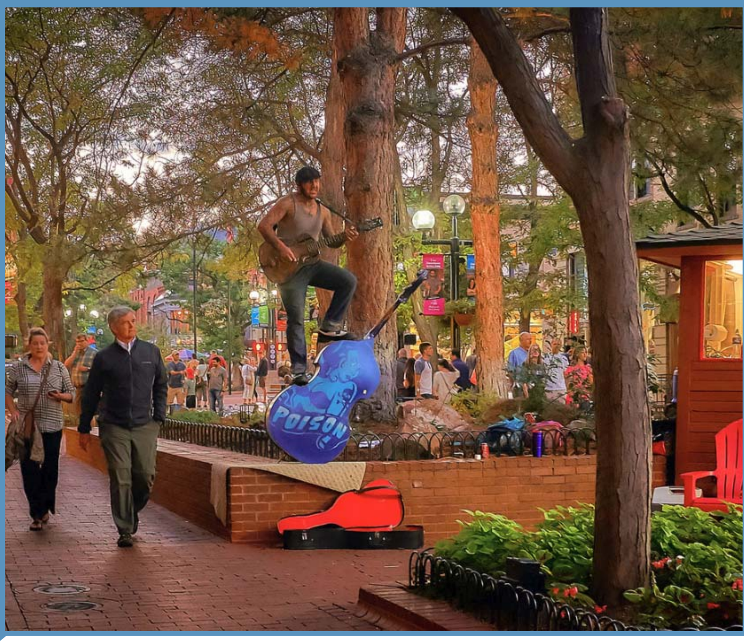
Downtown Boulder User Survey 2022

RRC

DOWNTOWN BOULDER PARTNERSHIP

CITY OF BOULDER

Boulder COLORADO VISIT BOULDER



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Introduction

RRC has been doing intercept surveys in downtown Boulder since 1995. Originally done annually, they are now done every other year.

The most recent prior survey in the series was done in 2018. In 2020, the regular research was paused due to the pandemic. Goals of the research include:

- Defining visitor profiles – who is coming downtown?
- What drives various user segments to visit downtown?
- Measuring spending impacts
- How does the downtown rating compare to expectations and past experiences?

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Methodology

Intercept Survey

Interviews were conducted between August 1st and September 24th on Pearl Street from 10th to 17th streets. Survey hours generally ran from 10:00 a.m. to 8:00 p.m.

In this report, the 2022 results are compared to results from prior years, particularly pre-covid (2018) and 2012, to assist in identifying trends. Year to year, many questions remain similar, allowing for the monitoring of longitudinal trends.

Several questions were asked only to specific sub-groups of survey respondents (such as overnight visitors or City residents); as a result, only the segment to which the question was posed is discussed. Within this report, segments only with notable changes may be discussed in an effort to highlight findings of particular interest.

669 Total Surveys Completed

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Key Research Findings

Key Findings

Locals are coming downtown. The percentage of visitors interviewed dropped slightly while the number of Boulder residents increased to about 1/3 compared to 25% in 2018.

Trips downtown were more evenly distributed across Boulder. The share coming from South and East Boulder increased from 24% to 33% in 2022. However, downtown and North Boulder neighborhoods still account for more than half of visits.

Cars are still the dominant mode for getting downtown. The percentage actually increased from 60% in 2018 to 67% in 2022. While efforts to encourage alt modes are important, accommodating autos is still a key driver of downtown visitation and revenues.

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Key Findings

Good news for cash registers. Dining and shopping both rose sharply as reasons for coming downtown. This shift is reflected in spending patterns as well. People watching and employment dropped in terms of importance to choosing downtown.

Event attendance dropped significantly among our sample from 2018 to 2022. The percentage who had attended no downtown events more than doubled. This is no doubt due to lingering impacts of Covid era behaviors.

Overall ratings of downtown dipped. The number saying the experience is improving dropped while those saying it is declining increased. However, except for cleanliness and safety, ratings for specific items were fairly stable.

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Key Findings

Parking ratings increased for both ease of finding space and the overall experience. This may correlate to more people choosing to drive downtown vs. other modes.

Transients are a serious issue. While still a minority, the share of respondents saying the situation is getting worse jumped sharply from 10% to 27% in 4 years. Though not at the crisis point seen in some cities, this should be monitored closely.

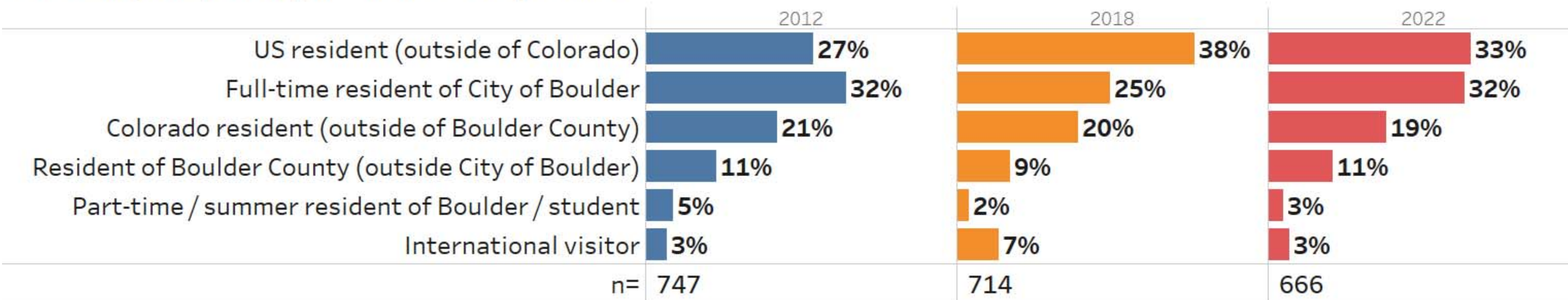
Spending per visit jumped sharply from 2018 for both dining and shopping. Visitors are critical to downtown businesses. Out-of-state tourists outspend locals by more than 2 to 1 per trip to Pearl Street.

Visitor Type & Geographic Origin

Visitor Type & Geographic Origin

After dipping in 2018, the percentage of locals on Pearl Street rebounded this year to roughly 1/3 of respondents. Overall, 44% of those interviewed live in Boulder or within the County.

Where is your primary residence? Are you a...

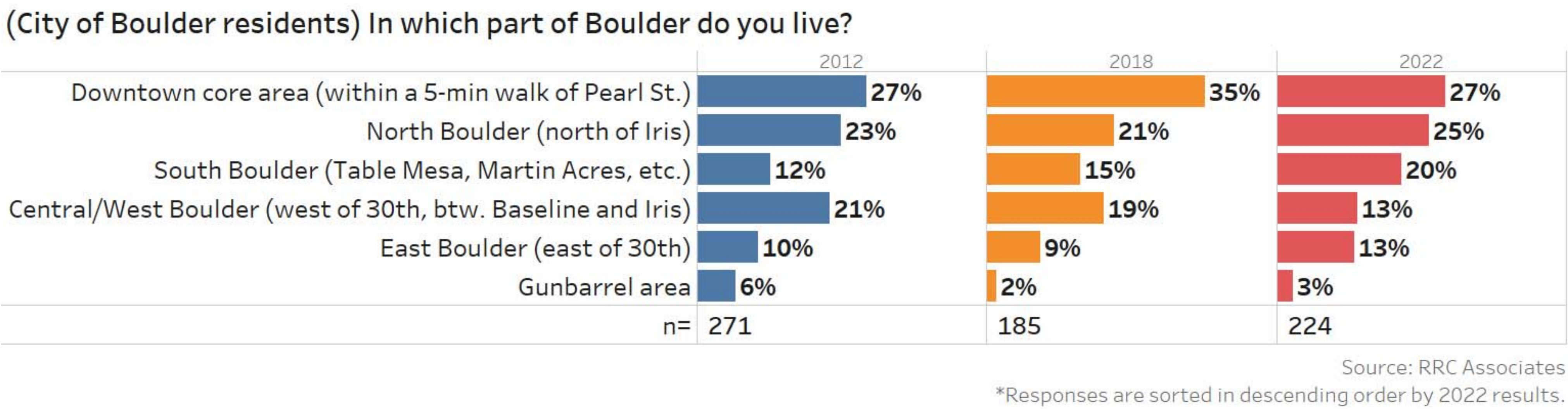


Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

Visitor Type & Geographic Origin

The downtown area and north Boulder continue to make up more than half of the city residents coming downtown. However, both south and east Boulder residents have increased their visits to Pearl Street.



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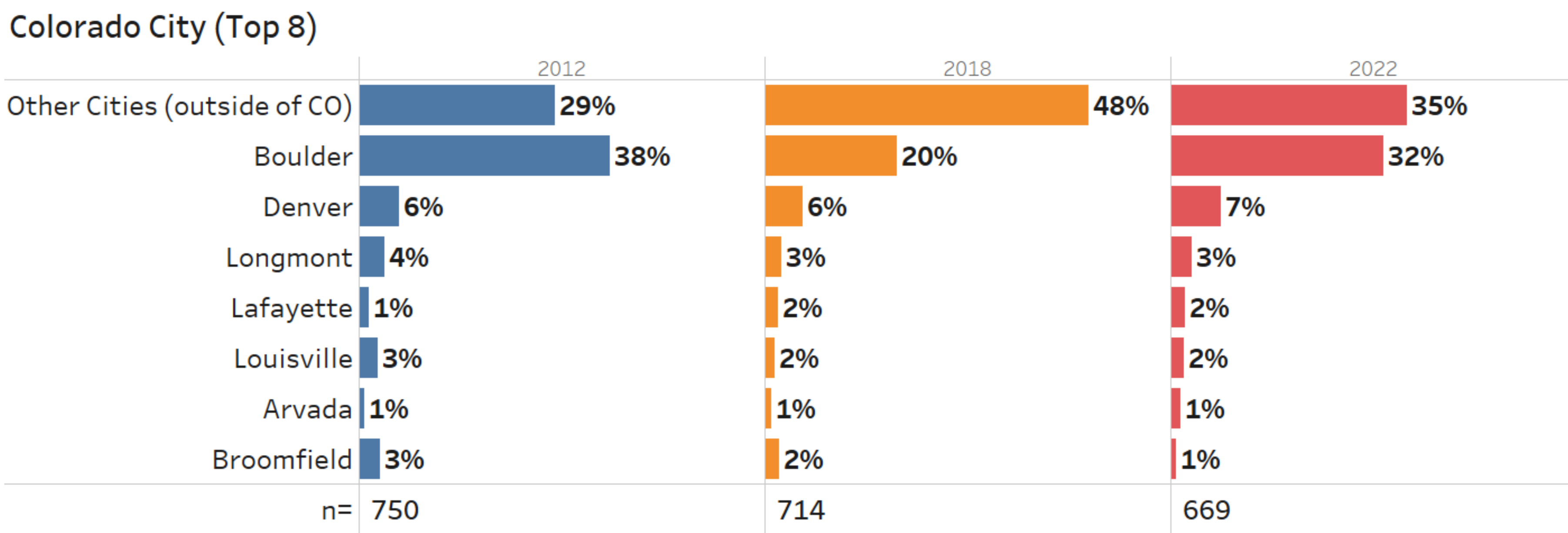
Colorado Cities

Among visitors to downtown from Colorado, the most common origin city is Boulder (32%), up from 20% 4 years ago. Other popular cities include Denver (7%) and Longmont (3%).



Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

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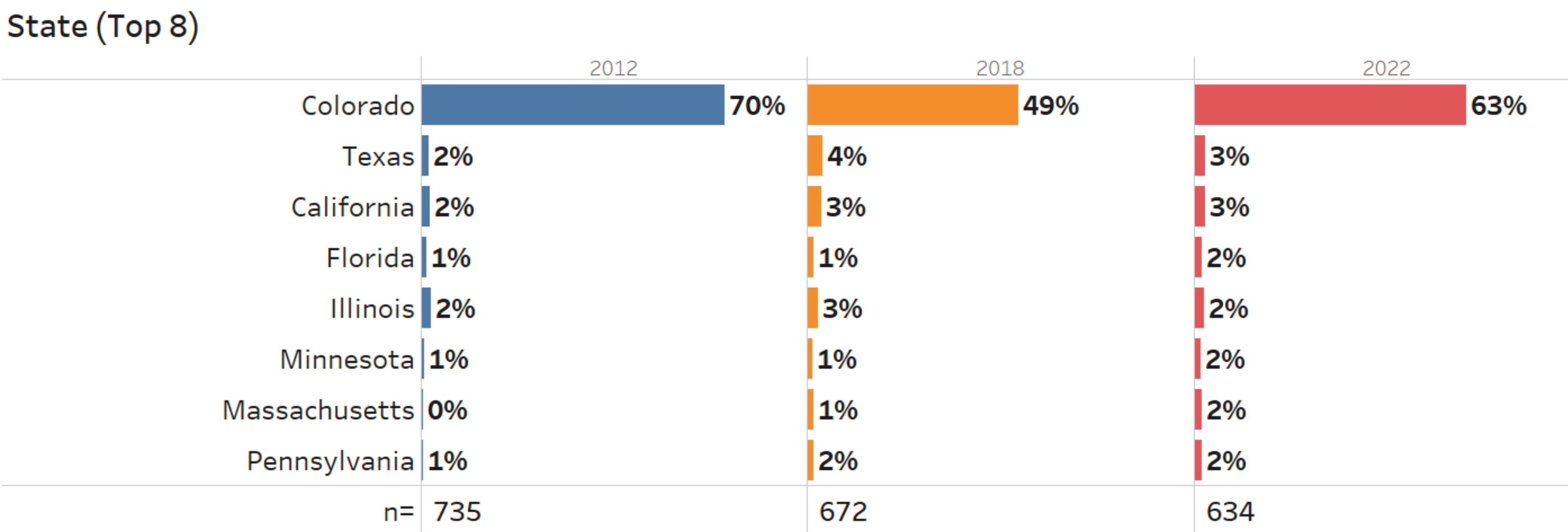
States

The share of visitors from Colorado jumped from half to nearly 2/3 between 2018 and 2022. Texas, California, Florida and Illinois continue to be key states for visitation.

