



DOWNTOWN BOULDER INTERCEPT SURVEY

2024 Final Report



RRC





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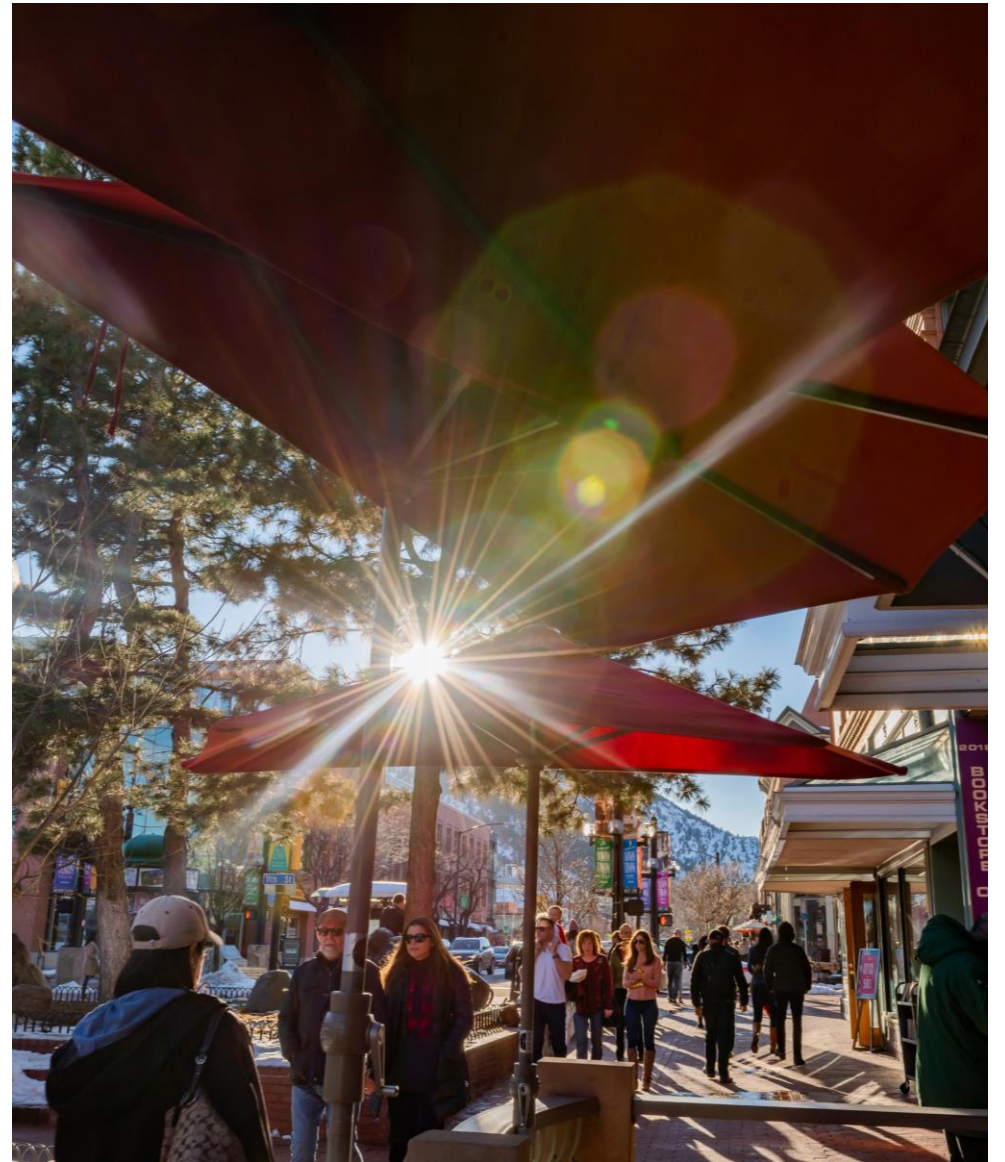
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INTRODUCTION

RRC has been doing intercept surveys downtown since 1995. The most recent prior survey was in 2022.

Goals of the research include:

- Defining visitor profiles – who is coming downtown?
- What drives people to visit downtown?
- Measuring spending impacts
- How does the downtown experience compare to expectations and past visits?



METHODOLOGY



Intercept Survey Process

- A team of interviewers intercepted pedestrians on Pearl Street from 9th to 17th Streets.
- Surveys were recorded on digital tablets.
- Respondents received free beverage vouchers for Capital One Café.
- Interviews were conducted between July 19th and September 16th.

A screenshot of a survey form displayed on a digital tablet. The screen shows a time of 12:29 and a signal strength indicator. The text on the screen reads: "Hi, my name is _____ and I am conducting a survey for the Downtown Boulder Partnership. We are doing a survey for research purposes only. In exchange for a few minutes of your time, I have a coupon for a free beverage of your choice at the Capital One Café. Do you have a few minutes to provide feedback about your experience in Downtown Boulder?" Below this is a question: "Where is your primary residence? Are you a..." followed by five radio button options: "Full-time resident of City of Boulder", "Part-time / Summer resident of Boulder / student", "Resident of Boulder County (outside of Boulder)", "Colorado resident (outside of Boulder County)", and "US resident (outside of Colorado)".

775
Total Surveys Completed



welcome to your
happy place
DOWNTOWN BOULDER
VisitDowntownBoulder.com

KEY FINDINGS

KEY FINDINGS



Survey results were strong in 2024. After a challenging start due to a summer heat wave, we finished with 775 total surveys for a robust and reliable sample. We had 669 responses in 2022 and 714 in 2018.



Locals are coming downtown. Just over half of Colorado respondents were from Boulder vs. 43% in 2018. There were fewer downtown residents and an increase from South Boulder and Gunbarrel. Among locals, a quarter live in North Boulder.



Aside from Boulder, the biggest Colorado cities of origin were predictably Longmont, Denver, Lafayette, Broomfield and Louisville. Looking outside of Colorado, the top states for visitation were California, Texas and Illinois.

KEY FINDINGS



Visitors are critically important to downtown businesses. 41% of those surveyed are from outside of Colorado. Out-of-state visitors spend nearly double per visit downtown vs. Boulder County residents. More than half choose paid lodging (hotels or vacation rentals).



60% of visitors are in town for leisure (vacation or visiting friends/family). This year saw a jump in college visits with 1 in 10 reporting they were here to visit or check out CU Boulder. Most people rely on word of mouth for pre-trip planning or have been to Boulder before.



This year saw a rise in people coming to shop but a drop in those who came to eat. The number of downtown employees dropped by half from 2018. Clearly the post-Covid shift to remote and hybrid work is impacting pedestrian traffic as it is in urban districts nationwide.

KEY FINDINGS



While numbers were down from 2022, half of respondents still reported eating a meal while downtown. When asked what drove the choice of restaurants, the top response was cuisine type, followed by ambiance. Price was not a major factor in choosing a restaurant.



Regarding the impacts of panhandlers downtown, respondents are evenly split with just over half reporting no impact on their experience and 47% saying there was a negative affect. Feedback on the trends in the homeless situation improved over 2022 but still lags how people felt in 2018.



Farmers Market, Bands on the Bricks, Creek Fest and Pearl Street Arts Fest are the most attended events downtown. Overall, fewer people say they go to events compared to pre-Covid. This year, 45% said they had not gone to any downtown events vs. 18% in 2018.

KEY FINDINGS



More than two thirds of visitors said their experience in Boulder was better than expected and over 60% said they would be extremely likely to recommend Boulder to friends for a leisure destination. Interestingly, Boulder residents gave the city higher ratings than people from out of town.



Looking at downtown ratings, twice as many people (29%) said the downtown experience is improving vs. declining (14%). Specific attributes such as cleanliness, safety, restaurant selection and shopping choices also rated highly though a bit lower than pre-Covid reviews.



Overall results are strong with generally improved feedback vs. 2022. However, downtown is still recovering from the huge impacts of the pandemic on work, dining, special events and homelessness. Note these challenges are felt nationwide and downtown Boulder is actually faring better than many larger urban districts that rely more heavily on the office market.



Kindly respect the following
PEARL STREET MALL
RULES & REGULATIONS

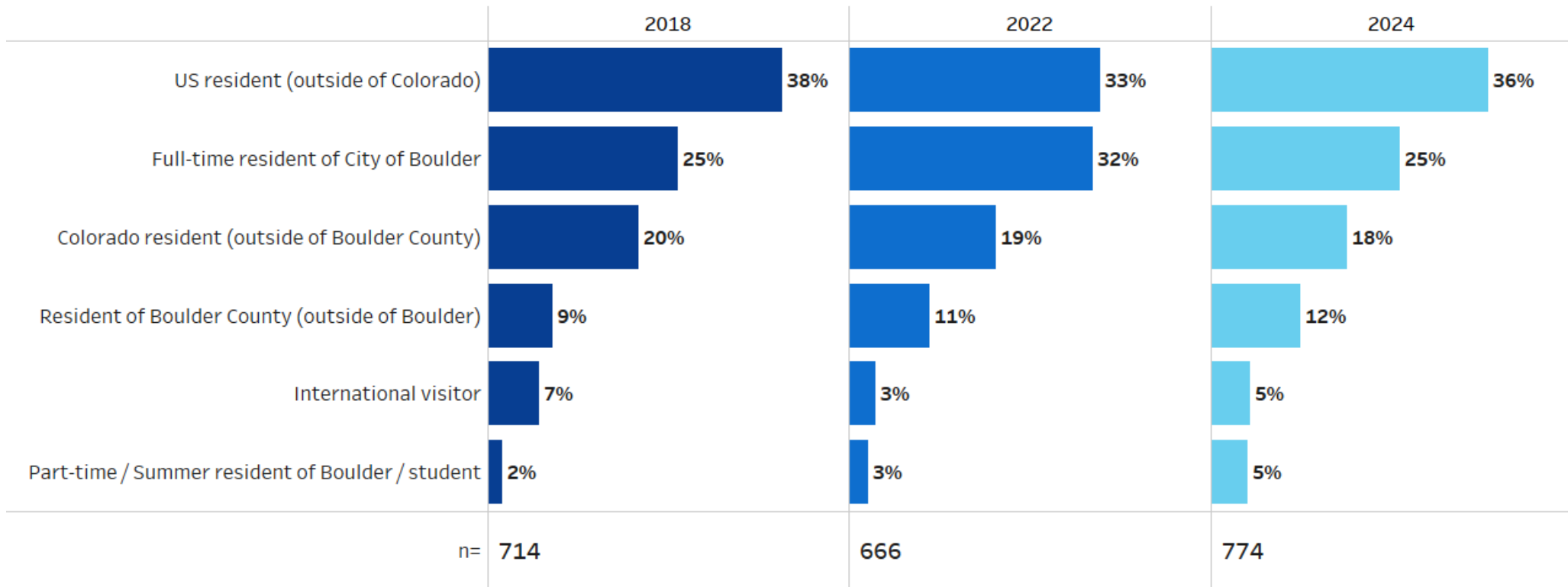


VISITOR TYPE & GEOGRAPHIC ORIGIN

VISITOR TYPE & GEOGRAPHIC ORIGIN

Visitors are clearly important to the mix of people in downtown Boulder. After a slight downturn in 2022 post pandemic, numbers rebounded this year. The percentage of locals dropped back to the 2018 level of 25%.

