

DOWNTOWN GOLDEN PATRON INTERCEPT

Intercept Survey Results

*City of Golden
Economic Development Commission*

**May/June 2008
&
December 2008**

**Compiled by Steven Williams,
GURA Redevelopment Intern, for the City of Golden
Summary Report by City of Golden Planning Department**

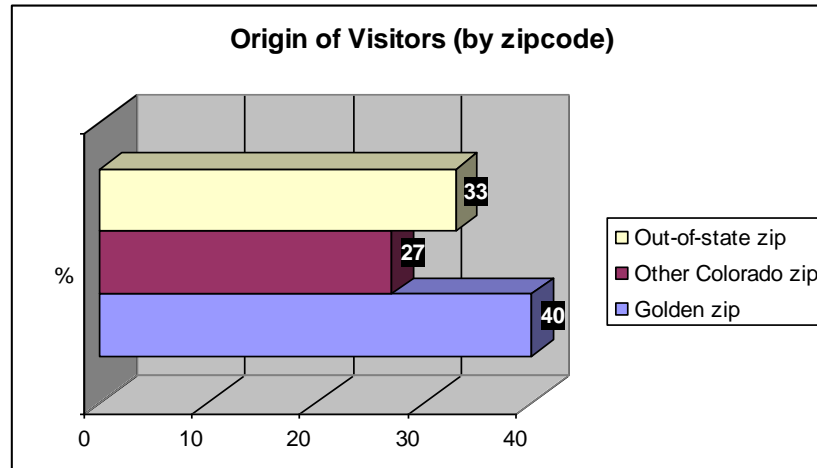
The purpose of these recurring surveys is to understand the composition of downtown visits during various seasons of the year and to document primary trip motivations. The surveying is conducted by Golden Greeter staff. Although not professional surveyors, these individuals provide reasonable information for use by EDComm or individual businesses. Each wave of consumer research has a goal of 200+ completed interviews. Each interviewing wave covers a span from Monday through Saturday and from noon until approximately 7:00 pm. Only adults over the age of 18 are included in the surveying.

Respondents are selected without regard to purchasing behavior. All expenditures and purchasing rates are calculated on the basis of the smaller sub-set of respondents who indicate that they are finished with their visit at the time of their interview.

1. What is your zip code? _____

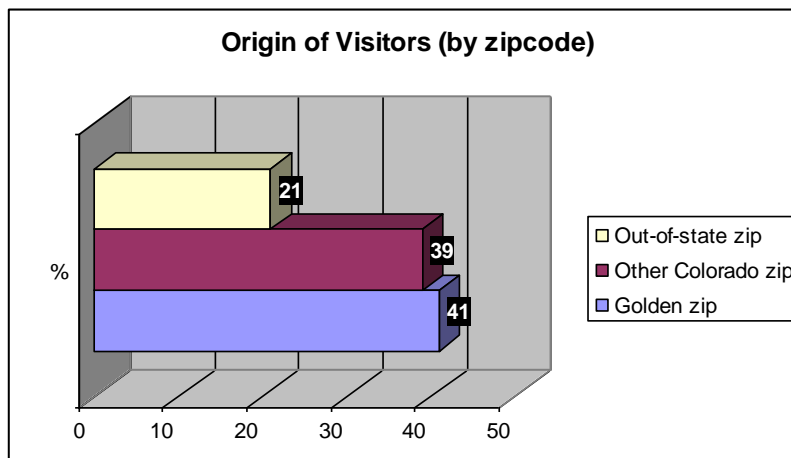
MAY/JUNE 2008

40% of survey respondents listed 80401 or 80403 as their current zip code; 27% percent of respondents listed other Colorado zips, and 33% listed out-of-state zip codes.



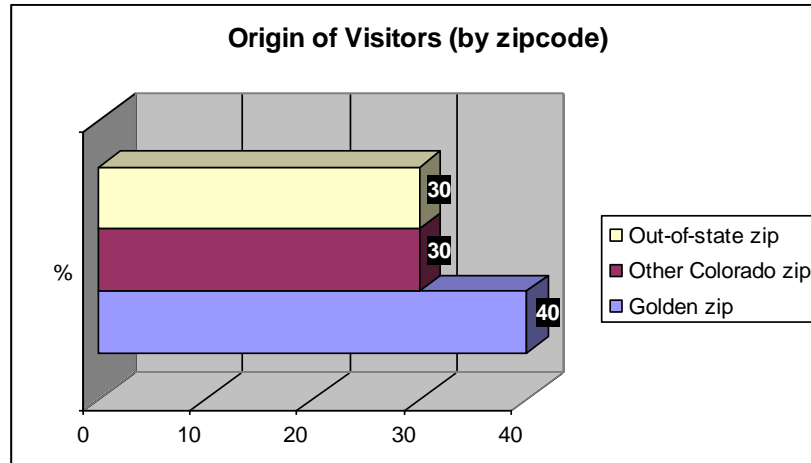
DECEMBER 2008

41% of survey respondents listed 80401 or 80403 as their current zip code; 39% percent of respondents listed other Colorado zips, and 21% listed out-of-state zip codes.



COMBINED

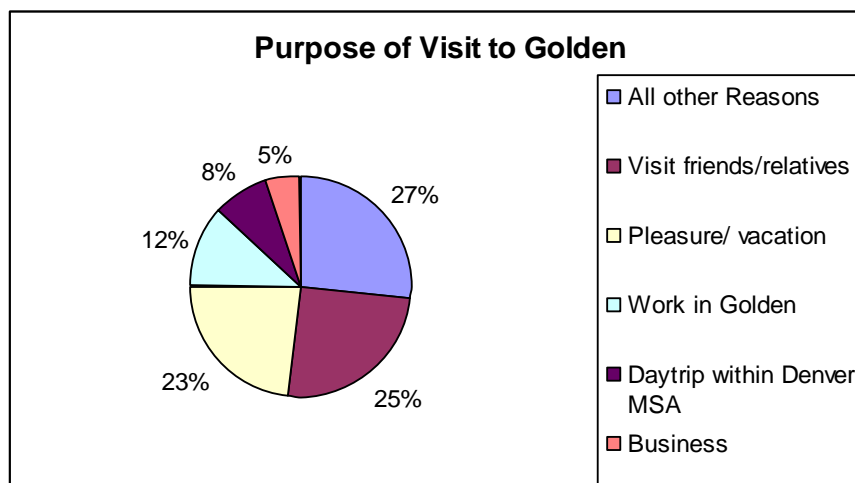
40% of survey respondents listed 80401 or 80403 as their current zip code; 30% percent of respondents listed other Colorado zips, and 30% listed out-of-state zip codes.



2. What is the primary purpose of your visit to Golden today?

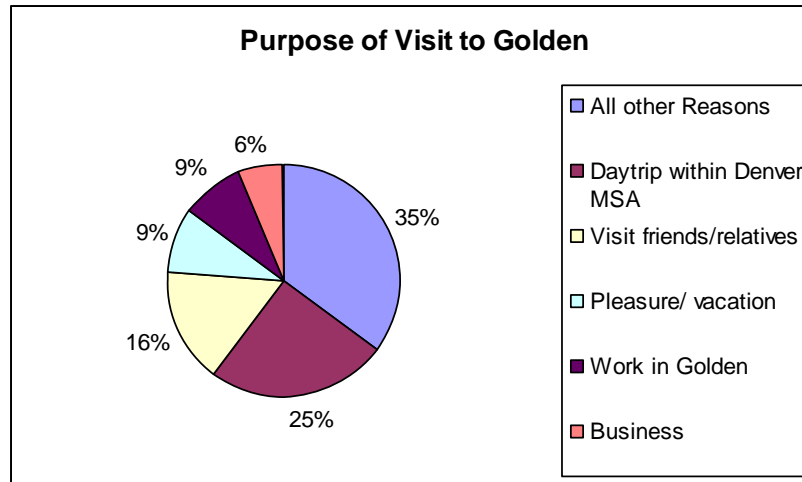
MAY/JUNE 2008

| RESPONSE RANKINGS | |
|-----------------------------------|--------------------|
| 1. All Other Reasons | 89 responses (27%) |
| 2. Visit Friends/Relatives | 83 responses (25%) |
| 3. Pleasure Vacation | 76 responses (23%) |
| 4. Work in Golden | 39 responses (12%) |
| 5. Daytrip from within Denver MSA | 25 responses (8%) |
| 6. Business Trip | 15 responses (5%) |
| No Response (NR)- | 2 responses |