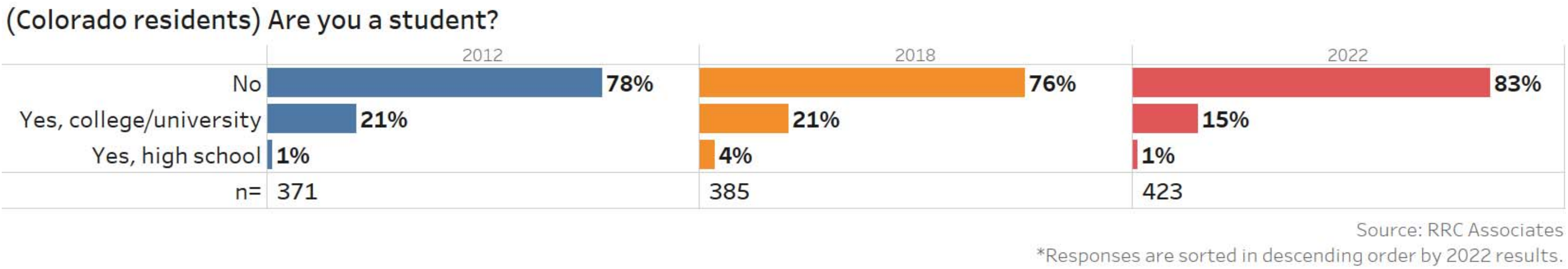


Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

Students in Downtown Boulder

After holding steady from 2012 to 2018, the percentage of college students in the downtown mix dropped to 15% this year.



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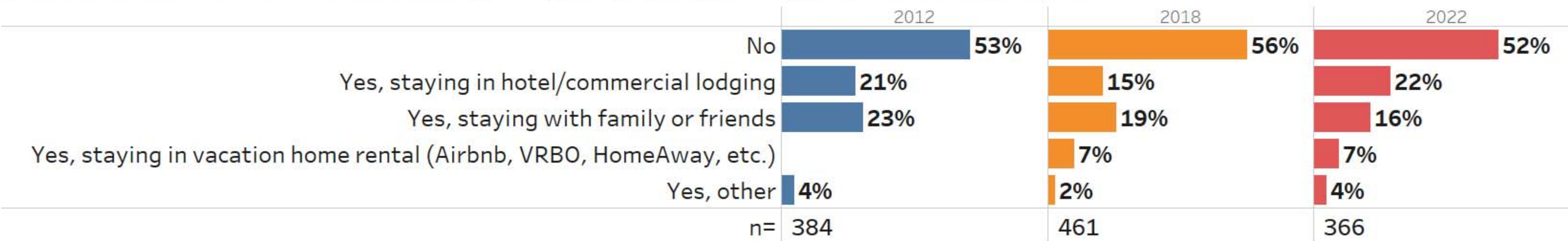
Overnight Visitors and Trip Planning

Overnight Visitors & Accommodation

A majority of downtown visitors did not stay overnight in the Boulder area. Among those who did spend the night, most stayed in a hotel/commercial lodging, representing more visitors than ten years ago.

(Visitors from outside Boulder County) Are you spending the night in the Boulder area?

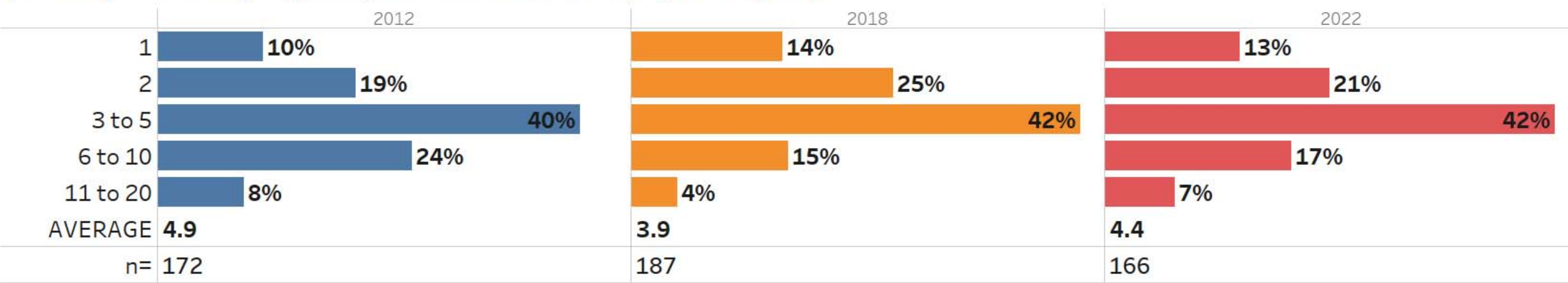


Source: RRC Associates
*Responses are sorted in descending order by 2022 results.

Nights Spent in Boulder

Average length of stay rebounded from 2018 but still lags behind the 2012 number of 4.9 nights.

(Overnight visitors) Nights spent in Boulder area (cap. 20 nights)



Source: RRC Associates

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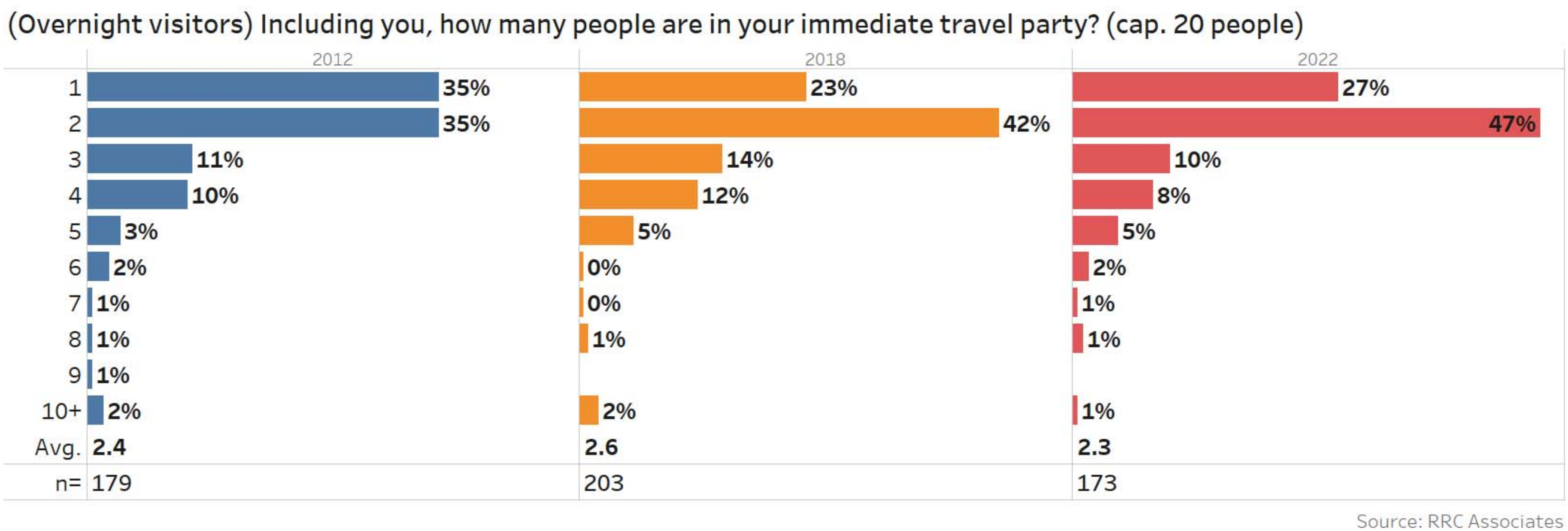
Travel Party Size

Among parties staying overnight, the average party size has decreased over the last four years.



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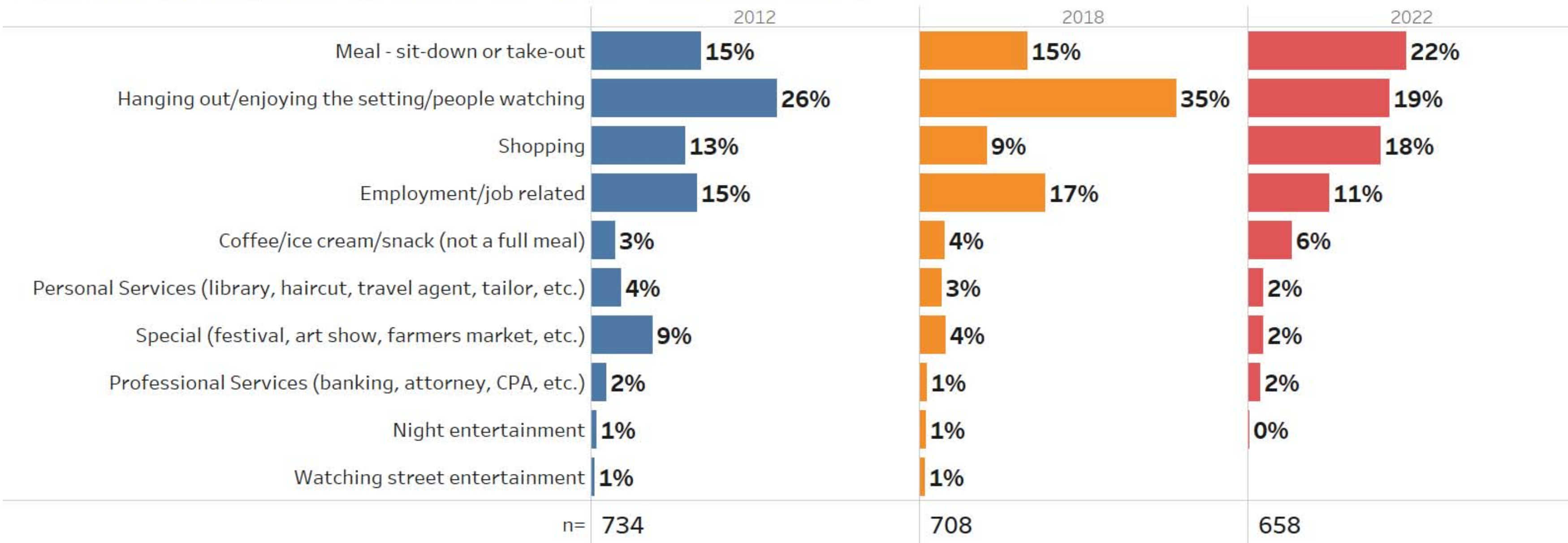
Primary Reason for Visiting Boulder

Dining and shopping both jumped as the primary reason for visiting downtown. Predictably, trips downtown for employment dropped.

What is the primary reason you came to Downtown Boulder TODAY?

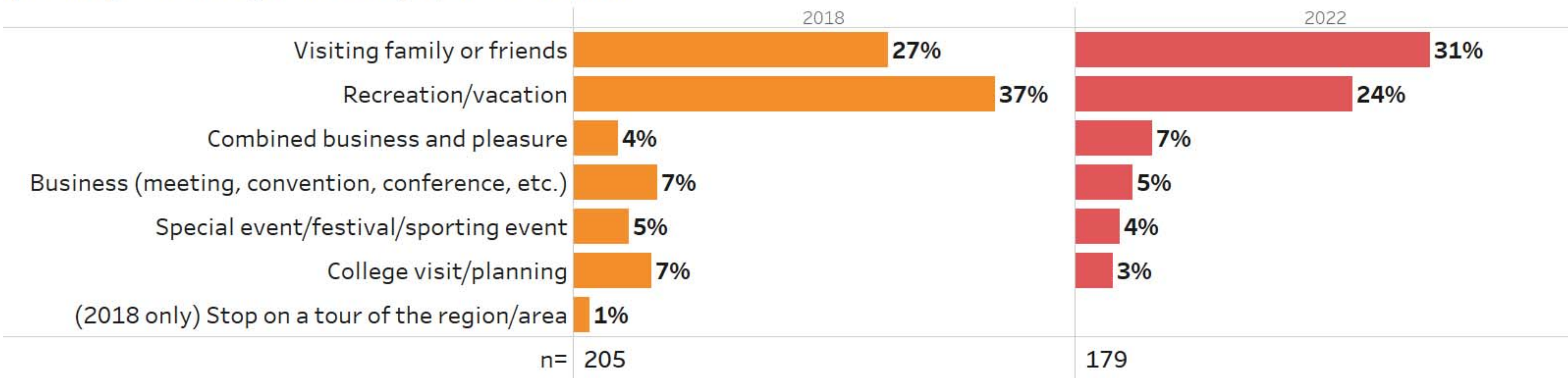


Source: RRC Associates

Reasons for Visiting Boulder

Visiting friends/family and vacation are the dominant reasons most people are visiting Boulder.

(Overnight visitors) What brings you to Boulder?



Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

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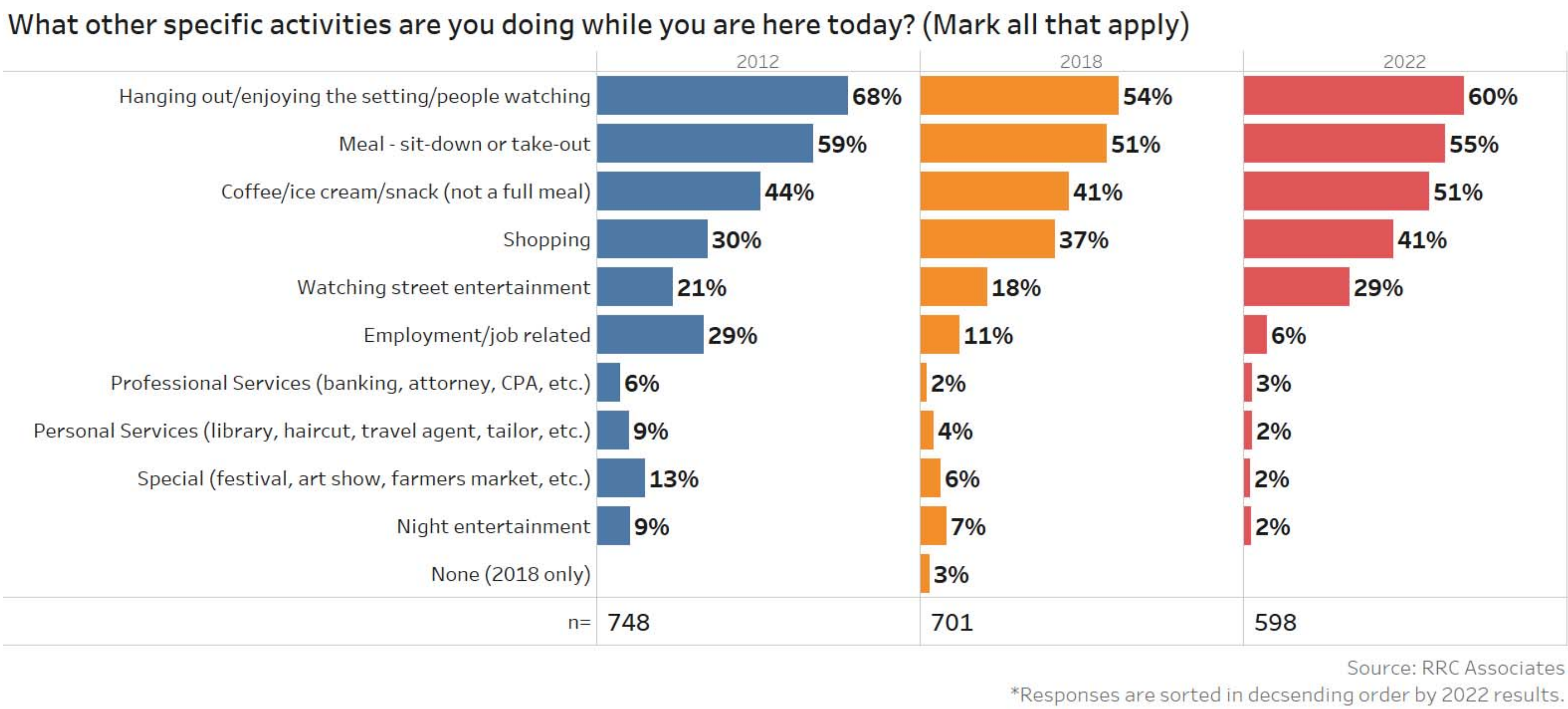
Activities in Boulder

Dining, snacking and shopping are all growing as ancillary activities when people visit downtown. The upward trend of these choices which drive spending are a healthy sign.



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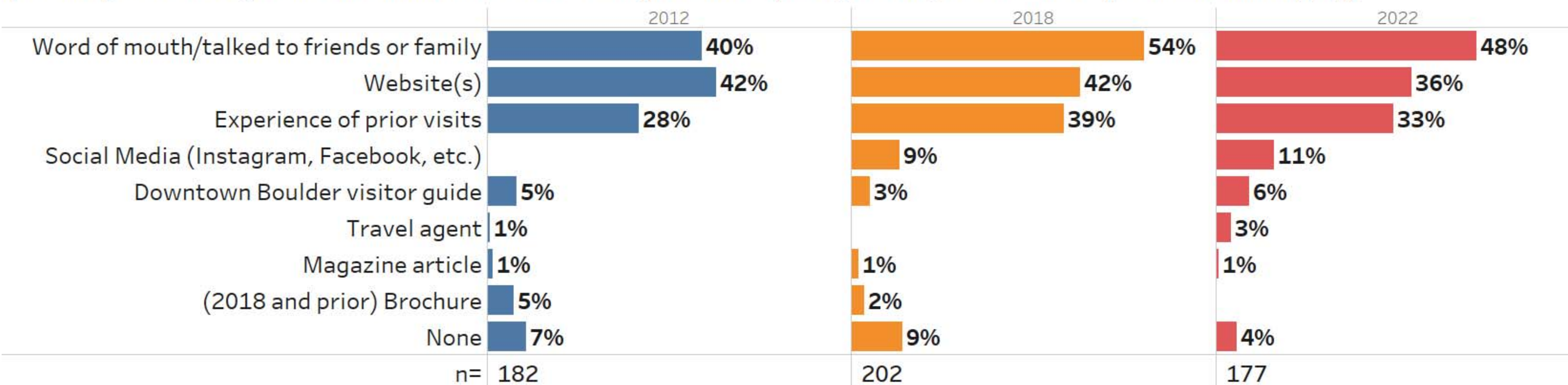
Trip Planning Sources

Word of mouth continues to be the most used information source on planning trips to downtown Boulder (48%). Websites (36%) and prior visits (33%) also continue to be among the most popular sources of information.

(Overnight visitors) What information sources did you use to plan your trip to Boulder? (Mark all that apply)



Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

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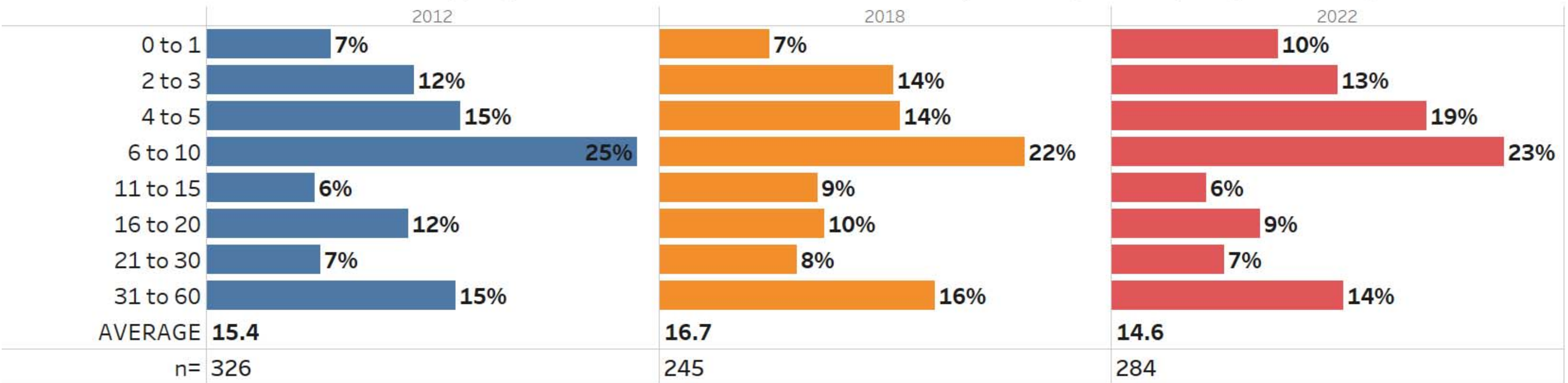
Area Resident Behavior

Prior Visitation

After jumping in 2018, average number of visits by Boulder County residents dropped below 2012 levels this year. This is a trend that should be monitored.

(Boulder County residents) Not including employment/work, about how many times in the past two months have you visited Downtown Boulder for errands, shopping, restaurants, entertainment, etc.? (Including this trip, cap. 60 times)



Source: RRC Associates

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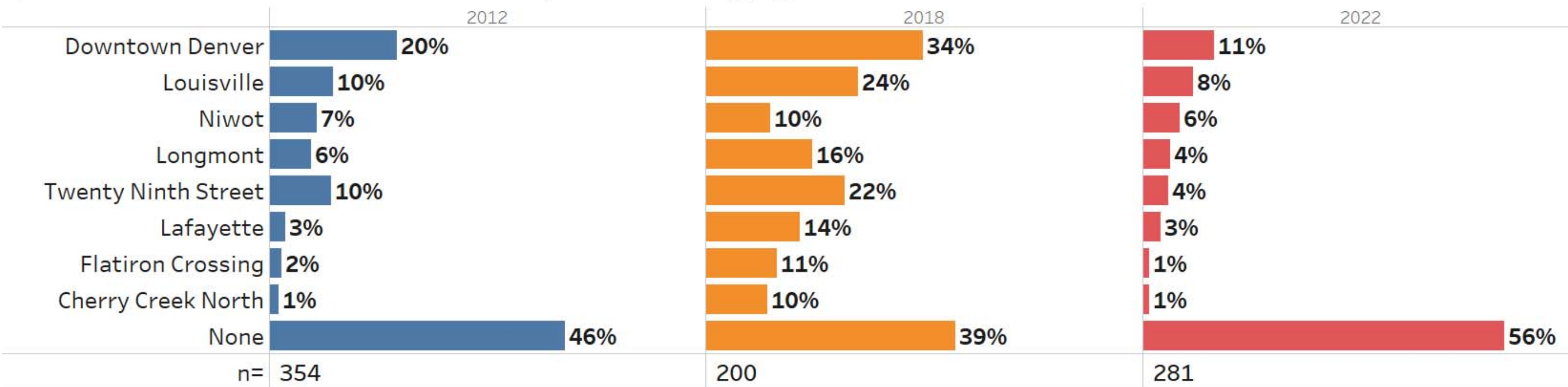
Visitation to Other Communities or Shopping Areas

Event attendance outside of downtown Boulder dropped sharply compared to 2018. This likely reflects lingering impacts of the pandemic and should trend upward in the future.

(Boulder County residents) In the past 12 months, in what other communities or shopping areas have you attended any special events, festivals, or free concerts? (Mark all that apply)



Source: RRC Associates
*Responses are sorted in descending order by 2022 results.

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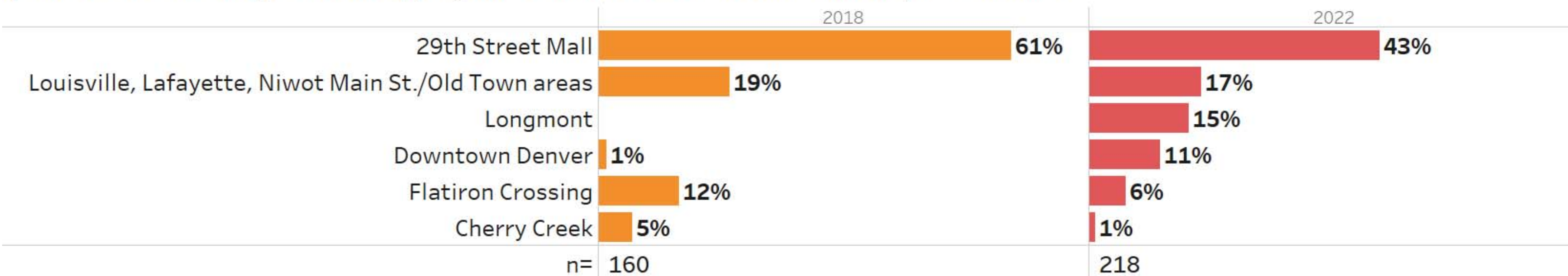
Other Shopping Areas Visited

Twenty Ninth Street is still the most visited shopping area outside of downtown although numbers dropped sharply there as well as for Flatiron Crossing.

(Calculated variable) Other shopping area visited the most times in the past 2 months



Source: RRC Associates
*Responses are sorted in descending order by 2022 results.

