# DOWNTOWN BOULDER SURVEY 2006

## Summary of Results

*October 2006*

Prepared for

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

Prepared by

*RRC Associates*
*4940 Pearl East Circle, Suite 103*
*Boulder, Colorado 80301*
*303/449-6558*
*www.rrcassoc.com*

# TABLE OF CONTENTS

# DOWNTOWN BOULDER USER SURVEY
## 2006
## FINAL REPORT

## INTRODUCTION

This report summarizes the final results of the 2006 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 802 interviews were completed during the research period between July 21 and September 3, 2006.[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 awareness of downtown parking alternatives and 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, 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. 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 2005 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

[1] For the total sample size of 802 interviews, the standard margin of error is +/-3.46 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.

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 2006 survey is the fourteenth 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 2006 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 2005; 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

### *Visitor Mix*

- The proportion of mall users who are ***full time City of Boulder residents*** slipped to 37 percent of those interviewed, on the low end of but within the historical range of 37 to 41 percent for this user group. Despite this decline, 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. The second largest group, ***US residents outside Colorado***, was stable at 26 percent of the visitor mix. ***Colorado residents outside Boulder County*** (16 percent) and ***Boulder County residents*** (14 percent) account for most of the rest of the downtown user population. Summer/part time City residents and International visitors (each 3 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.
- Again this year, residents of ***North Boulder*** remain 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-eight percent of downtown users who are city residents live in North Boulder, up from 23 percent last year and 20 percent in 2004.
- Concurrently, the proportion of city residents who live in ***Central/West Boulder*** declined to 40 percent, from a historical range of about 47 to 49 percent. Nevertheless, these residents continue to make up the largest group of City users, though the majority of city residents are from parts of the city other than Central/West Boulder.

### *Spending Patterns*

- Overall, the ***average amount spent increased substantially*** for the second year, this year almost entirely attributable to a boost in average spending from out-of-state residents. The average amount shoppers and diners spent this summer ***increased by 10.5 percent***, up to $52.90 from $47.88 last year. This average spending figure is the highest recorded during the years of the study and the first time the average spending figure has crossed the $50 threshold since 2000. The boost in overall spending was primarily attributable to the average spending of out-of-state residents, who averaged $86.91, up substantially (25 percent) from $69.77 a year ago. Spending among the other visitor segments was largely flat (or even down somewhat). These increases correlate with the increased sales tax revenues recorded in the downtown CAGID area for the 2006 summer period.
- ***Average spending was up for dining but down slightly for shopping***. Average expenditures for dining were $23.62, up 26 percent from $18.82 the year prior and approaching the average shopping figure. Clearly, the increase in overall spending is attributable to the gain in the dining average. On the other hand, average shopping expenditures were $24.19, down from $25.01 in 2004, a decrease of 3 percent.
- In terms of the single primary reason for coming to Downtown Boulder, ***hanging out/enjoying the ambiance/people watching*** has been elevated to the clear number one slot, with 29 percent of the respondents indicating that it was the single biggest motivator for visiting. Two other reasons, ***shopping*** and ***eating a meal***, were also of strong importance, though not quite to the

level of hanging out/people watching. Overall, 20 percent came primarily for a meal (up from 18 percent) and 18 percent came for shopping (down from 23 percent). The decline in shopping as a primary reason for coming appears to be part of a long term trend, interrupted last year by a temporary rebound in shopping as the main reason for visiting.

### *User Demographics*

- The average age of the ***Downtown Boulder user declined for the first time in 2006***, to an average age of 39.8, down about one year from 40.7 last summer and only slightly older than 39.1 in 2004. The median age was 39, down from 40.5 the prior summer. The biggest shifts were observed in the 21 to 34 cohort (36 percent of all users, up from 29 percent) and the 55 and over group (18 percent, down from 21 percent).
- This age reversal is important in stabilizing the ageing of the customer base; a healthy flow of visitors through the years would tend to be stable, with younger visitors replacing older visitors. Except for students, non-student City residents are the youngest group on average (39.6 years, up from 37.7 years), while out-of-state visitors are the oldest (43.6 years, down from 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 (55 percent earn less than $15,000).
- 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.

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 | 54% | 38% | 52% | 50% | 53% |
| Female | 46% | 62% | 48% | 50% | 47% |
| **HOUSEHOLD INCOME** | | | | | |
| $0 – 14,999 | 15% | 55% | 7% | 3% | 6% |
| $15 - 24,999 | 10% | 12% | 4% | 6% | 2% |
| $25 - 49,999 | 23% | 10% | 15% | 19% | 14% |
| $50 - 74,999 | 16% | 10% | 23% | 21% | 19% |
| $75 - 99,999 | 13% | 7% | 21% | 17% | 14% |
| $100,000 – 199,999 | 18% | 5% | 27% | 30% | 37% |
| $200,000 or more | 5% | 1% | 3% | 4% | 8% |

*(table continues)*

| | City of Boulder Resident – Non-student | City of Boulder Resident – University Student | Boulder Co. Resident | CO Resident outside BoCo | US Resident outside CO |
|---|---|---|---|---|---|
| **AGE** | | | | | |
| Average age | 39.6 | 25.5 | 43.0 | 42.0 | 43.6 |
| Median age | 37 | 23 | 44 | 40 | 44 |
| **HOUSEHOLD STATUS** | | | | | |
| Single, no children | 42% | 0% | 26% | 23% | 25% |
| Couple, no children | 15% | 0% | 14% | 25% | 15% |
| Household w/children at home | 30% | 0% | 39% | 33% | 33% |
| Empty Nester | 13% | 0% | 21% | 19% | 27% |
| University student | 0% | 100% | 0% | 0% | 0% |

## *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 38 percent said the primary reason for their trip was visiting family/friends. Recreation/sightseeing is also quite important, as 32 percent of overnighters cited it as the primary 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, 34 percent were staying in commercial lodging in the City of Boulder, 13 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 $735 (median of $500)***. The average overnighter spent $207 for lodging (including those who spent nothing on lodging because they stayed with family or friends), $228 on average for shopping, and $223 for dining and entertainment on their trip.
- Visitors staying in commercial lodging spend considerably more ($1,026 in total during the visit to Boulder) than those staying with friends or family, who do not have any lodging expenses ($519 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, despite being on shorter trips (3.8 nights, versus 5.2 nights for those staying with family/ friends).
- 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-five percent said it was very important or important in their decision to visit.
- In a new question this year, overnighters were asked how likely they would be to recommend Boulder to a friend, family member, or colleague. Seventy-one percent of respondents were classified as Promoters of Boulder (scoring this question a 9 or 10 out of ten), 24 percent were Passive (7 or 8), and the remaining 5 percent were Detractors (6 or lower). The percentage of

Promoters minus the percentage of Detractors results in a Net Promoter Score of 66 (about average for other summer destinations surveyed by RRC Associates in 2006).

### *Transportation*

- ***Transportation patterns were stable again***, with 70 percent driving a private vehicle downtown; 13 percent walked, 9 percent rode the bus, and 7 percent biked. City of Boulder residents were most likely to use alternate modes of transportation, as less than 50 percent drove a personal vehicle downtown.
- A ***gradual increase in the proportion parking in a parking structure/garage*** was observed again this year. Thirty-two percent of drivers utilized the structures, up steadily from 25 percent three summers ago. The continued advertising, signage, and public education regarding 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. The short-term visitor/ shopper tends to prefer the metered space, while longer-term visitors tend to favor the structures.

### *Awareness of Parking Alternatives*

- Awareness remains high among County residents for ***free parking on weekends in parking structures*** (81 percent) and for ***free parking at meters all day Sunday*** (80 percent). As well, increased awareness of the parking garage at 10th and Walnut was observed, with 65 percent aware this year, up from 51 percent a year ago. Awareness is quite low for the Cash Pass and/or Meter Key program, at just 30 percent of County residents aware of those programs.

### *Satisfaction Ratings*

- Satisfaction ratings in general remained quite positive again this year; in fact, ***most attributes exhibited stability or improvement over already-high 2005 scores***. The feeling of safety and security, variety of restaurants, and overall cleanliness and maintenance were the top rated attributes. Slight declines were noted for directory information/ signs and family orientation/kids play areas. A new category, directional signs for parking, was the lowest rated attribute in the mix. Given the design guidelines of "wrapping" the parking structures with retail and office uses, the garages tend to be less obvious to the visitor or less frequent downtown user, so improved directional signs take on added importance to this higher-spending, auto-dependent segment.

### *Competition/Perceptions*

- The ***average number of non-work visits to the Downtown Boulder area jumped***: 14.7 visits in the past two months, up from 11.8 visits last summer. The median number also increased to 10 visits from 8 a year ago. Not surprisingly, City residents exhibited higher visit figures (average of 16.9 median of 10 than County residents (average of 9.4, median of 5).
- Within the City, those who live in the ***Central/West Boulder area*** report an average of 18.5 visits (median of 10), and residents of ***North Boulder*** visit a similar average of 18.0 times (median 10), 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. Other shopping areas in Boulder are at an average of 7.3 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.
- The survey this summer concluded prior to the opening of 29th Street in Boulder. It will be informative to monitor potential shifts in the competitive environment next year, not only with respect to downtown Boulder, but with the variety of other retail centers as well.

### *Advertising, Website Usage, and Special Events/Festivals*

- Advertising recall slipped again this year. Overall, ***16 percent said they saw an ad or information source for Downtown Boulder*** prior to their visit (down from 22 percent a year ago); another 7 percent said they saw an ad for an individual downtown merchant (down from 8 percent). In total, 22 percent saw some type of advertising prior to their visit, while the other 78 percent did not see any ads. Awareness of the Downtown Boulder ads was highest among City and County residents, as 32 to 23 percent, respectively, of these segments indicated awareness Downtown Boulder advertising.
- The most common places to see a Downtown Boulder ad are a newspaper, the radio, and a brochure. Other advertising sources include a web page, a general/ feature article, television, and direct mail.
- ***Seventeen percent of all downtown users have visited the Downtown Boulder website*** in the past. Of those, 55 percent said they used the website to collect information about events, followed by dining (18 percent), shopping (14 percent), and parking (6 percent). “Other” information people use the website for include general information, hotel information, maps, and general overview information about the area. The Downtown web site is currently being reorganized and upgraded, and continuing to monitor the utilization of the site will be important next summer.
- 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 in drawing people from outside the city to the downtown area.

### *Panhandlers*

- The ***impact of panhandlers on the experience downtown remains low,*** though it appears to be somewhat of a greater concern this year compared to last. The proportion saying that the behavior of panhandlers has an impact on their experience downtown grew to 21 percent from 13 percent. As well, ten percent believe that the activities of panhandlers have become more of a problem in the past two years, up from only 5 percent last summer. Both these findings indicate that the issue is potentially becoming more problematic and that the downtown community and leadership should be aware of and continue to monitor these issues.

### *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 45 percent believing the area is improving, 34 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.

### *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 better safety, more festivals, and better parking. Some sample comments include:

*After dark I walk around with pepper spray because of drunk students, not transients*
*Better play area, get rid of teenager hangouts*
*Make it easier to find stuff and more parking, more accessible*
*More diversity - smaller vendors, more Boulder-specific vendors, less Gap stores*
*Wish they had more festivals every weekend, concerts, fairs, art*
*Reduce panhandling*
*Movie theater, outdoor movies on courthouse lawn*
*More places to lock up bikes. If you drive a hybrid car, free parking.*
*More live music outside, less vagrants - scary to parents*
*More diversity in restaurants as far as price*
*Love everything about downtown*
*It's good; get a movie theater, department stores, general merchandise*

#### 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 kids activities, more restrooms, and more shade. Also, several positive comments noted what a great place Downtown Boulder is to visit.

*They should have a sign to the downtown area - directions for tourists. We drove around 4 blocks and didn't know where to go.*
*Signs to Pearl St. off Highway 36*
*Shade pop-jet fountain area where parents sit*

*Need more shade*
*More restrooms*
*More movie theatres*
*Like to be able to walk dog*
*Ease up on paid parking*
*Better signage, Diagonal and I-25*
*Do not allow smoking, clean up alleyways. Elevators in parking garage dirty.*
*More kids' activities*
*Really impressed with atmosphere (outdoors and shopping)*

## *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 better landscaping and flowers, a better variety of stores, 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.

*Because I have more access to nightlife and bars*
*Better overall atmosphere*
*Better police presence, less teen hangouts*
*Critical mass of people who care about downtown*
*More entertainment, happy with new businesses/restaurants/coffee shops*
*It's more diverse, the stores I like (coffee shop/bookstore) have stayed*
*Good maintenance, flowers and new buildings*
*I like the layout in front of the courthouse, beautification*
*Well kept, flowers, don't like chains, prefer local companies*
*Paul does a great job with flowers*
*More restaurants, like the fountains, ped. areas, landscaping*

### Comments from Visitors – Quality of Experience is Improving

Generally, comments from visitors were generally focused on the improved level of cleanliness and a better mix of restaurants, among other observations. Some comments from visitors:

*Cleaner, more people*
*Cleaner, not as many bums*
*Food and landscaping good, shopping bad*
*I like the Pearl Street Mall, like to meet friends here*
*Used to get harassed by street people but it's better. More original shops.*
*Seems like more is open, higher quality stores*
*More restaurants, entertainment and shops*
*Fountain for kids, new construction, growth, cleanliness*
*Less panhandlers*

### Comments from Residents – Quality of Experience is Declining

Both visitors and residents who thought the area was declining noted that the area is becoming crowded and corporate, and that the vacancy rate is up.

*Crowded and zoo-like*
*More elitism and anti-social*
*Stores closing*
*Shopping quality has gone down, not as friendly and open, kinda sterile*
*They have run out of some of the unique shops*
*Empty stores, but better restaurants*

### Comments from Visitors – Quality of Experience is Declining

Visitors who thought the area was declining had similar feelings about the loss of the unique feeling of Downtown Boulder

*Authenticity lost - corporate chain stores*
*Losing its character because of chain stores*
*Too much construction and traffic*
*Nonsmoking! Too many music shops are closing.*

## *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: lower parking ticket rates, extended free hours in garages and meters, more garages, more bike racks, and other suggestions listed in the sample comments below.

*Bigger parking space*
*Gone up in price a lot*
*Make it cheaper*
*More bike racks*
*Smaller ticket fees*
*Workers downtown should get free parking*
*Not really, everyone should just walk/bike more*
*Longer duration at meter; validate employee parking*
*More garages*
*Do not extend meters past 6 - should be free then - will impact business and diners*
*Encourage non-car traffic*
*Free garages after 6:00*
*Less neighborhood restricted parking*
*Make tickets less expensive*

### *To the Best of Your Knowledge, What do Parking Meter/Garage Revenues Pay For?*

Interest exists in understanding the public perception of what parking meter and garage revenues fund. It appears that very few residents of the area were aware of what the revenues are used for, though most had some guesses. Maintenance, streets, roads, parking enforcement, and the general fund were the most commonly cited uses of the funds.