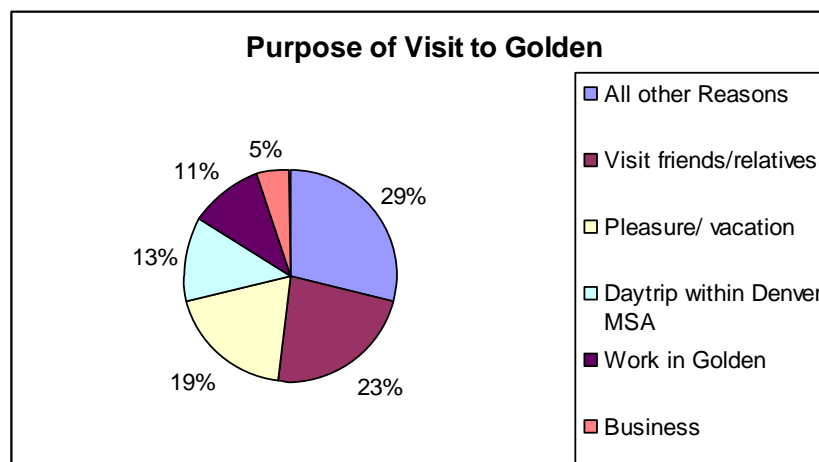
DECEMBER 2008

| RESPONSE RANKINGS | |
|-----------------------------------|--------------------|
| 1. All Other Reasons | 45 responses (35%) |
| 2. Daytrip from within Denver MSA | 32 responses (25%) |
| 3. Visit Friends/Relatives | 20 responses (16%) |
| 4. Pleasure Vacation | 11 responses (9%) |
| 5. Work in Golden | 11 responses (9%) |
| 6. Business Trip | 7 responses (6%) |
| No Response (NR)- | 0 responses |



COMBINED

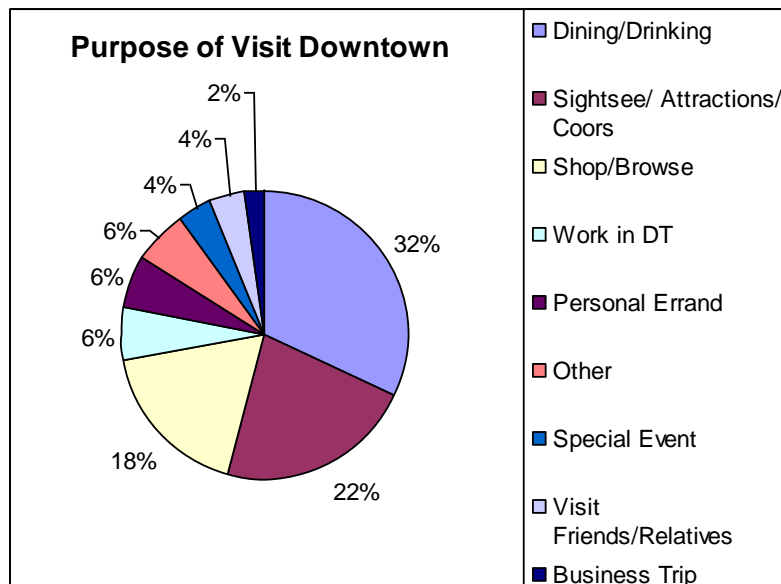
| RESPONSE RANKINGS | |
|-----------------------------------|---------------------|
| 1. All Other Reasons | 134 responses (29%) |
| 2. Visit Friends/Relatives | 103 responses (23%) |
| 3. Pleasure Vacation | 87 responses (19%) |
| 4. Daytrip from within Denver MSA | 57 responses (13%) |
| 5. Work in Golden | 50 responses (11%) |
| 6. Business Trip | 22 responses (5%) |
| No Response (NR)- | 2 responses |



3. What is the primary purpose of your visit to downtown today?

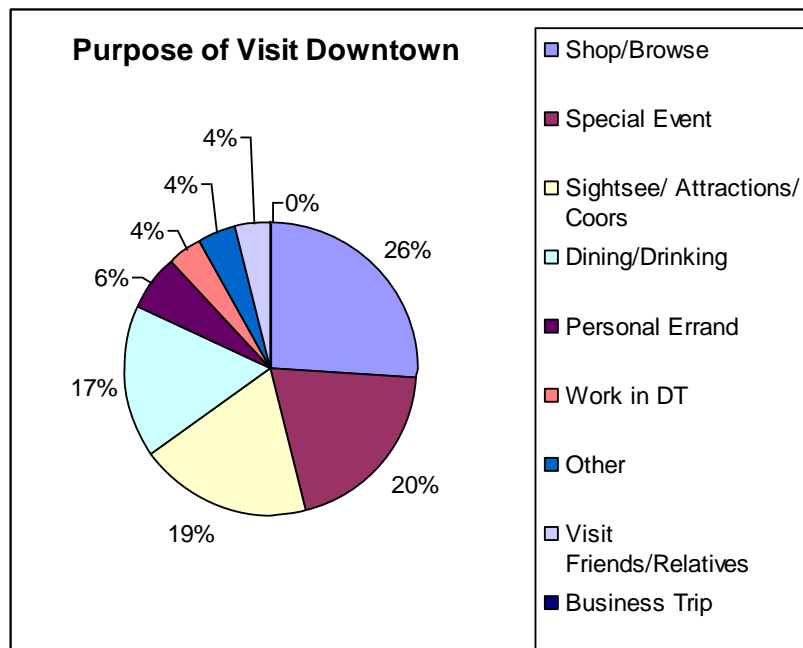
MAY/JUNE 2008

| RESPONSE RANKINGS | |
|---|---------------------|
| 1. Dining/Drinking | 138 responses (32%) |
| 2. Sightsee/Visit Attractions/Visit Coors | 92 responses (22%) |
| 3. Shop/Browse Stores and Galleries | 73 responses (18%) |
| 4. Work in Downtown | 24 responses (6%) |
| 4. Run Personal Errand | 24 responses (6%) |
| 6. Other Reasons | 23 responses (6%) |
| 7. Visit Friends/Relatives | 18 responses (4%) |
| 8. Attend Special Event | 15 responses (4%) |
| 9. Business Trip/Attend Convention | 7 responses (2%) |



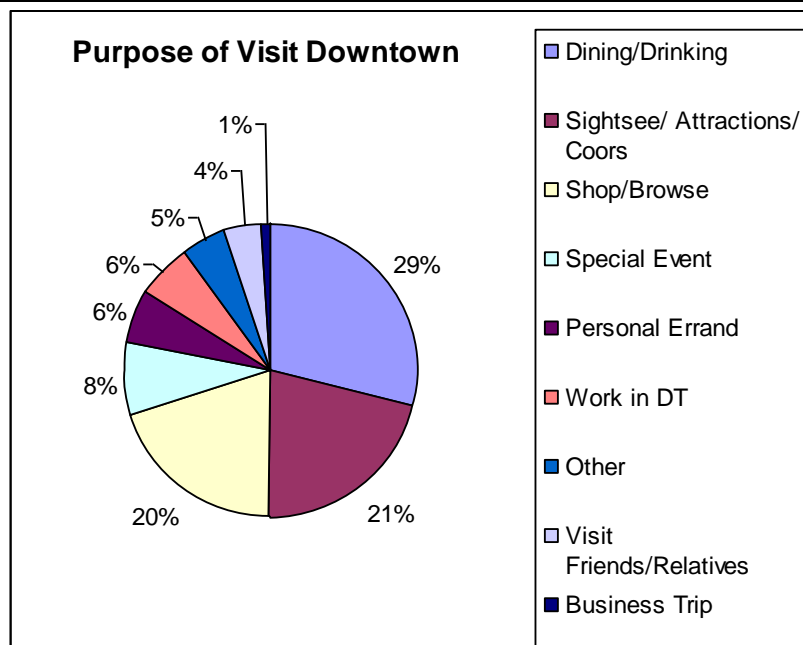
DECEMBER 2008

| RESPONSE RANKINGS | |
|---|--------------------|
| 1. Shop/Browse Stores and Galleries | 40 responses (26%) |
| 2. Attend Special Event | 31 responses (20%) |
| 3. Sightsee/Visit Attractions/Visit Coors | 30 responses (19%) |
| 4. Dining/Drinking | 26 responses (17%) |
| 5. Run Personal Errand | 9 responses (6%) |
| 6. Work in Downtown | 7 responses (4%) |
| 6. Visit Friends/Relatives | 7 responses (4%) |
| 8. Other Reasons | 6 responses (4%) |
| 9. Business Trip/Attend Convention | 1 responses (0%) |