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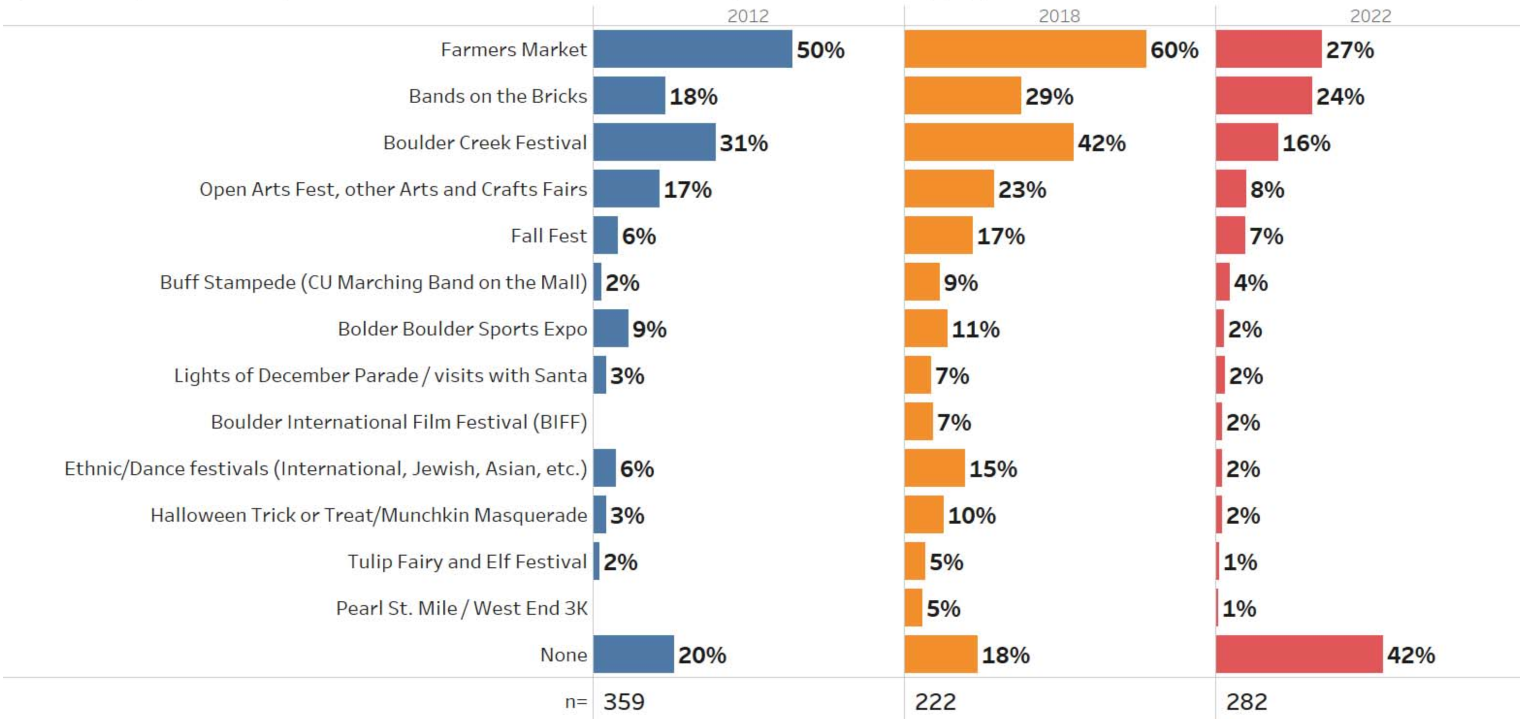
Activities, Concerts, Special Events, Festivals

Predictably, event attendance is down sharply from past years. This is likely related to the lingering impacts of Covid and can be expected to trend upward in the future.

(Boulder County residents) In the past 12 months, which activities, concerts, special events, festivals, etc. did you specifically make a trip to Downtown Boulder to attend? (Mark all that apply)



Source: RRC Associates
*Responses are sorted in decsending order by 2022 results.

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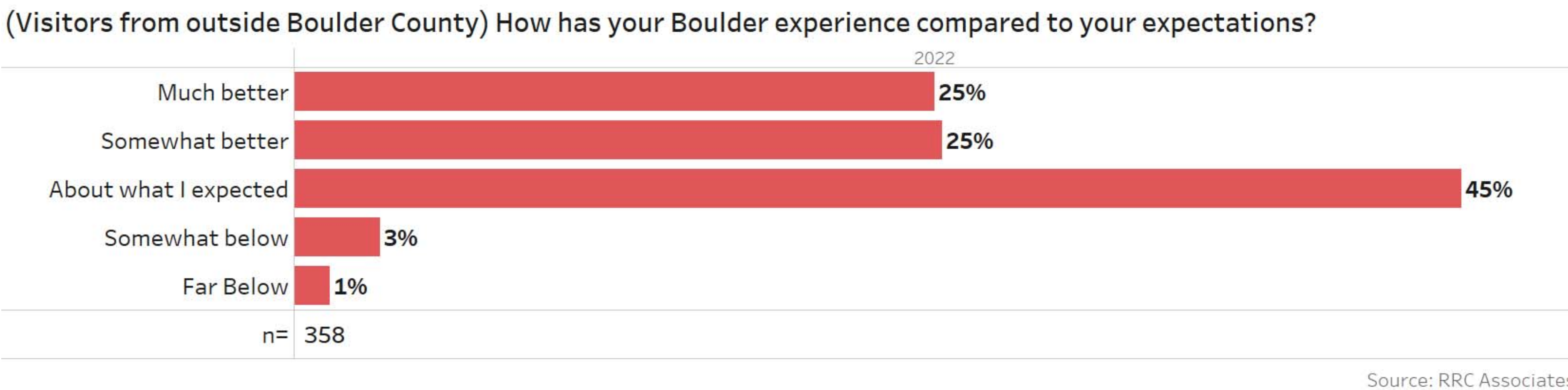
Ratings of Downtown Boulder

Boulder Expectations vs. Experience

This is good news for Downtown. 50% of respondents say their experience was better than what they were expecting. Only 4% of respondents’ expectations were below what they were expecting.



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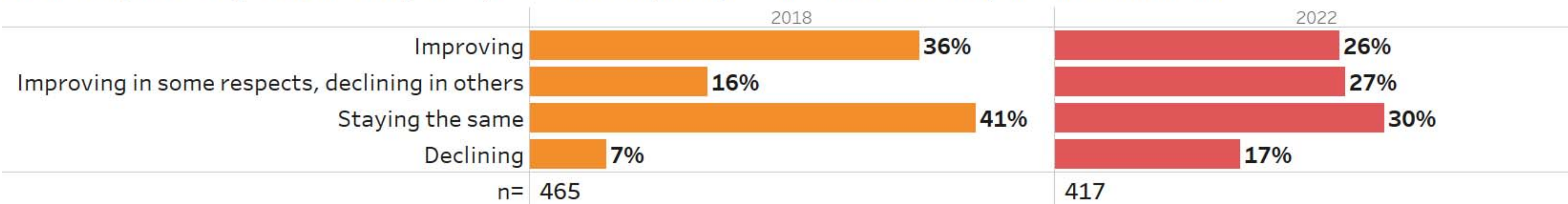
Quality of the Downtown Experience

While still a net positive, the trend for this question is a concern. Overall, respondents saying the quality of their Downtown experience has been improving decreased compared to 2018. Those responding the overall quality of the Downtown experience has been declining increased from 2018 (17% vs. 7%).

Over the past few years, would you say the overall quality of the Downtown experience has been:



Source: RRC Associates

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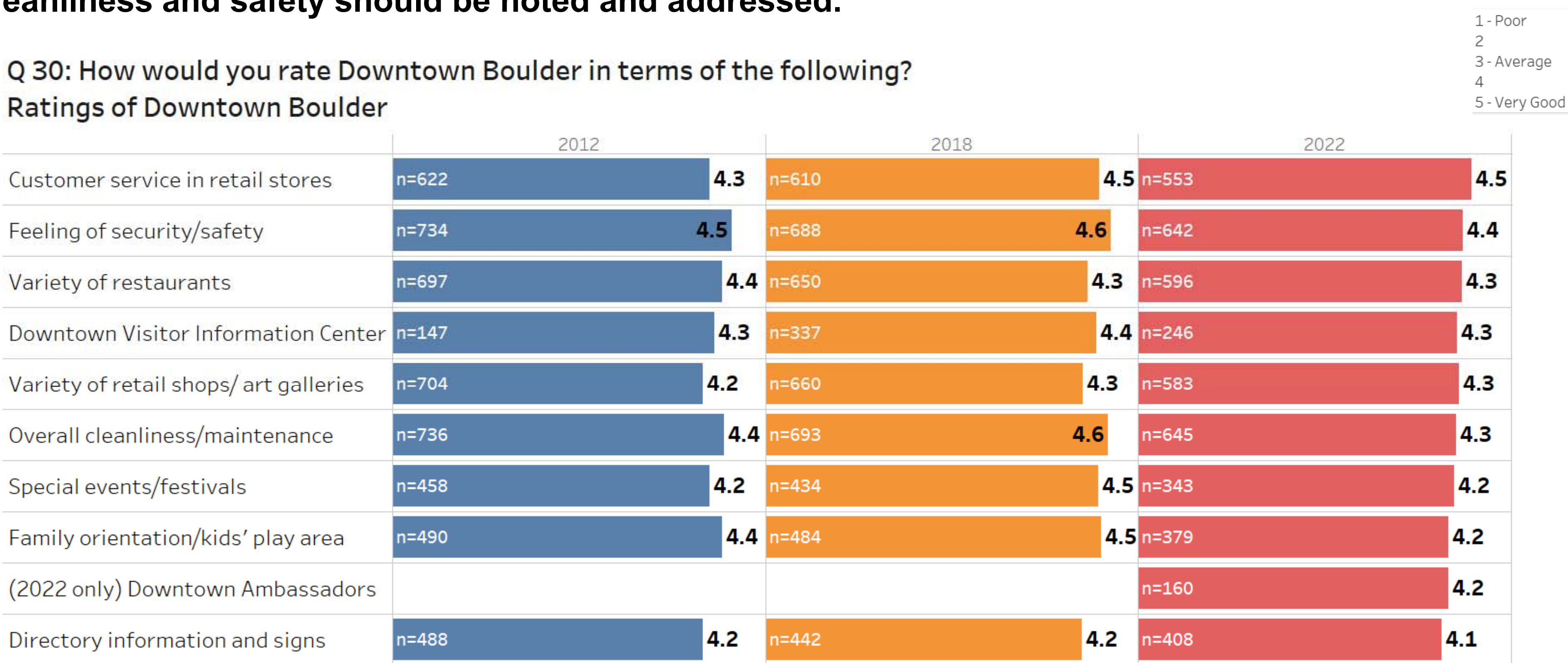
Ratings of Downtown Boulder

Most downtown attributes continued to rate highly with visitors. However, the lower ratings for cleanliness and safety should be noted and addressed.



Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

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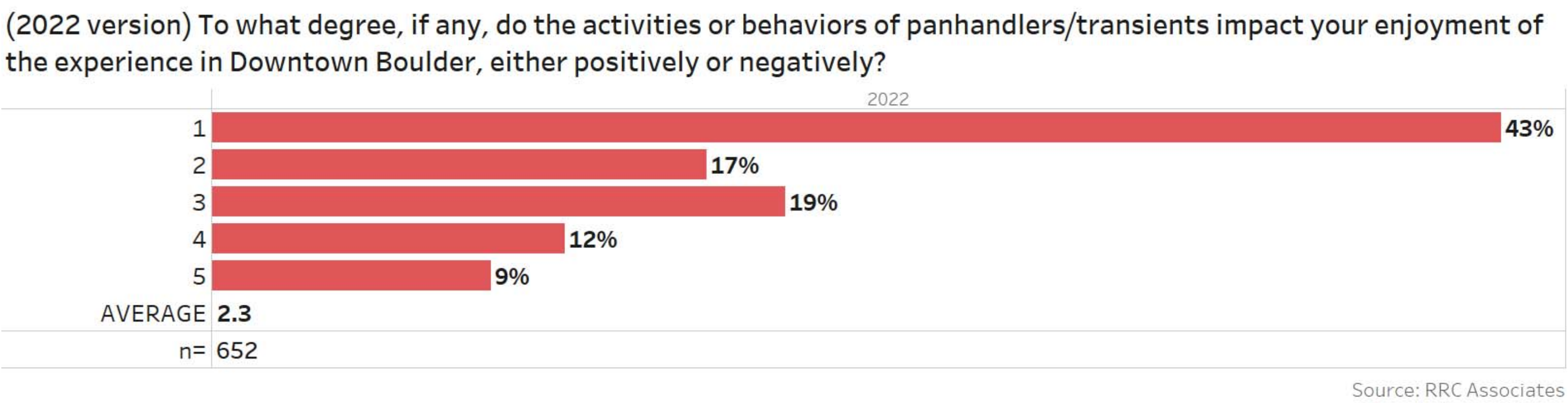
Panhandlers/Transients

21% of respondents reported that behaviors of transients/panhandlers significantly impacted their downtown experience.



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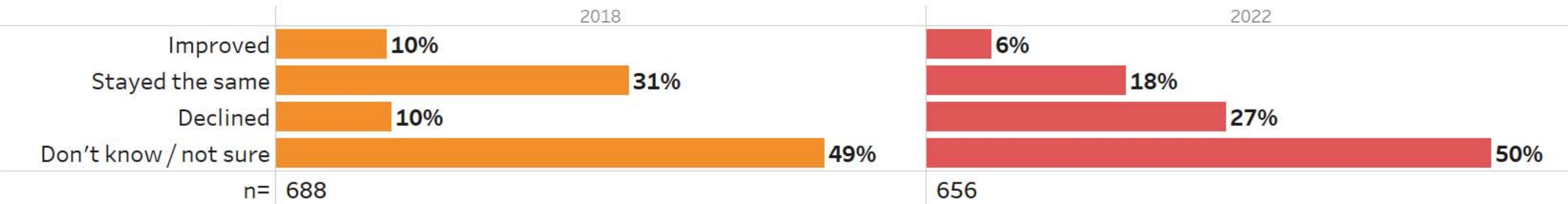
Panhandlers/Transients

Notably, Since 2018, significantly more people (27% vs. 10%) believe the issues with transients downtown are getting worse.