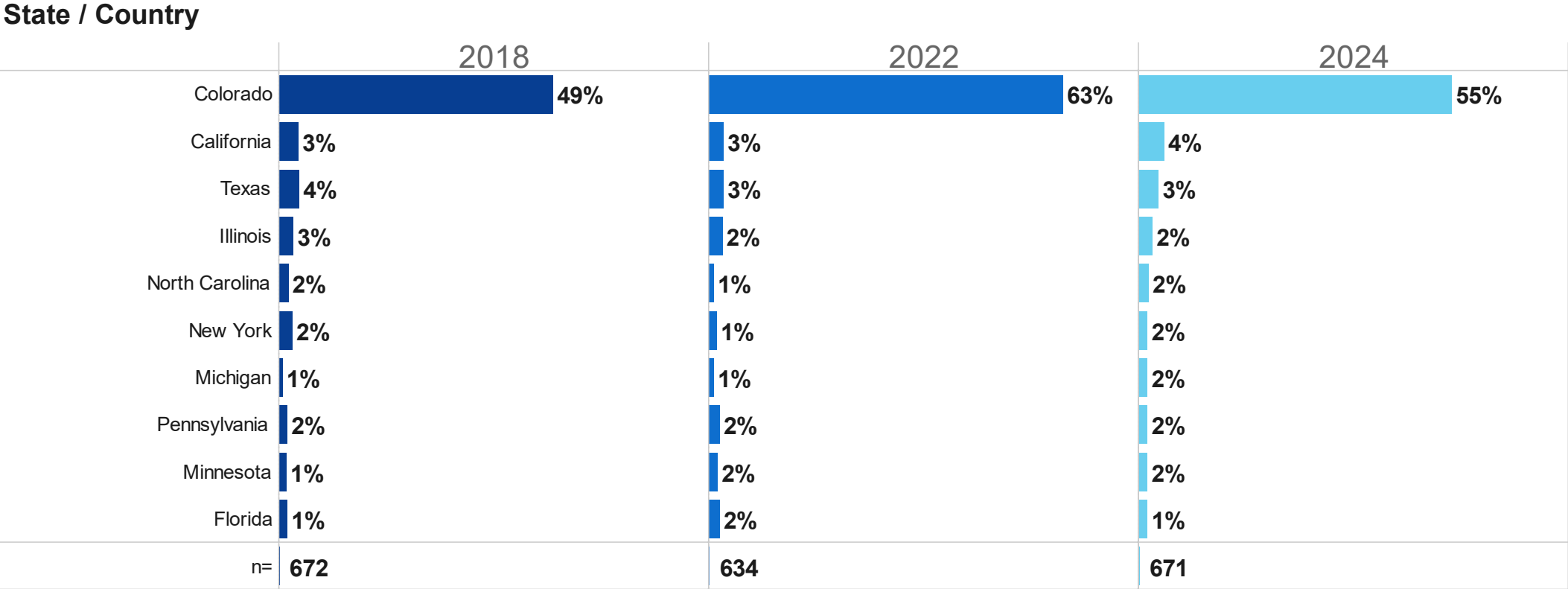
Where is your primary residence? Are you a...



Source: RRC Associates

STATES OF ORIGIN

Just over half of respondents are from Colorado (55%), a decrease from 2022. California and Texas remain the other biggest states of visitor origin.

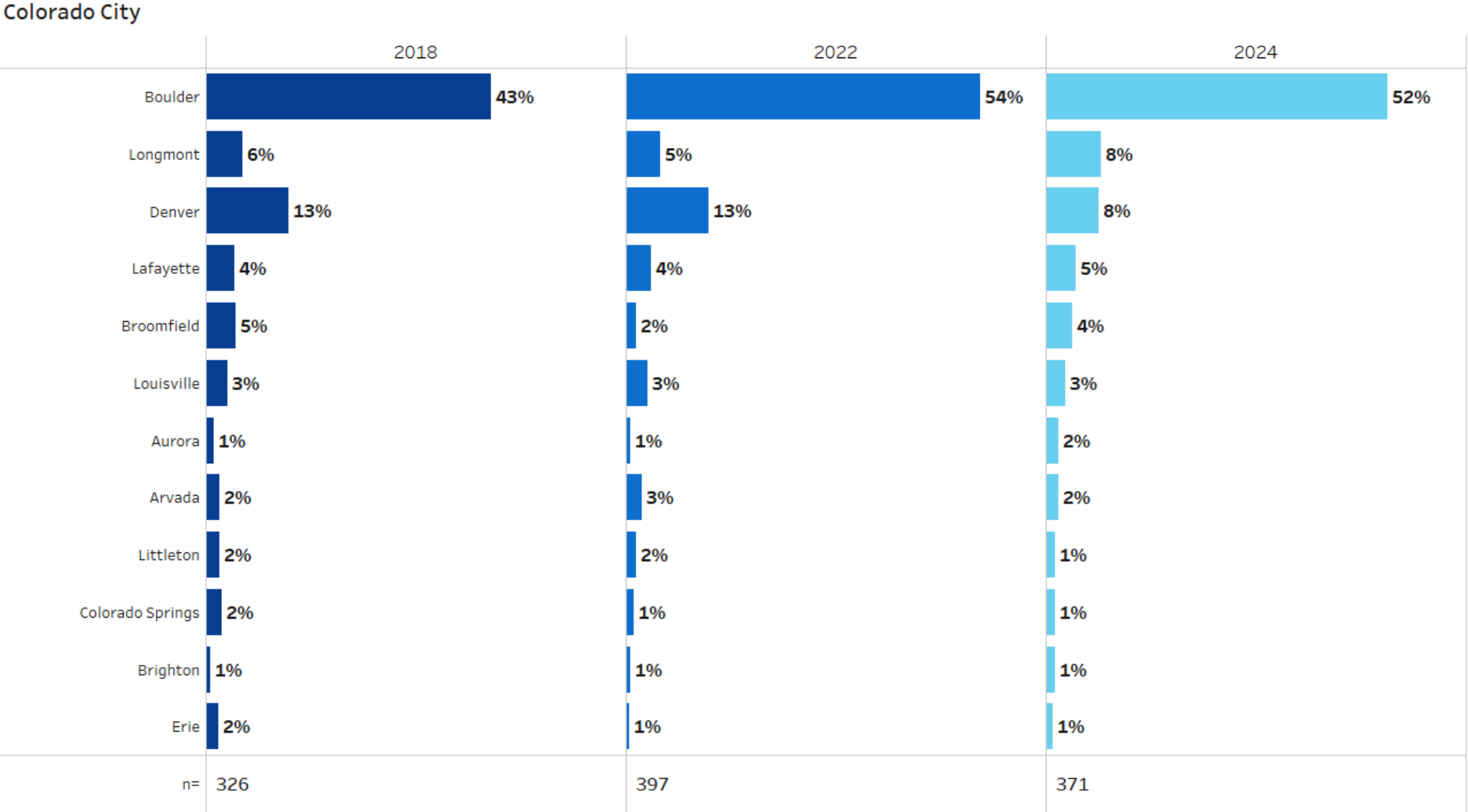


Source: RRC Associates
 *Responses are sorted in descending order by 2024 results.



COLORADO CITIES OF ORIGIN

Among Colorado residents, roughly half are from Boulder, followed by Longmont and Denver. Note the share of Boulder residents is up since the summer of 2018.

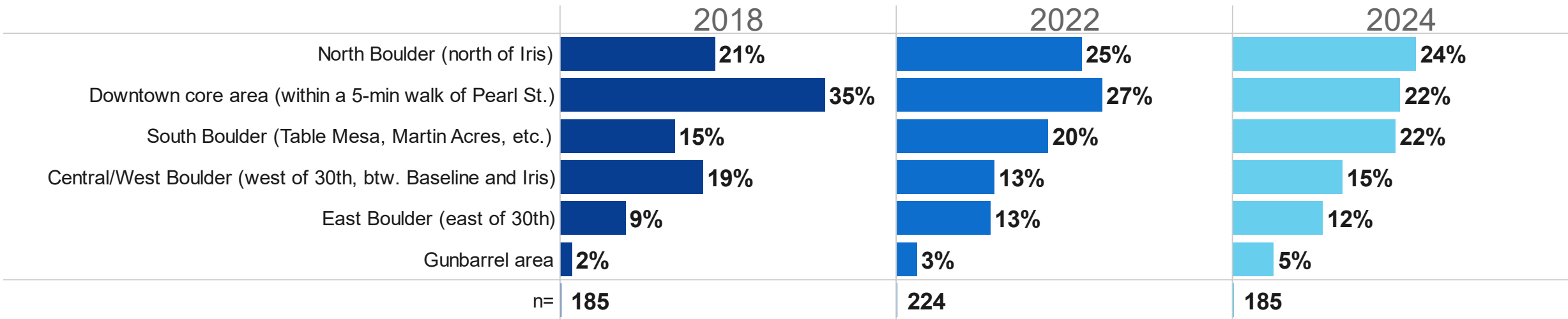


Source: RRC Associates

NEIGHBORHOODS IN BOULDER

The number of respondents who live downtown has dropped steadily since 2018 while South Boulder and Gunbarrel have increased. About 1 in 4 locals downtown report living in North Boulder.

(City of Boulder residents) In which part of Boulder do you live?

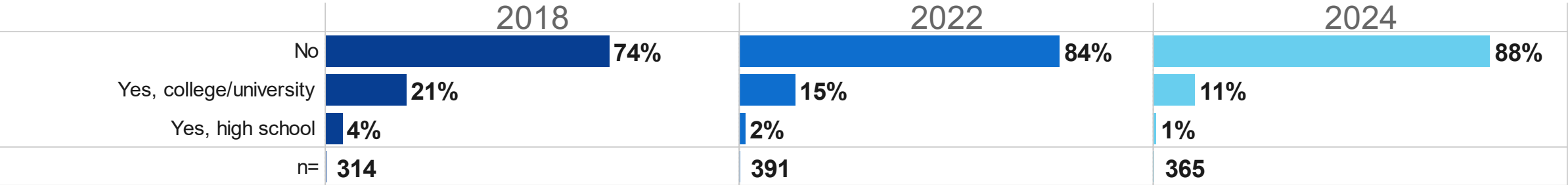


Source: RRC Associates

STUDENTS IN DOWNTOWN BOULDER

The number of student respondents has dropped steadily from 25% in 2018 to 13% this year.

Are you a student? (Colorado Residents)

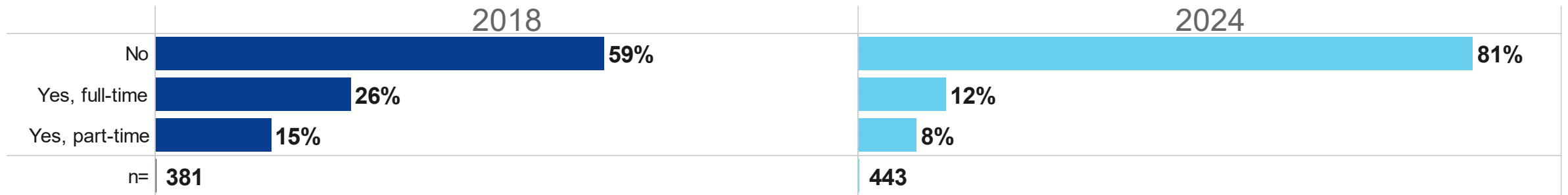


Source: RRC Associates

EMPLOYEES IN DOWNTOWN

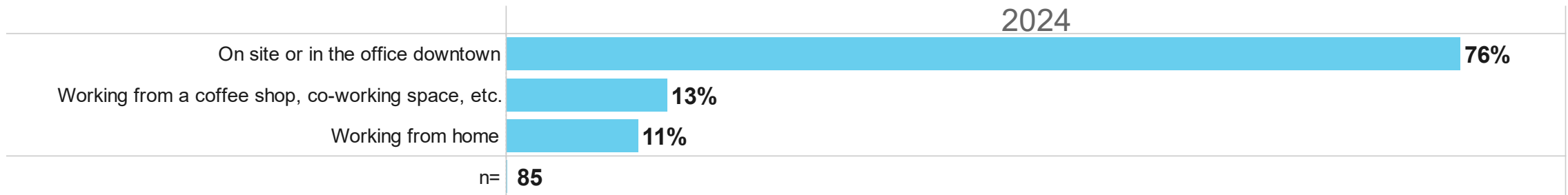
Not surprisingly, the number of downtown employees walking on Pearl Street has dropped from pre-Covid levels. The number employed both full and part-time downtown has dropped by about half since 2018.

Are you a full-time or part-time employee within the Downtown Boulder area?