*? Goes back to the city*
*City maintenance?*
*City service and maintenance*
*Patrol of structures*
*No idea - general fund*
*Maintenance*
*Maintenance of roads and sidewalks, cleaning*
*Upkeep of structures/streets*
*Upkeep, parking enforcement*
*Street maintenance*
*Roads*
*Parking enforcement, pay off bonds*
*General fund*
*Don't know, maybe general fund*
*Don't know - open space*
*Don't know - street upkeep*
*Don't know - assume it goes to public works and city*
*City of Boulder*

## GRAPHS

This section presents a series of graphical illustrations of the survey results from the 2006 Downtown Boulder User Survey.

FIGURE 1
VISITOR TYPE
2002 TO 2006

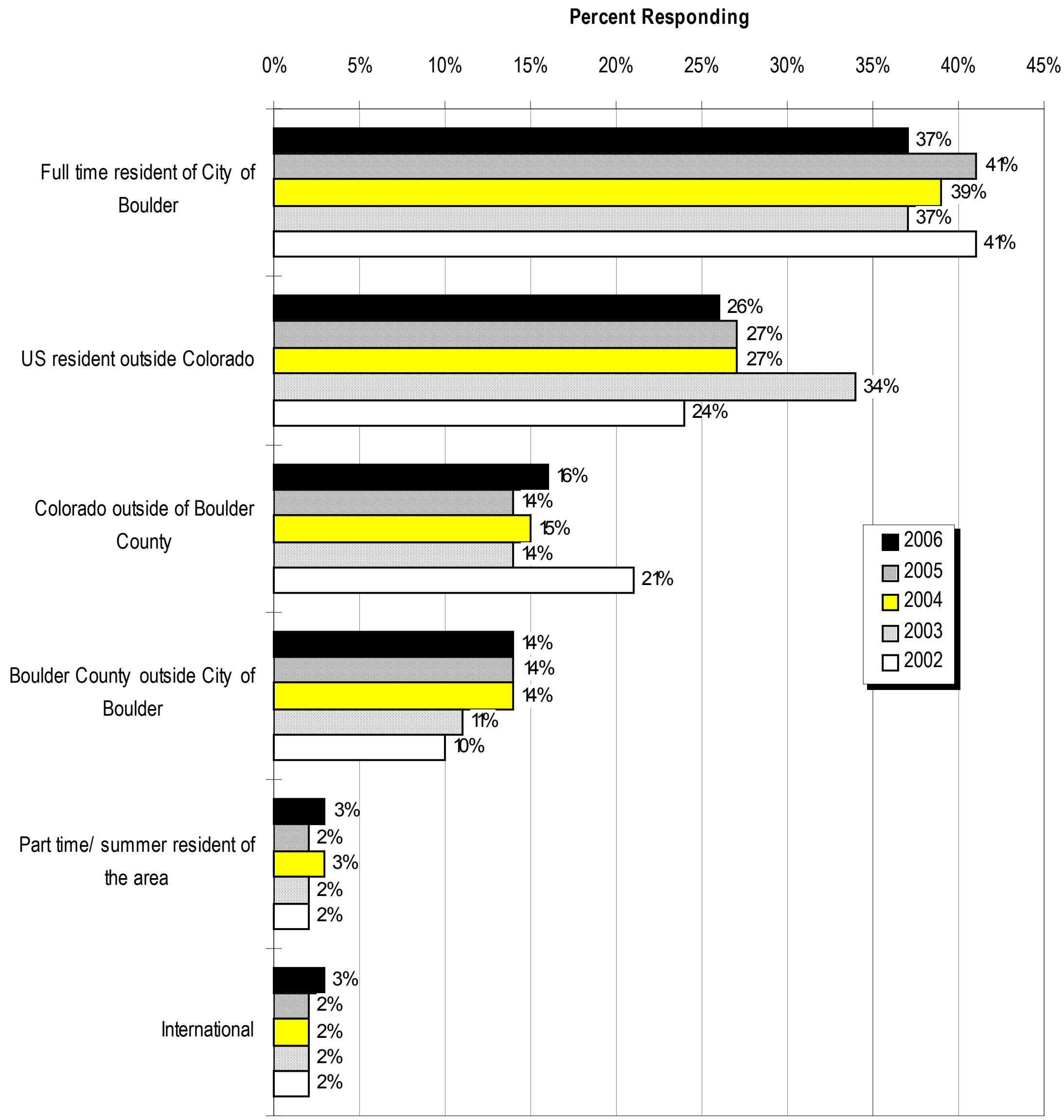


FIGURE 2A
VISITOR CHARACTERISTICS
GENDER / AGE

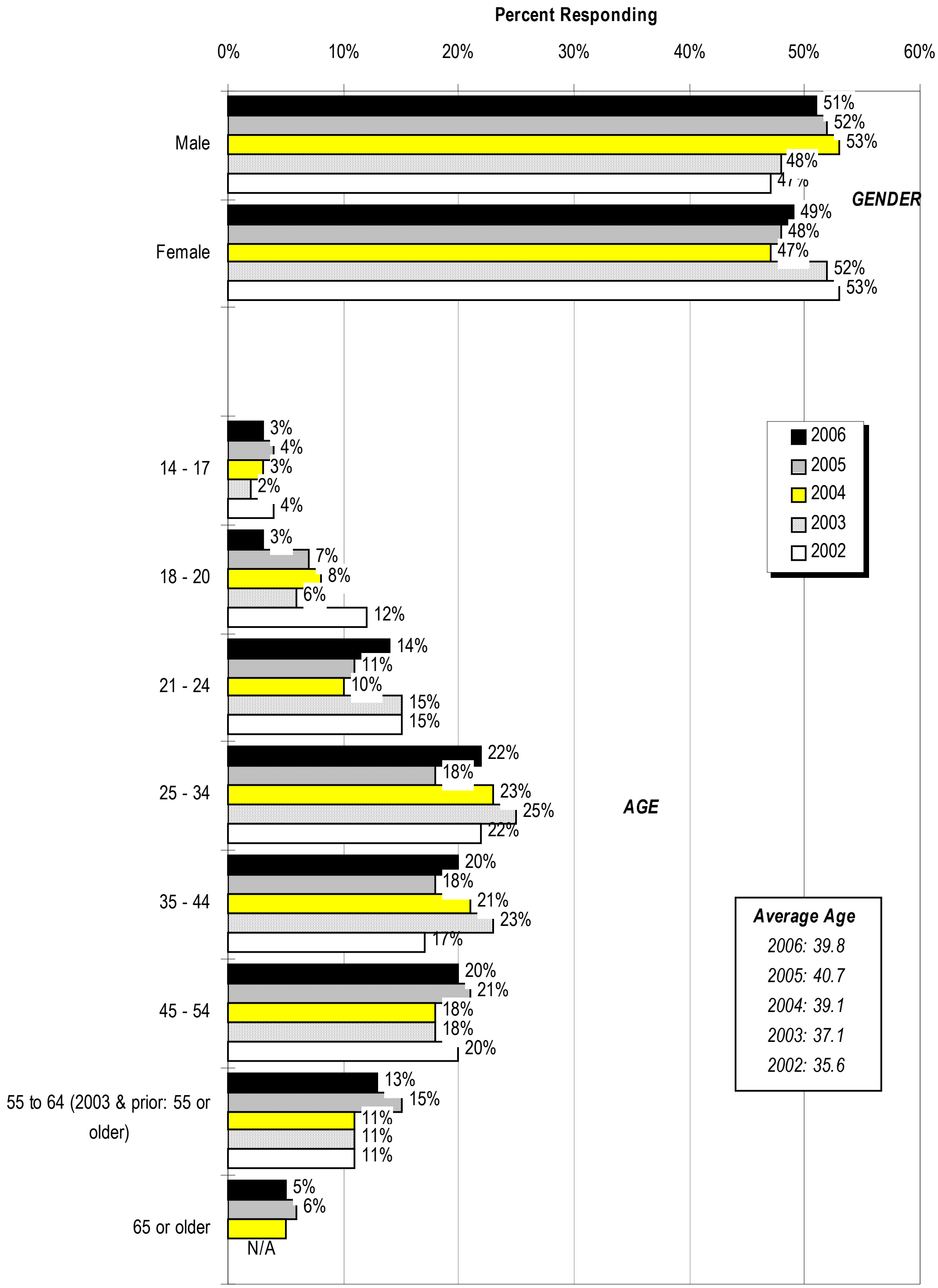


FIGURE 2B
VISITOR CHARACTERISTICS