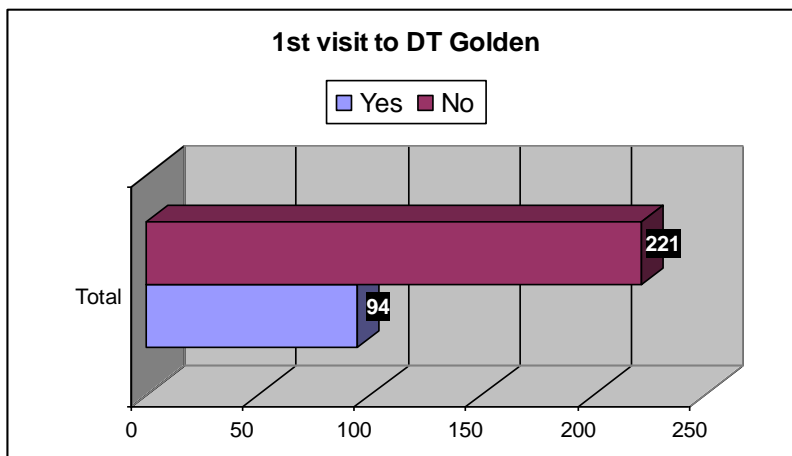


COMBINED

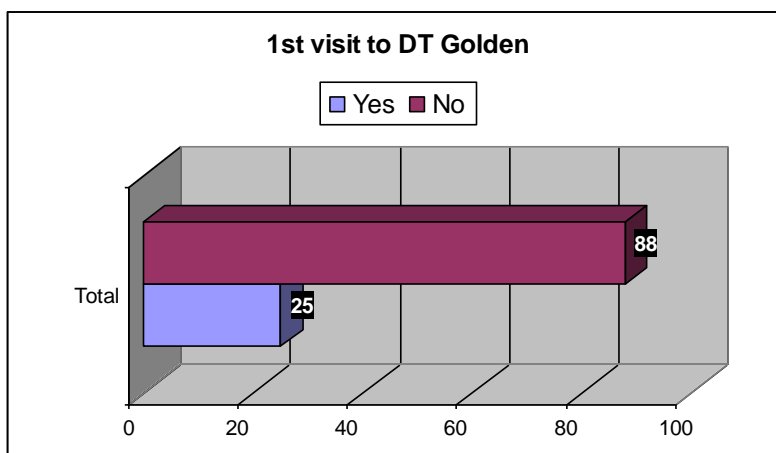
| RESPONSE RANKINGS | |
|---|---------------------|
| 1. Dining/Drinking | 164 responses (29%) |
| 2. Sightsee/Visit Attractions/Visit Coors | 122 responses (21%) |
| 3. Shop/Browse Stores and Galleries | 113 responses (20%) |
| 4. Attend Special Event | 46 responses (8%) |
| 5. Run Personal Errand | 35 responses (6%) |
| 6. Work in Downtown | 31 responses (6%) |
| 7. Other Reasons | 29 responses (5%) |
| 8. Visit Friends/Relatives | 25 responses (4%) |
| 9. Business Trip/Attend Convention | 8 responses (1%) |



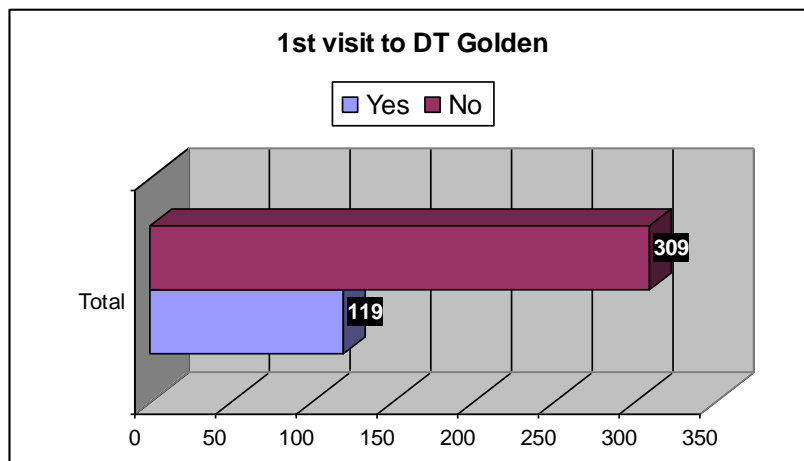
4. Is this your first visit to downtown Golden?_ (Better than 2:1 have visited previously.)
 (If yes, skip to question 6. Otherwise proceed to question 5)
MAY/JUNE 2008
94 Yes, 221 No



DECEMBER 2008
25 Yes, 88 No



COMBINED
119 Yes, 309 No



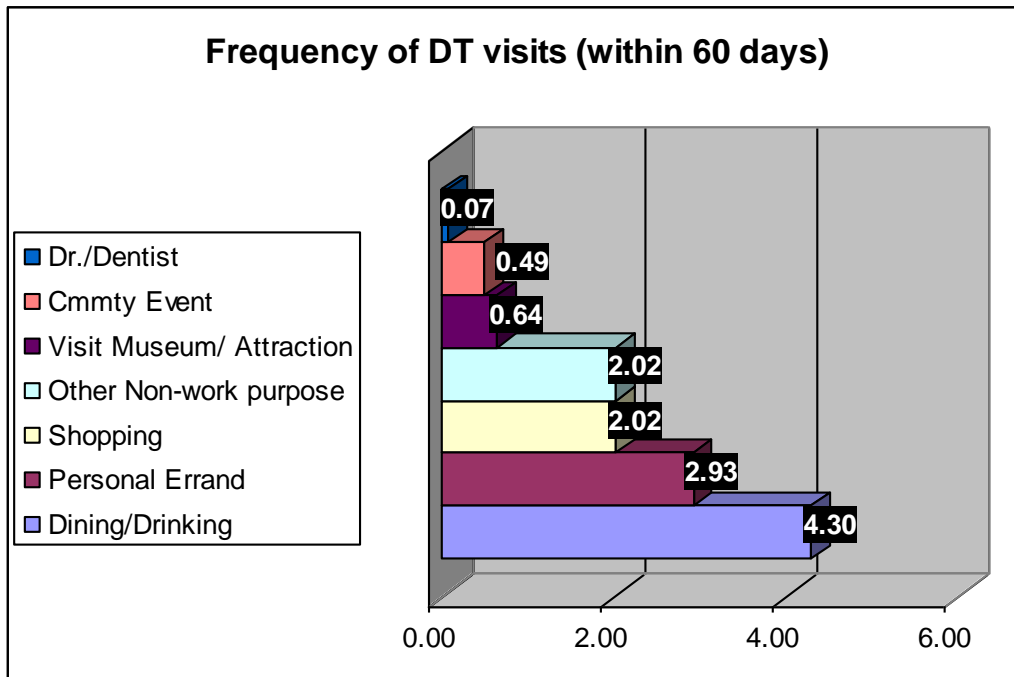
5. In the past 60 days, how many times have you visited downtown Golden for the following purposes?

Sums of responses reflect the total amount of respondent visits made to downtown Golden in the past 60 days, and the average reflects the average number of non-work visits each respondent made to Downtown Golden within 60 days for each activity.

MAY/JUNE 2008

Collectively, May/June respondents made 3901 non-work visits downtown in the past 60 days and averaged 12.20 total non-work trips per 60 days.

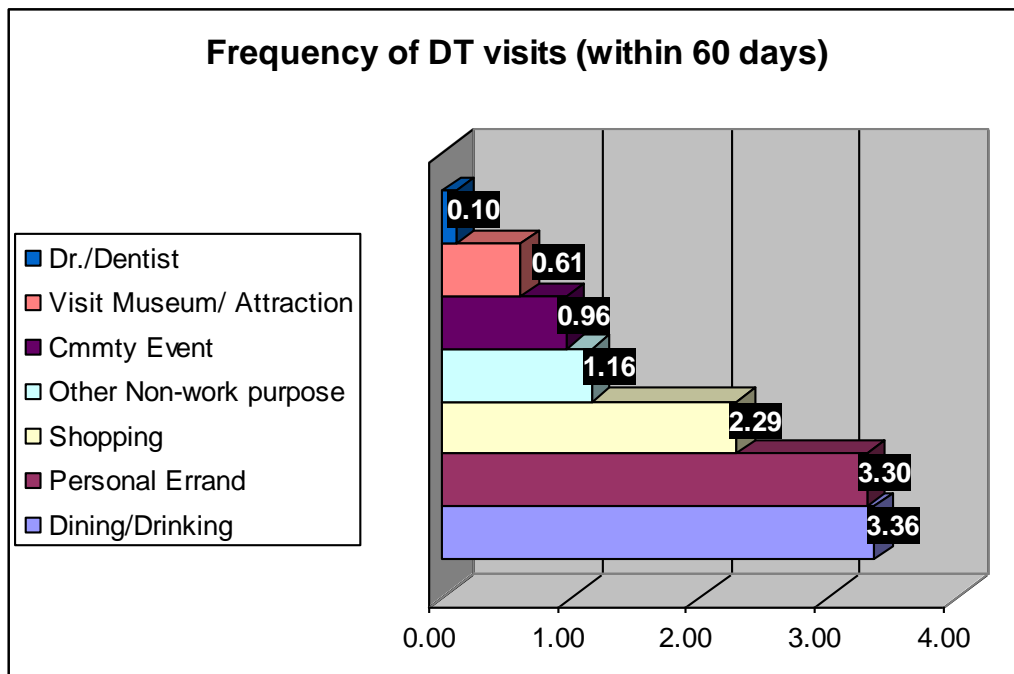
| RESPONSE RANKINGS | |
|-------------------------------|----------------------|
| 1. Dining/Drinking | Sum 1343, Avg. 4.30 |
| 2. Personal Errand | Sum 918, Avg. 2.93 |
| 3. Any Other Non-Work Purpose | Sum 632, Avg. 2.02 |
| 4. Shopping | Sum 631, Avg. 2.02 |
| 5. Visit Museum or Attraction | Sum 201, Avg. 0.64 |
| 6. Attend Community Event | Sum 153, Avg. 0.49 |
| 7. Doctor/Dentist Appointment | Sum 23, Avg. 0.07 |
| Total Non-Work Visits | Sum 3901, Avg. 12.20 |