Over the past few years, would you say the situation with panhandlers/transients has:



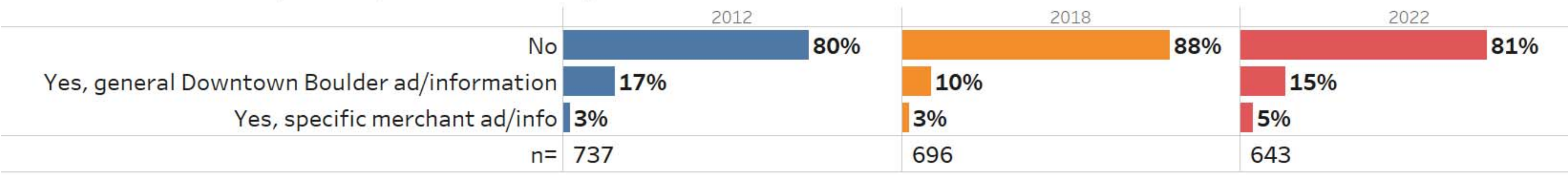
Source: RRC Associates

Advertisements

Awareness of Advertising

Awareness of DBP marketing efforts increased from 10 to 15% between 2018 and 2022. Specific merchant advertising awareness rose slightly to 5%.

Were you aware of any advertising or information sources promoting Downtown Boulder in general or an individual Downtown merchant prior to your arrival today?

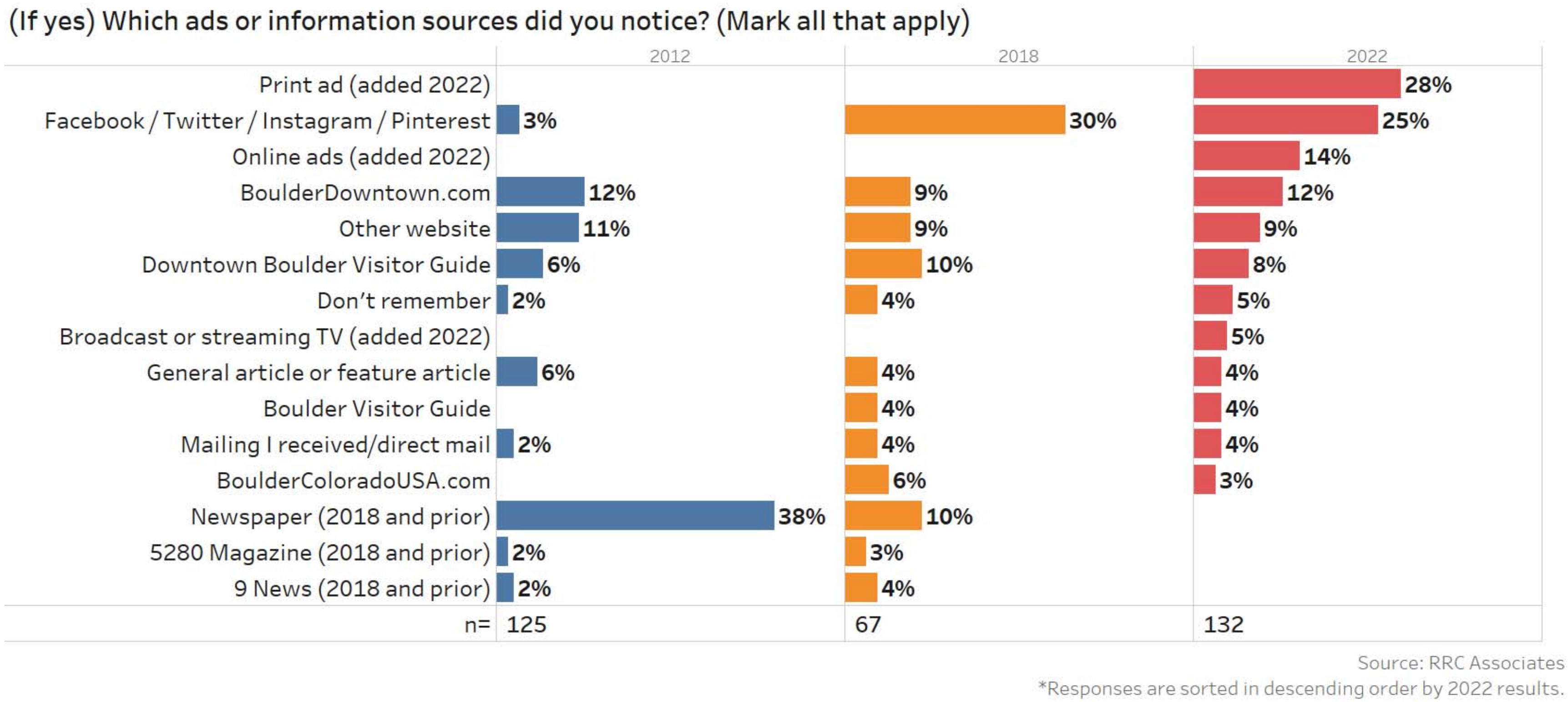


Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

Ads and Information Sources

Most commonly recalled advertising in 2022 included print ads, social media, and online ads (14%). Note the dramatic increase in social media usage since 2012.



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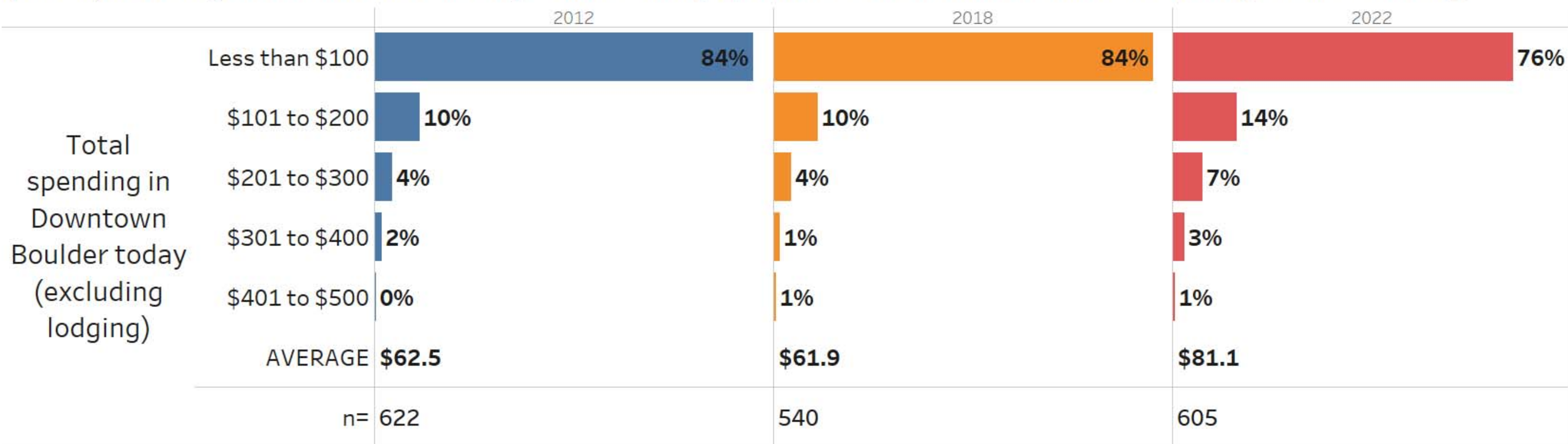
Spending

Total Spending

After relatively flat spending from 2012 to 2018, expenditures jumped sharply in 2022. Some of this increase is attributable to inflation. However, 31% higher spending is a healthy increase even after adjusting for inflation.

(All respondents) How much in total will you individually spend in the Downtown Boulder area today on the following?



Source: RRC Associates

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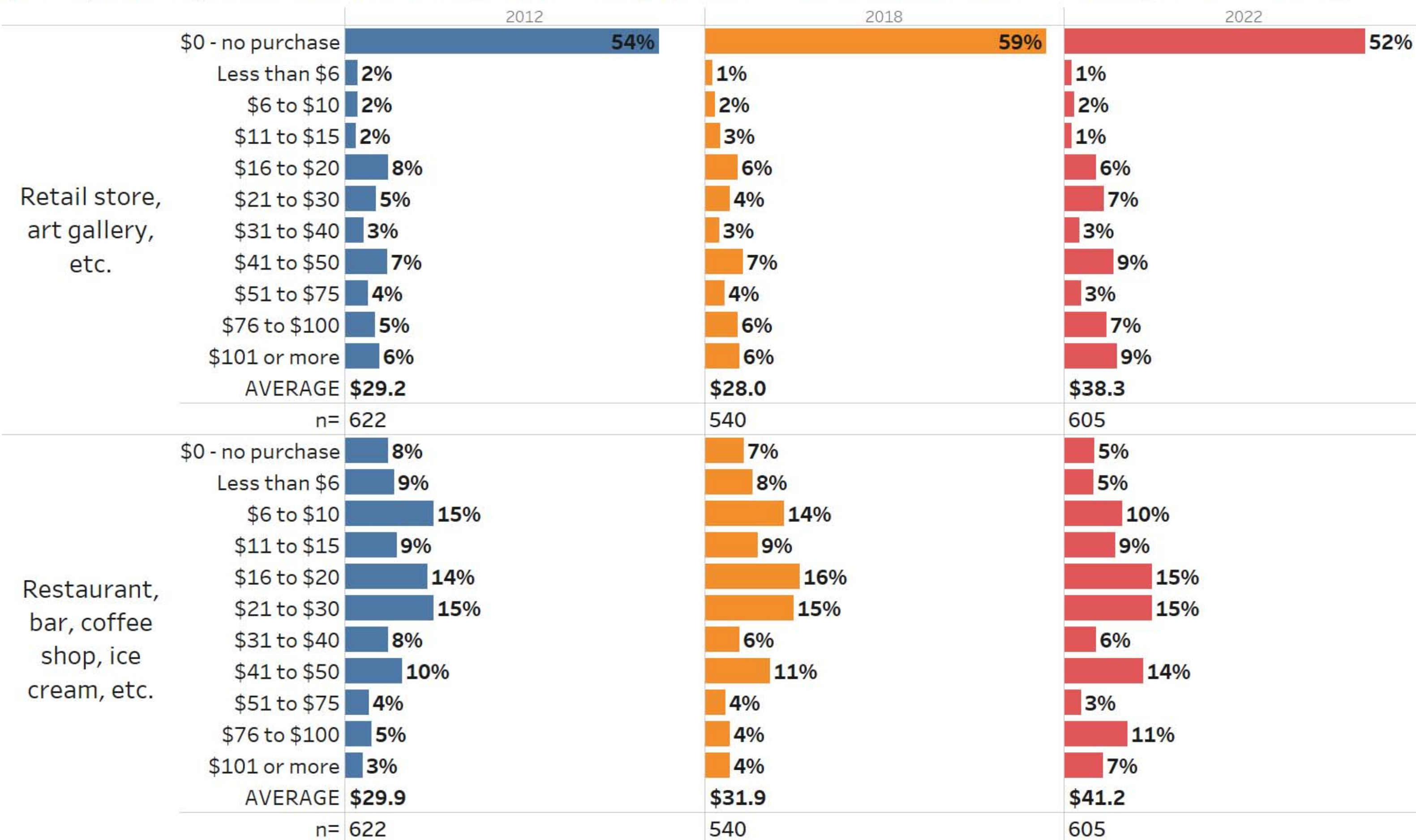
Retail and Restaurant Spending

(All respondents) How much in total will you individually spend in the Downtown Boulder area today on the following?



Source: RRC Associates

Both retail and restaurant spending jumped sharply from 2018 to 2022. This correlates with more people saying their primary reason for visiting was to shop or dine.

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Retail Spending by Visitor Type

As shown every year since 1995, visitors spend significantly more than locals on average. Higher spending seems to correlate directly with living further away from Boulder!

(All respondents) How much in total will you individually spend in the Downtown Boulder area today on the following? (2022 Only)

		City of Boulder Resident (Non-student)	Boulder Co. Resident	CO Resident outside BoCo	Visitor from outside CO
Retail store, art gallery, etc.	$0 - no purchase	65%	67%	56%	38%
	Less than $6	2%		1%	1%
	$6 to $10	1%		3%	1%
	$11 to $15	1%	3%	2%	0%
	$16 to $20	5%	2%	5%	6%
	$21 to $30	3%	8%	10%	7%
	$31 to $40	3%	3%	3%	3%
	$41 to $50	6%	6%	9%	11%
	$51 to $75	2%	2%	3%	5%
	$76 to $100	5%	5%	3%	12%
	$101 or more	6%	5%	6%	16%
	AVERAGE	$22.7	$27.0	$27.4	$58.8
	n=	144	64	120	232

Source: RRC Associates

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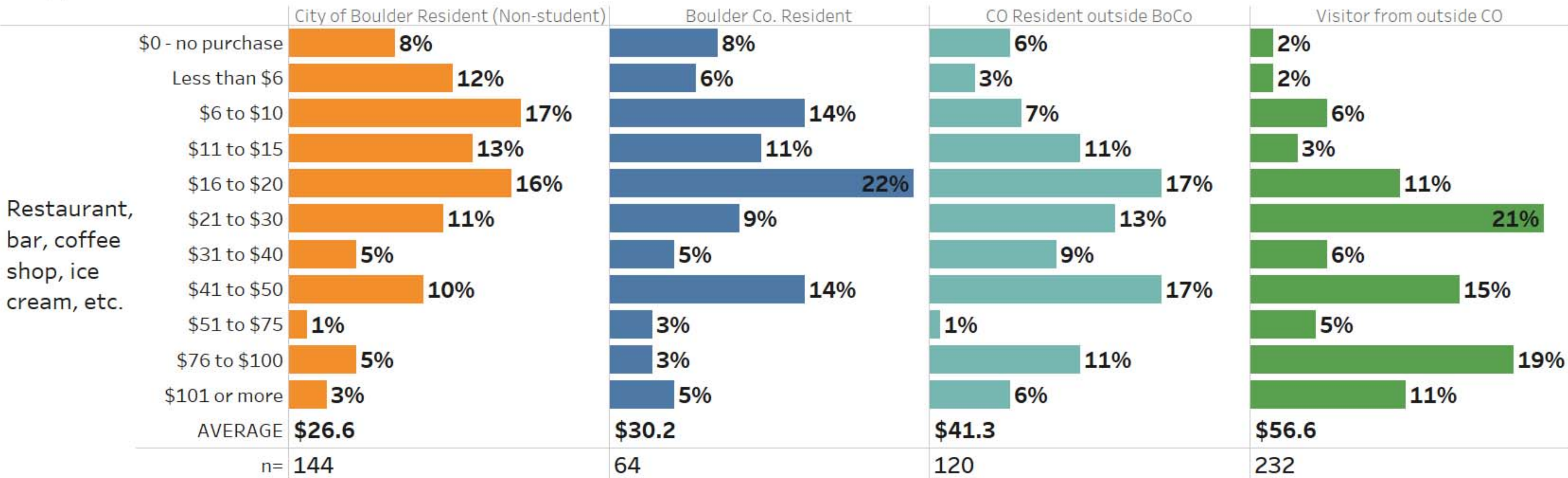
Food and Drink Spending by Visitor Type

Out-of-state visitors spend more than double city residents on dining downtown.