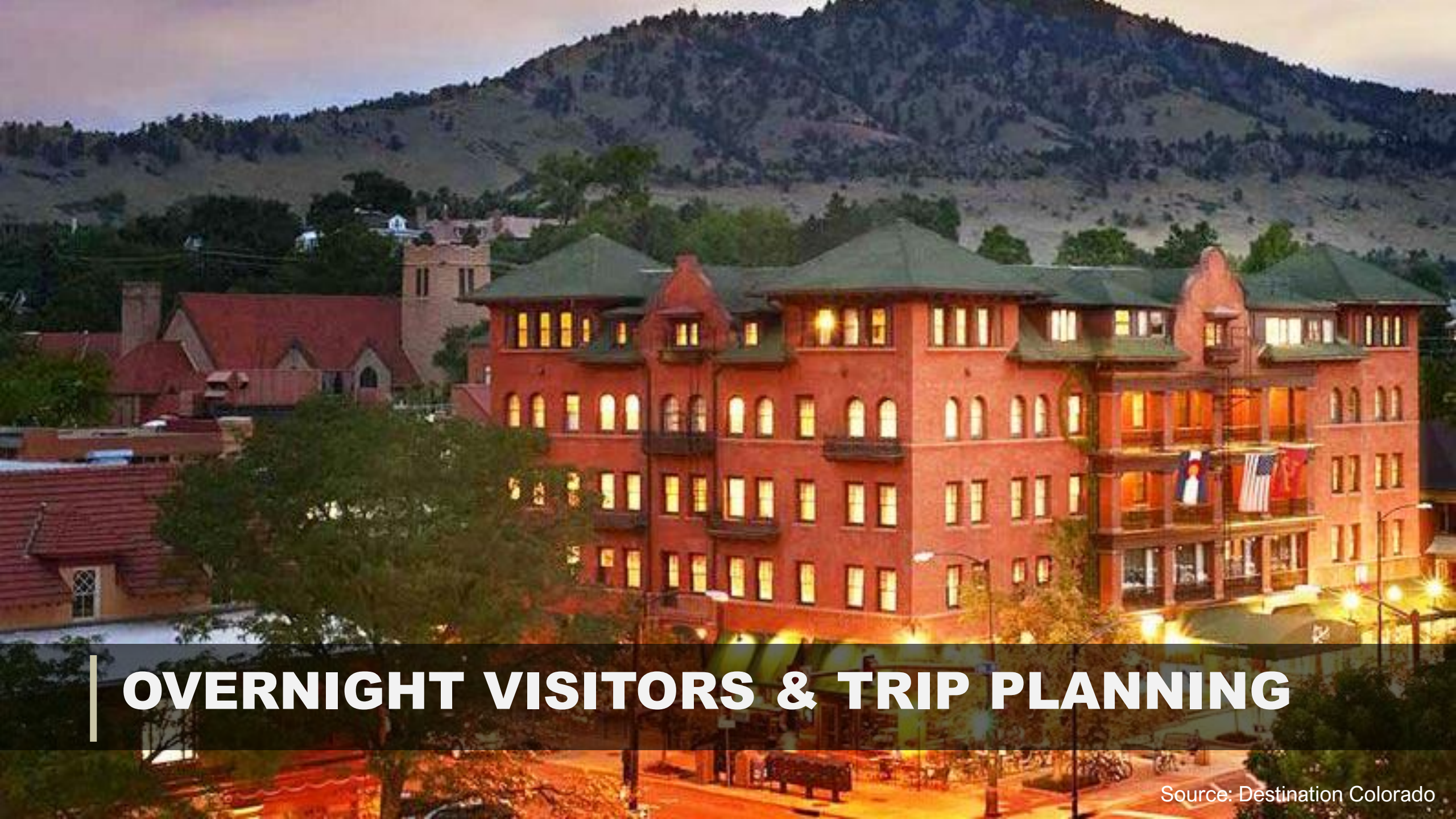


Source: RRC Associates

On average, what percent of your working hours are spent:



Source: RRC Associates



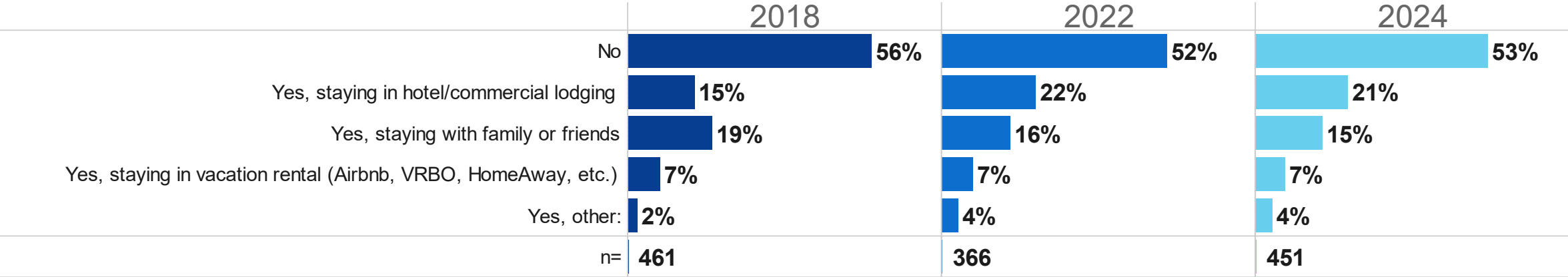
OVERNIGHT VISITORS & TRIP PLANNING

Source: Destination Colorado

VISITORS & ACCOMMODATIONS

Tourists continue to be important for downtown Boulder and were fairly evenly split between overnight and day visitors. Among overnigheters, most were staying in paid lodging (hotels or vacation rentals).

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

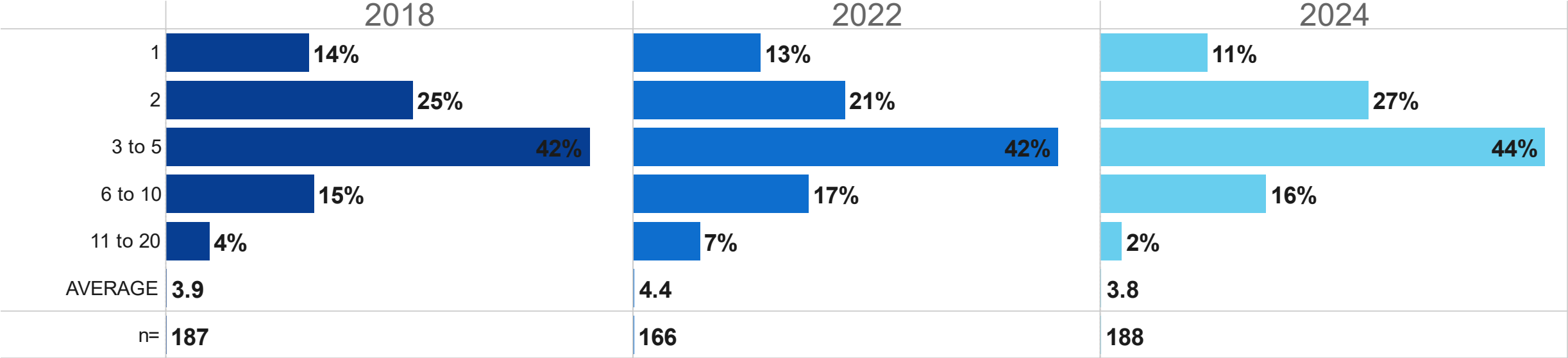


Source: RRC Associates

NIGHTS SPENT IN BOULDER

Average length of stay returned to 2018 levels for an average of 3.8 nights.

(Overnight visitors) How many nights will you spend in the Boulder area?

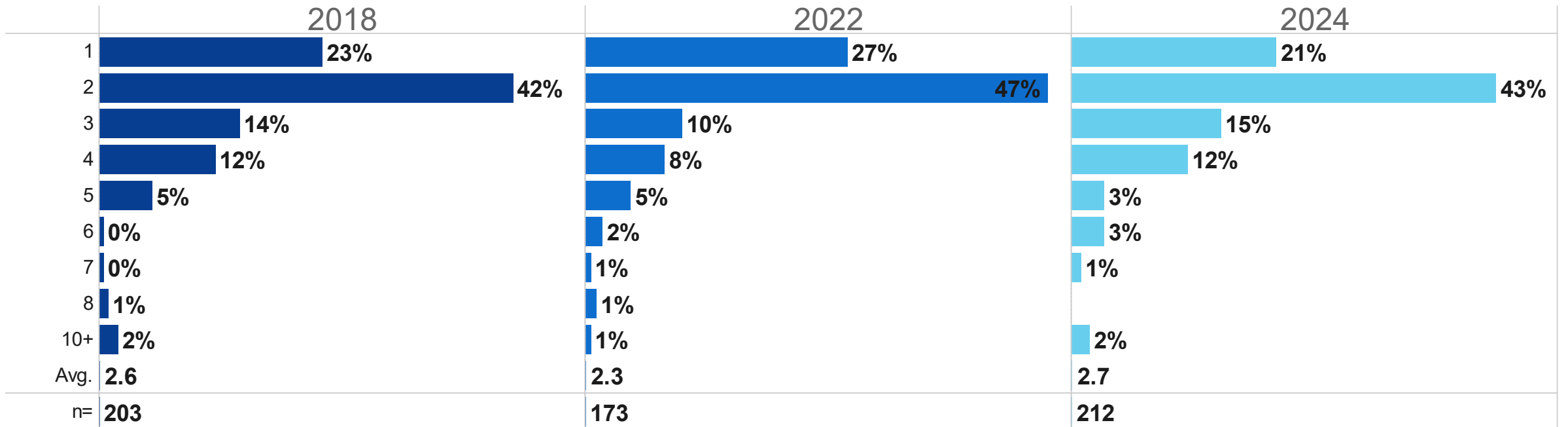


Source: RRC Associates

TRAVEL PARTY SIZE

Overnight travel party size has increased slightly from 2022 (similar to 2018 levels) for an average of 2.7 people per party.

(Overnight visitors) Including you, how many people are in your immediate travel party? (cap. 20 people)

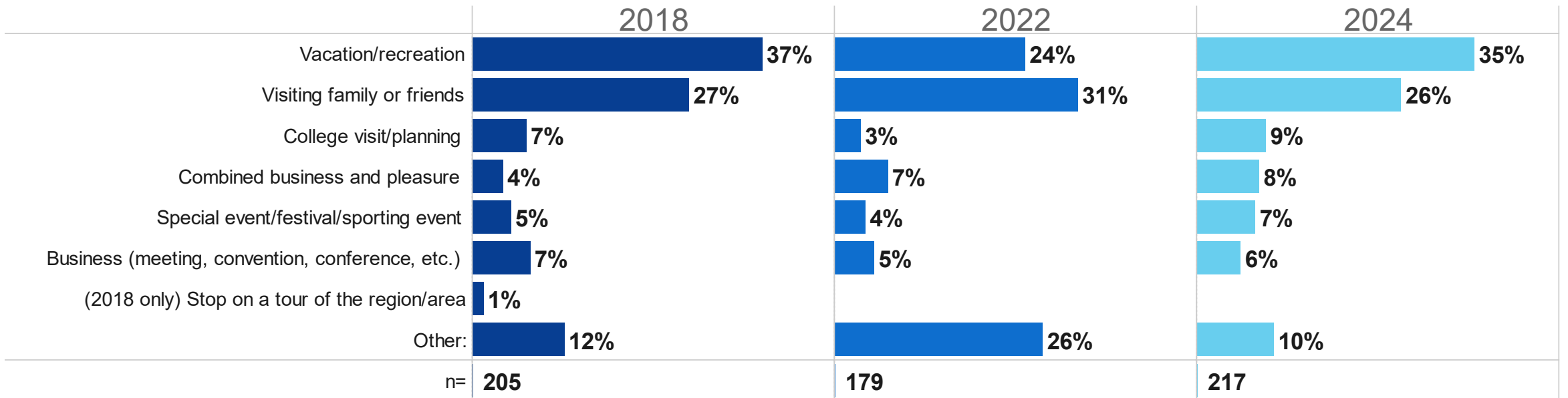


Source: RRC Associates

REASONS FOR VISITING BOULDER

For overnight visitors, the primary reason for coming to Boulder was for vacation followed by visiting family or friends. 1 in 10 people were on college visits to check out CU Boulder.

(Overnight visitors) What brings you to Boulder?