DECEMBER 2008

Collectively, December respondents made 1331 non-work visits downtown in the past 60 days and averaged 11.68 non-work trips per 60 days.

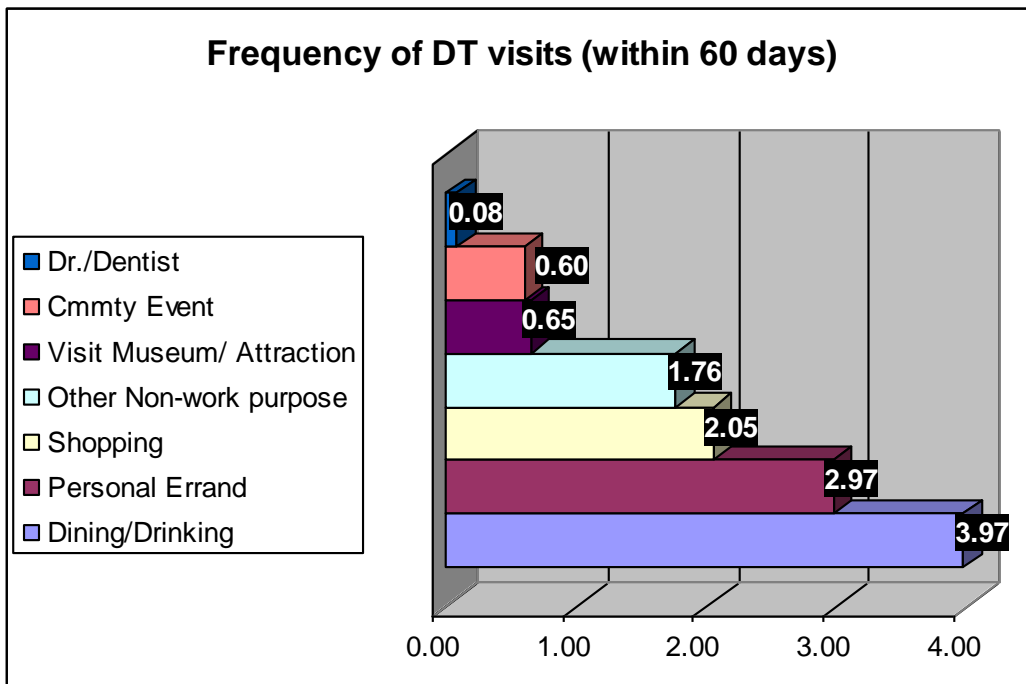
| RESPONSE RANKINGS | |
|-------------------------------|----------------------|
| 1. Dining/Drinking | Sum 380, Avg. 3.36 |
| 2. Personal Errand | Sum 373, Avg. 3.30 |
| 3. Shopping | Sum 259, Avg. 2.29 |
| 4. Any Other Non-Work Purpose | Sum 131, Avg. 1.16 |
| 5. Attend Community Event | Sum 108, Avg. 0.96 |
| 6. Visit Museum or Attraction | Sum 69, Avg. 0.61 |
| 7. Doctor/Dentist Appointment | Sum 11, Avg. 0.10 |
| Total Non-Work Visits | Sum 1331, Avg. 11.68 |



COMBINED

Collectively, May/June & December respondents made 5232 non-work visits downtown in the past 60 days and averaged 12.05 non-work trips per 60 days.

| RESPONSE RANKINGS | |
|-------------------------------|----------------------|
| 1. Dining/Drinking | Sum 1723, Avg. 3.97 |
| 2. Personal Errand | Sum 1291, Avg. 2.97 |
| 3. Shopping | Sum 890, Avg. 2.05 |
| 4. Any Other Non-Work Purpose | Sum 763, Avg. 1.76 |
| 5. Visit Museum or Attraction | Sum 280, Avg. 0.65 |
| 6. Attend Community Event | Sum 261, Avg. 0.60 |
| 7. Doctor/Dentist Appointment | Sum 34, Avg. 0.08 |
| Total Non-Work Visits | Sum 5232, Avg. 12.06 |



6. Are you completing your visit now?

Respondents who indicate that their visit to Downtown is completed at the moment they are interviewed are considered “exiting” respondents. Their spending patterns are important to understand.

MAY/JUNE 2008

103 Yes, 210 No

DECEMBER 2008

51 Yes, 63 No

COMBINED

154 Yes, 273 No

If so, how much did you spend here today in our shops?

MAY/JUNE 2008 (103 Exiting Respondents)

Sum- \$6535, Avg- \$63.45*

***(This average distorted by one \$5,000 purchase; the average retail spending without this lone patron would be reduced to \$15.05).**

DECEMBER 2008 (49 Exiting Respondent)

Sum \$2017, Average- \$41.16

COMBINED (152 Exiting Respondents)

Sum \$8552 (*Adjusted Sum \$3552), Average- \$56.26 (*Adjusted Avg. \$23.52)

How much in restaurants?