(All respondents) How much in total will you individually spend in the Downtown Boulder area today on the following? (2022 Only)



Source: RRC Associates

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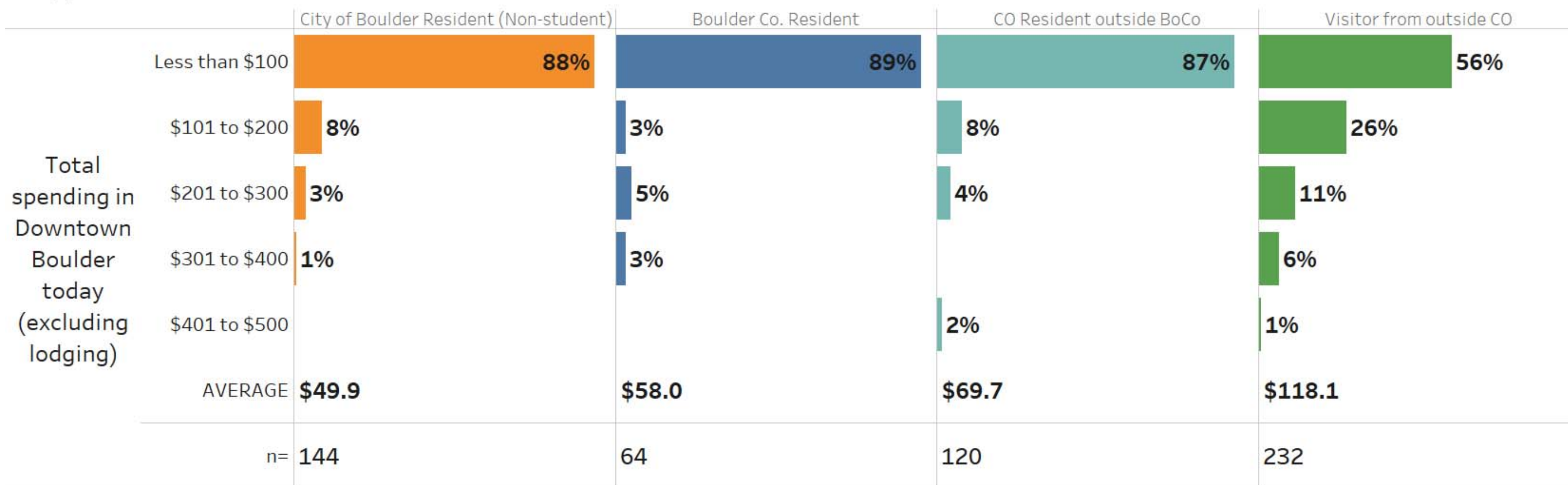
Total Spending by Visitor Type

Spending in shops and boutiques also shows that visitors spend significantly more per trip downtown. Note that certain retailers who cater to visitors will benefit more from this trend.

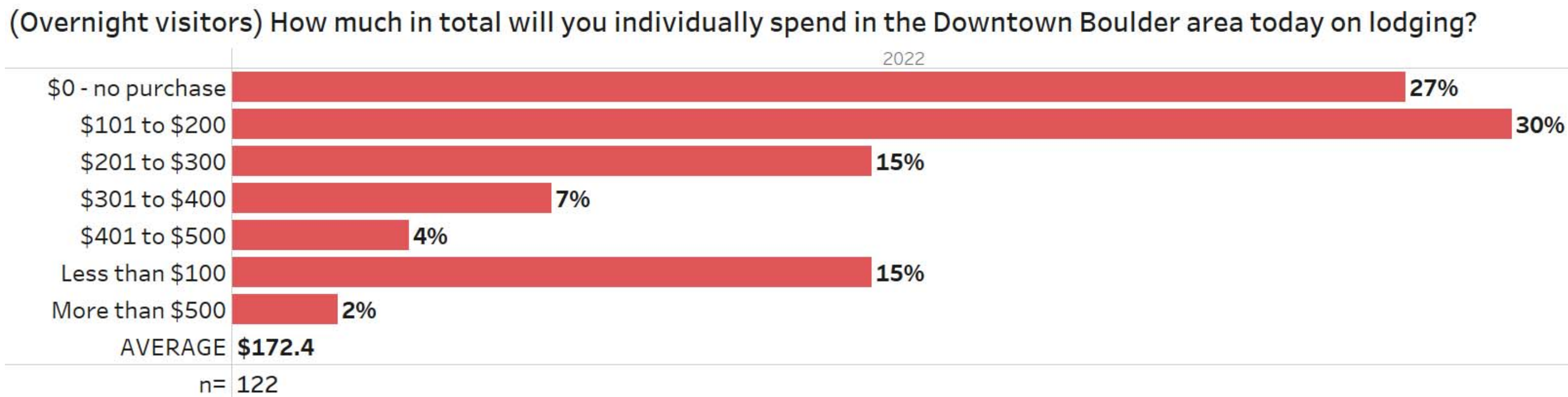
(All respondents) How much in total will you individually spend in the Downtown Boulder area today on the following? (2022 Only)



Source: RRC Associates

2022 Lodging Spending

Overnight visitors reported spending an average of $172 per night per person on lodging in Boulder.



Source: RRC Associates

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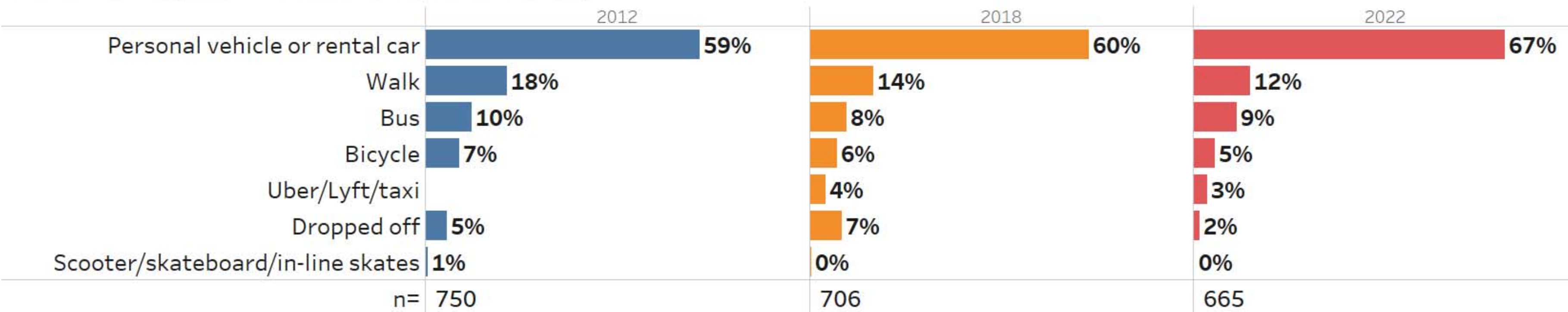
Transportation

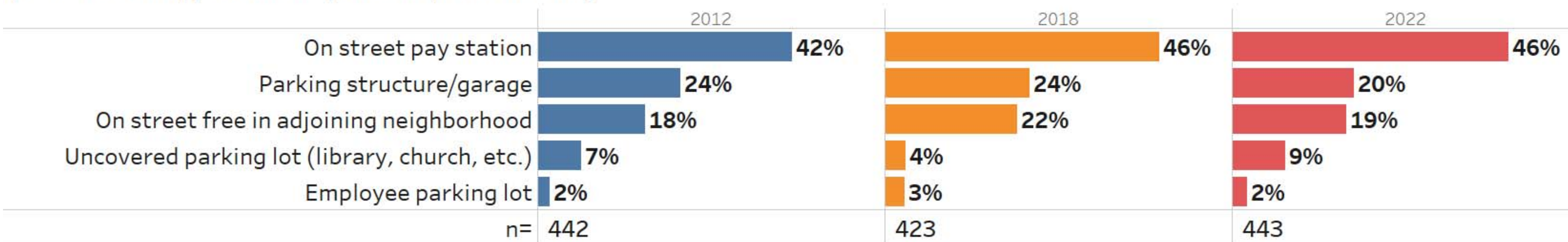
Travel Modes to Downtown Boulder

Two thirds of people drove downtown which is an increase from 2018. Cars show no sign of losing their popularity as the primary mode of transportation for trips downtown.

How did you get to Downtown Boulder this trip?



(If drove today) Where is your car parked today?



Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

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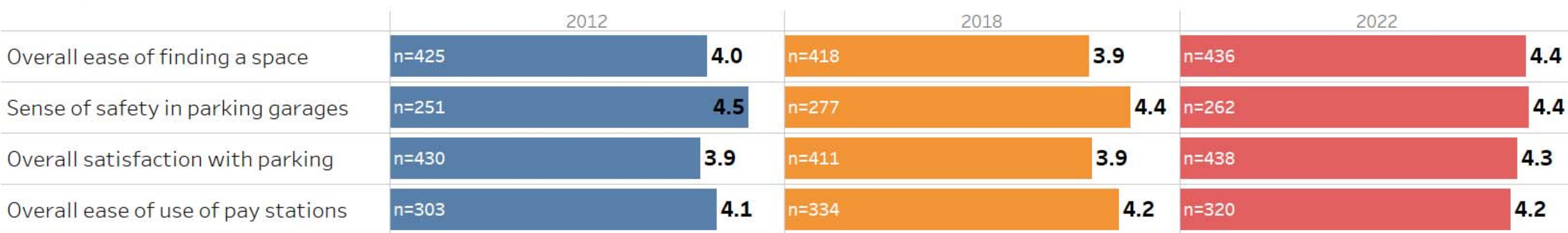
Satisfaction with Parking

Among those who drove, the overall satisfaction with parking and the ease of finding a space both increased from 2018.

1 - Poor
2
3 - Average
4
5 - Very Good

Q 24: (If drove today) How do you rate your satisfaction with parking today?



Source: RRC Associates
*Responses are sorted in descending order by 2022 results.

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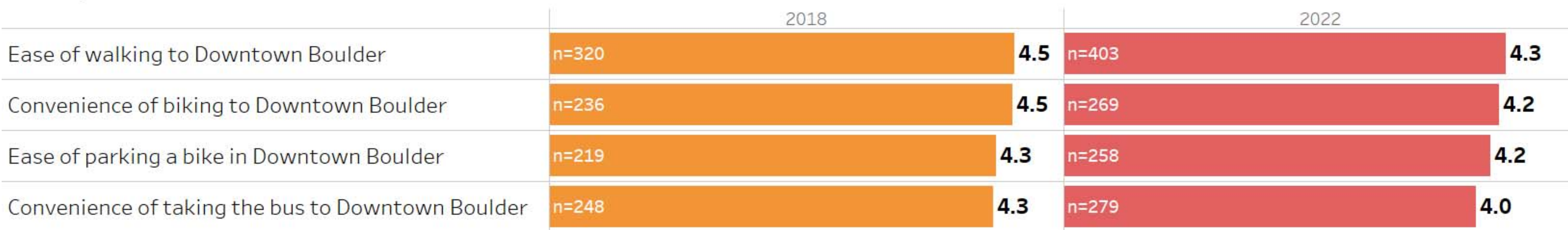
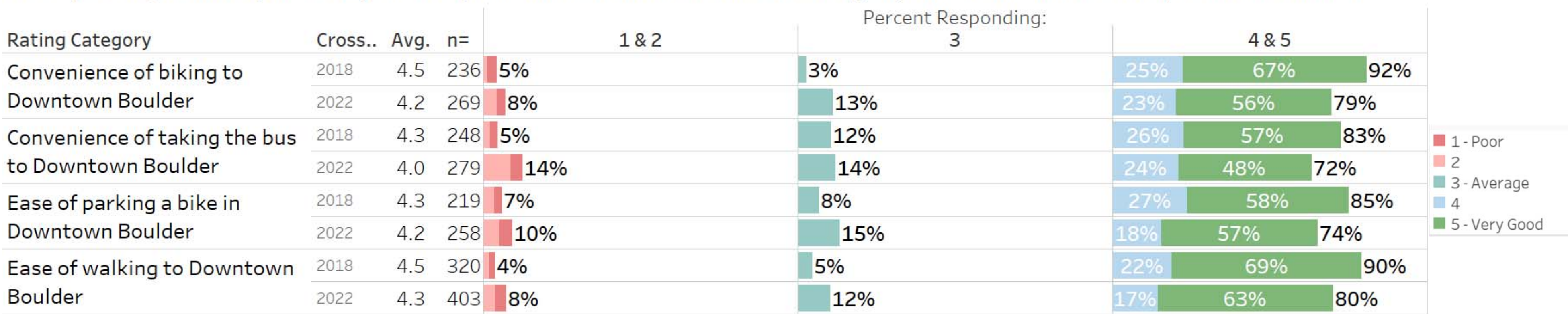
Alternative Modes of Transportation
Averages

Ratings of satisfaction for all alternative transportation modes decreased slightly from 2018.