HOUSEHOLD STATUS / HOUSEHOLD INCOME

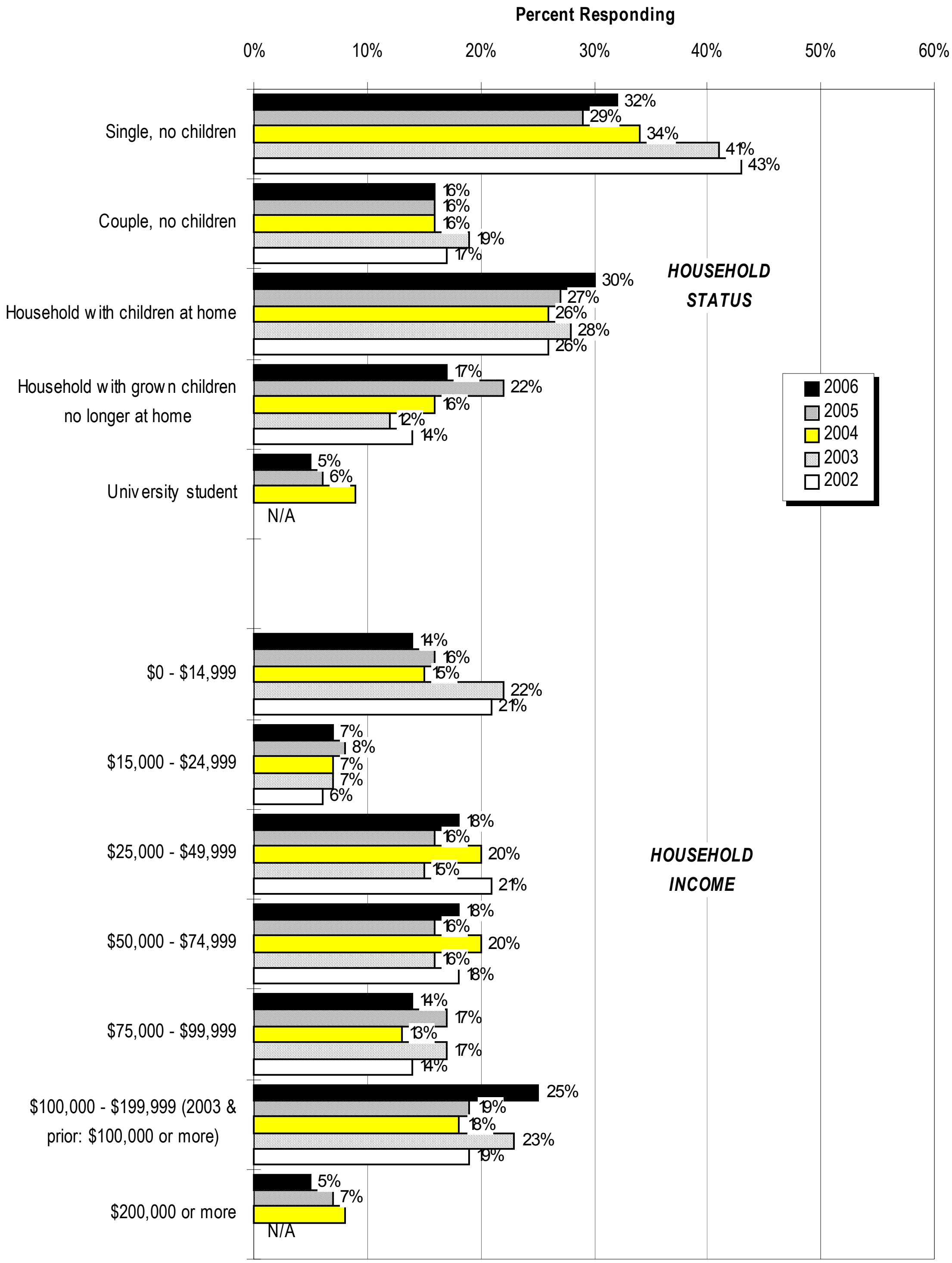


FIGURE 3A
VISITOR CHARACTERISTICS BY 2006 VISITOR TYPE
GENDER / AGE

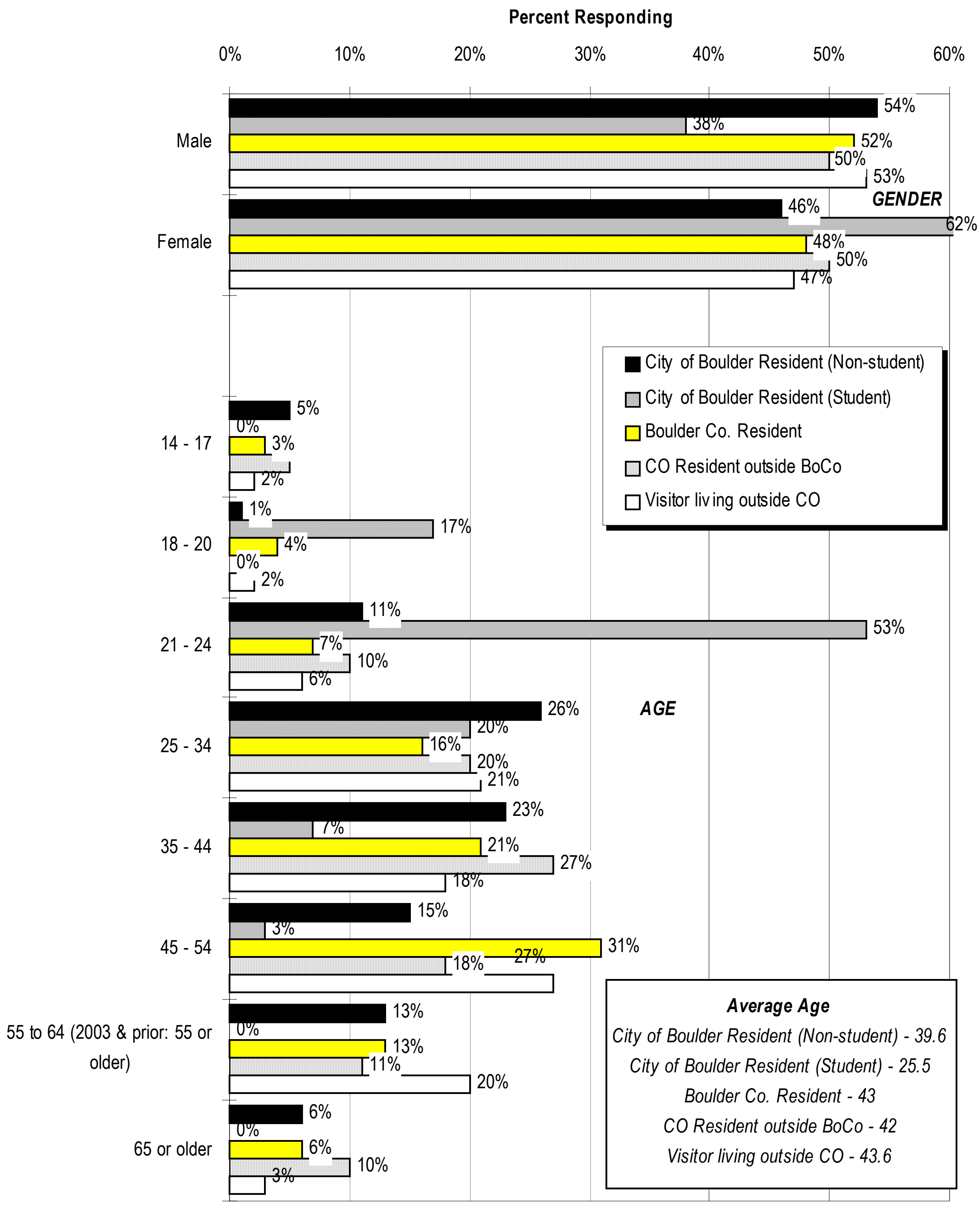


FIGURE 3B
VISITOR CHARACTERISTICS BY 2006 VISITOR TYPE
HOUSEHOLD STATUS / HOUSEHOLD INCOME

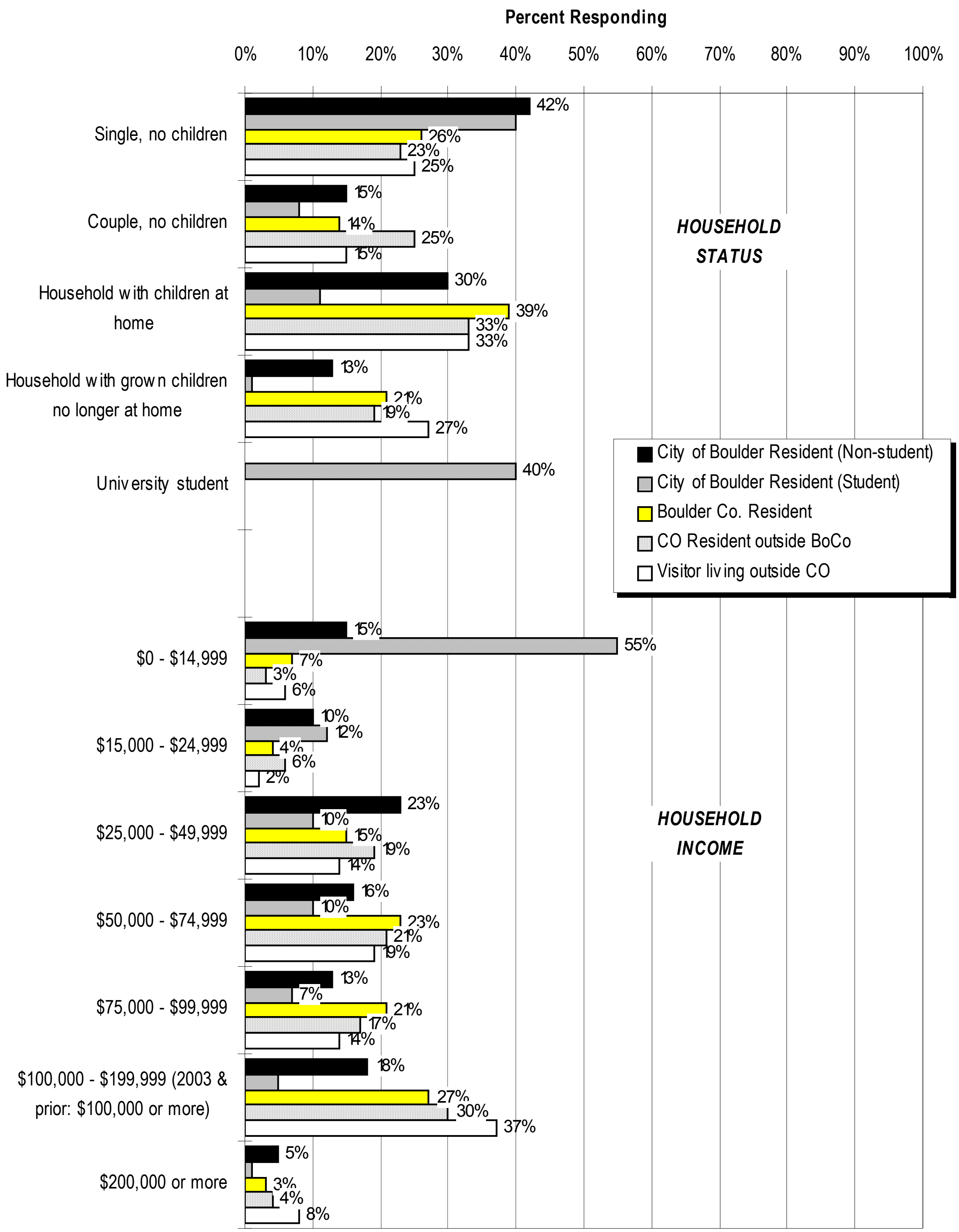


FIGURE 4
IN WHAT PART OF THE CITY DO YOU LIVE?
2002 TO 2006

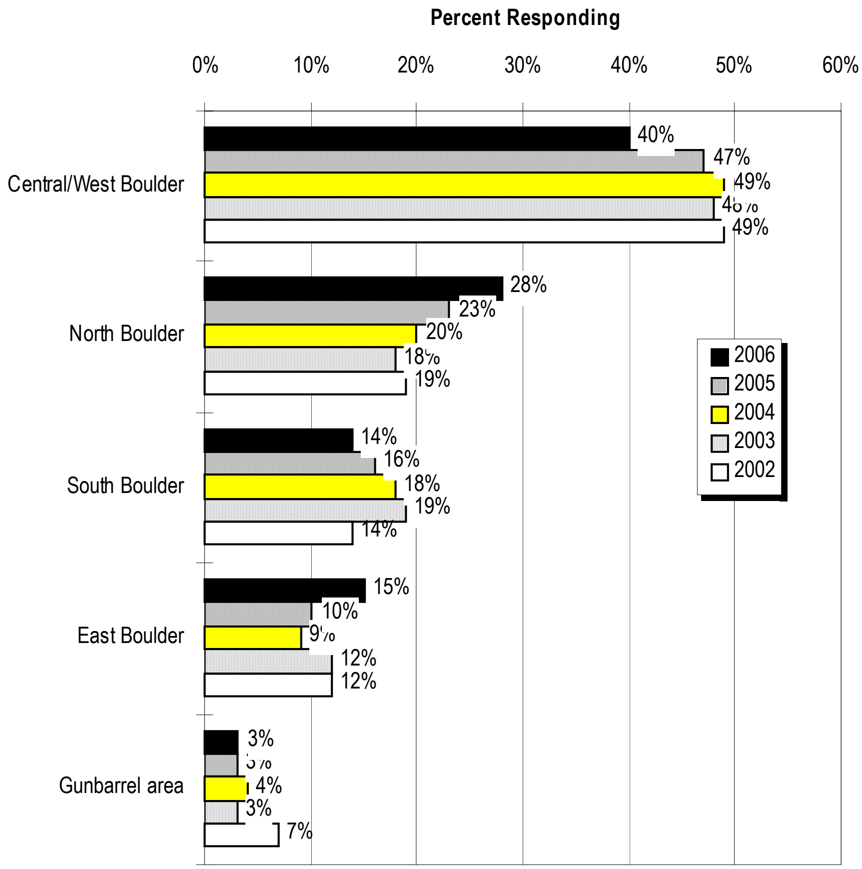


FIGURE 5
OUT-OF-COUNTY USER QUESTIONS
2004 TO 2006

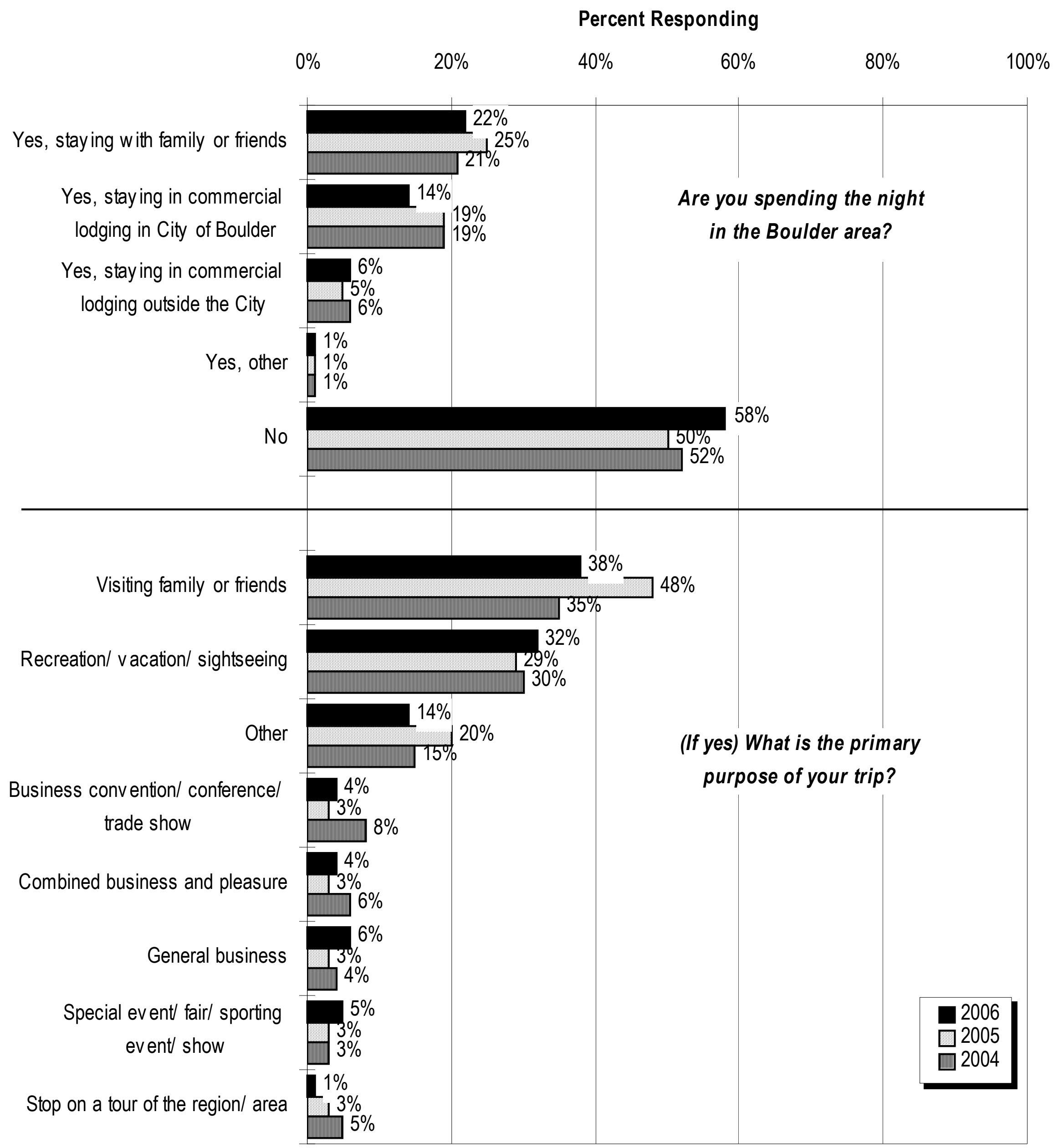


FIGURE 6A
ARE YOU SPENDING MONEY TODAY?
2002 TO 2006

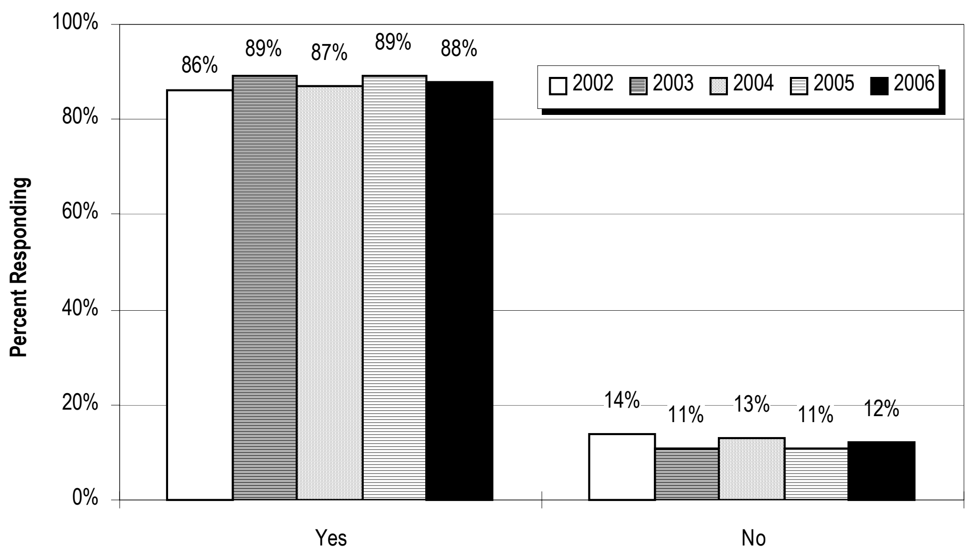



FIGURE 6B
ARE YOU SPENDING MONEY TODAY?
BY 2006 VISITOR TYPE

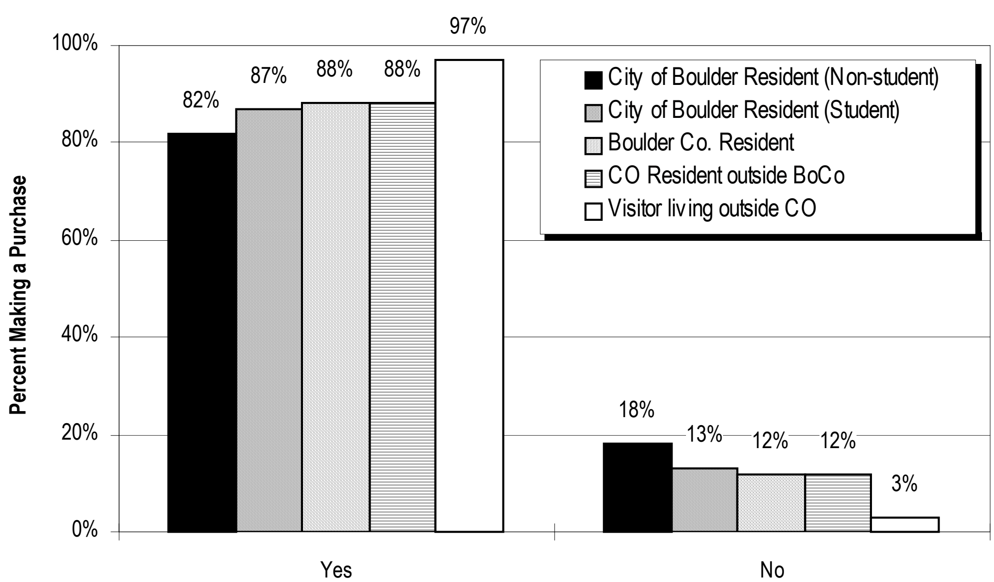


FIGURE 7A
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY SPENDING CATEGORY, 2002 TO 2006