MAY/JUNE 2008

Sum- \$2411.10, Avg- \$23.41

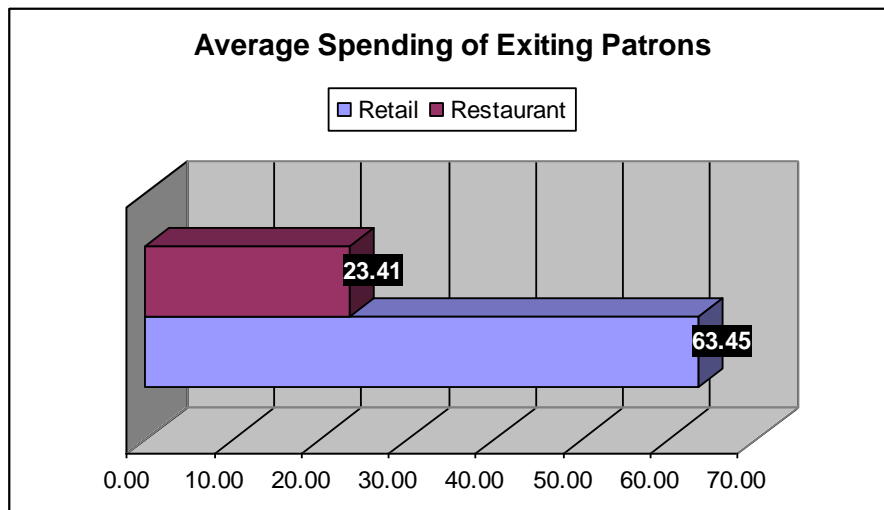
DECEMBER 2008

Sum \$1172, Average- \$23.92

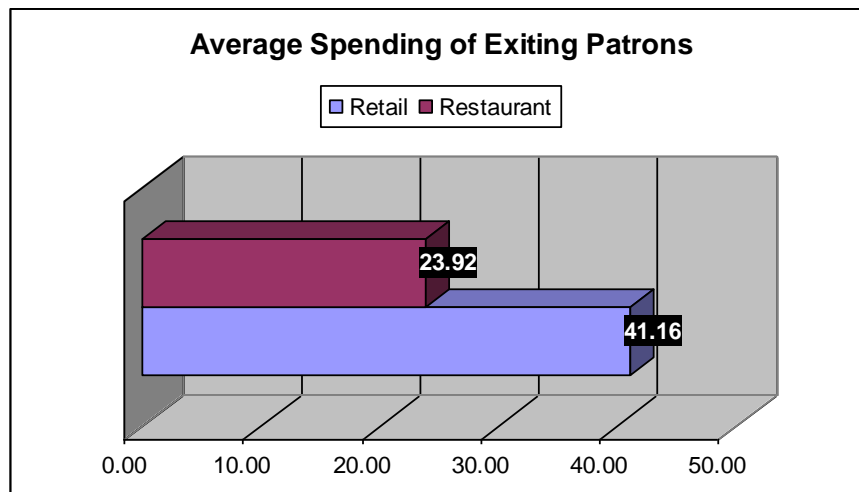
COMBINED

Sum \$3583.10, Average- \$23.57

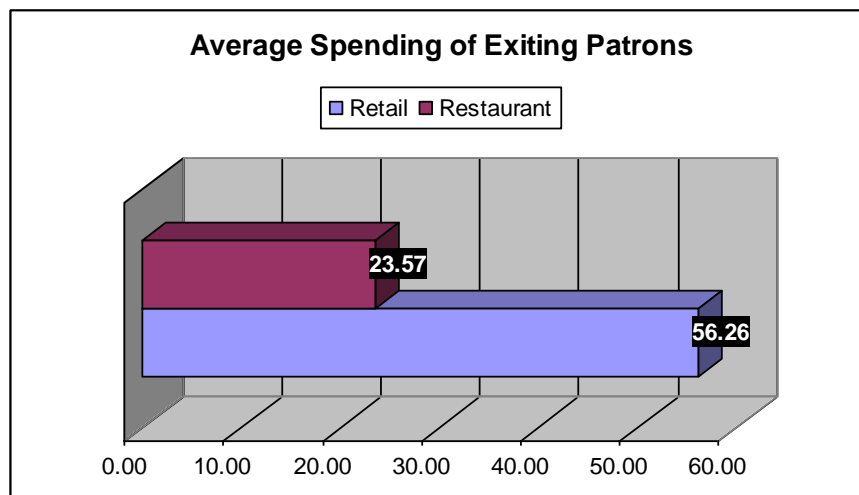
MAY/JUNE 2008



DECEMBER 2008



COMBINED



7. DEMOGRAPHIC PROFILE OF DOWNTOWN PATRONS

Age:

MAY/JUNE 2008 Avg. 44.7

DECEMBER 2008 Avg. 46

COMBINED Avg. 45

MAY/JUNE 2008

Sex M -152 F -157

DECEMBER 2008

Sex M -58 F -73

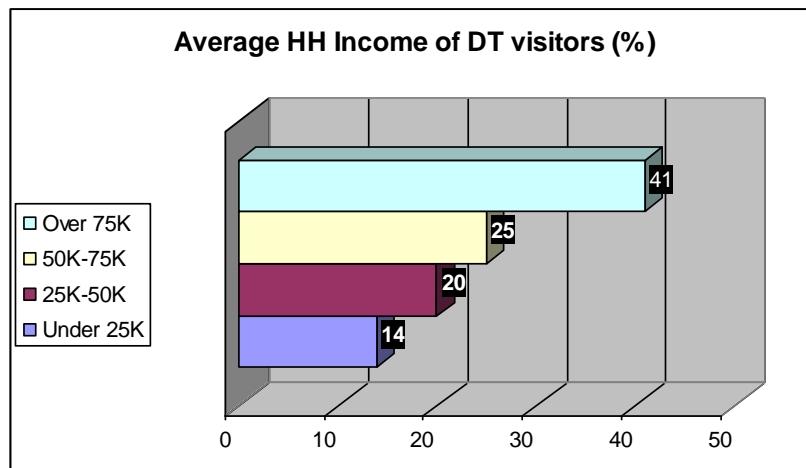
COMBINED

Sex M -210 F -230

MAY/JUNE 2008

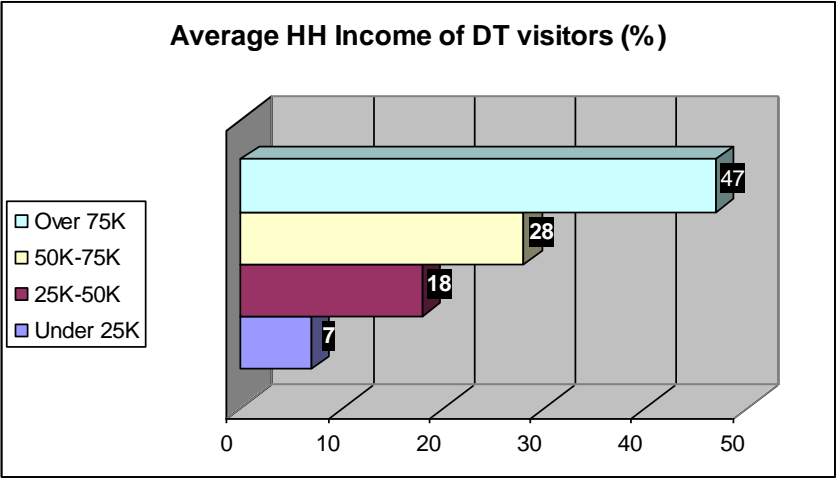
Group Size and Composition

| ANNUAL HOUSEHOLD INCOME OF DOWNTOWN GOLDEN'S ADULT PATRONS | |
|---|----------------------|
| Over \$75,000 | 103 respondents, 41% |
| \$50,000 to \$74,999 | 62 respondents, 25% |
| \$25,000 to \$49,999 | 50 respondents, 20% |
| Under \$25,000 | 34 respondents, 14% |
| 67- NR's | |



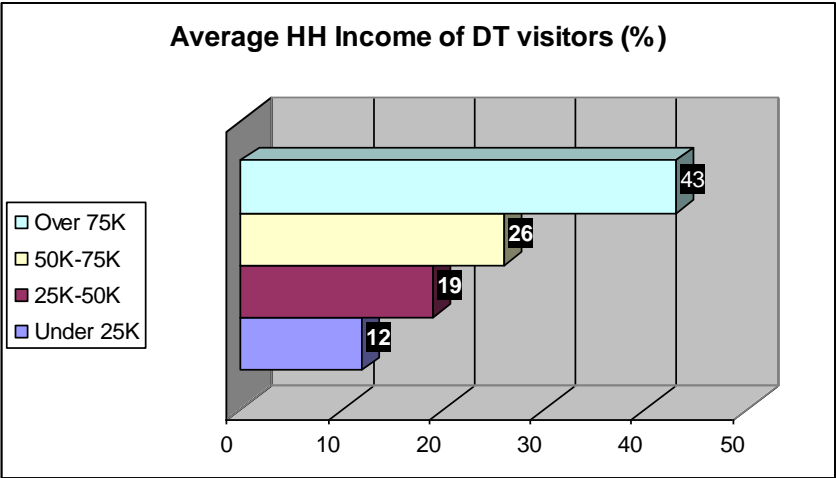
DECEMBER 2008

| ANNUAL HOUSEHOLD INCOME OF DOWNTOWN GOLDEN'S ADULT PATRONS | |
|---|---------------------|
| Over \$75,000 | 45 respondents, 47% |
| \$50,000 to \$74,999 | 27 respondents, 28% |
| \$25,000 to \$49,999 | 17 respondents, 18% |
| Under \$25,000 | 7 respondents, 7% |
| 17- NR's | |