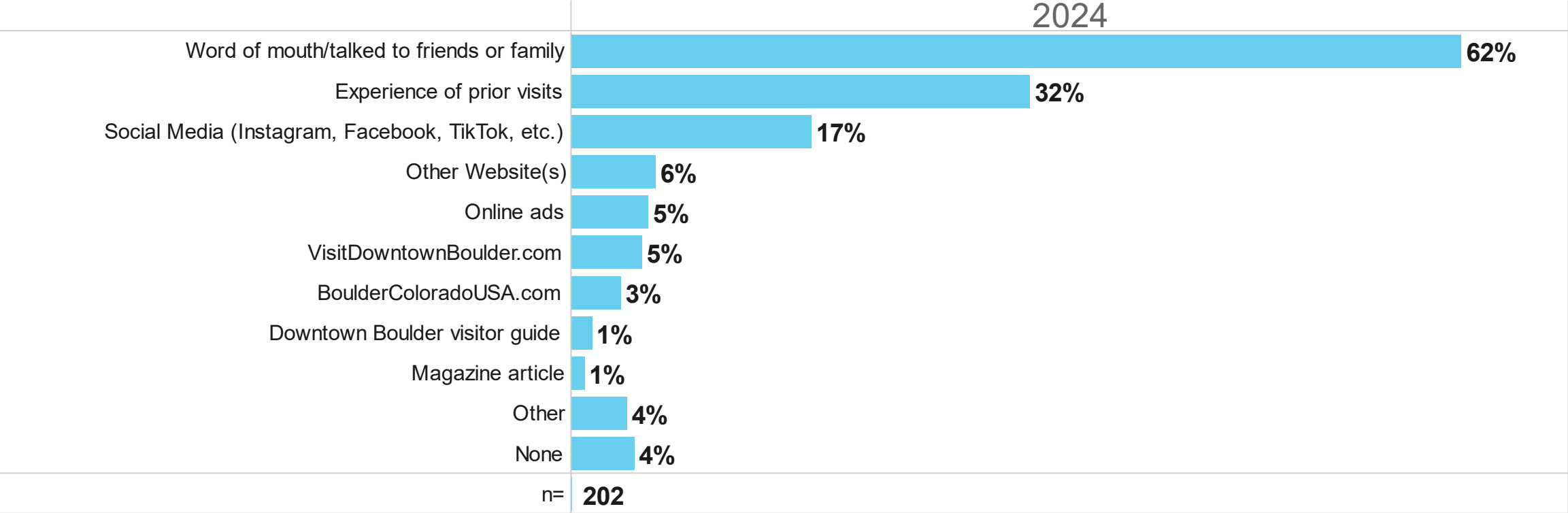


Source: RRC Associates

TRIP PLANNING SOURCES

Word of mouth is the dominant way that people learn about Boulder prior to visiting, followed by experience from prior visits. In terms of marketing channels, social media is the strongest.

What information sources did you use to plan your trip to Boulder? (Visitors Outside Boulder County)



Source: RRC Associates



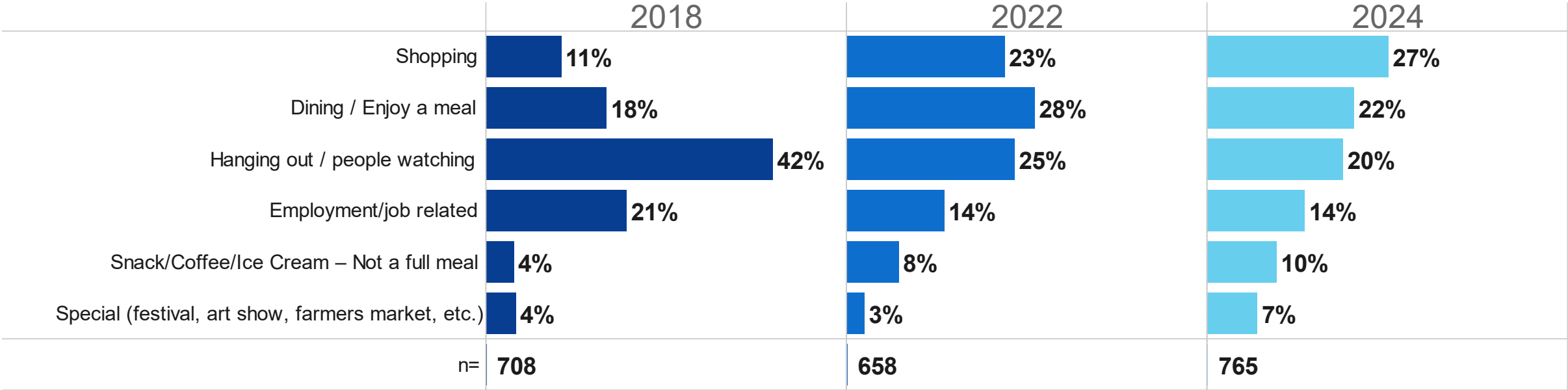


VISITING DOWNTOWN BOULDER

PRIMARY REASON FOR COMING DOWNTOWN

Shopping and dining were the biggest drivers of downtown visits this year. The trend toward hybrid and remote work is evident as job related trips remain below 2018 levels.

What is the primary reason you came to Downtown Boulder TODAY? (Colorado Residents)

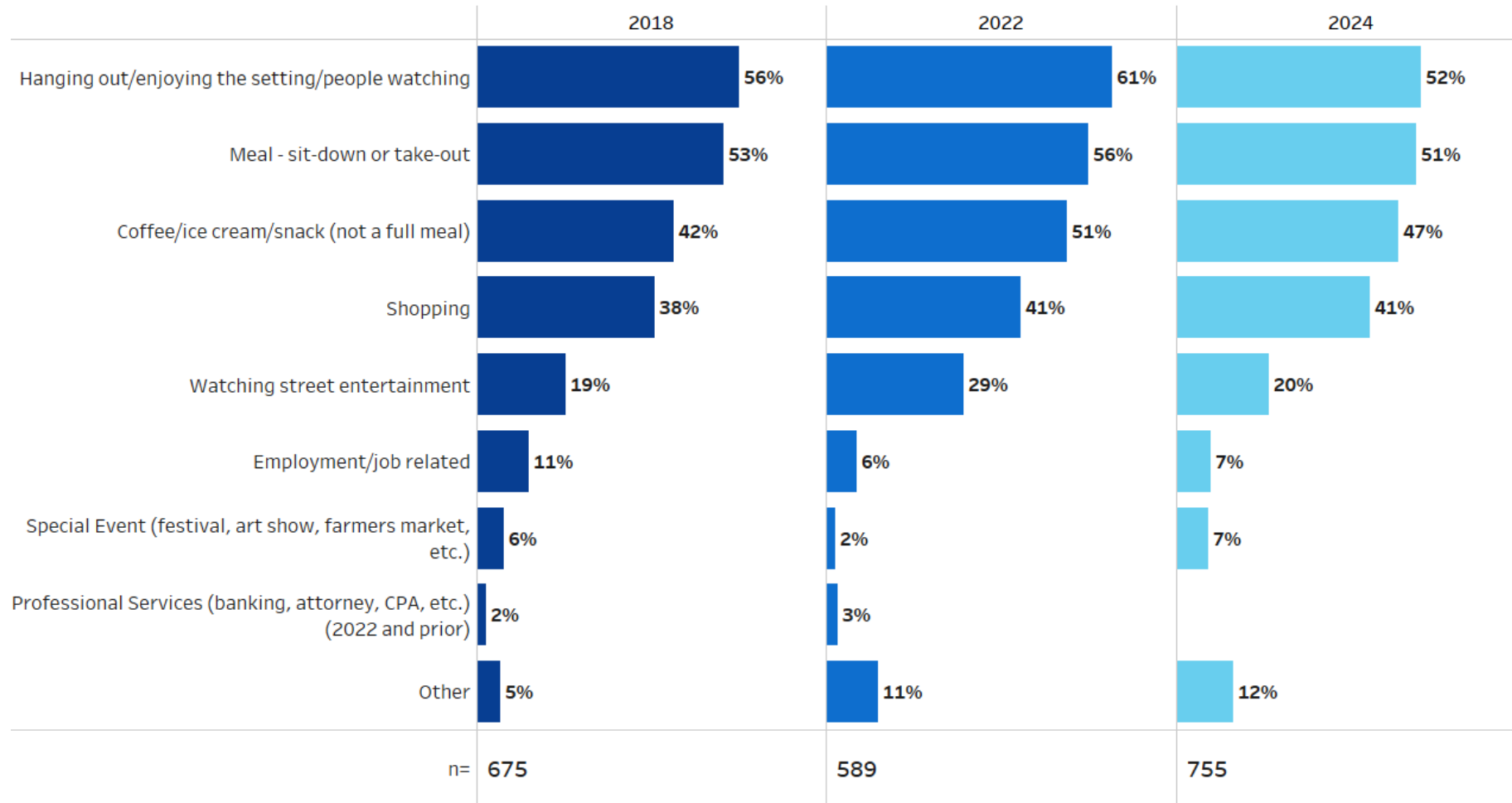


Source: RRC Associates

ACTIVITIES IN DOWNTOWN BOULDER

Hanging out, dining and shopping continue to be popular activities while visiting downtown Boulder.

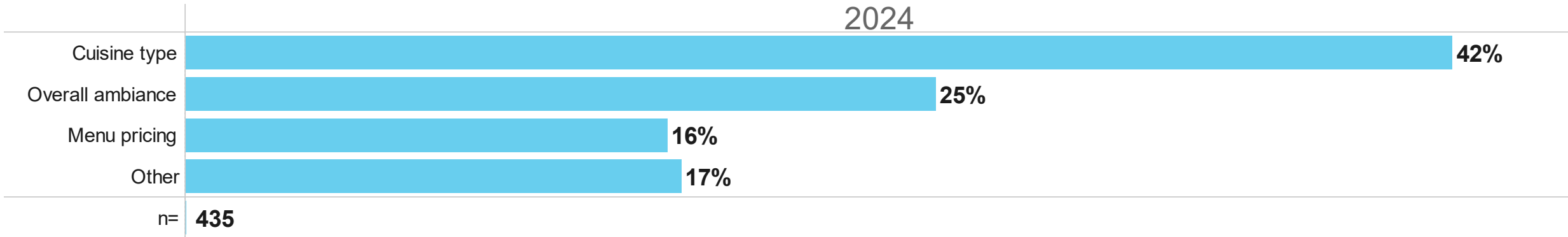
What other specific activities are you doing while you are here [in Downtown Boulder] today?



RESTAURANT CHOICES

Type of cuisine and ambiance are the primary factors in choosing a restaurant. Menu pricing was less important.

When considering a restaurant downtown, what is the key motivator for going inside or walking on to the next option?

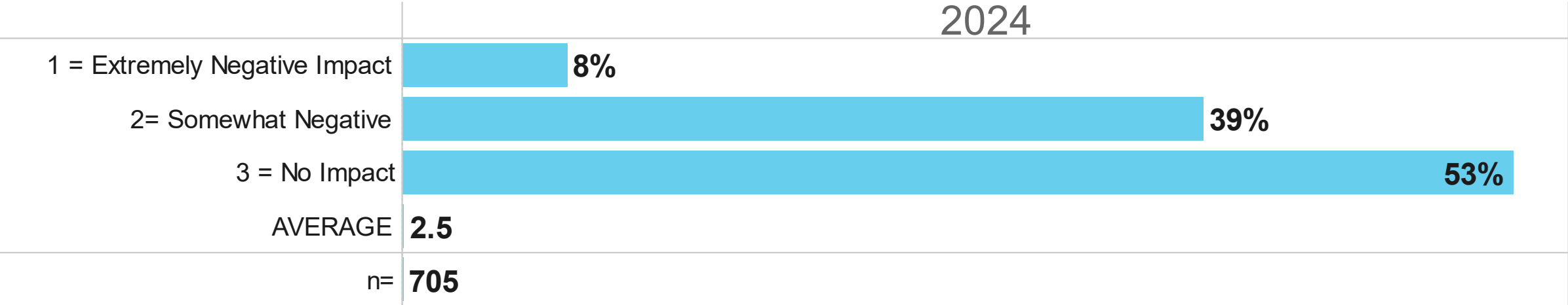


Source: RRC Associates

PANHANDLERS DOWNTOWN

Respondents are split fairly evenly on the impact of transients on the downtown experience. 53% say they have no impact and 47% say they have a negative impact.

To what degree, if any, do the activities or behaviors of panhandlers/transients impact your enjoyment of the experience in Downtown Boulder, either positively or negatively?