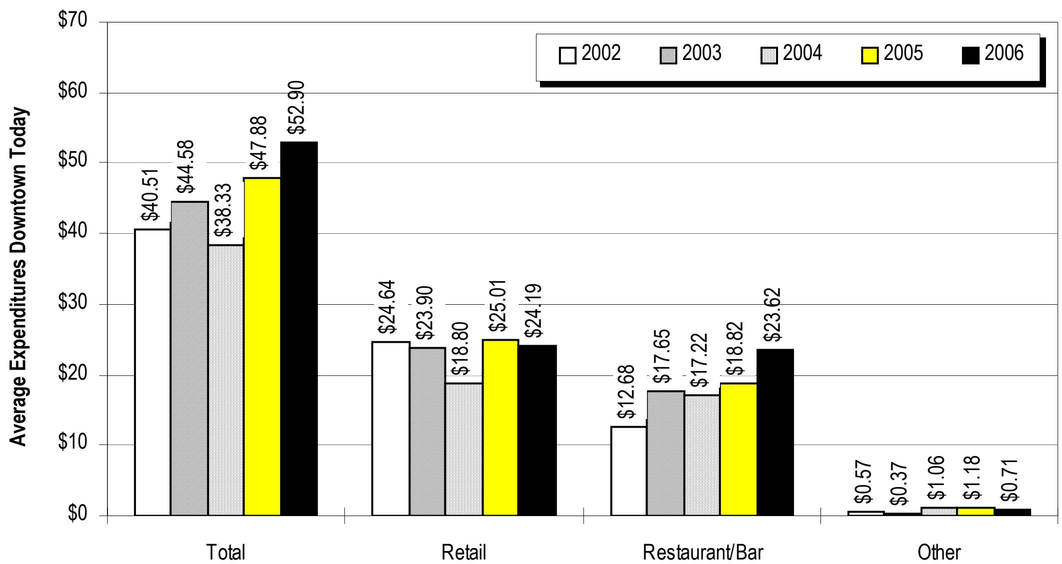



FIGURE 7B
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY VISITOR TYPE BY CATEGORY, 2006 ONLY

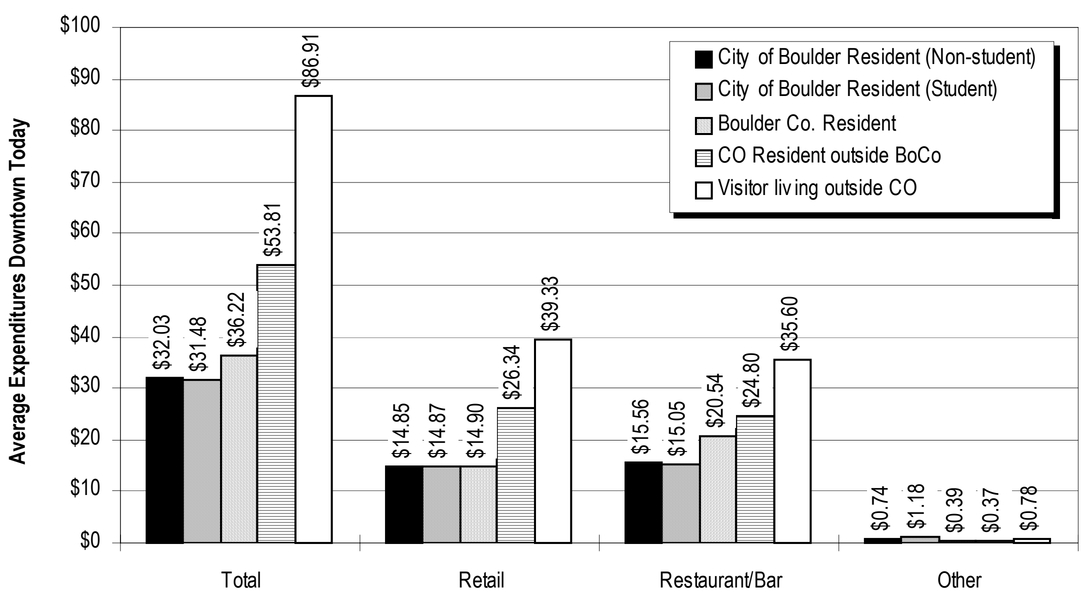


FIGURE 7C
AVERAGE TOTAL SPENDING (NOT INCLUDING NON-SPENDERS)
BY YEAR BY VISITOR TYPE

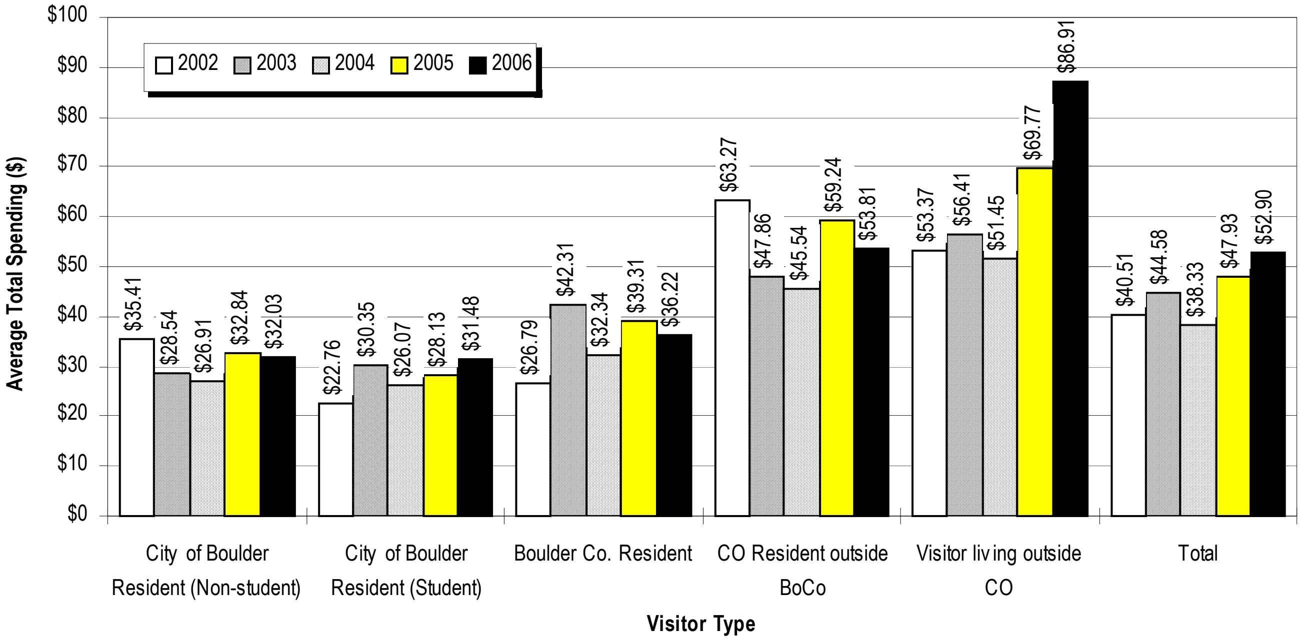



FIGURE 8
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY

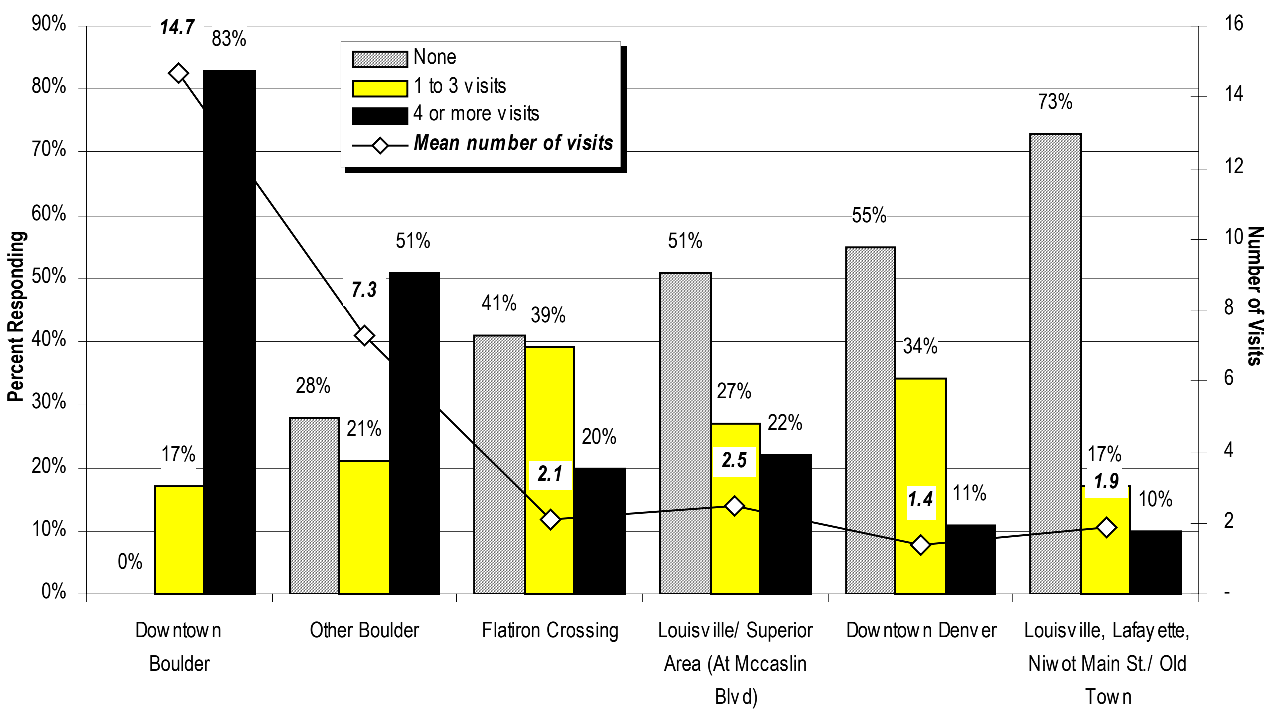


FIGURE 9
VISITS TO DOWNTOWN BOULDER AND OTHER REGIONAL SHOPPING AREAS IN PAST TWO MONTHS
BOULDER CITY/COUNTY RESIDENTS ONLY
2002 TO 2006