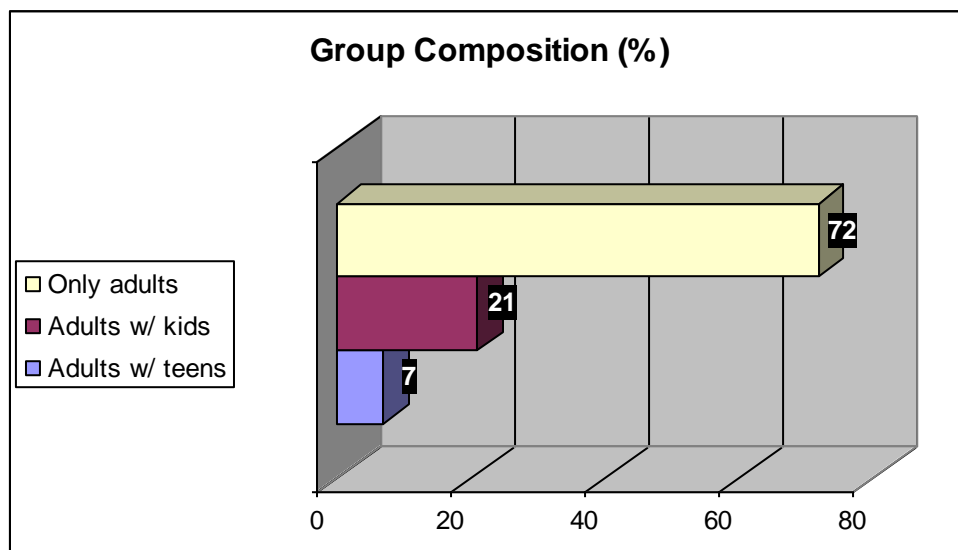
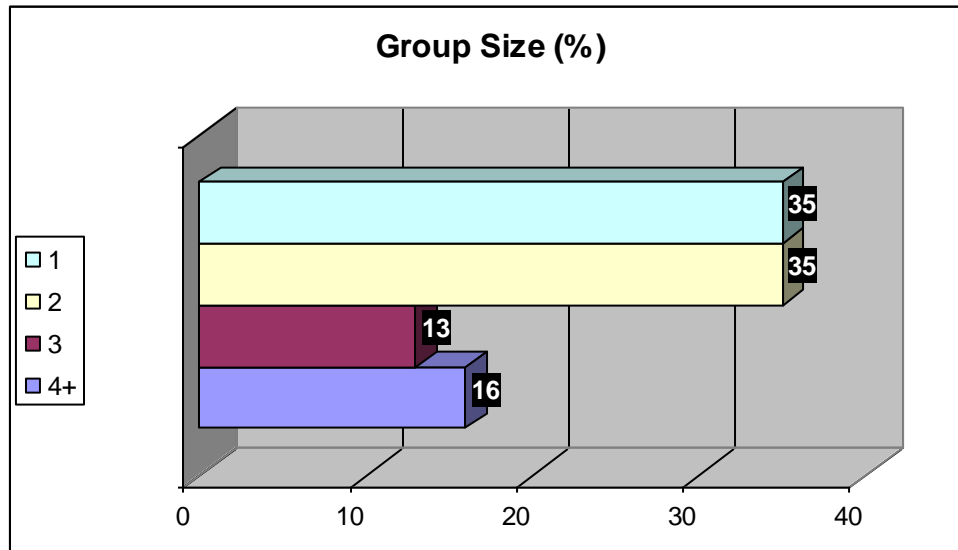
COMBINED

| ANNUAL HOUSEHOLD INCOME OF DOWNTOWN GOLDEN'S ADULT PATRONS | |
|--|----------------------|
| Over \$75,000 | 148 respondents, 43% |
| \$50,000 to \$74,999 | 89 respondents, 26% |
| \$25,000 to \$49,999 | 67 respondents, 19% |
| Under \$25,000 | 41 respondents, 12% |
| | 84- NR's |



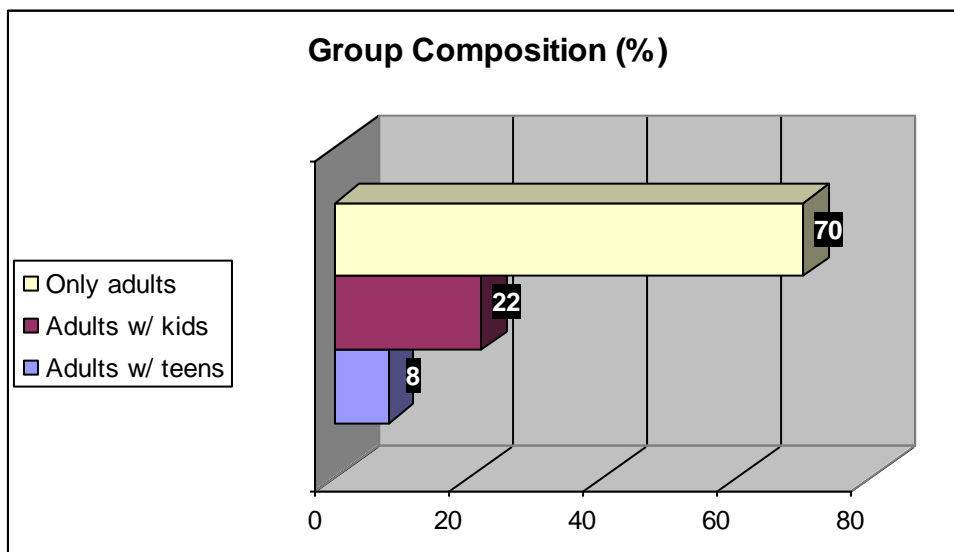
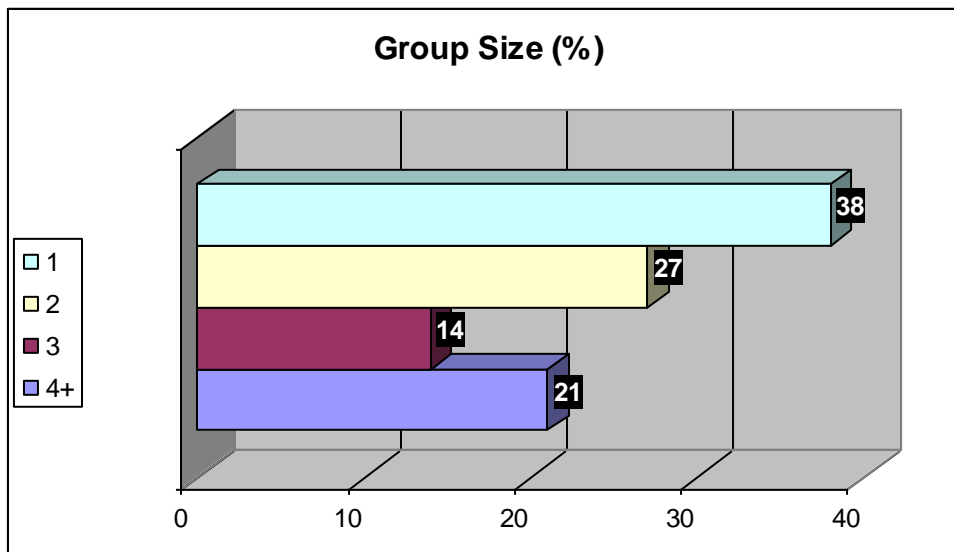
MAY/JUNE 2008

| GROUP SIZE AND COMPOSITION | | |
|----------------------------|------------|---------|
| Group Size: 1 | 110, (35%) | NR's- 5 |
| Group Size: 2 | 110, (35%) | |
| Group Size: 3 | 39, (13%) | |
| Group Size: 4+ | 51, (16%) | |
| Only adult(s) in group | 187, (72%) | NR's-66 |
| Adult with child(ren) | 52, (21%) | |
| Adult with teen(s) | 16, (7%) | |



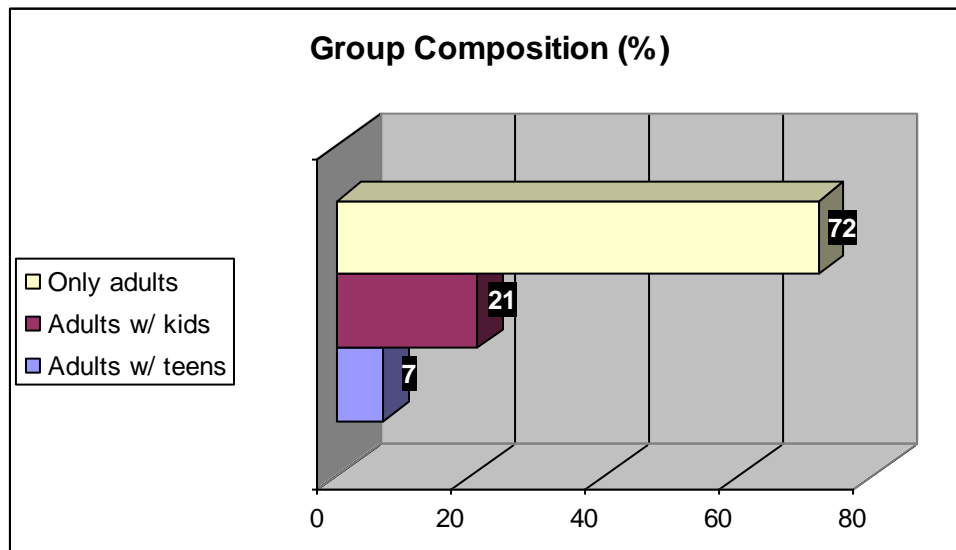
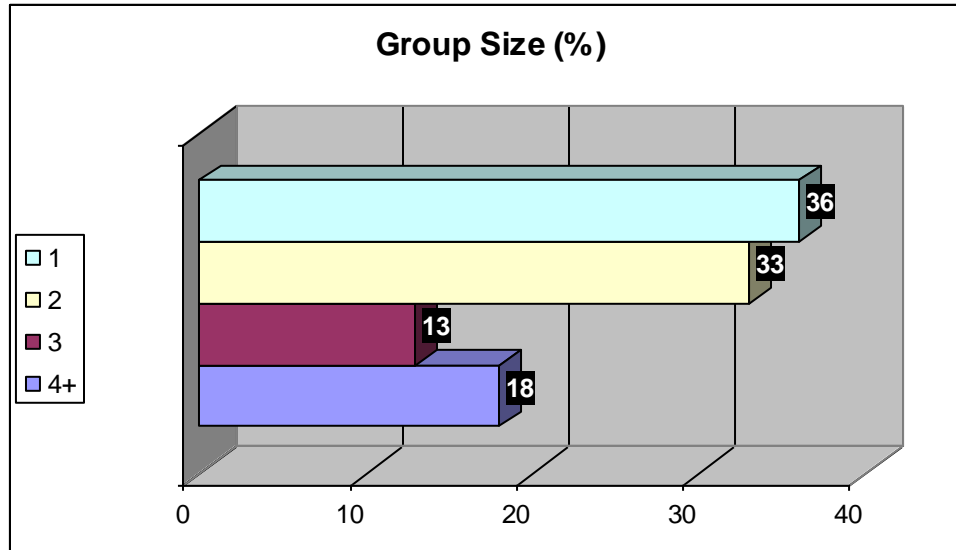
DECEMBER 2008