Q 25: (All respondents) How do you rate your satisfaction with the following aspects of alternate transportation modes?
Transportation



Q 25: (All respondents) How do you rate your satisfaction with the following aspects of alternate transportation modes?

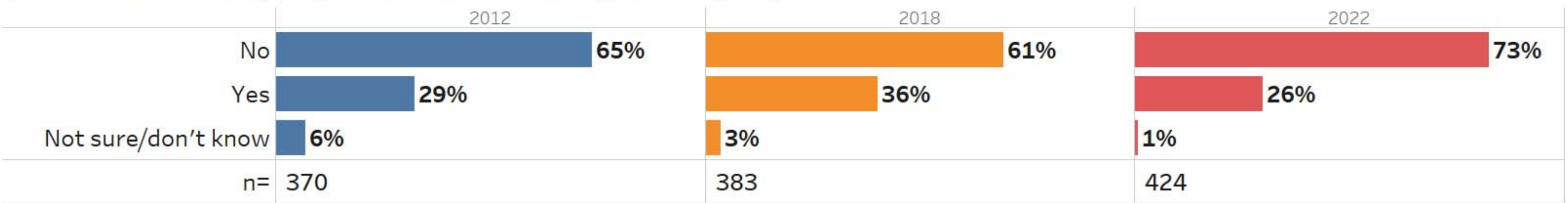


*Ratings categories are sorted in descending order by the average rating
Source: RRC Associates

Eco-Pass

Eco-Pass holders dropped measurably from 2018. This is likely due to impacts of the pandemic on commuting patterns and overall transit ridership.

(Colorado residents) Do you have an Eco-Pass (RTD bus pass)?



Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

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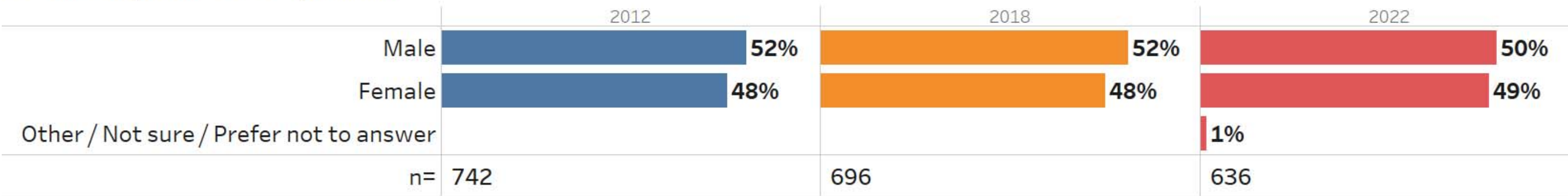
Demographics

Gender & Age

Respondents in 2022 trended older than past years with 37% falling into the 55+ category compared to 23% in 2018.

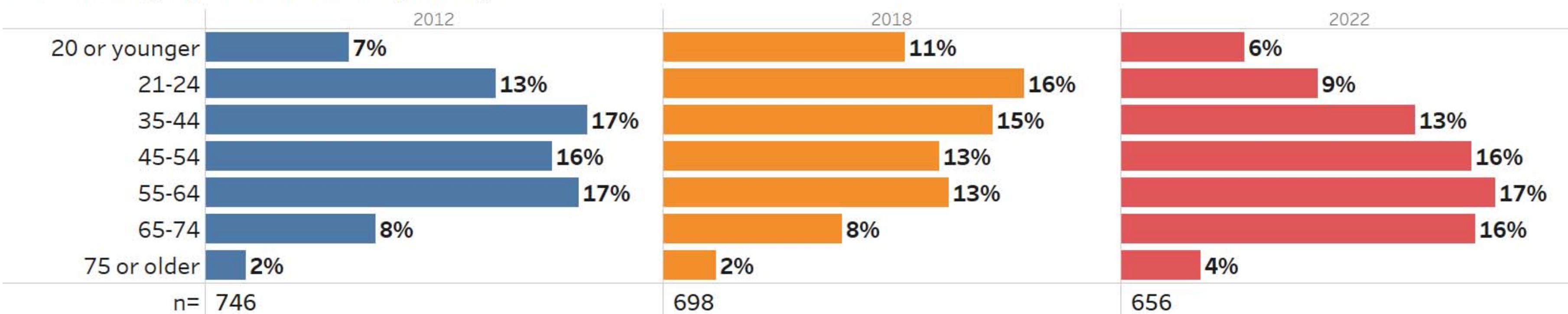
Observed gender of respondent



Source: RRC Associates

*Responses are sorted in descending order by 2022 results.

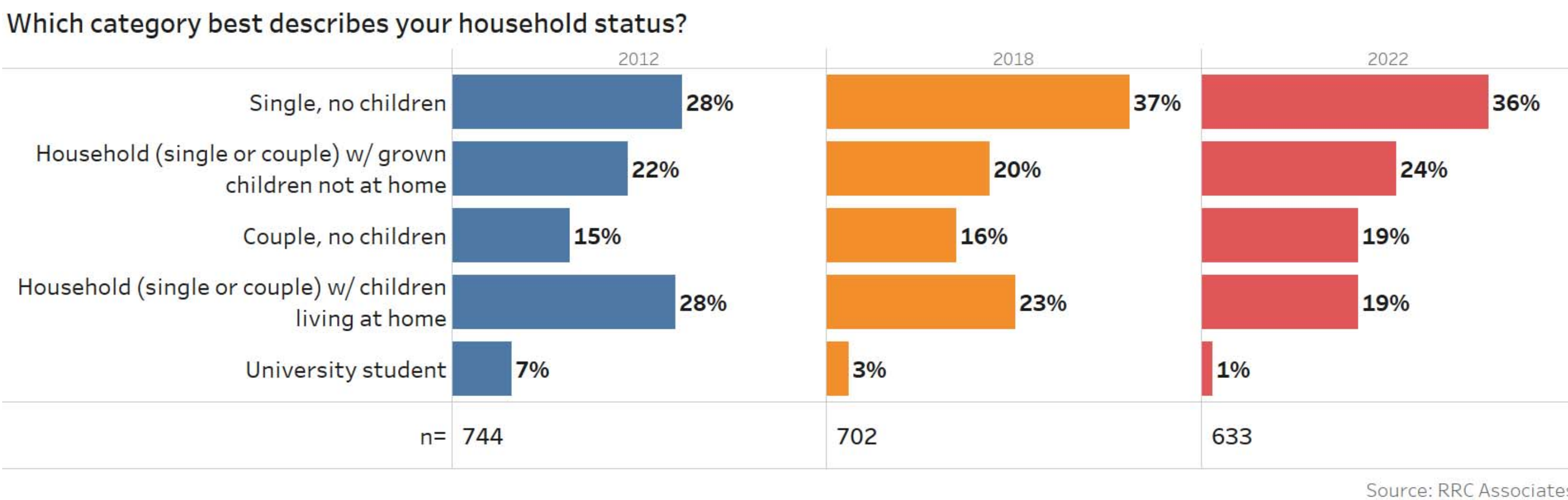
Which category best describes your age?



Source: RRC Associates

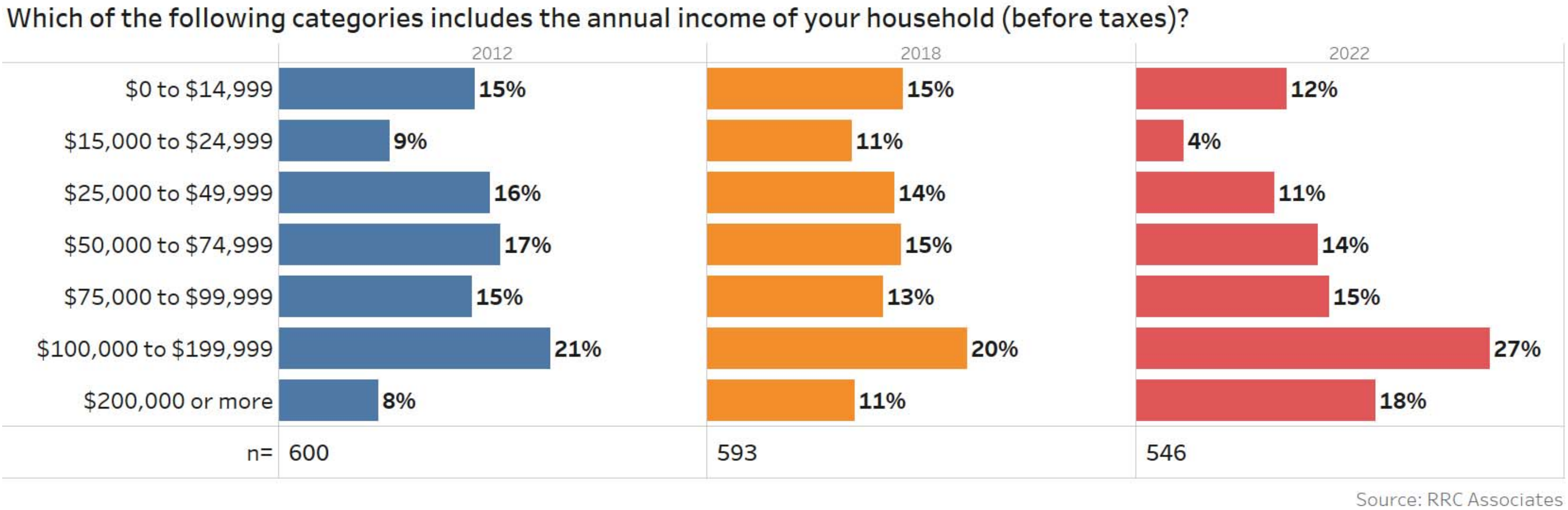
Household Makeup

Household makeup was fairly steady but there has been a steady decline in families with children since 2012.



Income

This year saw an increase in annual income compared to 2018 and 2012, with 45% of respondents making over $100,000, compared to 31% in 2018 and 29% in 2012. This correlates with the older reported age of those surveyed in 2022.



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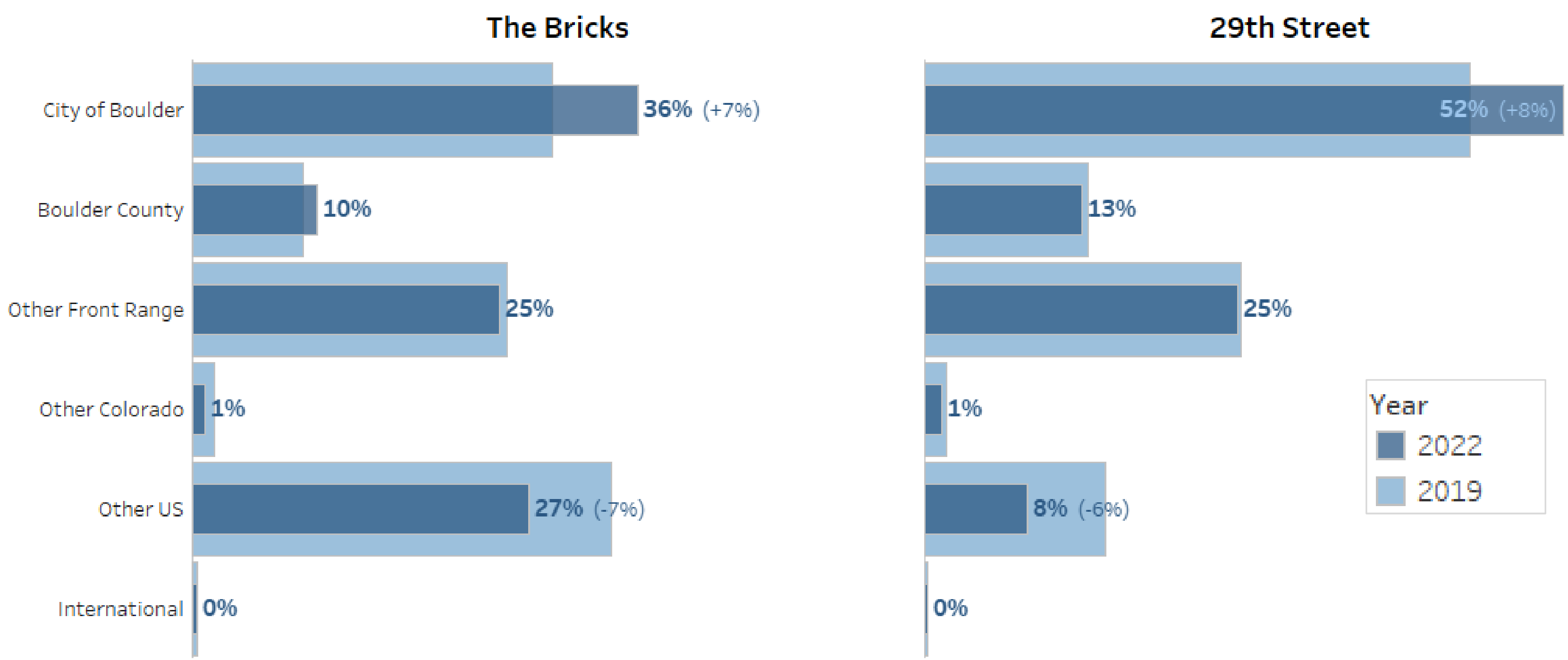
Mobility Data Examples

Visitor Origins

The Bricks vs. 29th Street, 2022 vs. 2019

Locals as a percentage of the mix jumped both at Twenty Ninth Street and the Pearl Street Mall while out-of-state visitation dropped at both locations. Note that tourism is far more prevalent on Pearl Street.