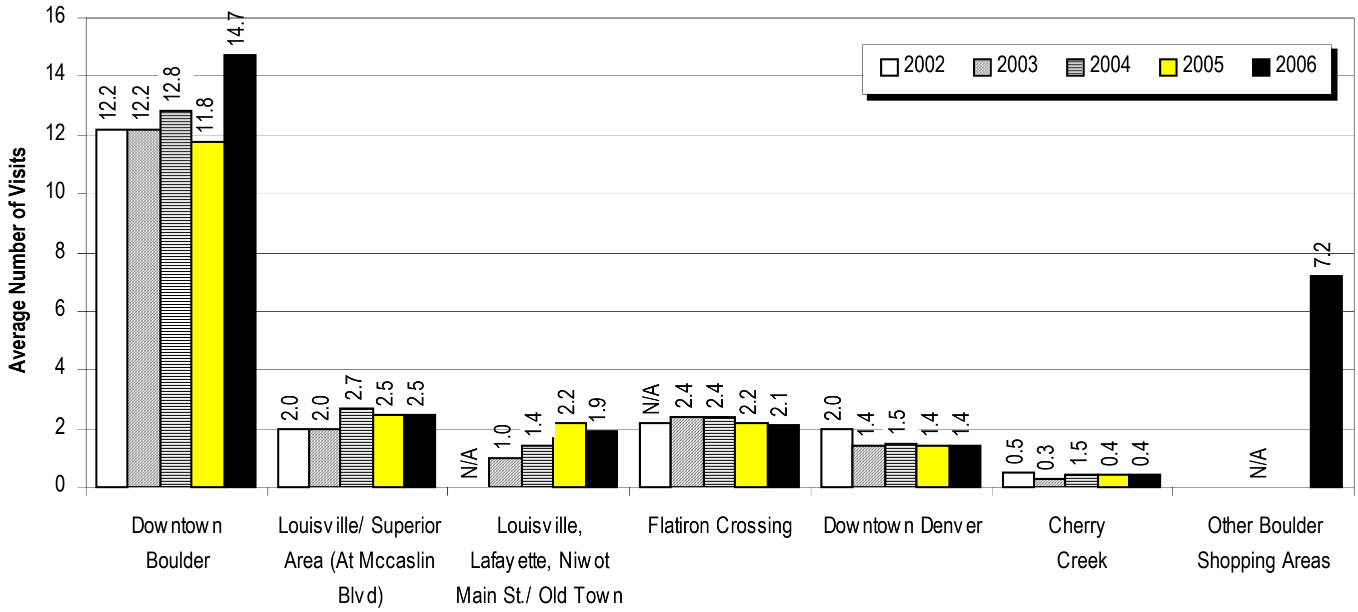


FIGURE 10
WHY DO YOU LIKE TO VISIT YOUR FAVORITE SHOPPING AREA?
BOULDER CITY/COUNTY RESIDENTS ONLY

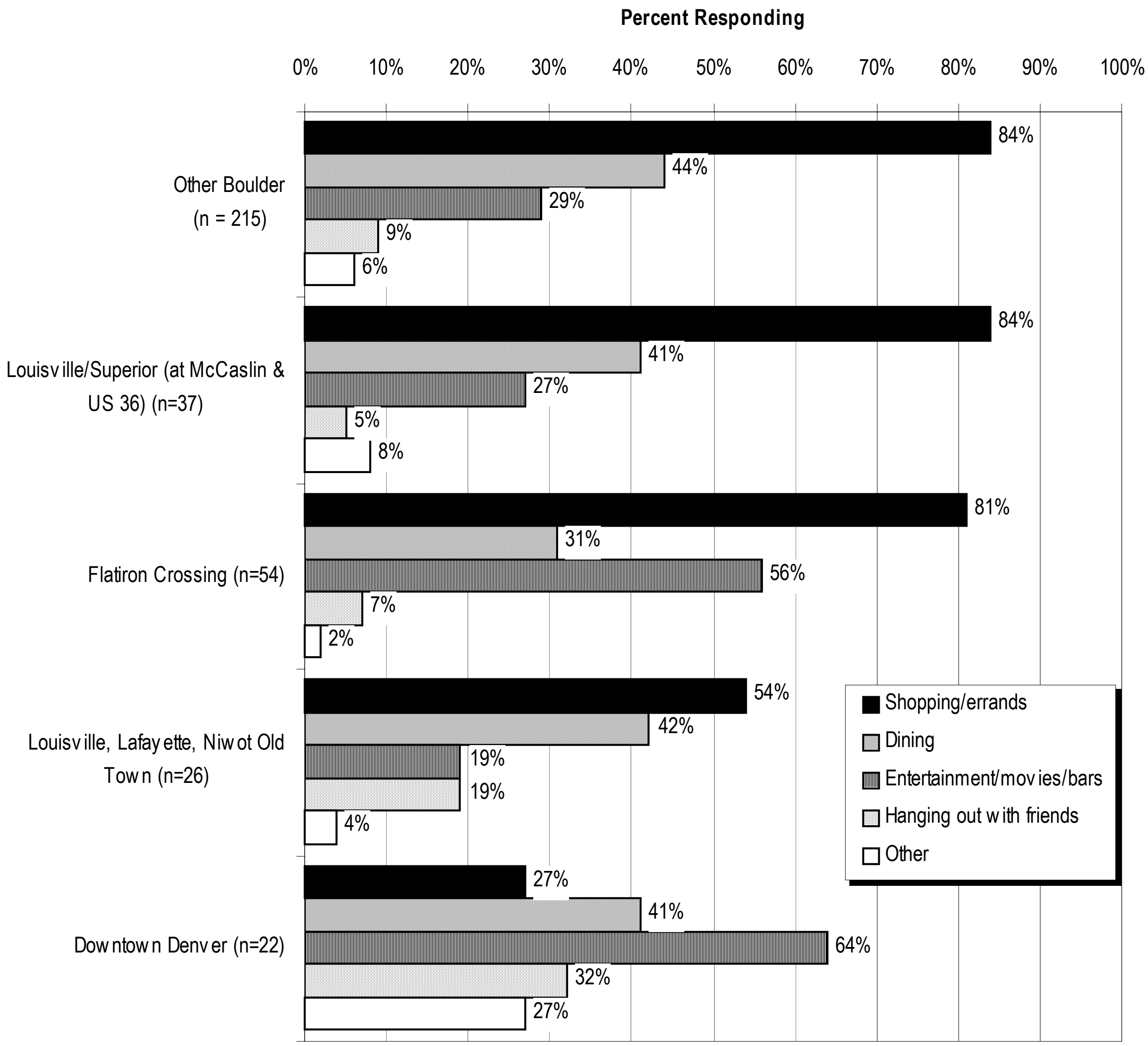


FIGURE 11A
**PRIMARY** REASON FOR COMING TO DOWNTOWN BOULDER TODAY
2002 TO 2006

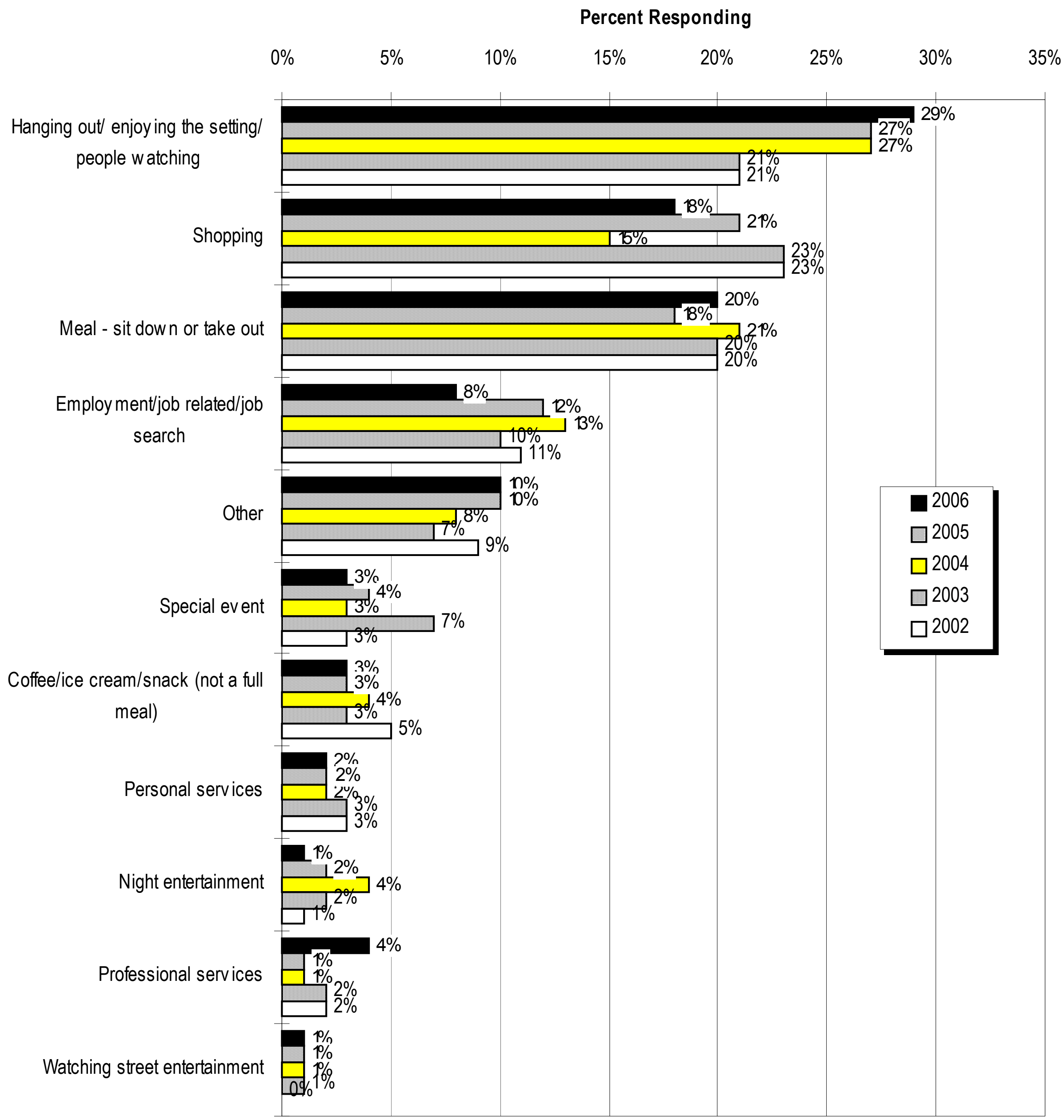


FIGURE 11B
**PRIMARY** REASON FOR COMING TO DOWNTOWN BOULDER TODAY
BY 2006 VISITOR TYPE

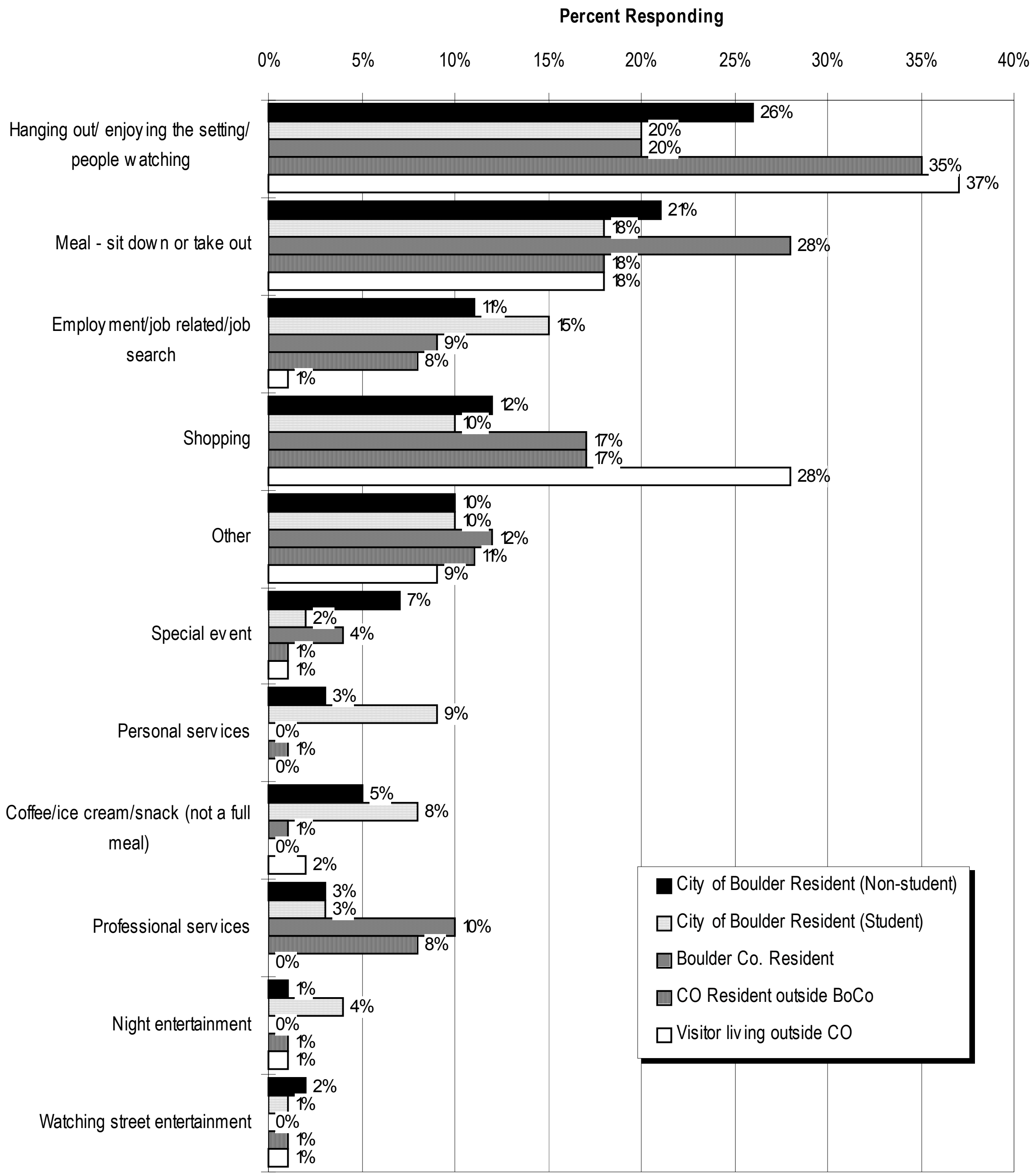


FIGURE 12A
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
2002 TO 2006

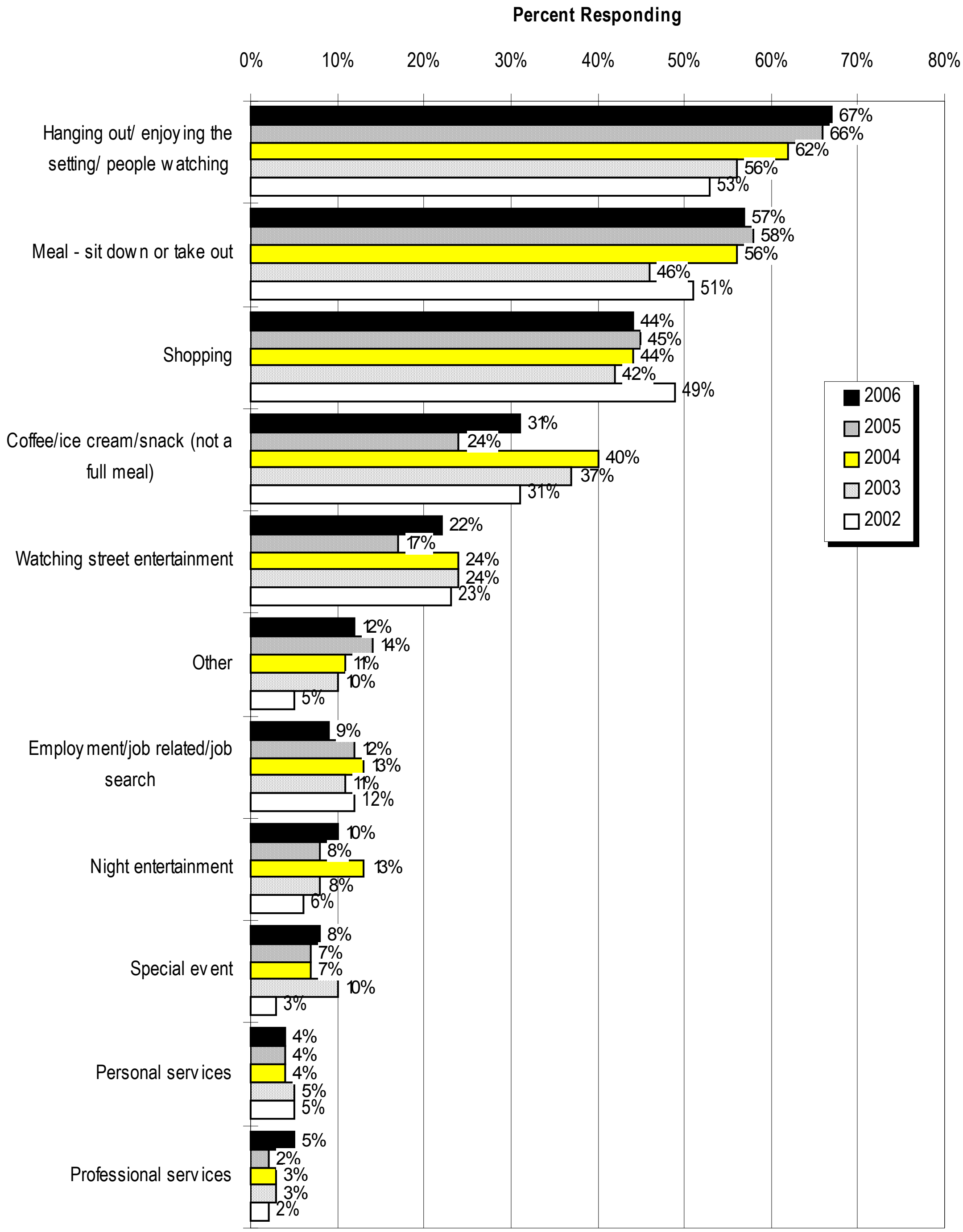


FIGURE 12B
WHAT ACTIVITIES ARE YOU DOING THIS VISIT? (PRIMARY ACTIVITY PLUS OTHER ACTIVITIES)