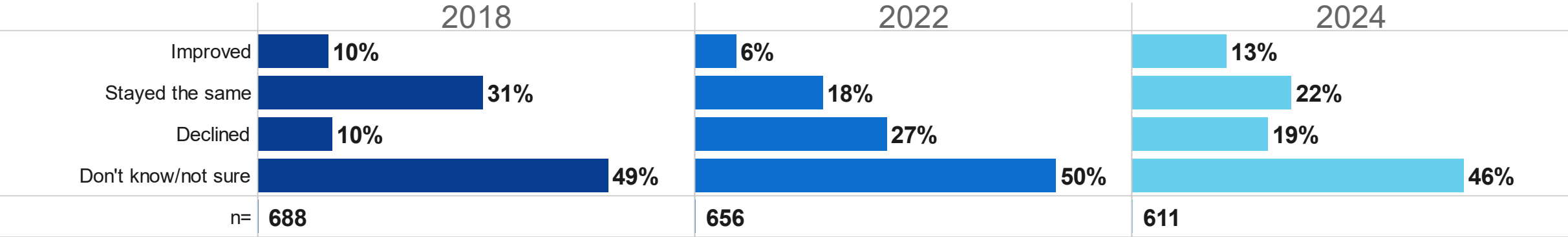


Source: RRC Associates

IMPACTS OF HOMELESSNESS DOWNTOWN

In good news for Downtown, people are feeling better about homeless trends in the district. More people say it's improving and fewer feel it is getting worse compared to 2022.

Over the past two years, would you say the situation with homeless/unhoused people in the downtown area has:



Source: RRC Associates

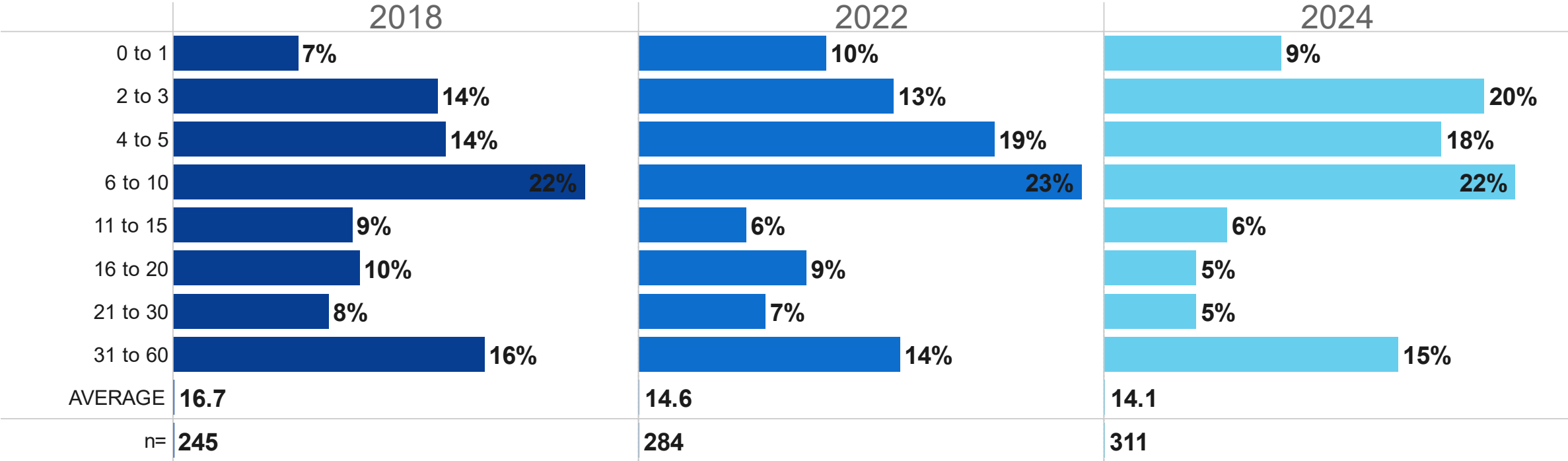


| AREA RESIDENT BEHAVIOR

PRIOR VISITS FOR AREA RESIDENTS

Frequency of downtown leisure visits continues to tick gradually downward. This likely correlates to the smaller number of people coming downtown to dine.

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)



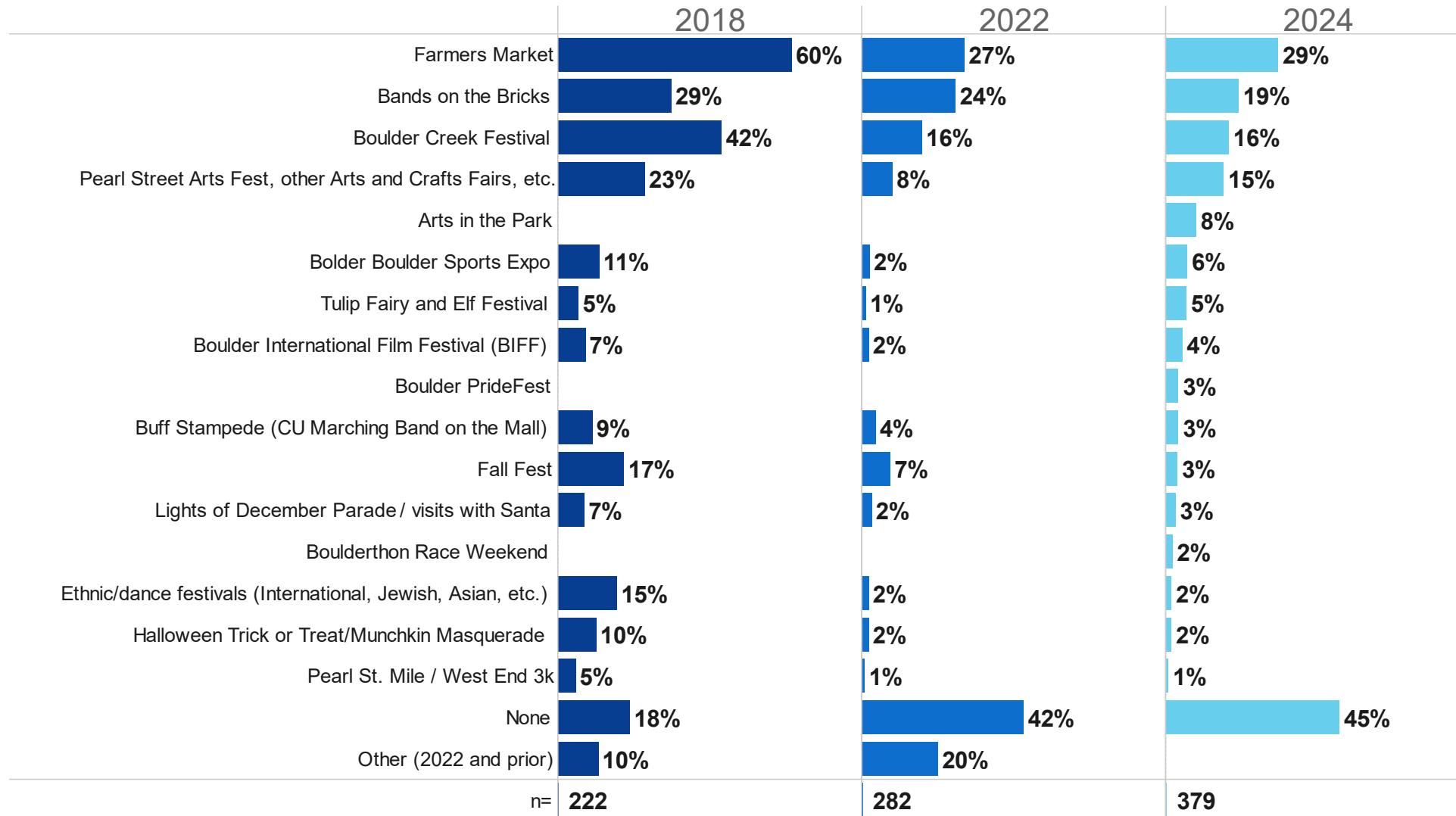
Source: RRC Associates



SPECIAL EVENTS ATTENDANCE

- Event attendance is still below pre-pandemic levels among respondents.
- Farmers Market, Bands on the Bricks, the Creek Fest and Arts Fest continue to draw people, though less than before Covid.
- Nearly half (45%) of county residents said they did not attend any of the listed events.

In the past 12 months, which concerts, special events, festivals, etc. did you specifically make a trip to Downtown Boulder to attend?



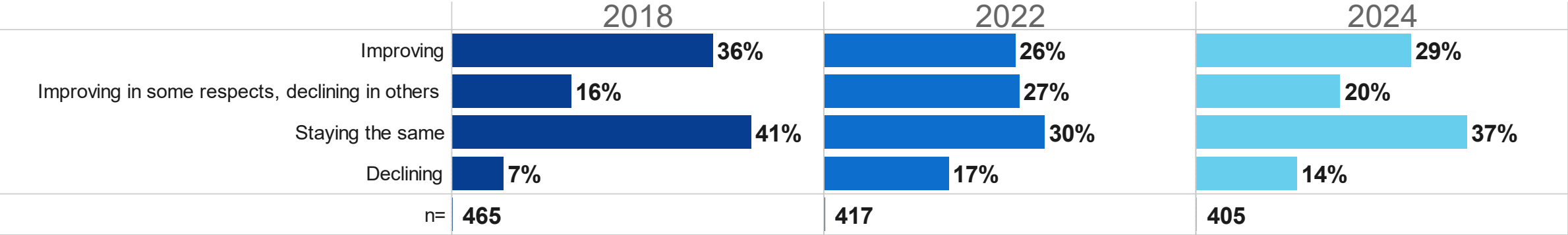


RATINGS OF DOWNTOWN BOULDER

QUALITY OF THE DOWNTOWN EXPERIENCE

Twice as many people say the downtown experience is improving vs. declining. The numbers have ticked up from 2022 but still lag 2018 when just 7% said the situation was getting worse.

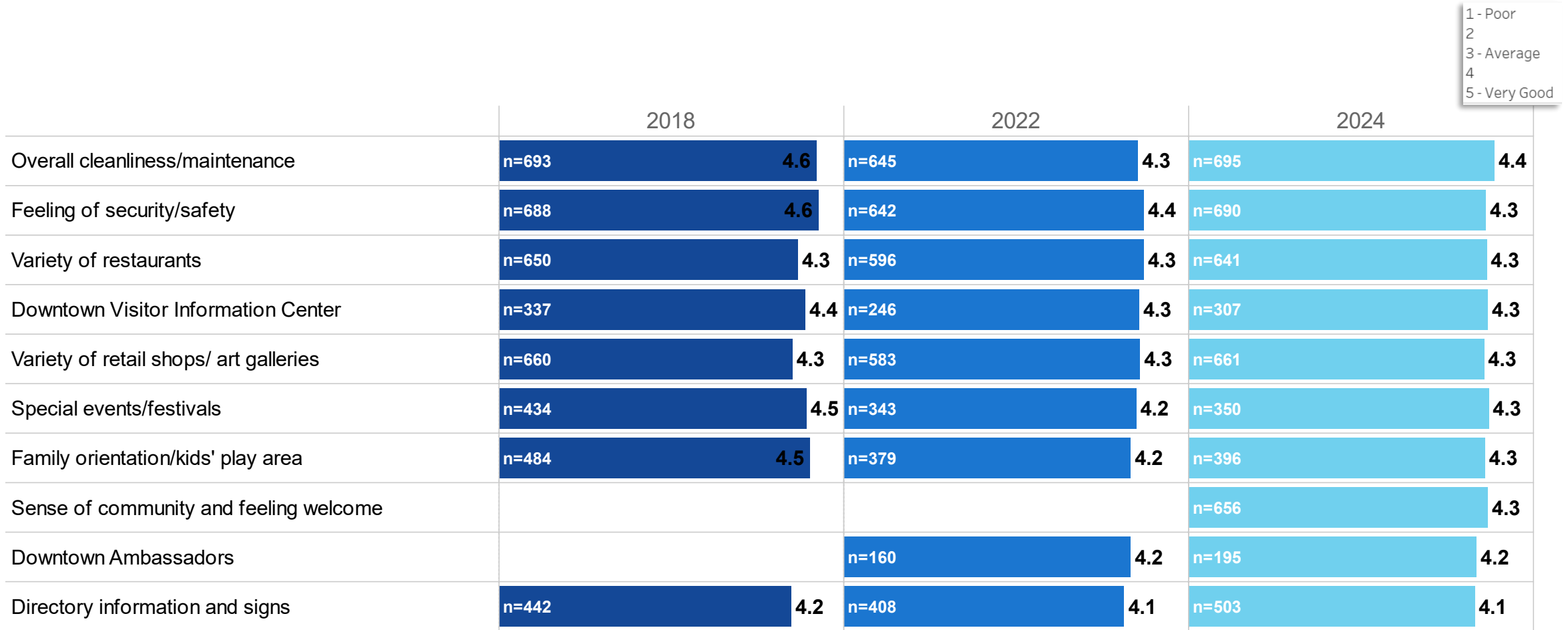
Over the past two years, would you say the overall quality of the Downtown experience has been



Source: RRC Associates

DOWNTOWN BOULDER ATTRIBUTES

Individual attributes of the downtown experience continue to rate very highly across the board.