| GROUP SIZE AND COMPOSITION | | |
|----------------------------|-----------|---------|
| Group Size: 1 | 42, (38%) | NR's- 1 |
| Group Size: 2 | 30, (27%) | |
| Group Size: 3 | 16, (14%) | |
| Group Size: 4+ | 24, (21%) | |
| Only adult(s) in group | 83, (70%) | NR's-0 |
| Adult with child(ren) | 26, (22%) | |
| Adult with teen(s) | 10, (8%) | |



COMBINED

| GROUP SIZE AND COMPOSITION | | |
|----------------------------|------------|---------|
| Group Size: 1 | 152, (36%) | NR's- 6 |
| Group Size: 2 | 140, (33%) | |
| Group Size: 3 | 55, (13%) | |
| Group Size: 4+ | 75, (18%) | |
| Only adult(s) in group | 270, (72%) | NR's-66 |
| Adult with child(ren) | 78, (21%) | |
| Adult with teen(s) | 26, (7%) | |



8. GOLDEN AREA SHOPPING ALTERNATIVES – Only for respondents from 80401 and 80403 zip codes.

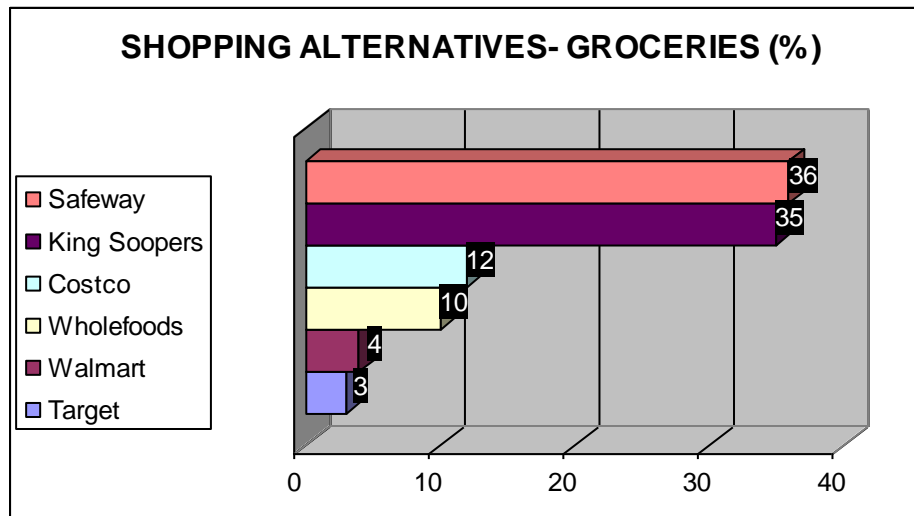
a. Where else do you shop for the following products?

Top responses in order of frequency. [Please note the number of non responses (NR's) listed and that statistically insignificant responses (less than 2) are not recorded below. Additionally, percentages are derived based on total number of responses, exclusive of non-responses, which are simply noted.]

MAY/JUNE 2008

Groceries _____

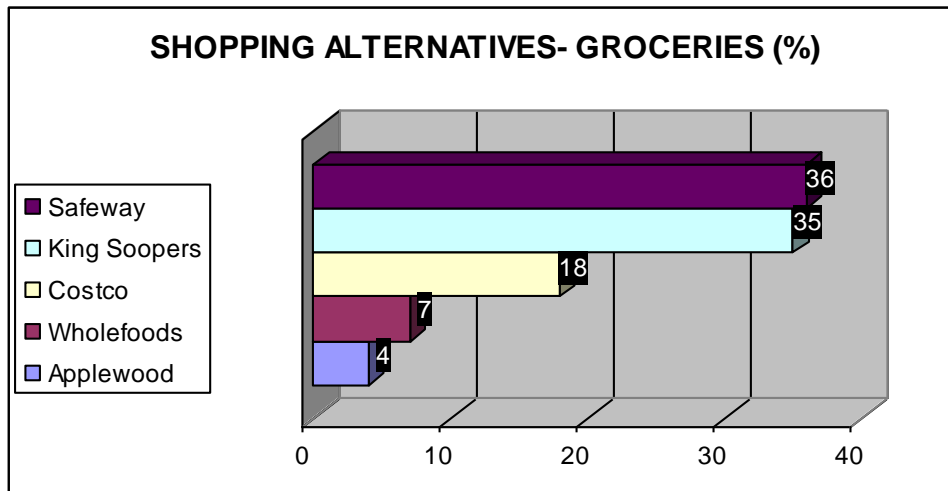
- 1) Safeway- 55 (36%)
- 2) King Sprs- 54 (35%)
- 3) Costco- 19 (12%)
- 4) Wholefoods- 15 (10%)
- 5) Walmart- 6 (4%)
- 6) Target- 5 (3%)
- NR- 198



DECEMBER 2008

Groceries _____

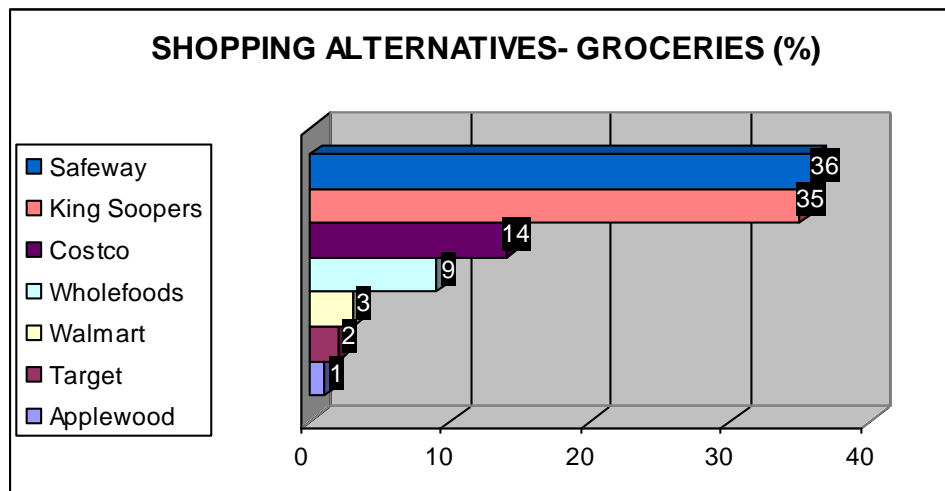
- 1) Safeway- 20 (36%)
- 2) King Sprs- 19 (35%)
- 3) Costco- 10 (18%)
- 4) Wholefoods- 4 (7%)
- 5) Applewood- 2 (4%)
- NR- 67