BY 2006 VISITOR TYPE

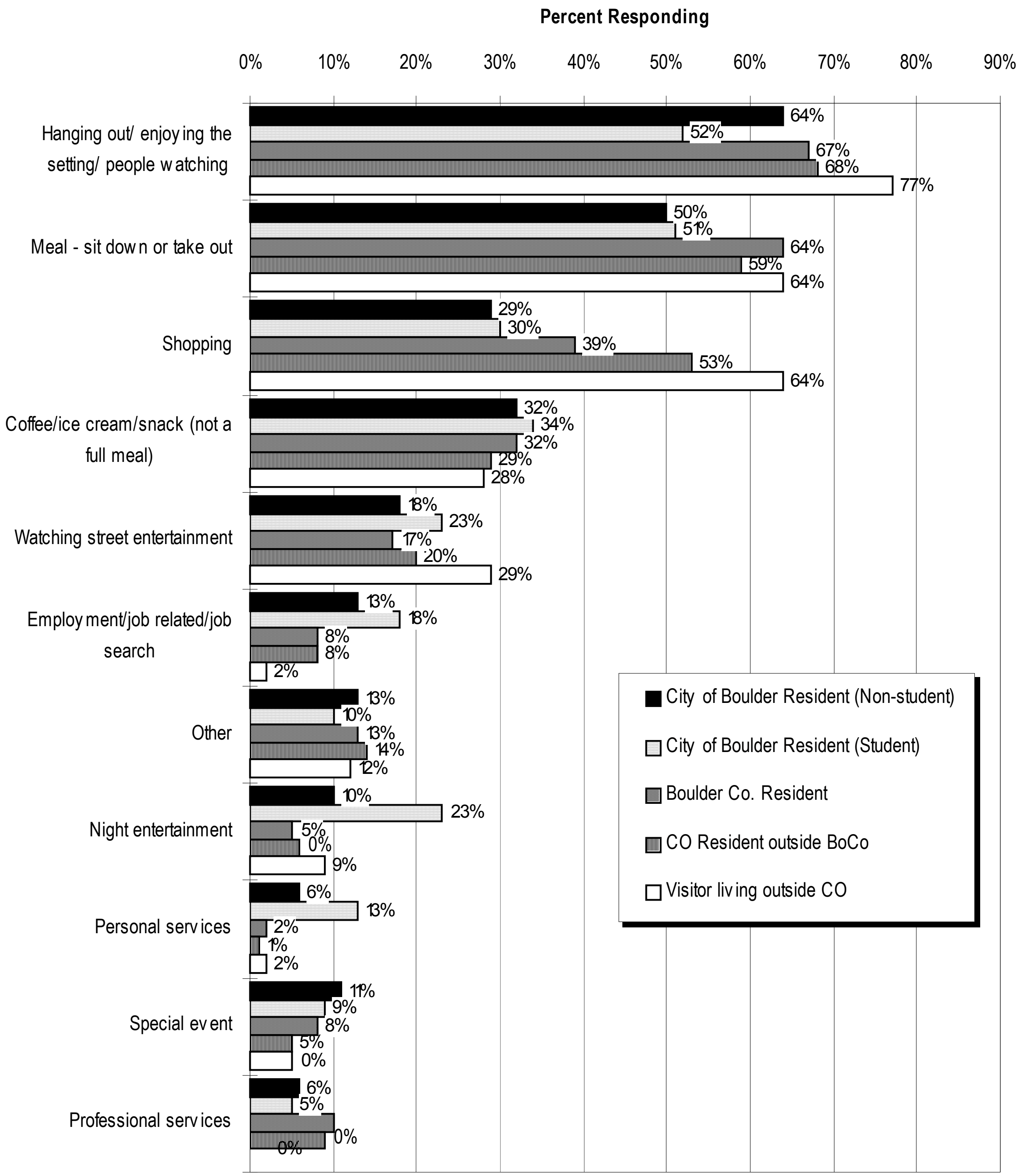


FIGURE 13
GENERAL RATINGS OF THE DOWNTOWN EXPERIENCE
2002 TO 2006

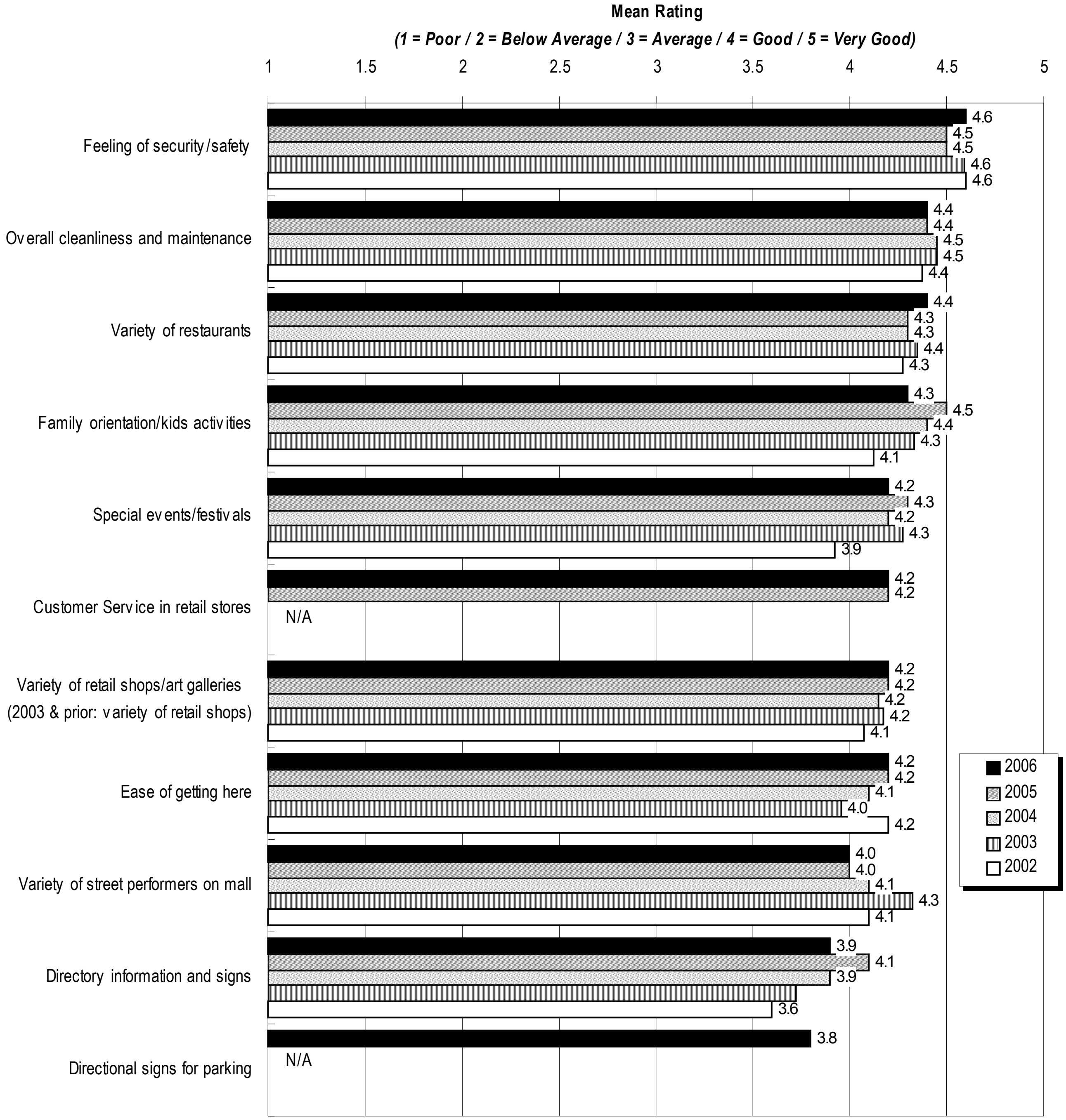


FIGURE 14
IMPACT OF PANHANDLER ACTIVITIES/BEHAVIORS ON YOUR ENJOYMENT DOWNTOWN
2003, 2005, 2006

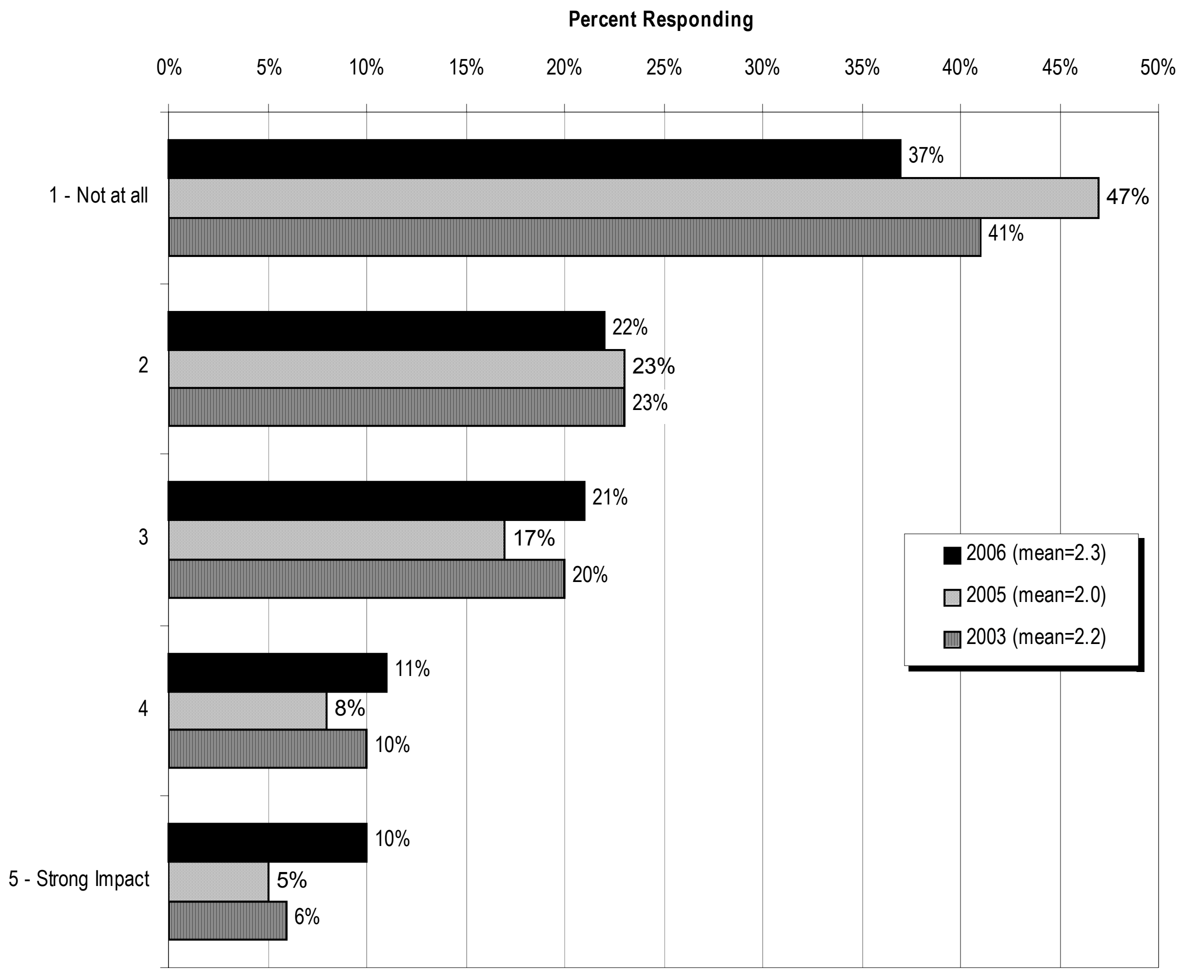


FIGURE 15
IMPACT OF PANHANDLER ACTIVITIES/BEHAVIORS ON YOUR ENJOYMENT DOWNTOWN
BY 2006 VISITOR TYPE

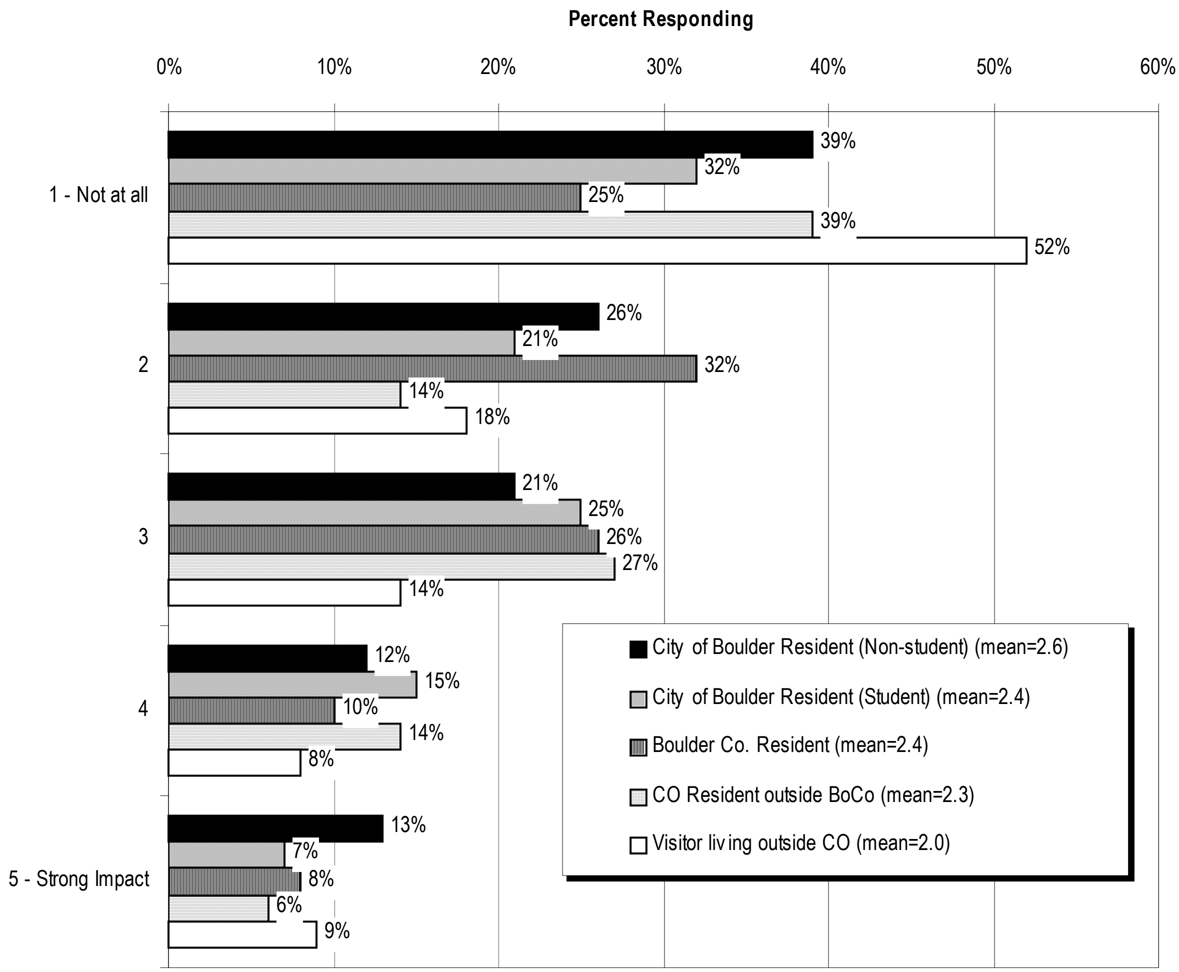


FIGURE 16
OVER THE PAST TWO YEARS, HAVE THE ACTIVITIES/BEHAVIORS OF PANHANDLERS IN DOWNTOWN BOULER: ?
BY 2006 VISITOR TYPE