Source: RRC Associates

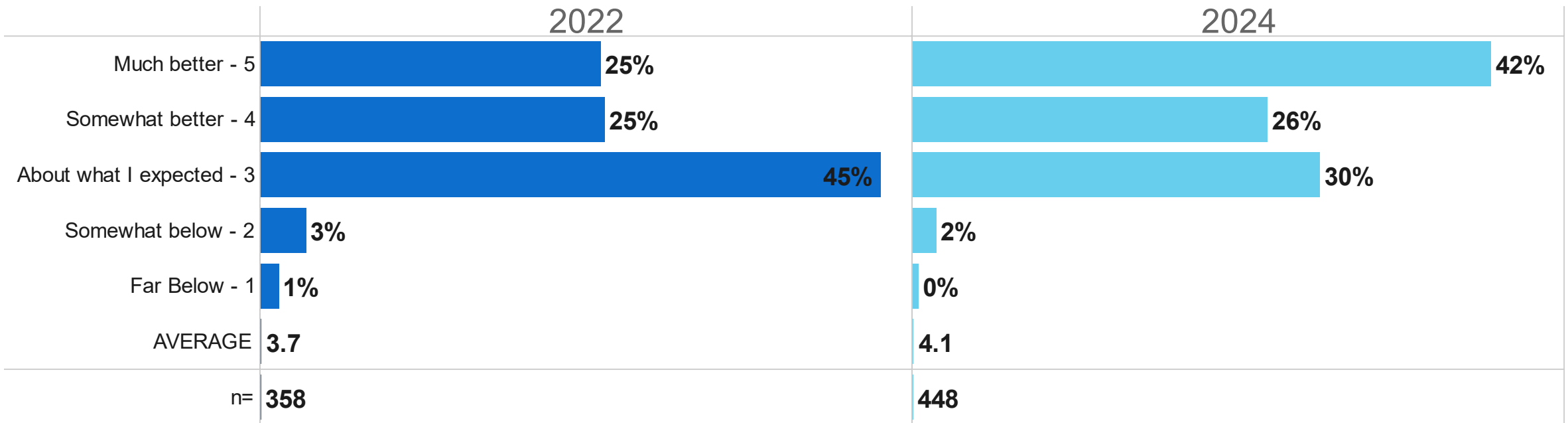


| RECOMMENDING BOULDER

BOULDER EXPECTATIONS VS. EXPERIENCE

In good news for Boulder, more than two thirds (68%) of visitors felt their Boulder experience was better than expected, up from 50% in 2022. Just 2% said it was worse than expected.

(Visitors from outside Boulder County) How has your Boulder experience compared to your expectations?

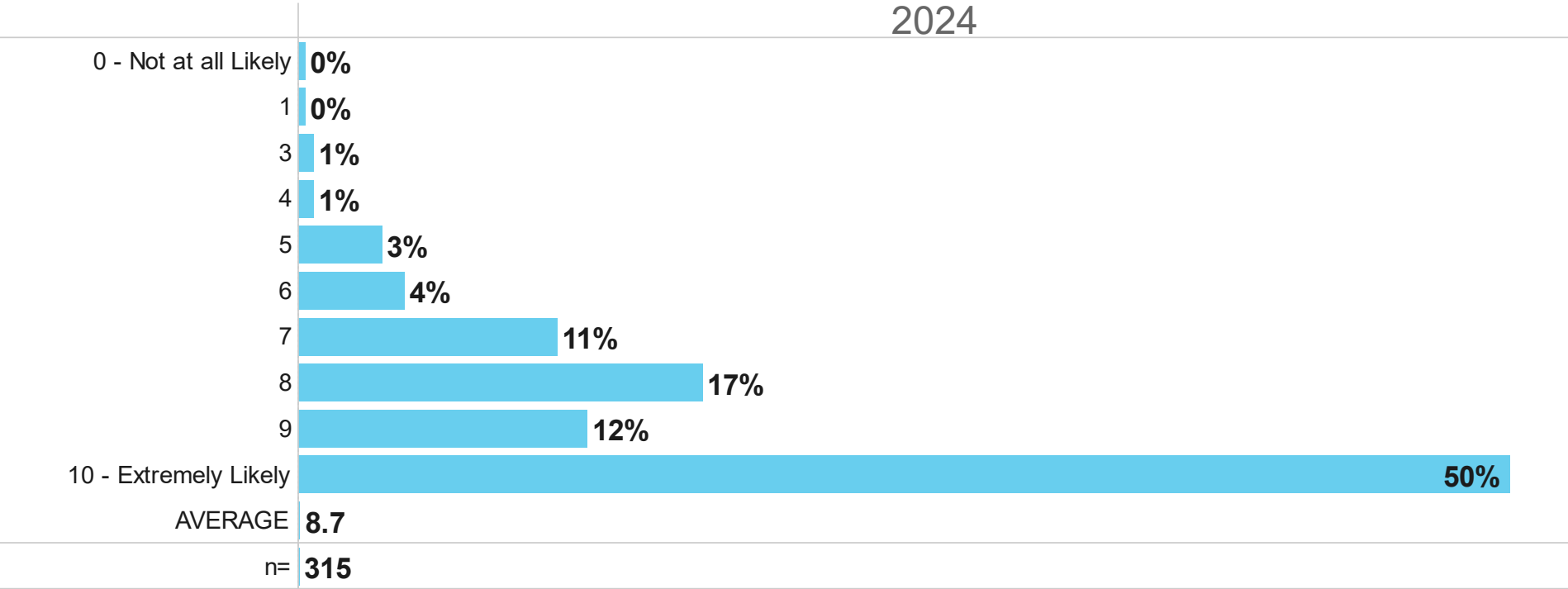


Source: RRC Associates

LIKELIHOOD TO RECOMMEND

Visitors are likely to suggest Boulder as a leisure travel destination with half rating the likelihood of recommending a 10 out of 10 and an average of 8.7 overall.

How likely would you be to recommend Boulder as a leisure travel destination to a friend or family member?

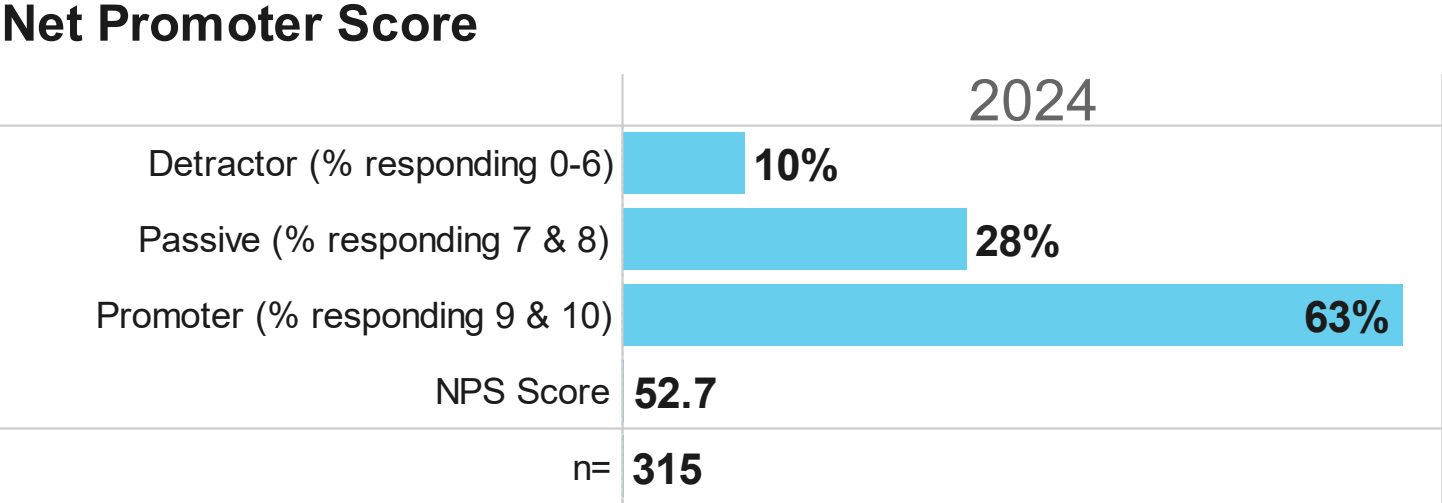


Source: RRC Associates



NET PROMOTER SCORE

Boulder scored well as a destination with a Net Promoter Score (NPS) of 53 from visitors to the city.*



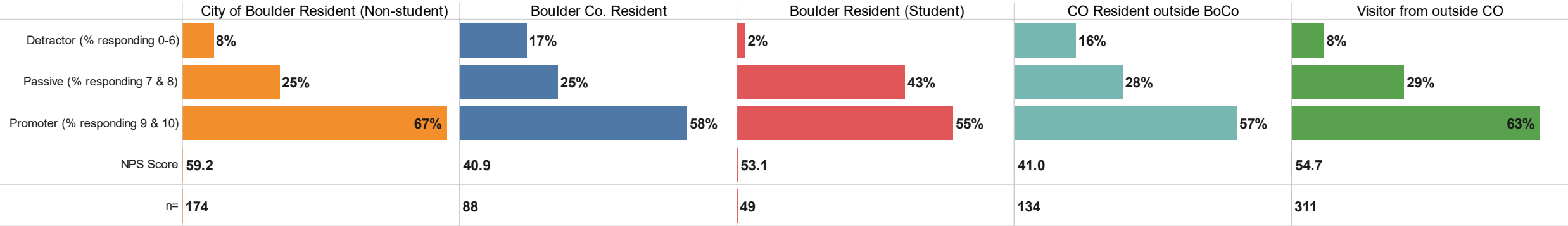
*Net Promoter Score range is -100 to +100

Source: RRC Associates

NPS FOR LOCALS & VISITORS

Boulder residents and visitors from outside of Colorado gave the highest NPS ratings. Colorado and County residents from outside of Boulder scored the city lowest.

Net Promoter Score



Source: RRC Associates



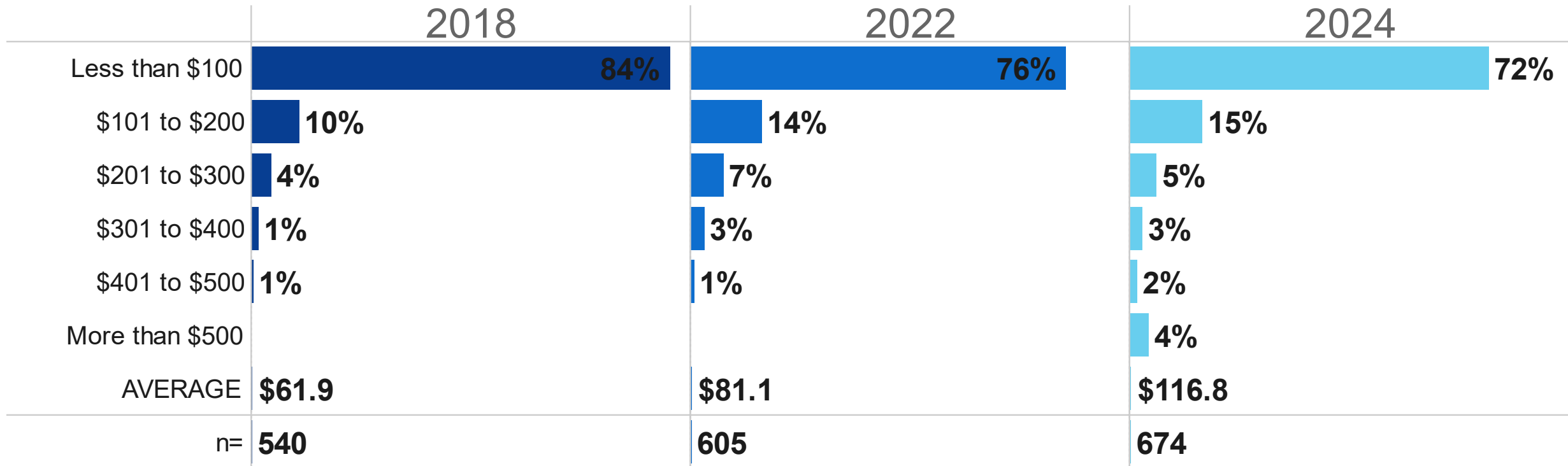


SPENDING

TOTAL SPENDING

Respondents reported spending more in downtown this year relative to 2022.