Jan. 1 – Aug. 31

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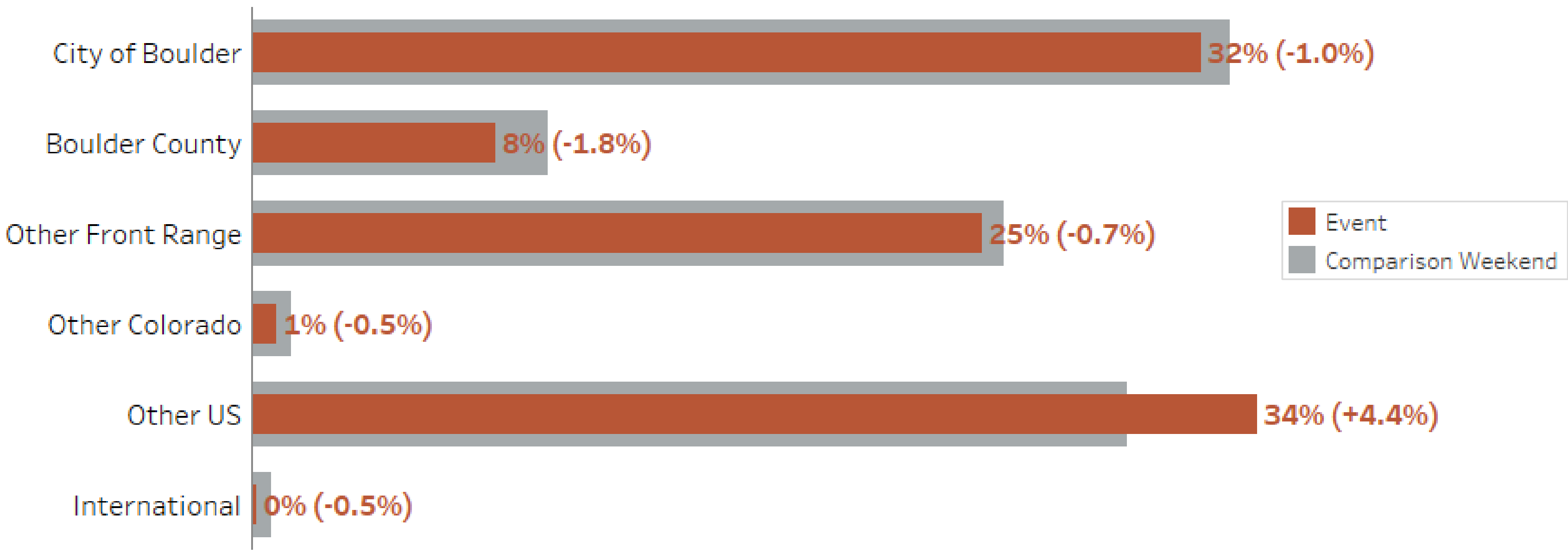
Visitor Origins of Pearl Street Arts Fest

vs. Prior and Following Weekend

Origins of those on the Pearl Street Mall during Arts Fest weekend did not differ significantly from non-event weekends. However, there were more out-of-state visitors on the mall for the event.



Jan. 1 – Aug. 31

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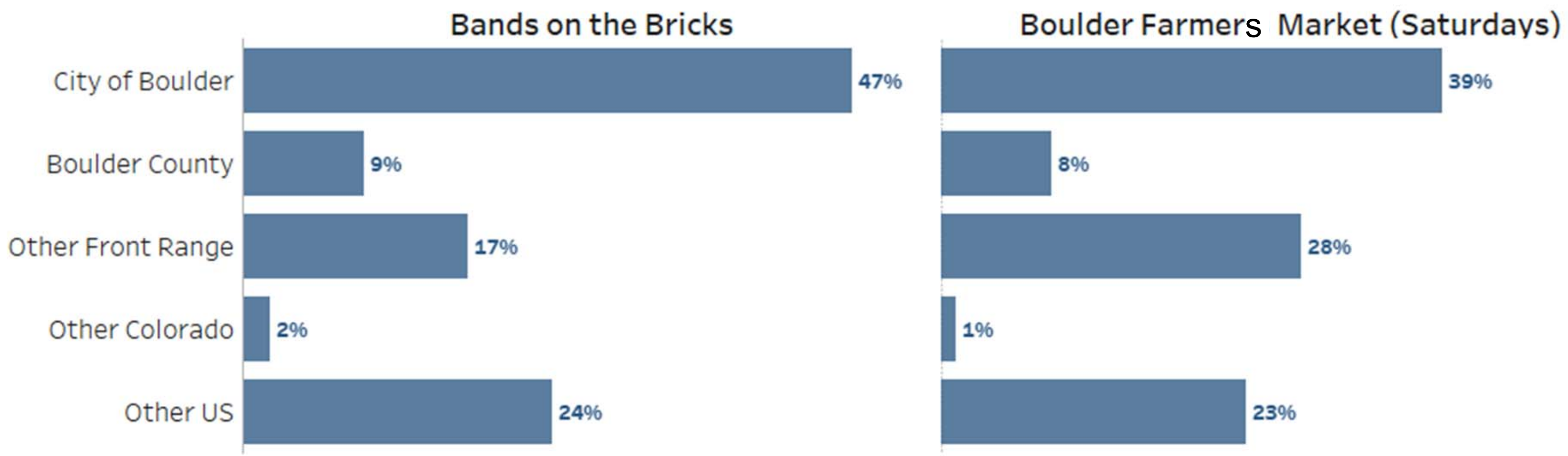
Visitor Origins

Bands on the Bricks vs. Farmers Market, 2022

Interestingly, Bands on the Bricks draws a greater share of locals vs. the Saturday Farmers Market. The Market is a stronger draw for Denver Metro residents coming to Boulder.



Summer 2022

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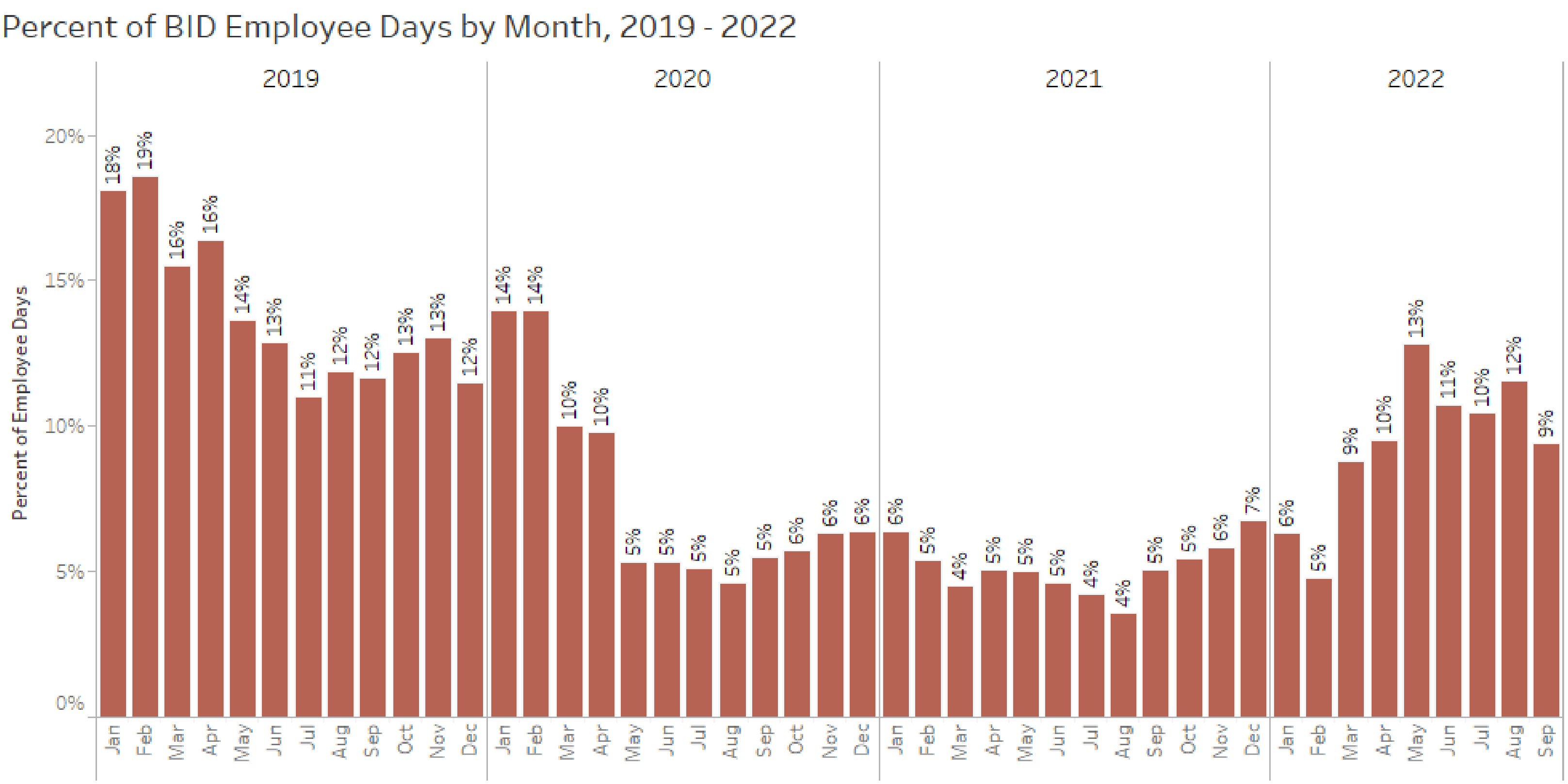
BID Employee Numbers by Month, 2019 - 2022

The number of employees downtown dropped sharply from early 2020 through early 2022. However, numbers are recovering through the summer and fall seasons. Based on national trends, however, they may not return completely to pre-Covid levels.



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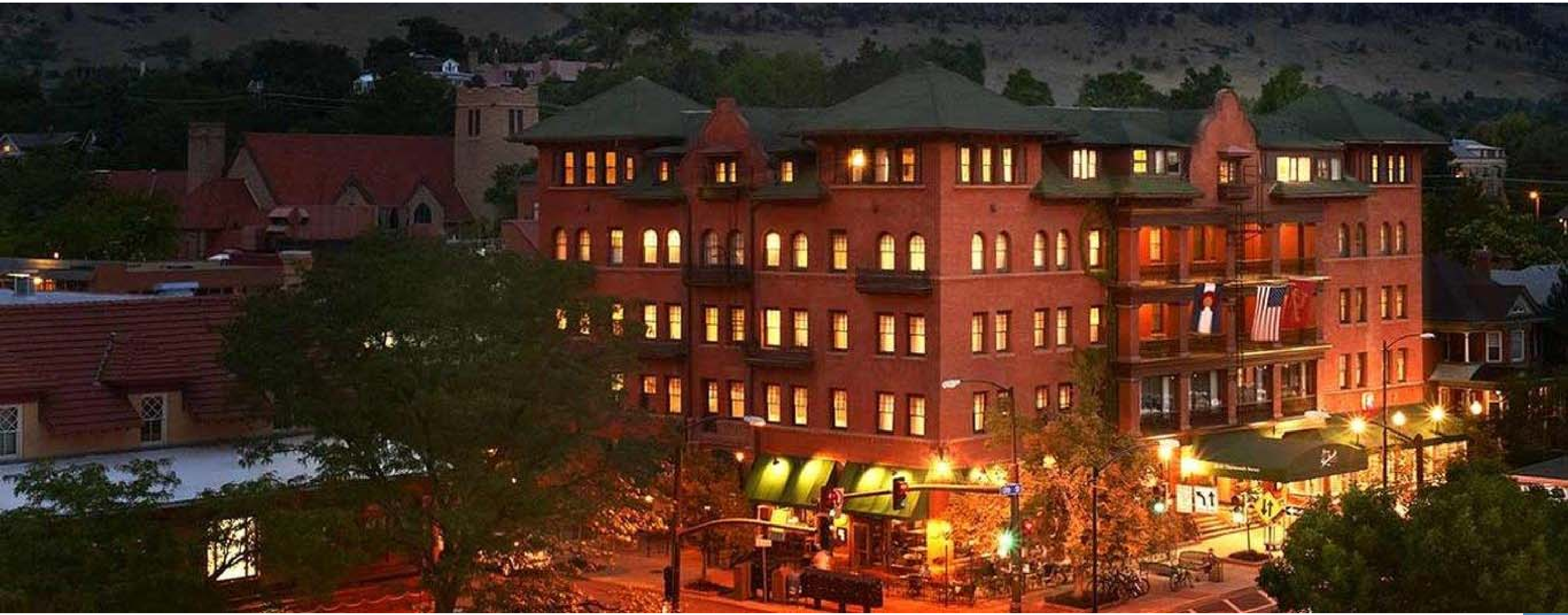

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