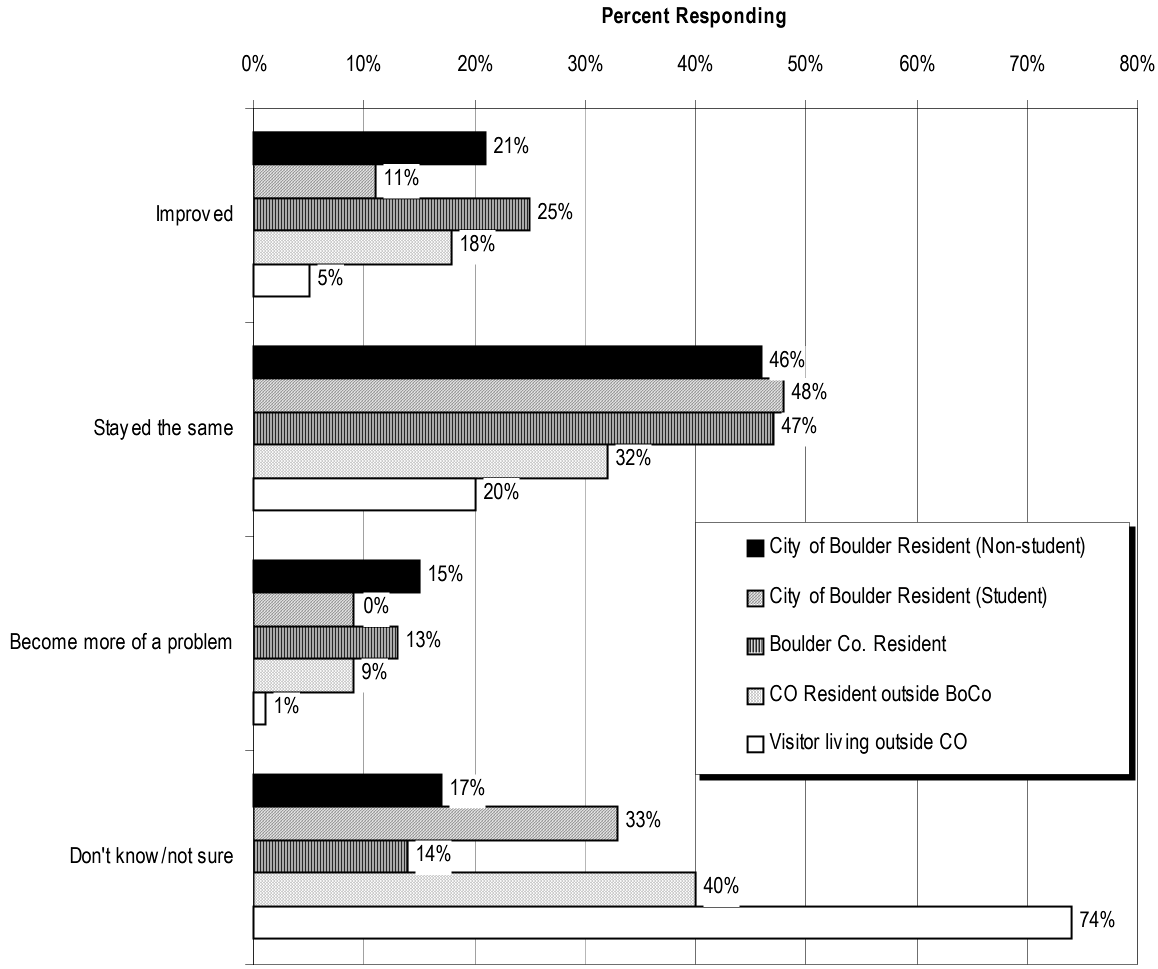


FIGURE 17
AWARENESS OF FREE PARKING ALTERNATIVES IN DOWNTOWN BOULDER
2004 TO 2006

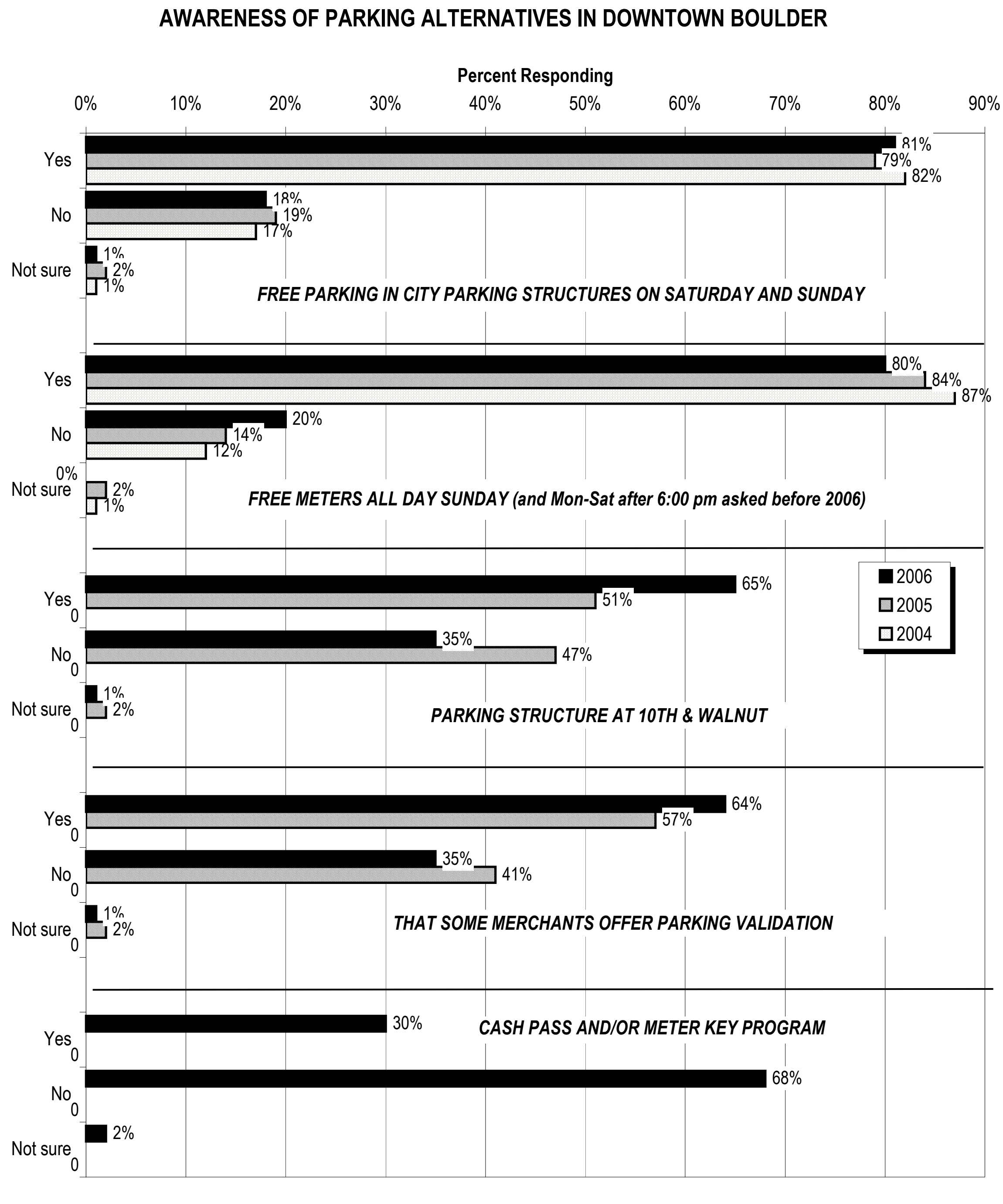


FIGURE 20A
MODE OF TRANSPORTATION DOWNTOWN
2002 TO 2006

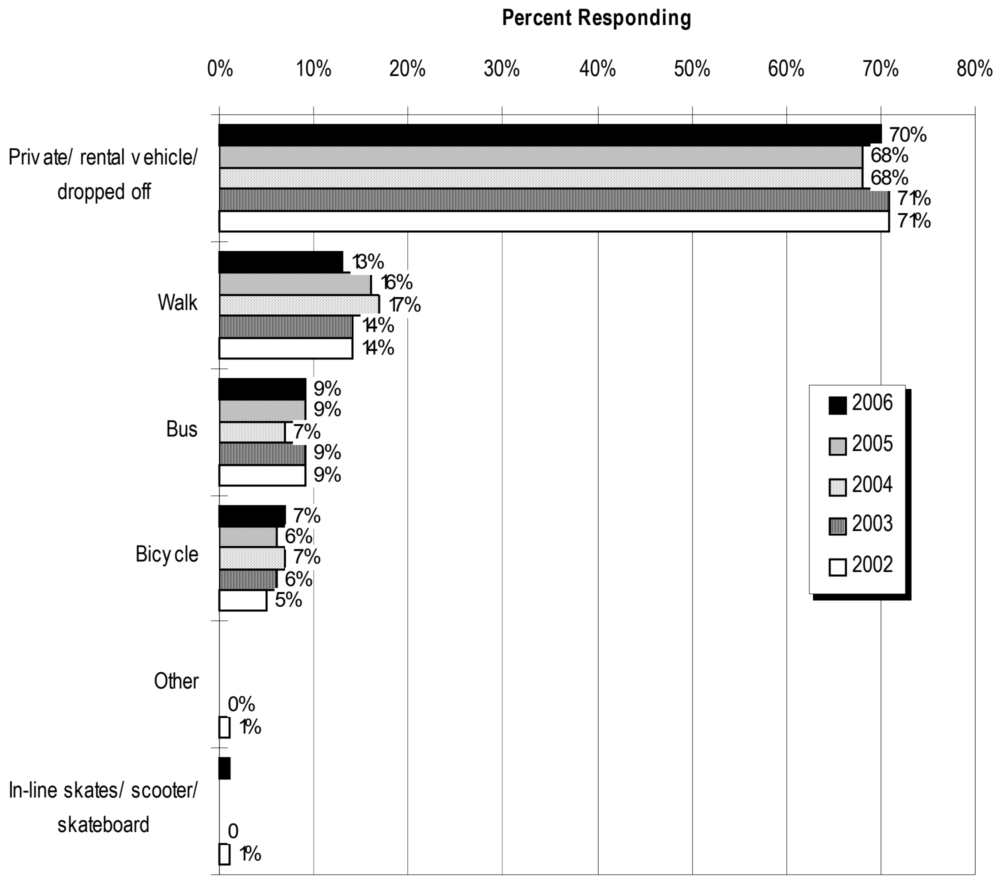


FIGURE 20B
MODE OF TRANSPORTATION DOWNTOWN
BY 2006 VISITOR TYPE

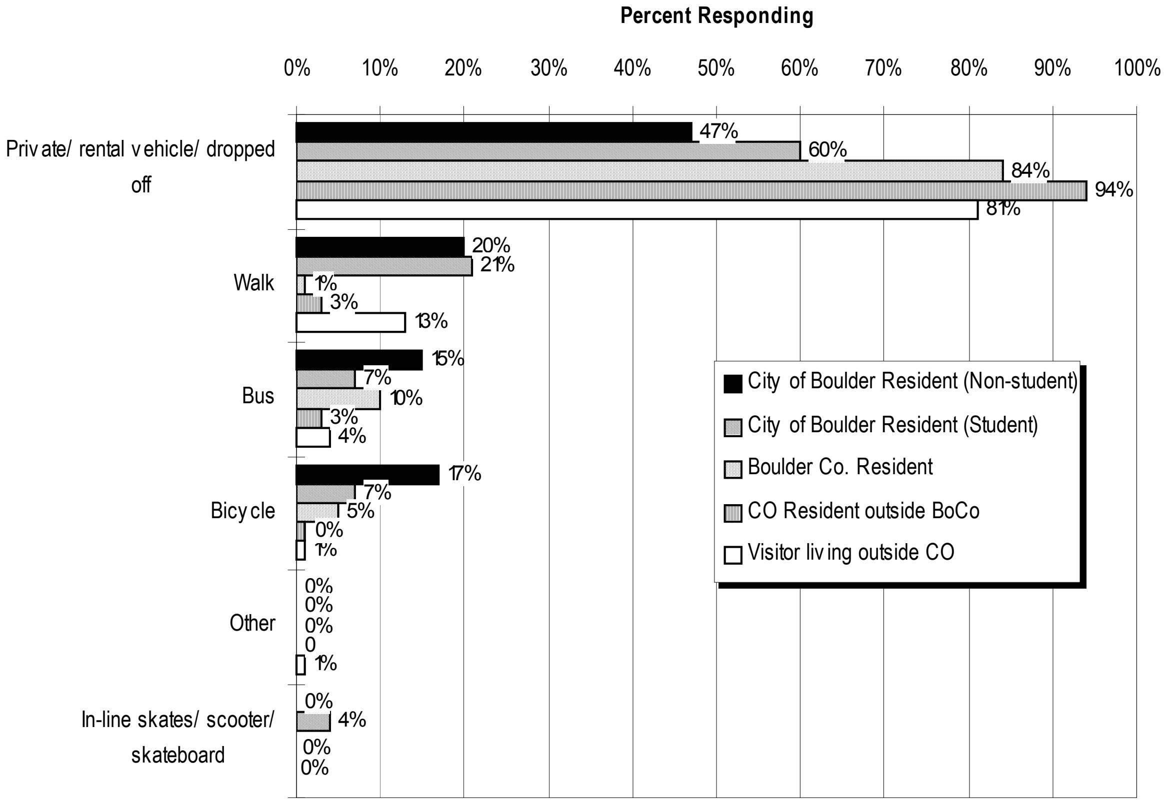


FIGURE 22
LOCATION OF PARKED VEHICLE
2002 TO 2006

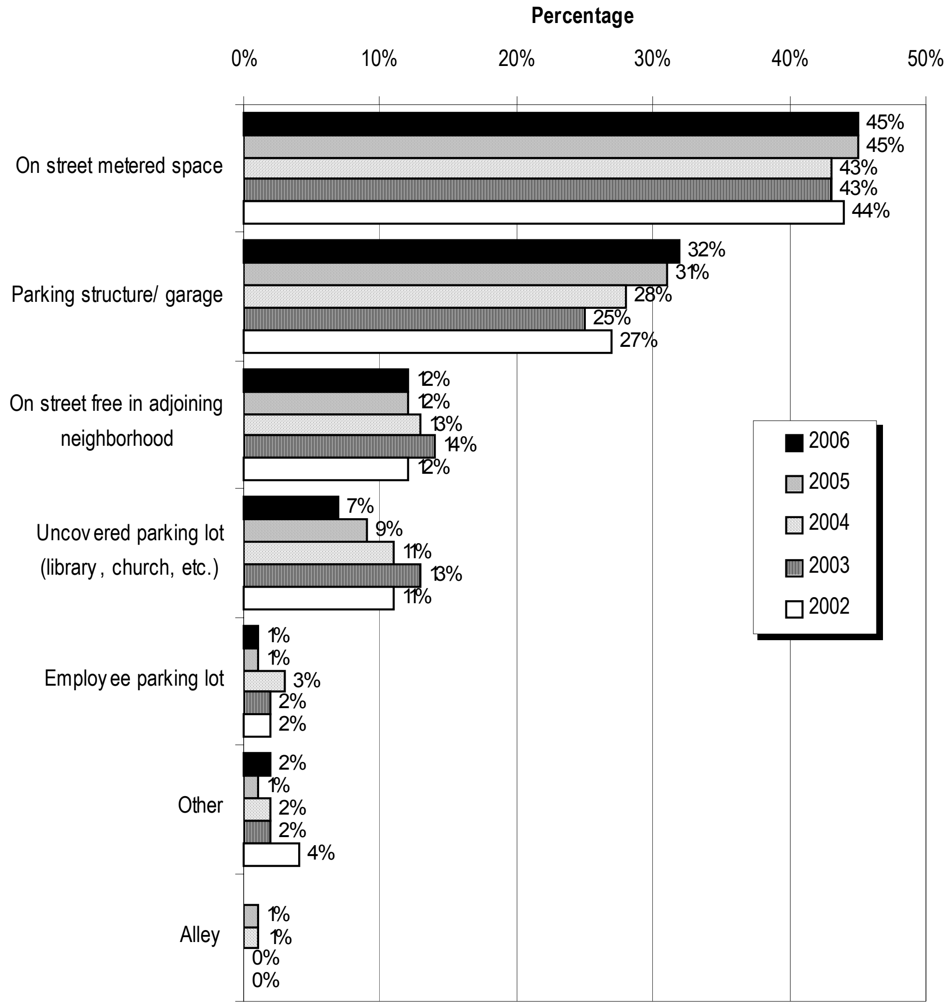


FIGURE 23A
ADVERTISING AWARENESS
2002 TO 2006

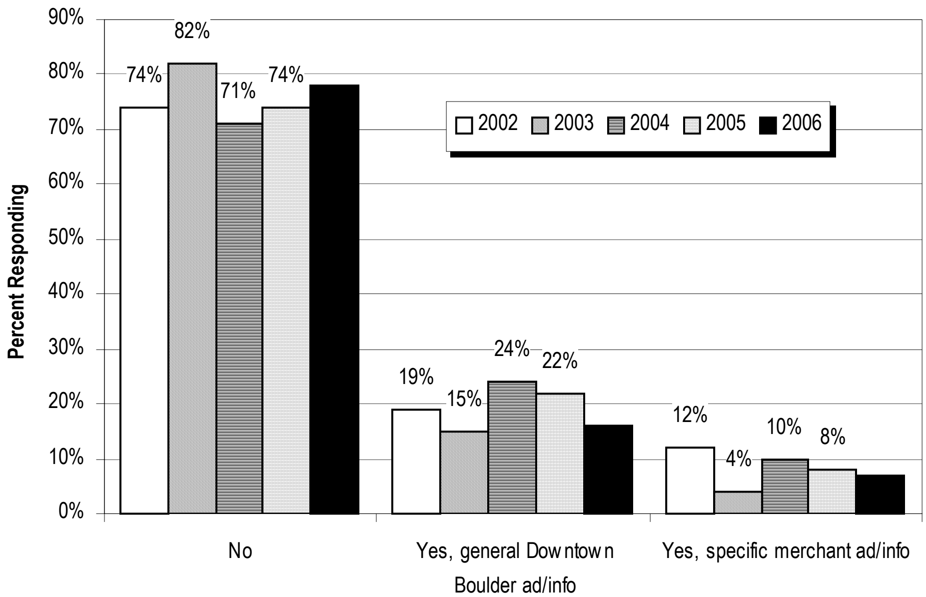



FIGURE 23B