Total spending in Downtown Boulder today (excluding lodging)



Source: RRC Associates

TOTAL SPENDING BY VISITOR TYPE

Consistent with past surveys, out-of-state visitors report spending significantly more than others during their visit to downtown Boulder. County residents from outside the city report spending the least.

Total spending in Downtown Boulder today (excluding lodging) (2024 Only)

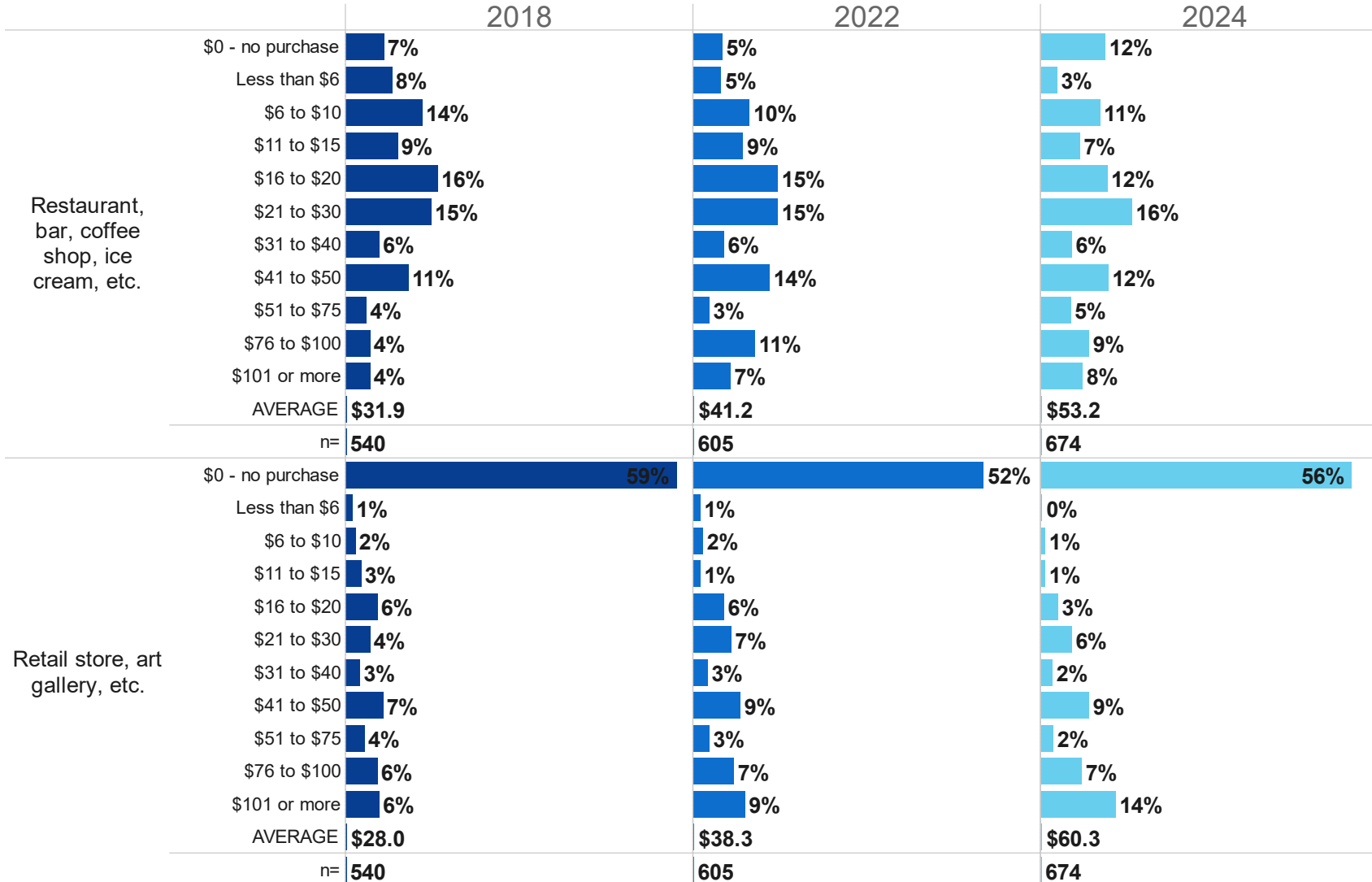
	City of Boulder Resident (Non-student)	Boulder Co. Resident	CO Resident outside BoCo	Visitor from outside CO
Less than \$100	81%	90%	69%	65%
\$101 to \$200	9%	3%	17%	19%
\$201 to \$300	2%	1%	7%	7%
\$301 to \$400	1%	1%	2%	4%
\$401 to \$500	1%	3%	2%	2%
More than \$500	5%	1%	3%	4%
AVERAGE	\$105.2	\$70.0	\$113.9	\$136.6
n=	139	70	123	302

Source: RRC Associates



RETAIL AND RESTAURANT SPENDING

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



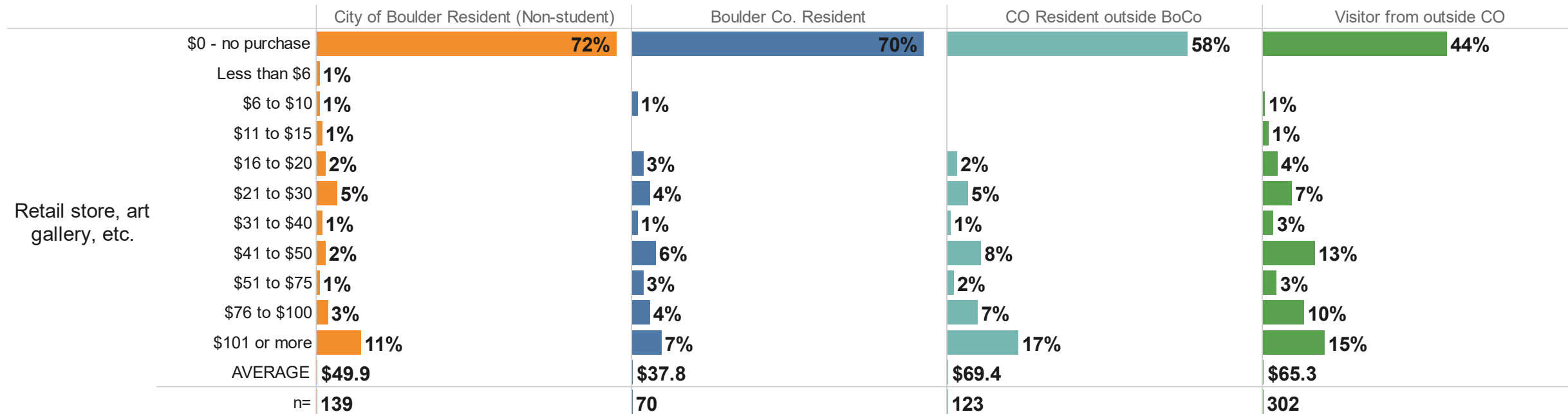
Spending per person on retail and dining jumped from 2022 to 2024.

Unlike past years, retail outpaced restaurant spending in 2024.

RETAIL SPENDING BY VISITOR TYPE

Consistent with prior surveys, visitors to Boulder spend far more in downtown shops and galleries than locals. However, Boulder residents outpace those from nearby cities.

How much in total will you individually spend in the Downtown Boulder area today on the following? (2024 Only)

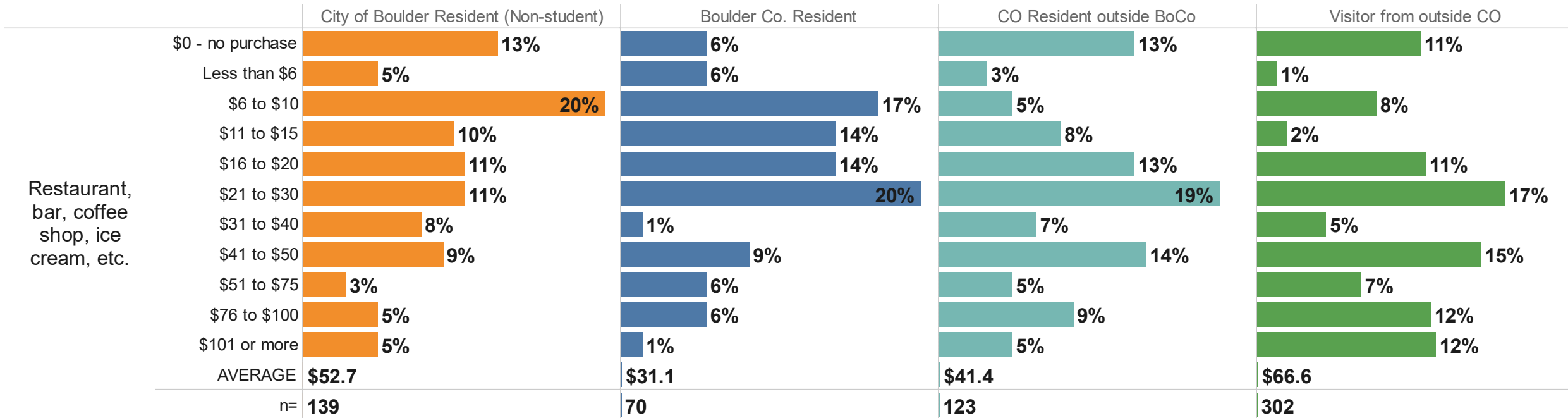


Source: RRC Associates

RESTAURANT SPENDING

Not surprisingly, visitors from other states spent the most on dining. However, Boulder locals outspend other Colorado residents in downtown restaurants.

How much in total will you individually spend in the Downtown Boulder area today on the following? (2024 Only)



Source: RRC Associates

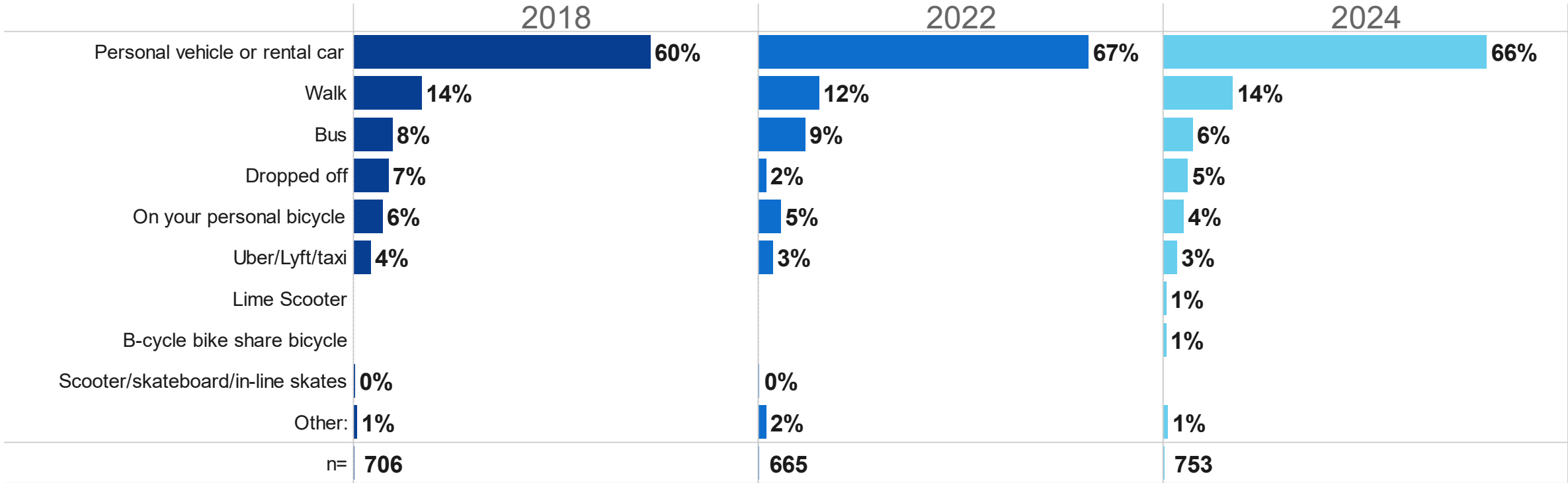


| TRANSPORTATION

TRAVEL MODES TO DOWNTOWN BOULDER

Consistent with 2022, two thirds arrived in a car. Walking is the second most common way to get downtown. Riding the bus or a bicycle both dropped slightly from 2022 numbers.

