmas Parade (11 percent, up from 8 percent), the Kinetics Parade (7 percent, down from 9 percent), ice skating (5 percent, down from 8 percent), Out to Lunch concerts (5 percent, down dramatically from 13 percent), and Boulder in Bloom/The Tulip Festival (4 percent, down from 6 percent). Some of the lower recall might be attributable to the timing of the survey compared to the date of the event; surveys were conducted from mid-June to early September, meaning that, for example, the last Fall Festival was nearly a full year ago when the surveys were administered.

The proportion saying they did not attend any events in the past year grew to 24 percent from 17 percent a year ago. Generally, City of Boulder residents attend special events and festivals with greater frequency compared to their counterparts in Boulder County. Indeed, 31 percent of County residents said they had not attended any special events in the past year, compared to only 19 percent of City residents.

Sixteen percent said they attended an "other" event or festival, including the Jewish Festival, the Asian Festival, West End events, Boulder Outdoor Cinema, and various other events.

FIGURE 26
WHICH ACTIVITIES, CONCERTS, SPECIAL EVENTS, FESTIVALS, ETC.
HAVE YOU ATTENDED IN DOWNTOWN BOULDER IN THE PAST YEAR?



OTHER DOWNTOWN PATTERNS

How Long Have You Been Visiting Downtown Boulder?

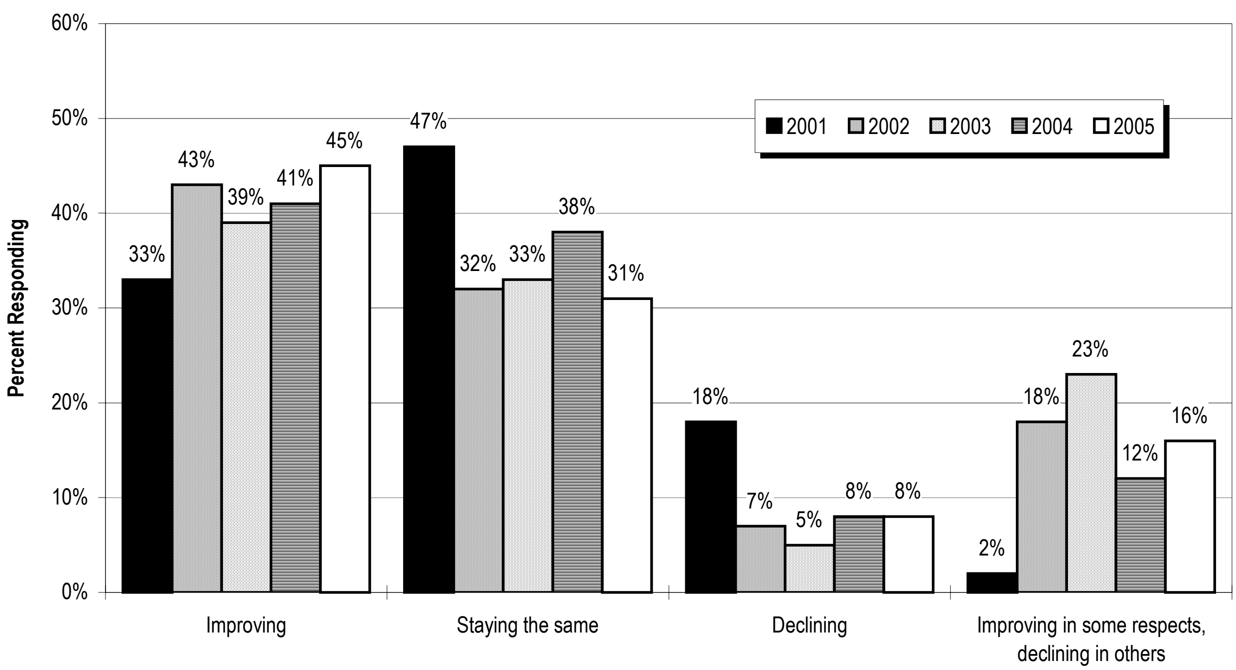
A question asked all respondents how many years they had been visiting Downtown Boulder. Overall, the average number of years visiting is 7.9, up from 7.2 last year and 6.1 the year prior. The primary difference is in the proportion saying they have been visiting for 10 years or more, which grew to 42 percent of all users this year from 36 percent last year and 28 percent the year before. Clearly, the visitor base continues to boast a strong repeat element, and the number of years visiting continues to increase.

Is the Downtown Experience Improving or Declining?

Those who indicated that they have been visiting 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 of this question are positive, with an increasing percentage saying that it is improving.

A higher proportion of respondents said that the overall experience in Downtown Boulder is improving – 45 percent versus 41 percent in 2004 and 39 percent in 2003. On the other hand, only 8 percent said they think the area is declining. An additional 16 percent indicated that the area is improving in some respects and declining in others. This result is quite positive and encouraging for the downtown community.

FIGURE 27
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?
2001 TO 2005



No matter the response, 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. The reader is encouraged to read the entire list of comments in the appendix section.

Comments from Visitors – Quality of Experience is Improving

Comments from visitors about the improvements were varied, generally commenting on better landscaping, more stores, the overall popularity of the area, and other improvements. Some comments are included below to give a flavor of the types of things visitors said about why downtown Boulder was improving.

Appearance of landscaping, less transients causing problems
Better variety of stores
I like the stores and I'm never disappointed when I come
Visually - flowers, unique feel - Colorful Colorado!
See more/different/better businesses/stores
There is better parking
More shops, easier parking, redoing buildings
Like the art, seating and walking areas and street entertainment
Flower beds, landscaping more decorative
Always full of people, seems that it has become more popular

Comments from Residents – Quality of Experience is Improving

Generally, comments from residents were generally focused on the improved homeless situation and the improved level of cleanliness, among other observations. Some comments from residents:

Always something fun to do on Pearl
Cleaned up panhandlers, east side is nicer
Boulder's always trying to make itself better
Fewer hippies, better job with transients, fountains
It gets better - there are more stores and it is kept well
It's gotten cleaner
Less panhandlers, new street performers and kiosks selling different things
Like the landscaping, the older buildings, facades
More fun, panhandlers are less aggressive
Nice restaurants, flowers and art
See people, attractive flowers, eating ice cream
The rock art, the courthouse has less homeless
Visually more pleasing, more to do, children's play area has improved

Comments from Visitors – Quality of Experience is Declining

Both visitors and residents who thought the area was declining noted that the area is becoming gentrified and corporate, and that the unique local shops are closing.

Gentrification, more corporate venues and businesses
Chain stores coming in

Becoming like any other mall. More corporate, lost small town local feel.
Unique shops have moved
Less local ownership, too much corporate, lost its unique feeling the way it was

Comments from Residents – Quality of Experience is Declining

Residents who thought the area was declining had similar feelings about the level of gentrification and loss of the unique feeling of Downtown Boulder

Because of parking tickets. Feels that money goes towards unimportant things in town.
Less funky, more gentrified, too expensive, not as interesting, need more local flavor
Parking, meters, panhandlers
Losing its individuality and less accepting of unique people
There are less trees and grass, less friendly/policed too much
Doesn't have the same atmosphere, is lacking something that it used to have

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