ADVERTISING AWARENESS
BY 2006 VISITOR TYPE

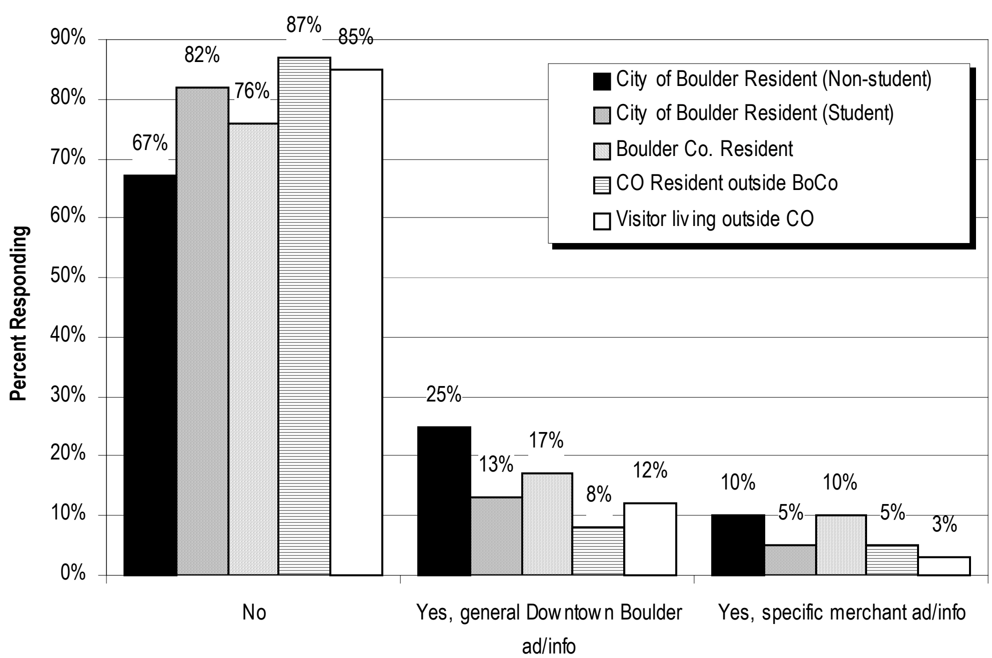


FIGURE 26
WHICH ACTIVITIES, CONCERTS, SPECIAL EVENTS, FESTIVALS, ETC. HAVE YOU ATTENDED IN DOWNTOWN BOULDER IN THE PAST YEAR?
2004 TO 2006

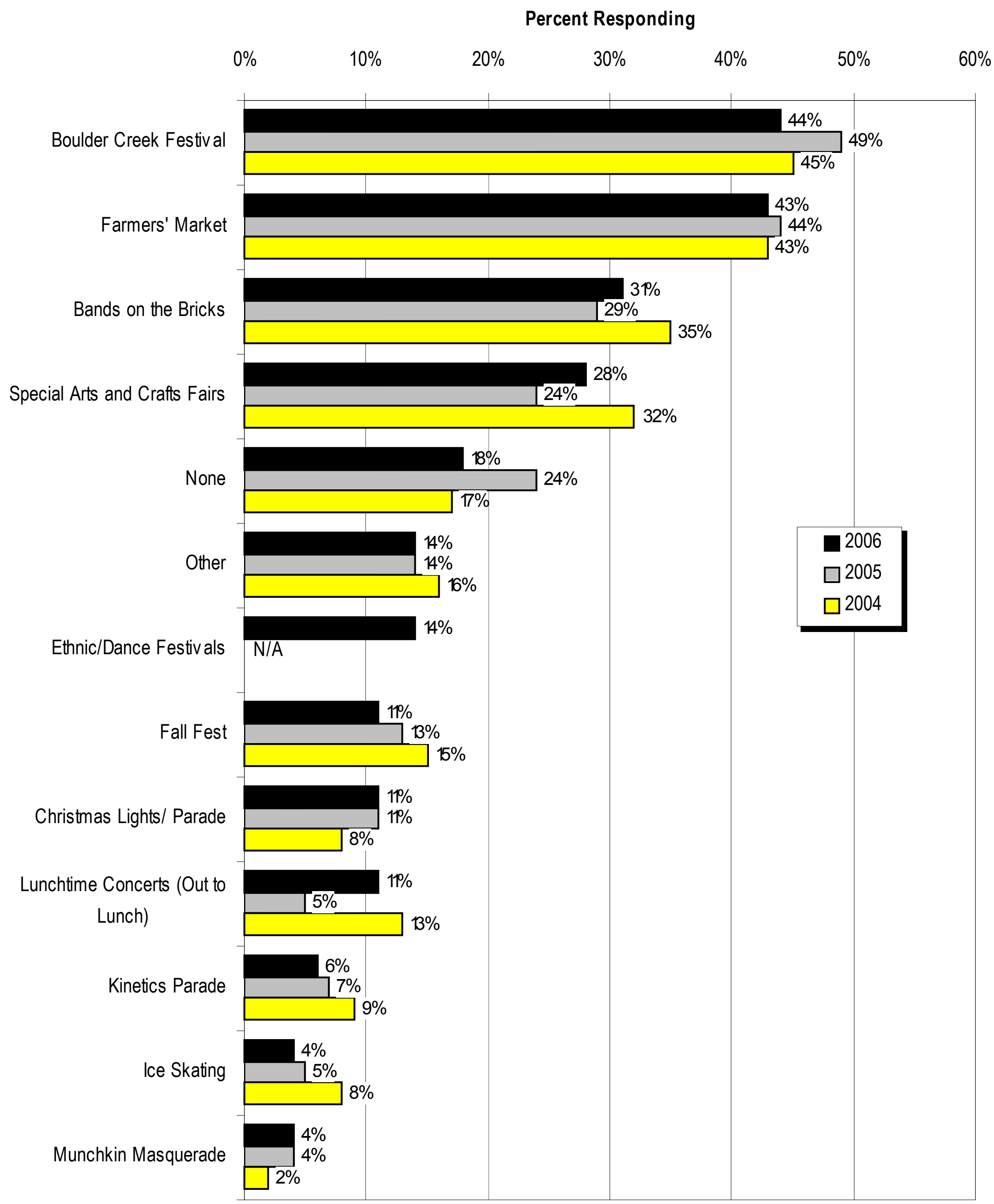
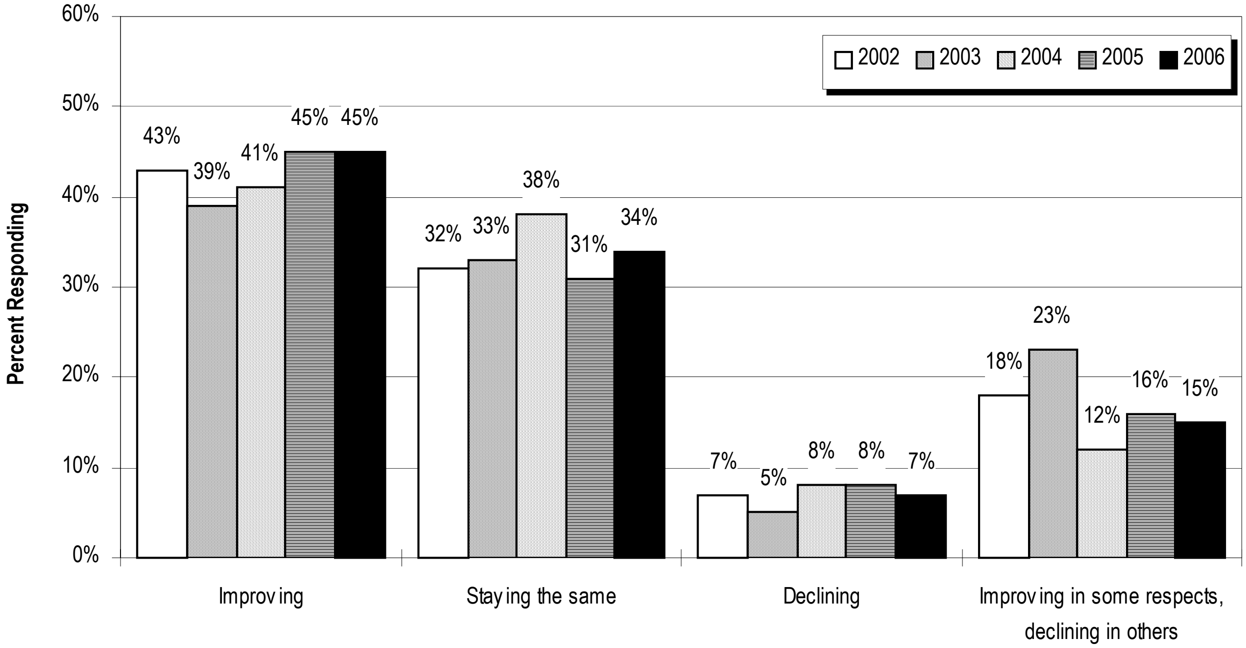


FIGURE 27
OVER THE PAST FEW YEARS, HAS THE DOWNTOWN BOULDER AREA BEEN IMPROVING, STAYING THE SAME, DECLINING, OR IMPROVING IN SOME RESPECTS AND DECLINING IN OTHERS?
2002 TO 2006




M:\JOBS\Boulder\City\Downtown Boulder Visitor\2006 (2217)\2006 Final report.doc