How did you get to Downtown Boulder this trip?

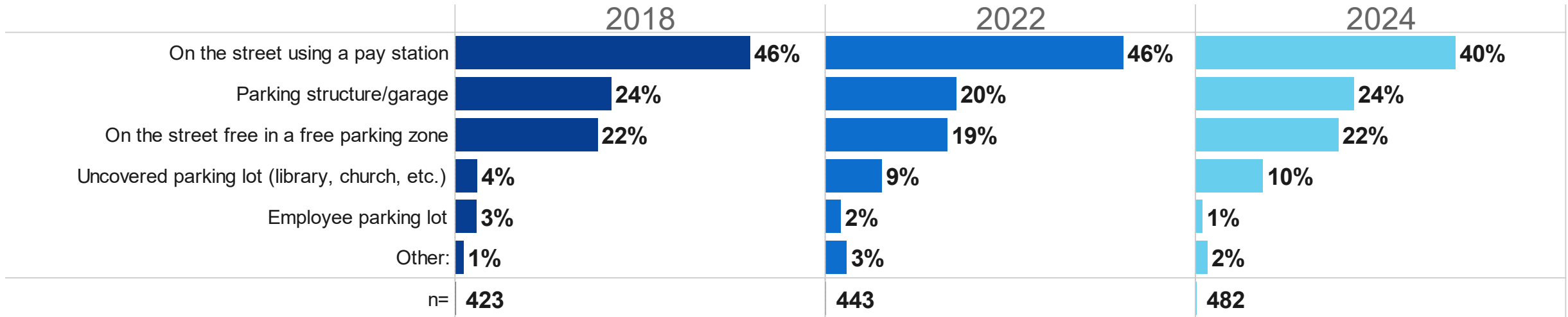


Source: RRC Associates

PARKING LOCATION

Street parking with pay stations dropped while garages and parking further out increased in 2024.

Where is your car parked today? - Selected Choice



Source: RRC Associates

SATISFACTION WITH PARKING

Though ratings have edged lower since 2022, all aspects of parking downtown continue to rate highly.

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

Using a scale of 1 to 5 where 1 is poor and 5 is very good, how do you rate your satisfaction with the following aspects of parking downtown?

	2018	2022	2024
Sense of safety in parking garages	n=277 4.4	n=262 4.4	n=255 4.4
Overall ease of finding a space	n=418 3.9	n=436 4.4	n=410 4.1
Overall satisfaction with parking	n=411 3.9	n=438 4.3	n=444 4.1
Overall ease of use of pay stations	n=334 4.2	n=320 4.2	n=362 4.1

Source: RRC Associates

ALTERNATIVE MODES OF TRANSPORTATION

Among those using alternative modes, ratings are generally higher than 2022 for satisfaction. The lowest rated for ease of use were Lime Scooters.

[If used] Using a scale of 1 to 5 where 1 is poor and 5 is very good, how do you rate your satisfaction with the following aspects of transportation options in Downtown Boulder?

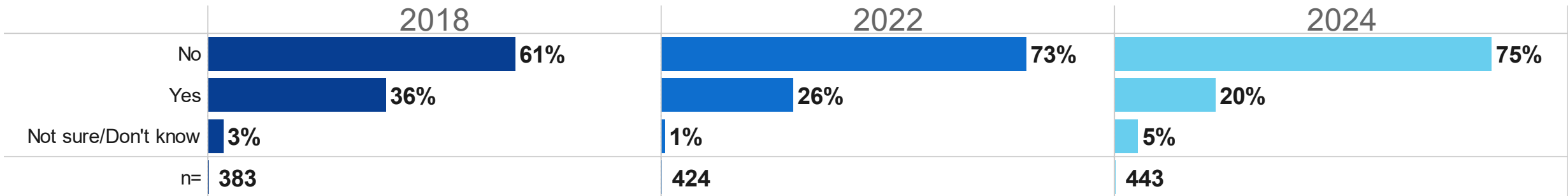
	2018	2022	2024
Ease of walking to Downtown Boulder	n=320 4.5	n=403 4.3	n=106 4.7
Convenience of biking to Downtown Boulder	n=236 4.5	n=269 4.2	n=28 4.6
Convenience of taking the bus to Downtown Boulder	n=248 4.3	n=279 4.0	n=44 4.4
Ease of parking a bike in Downtown Boulder	n=219 4.3	n=258 4.2	n=29 4.3
Ease of using Uber/Lyft			n=20 4.1
Ease of using a B-cycle bike share			n=4 4.0
Ease of using a Lime Scooter			n=5 3.4

Source: RRC Associates

ECO-PASS

Respondents who have an Eco-Pass continued to trend downward from pre-pandemic levels. This likely correlates to fewer employees coming downtown.

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



Source: RRC Associates

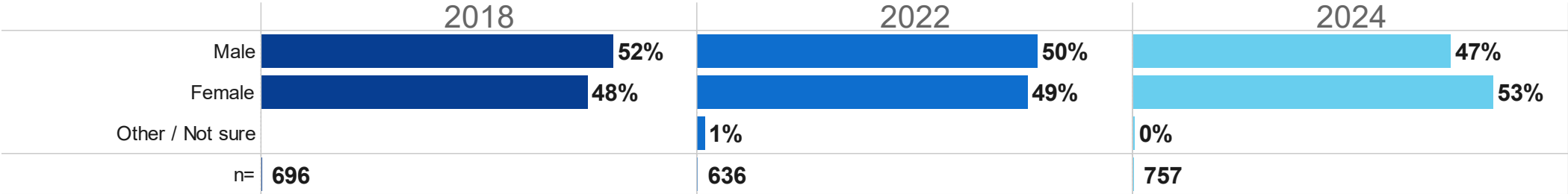


DEMOGRAPHICS

GENDER & AGE

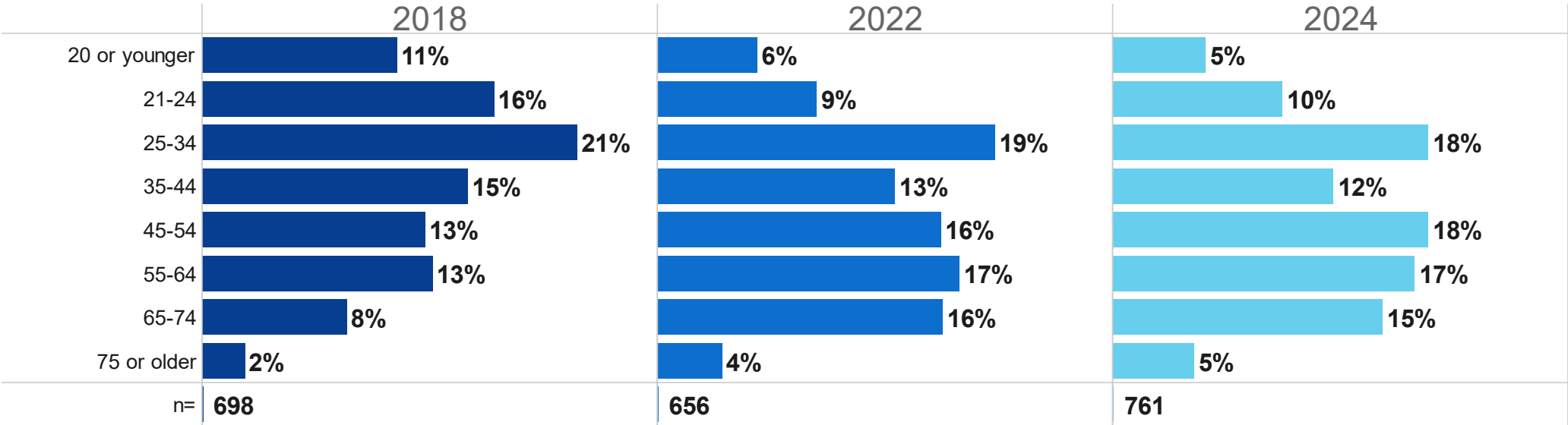
Gender and age trends have been consistent since 2018.

Observed gender of respondent



Source: RRC Associates

Which category best describes your age?



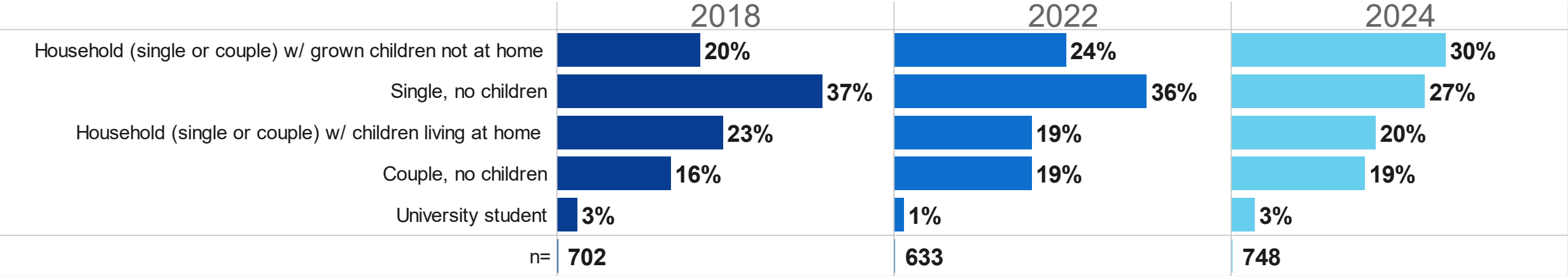
Source: RRC Associates



HOUSEHOLD MAKEUP

This year, fewer singles without children responded to the survey.

Which category best describes your household status?

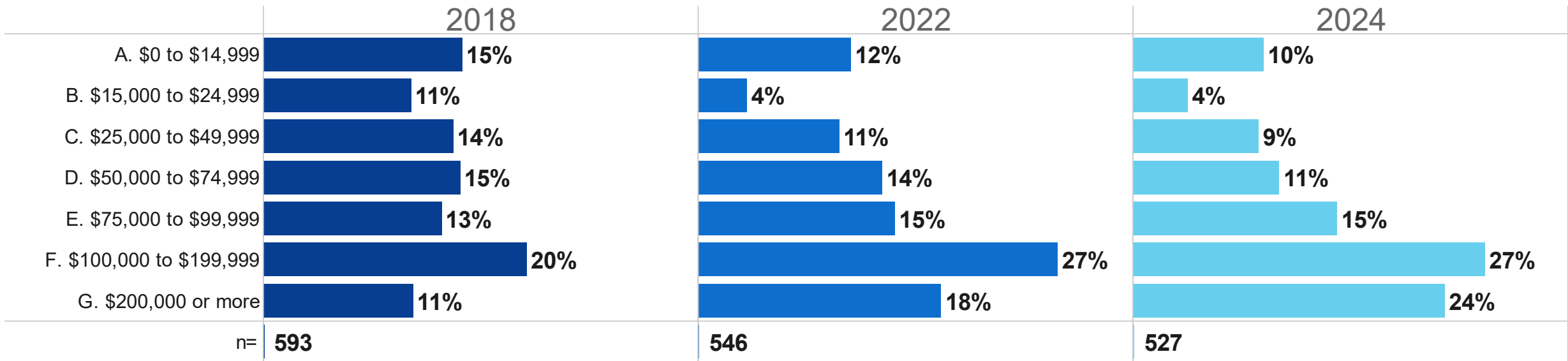


Source: RRC Associates

INCOME

The trend toward more affluent visitors downtown continues. In 2024, about half of those surveyed reported household incomes above \$100,000 vs. just 31% in 2018.

Which of the following categories includes the annual income of your household (before taxes)?



Source: RRC Associates

THANK YOU!



RRC

RRC ASSOCIATES

4770 Baseline Road, Suite 355
Boulder, CO 80303

rrcassociates.com
(303) 449-6558