COMBINED

Groceries _____

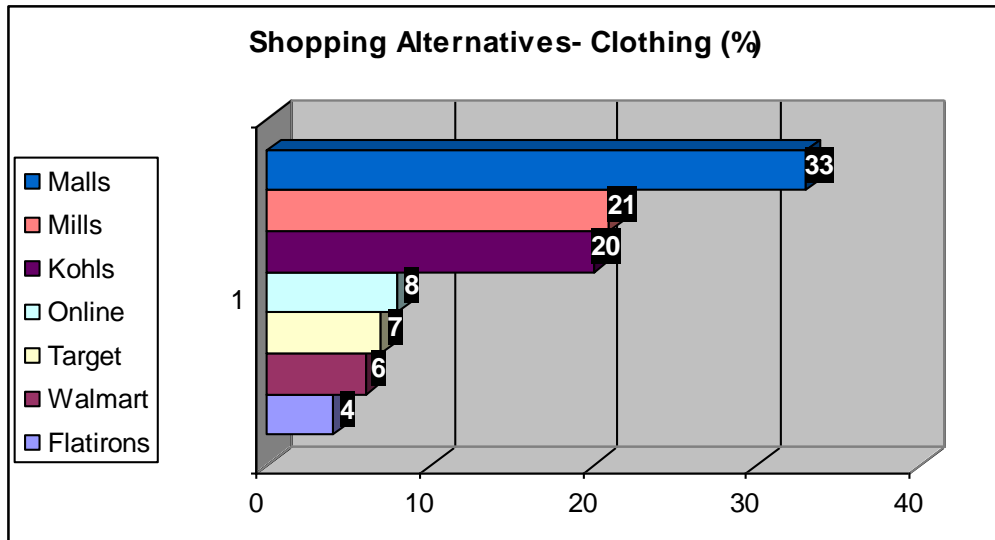
- 1) Safeway- 75 (36%)
 - 2) King Sprs- 73 (35%)
 - 3) Costco- 29 (14%)
 - 4) Wholefoods- 19 (9%)
 - 5) Walmart- 6 (3%)
 - 6) Target- 5 (2%)
 - 7) Applewood 2 (1%)
- NR- 265



MAY/JUNE 2008

Clothing _____

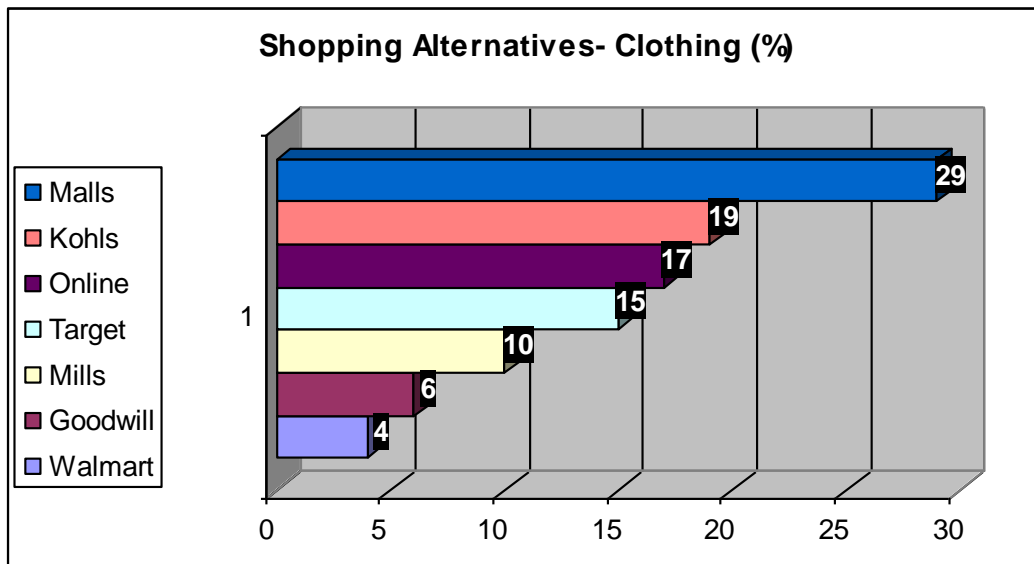
- 1) (Generic) Mall- 37 (33%)
 - 2) Mills- 24 (21%)
 - 3) Kohls- 23 (20%)
 - 4) Online- 9 (8%)
 - 5) Target- 8 (7%)
 - 6) Walmart- 7 (6%)
 - 7) Flatirons- 5 (4%)
- NR- 200



DECEMBER 2008

Clothing

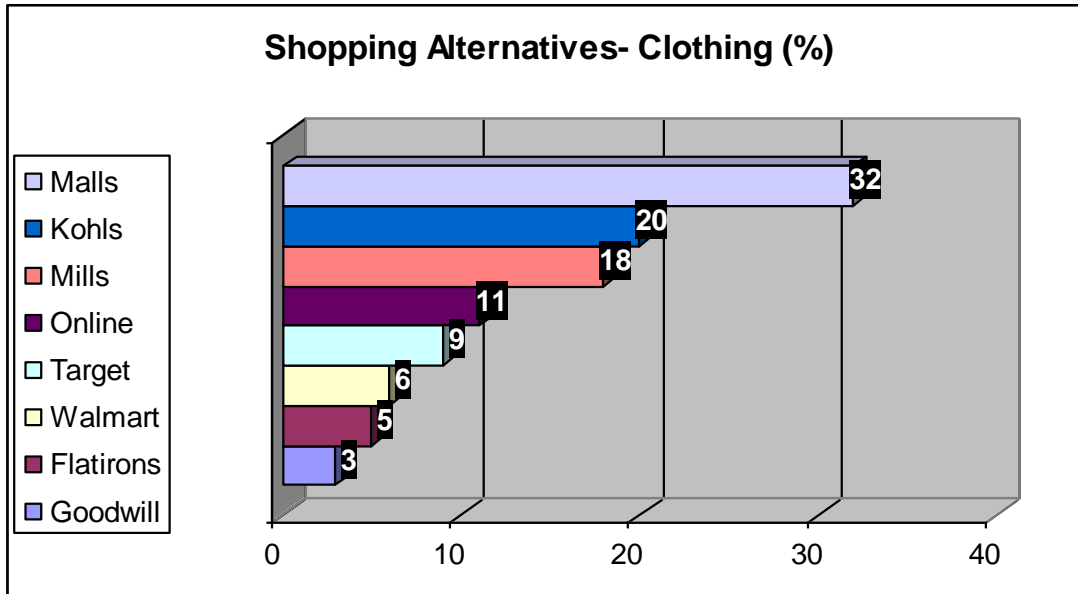
- 8) (Generic) Mall- 14 (29%)
- 9) Kohls- 9 (19%)
- 10) Online- 8 (17%)
- 11) Target- 7 (15%)
- 12) Mills- 5 (10%)
- 13) Goodwill- 3 (6%)
- 14) Walmart- 2 (4%)
- NR- 69



COMBINED

Clothing _____

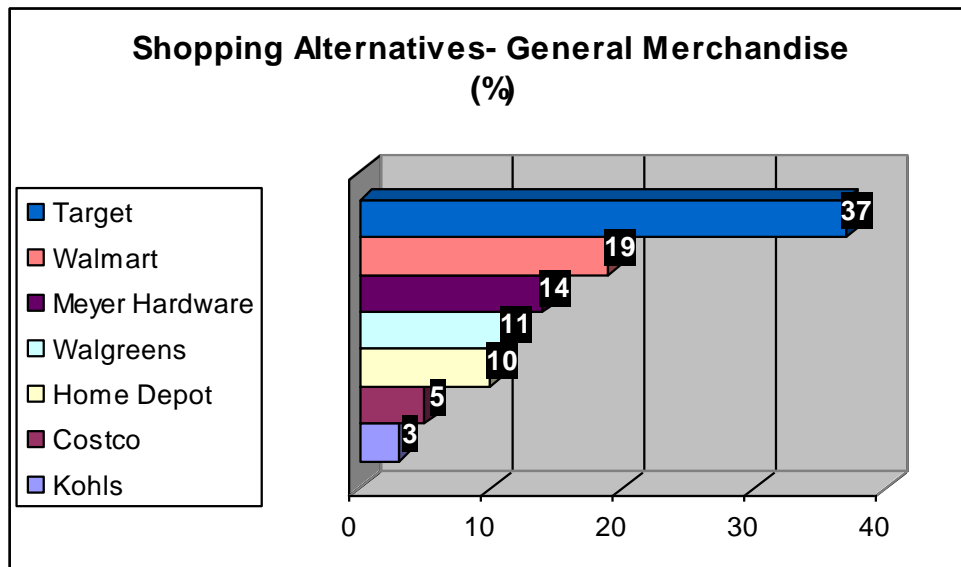
- 15) (Generic) Mall- 51 (32%)
- 16) Kohls- 32 (20%)
- 17) Mills- 29 (18%)
- 18) Online- 17 (11%)
- 19) Target- 15 (9%)
- 20) Walmart- 9 (6%)
- 21) Flatirons- 5 (3%)
- 22) Goodwill- 3 (2%)
- NR- 269



MAY/JUNE 2008

General Merchandise _____

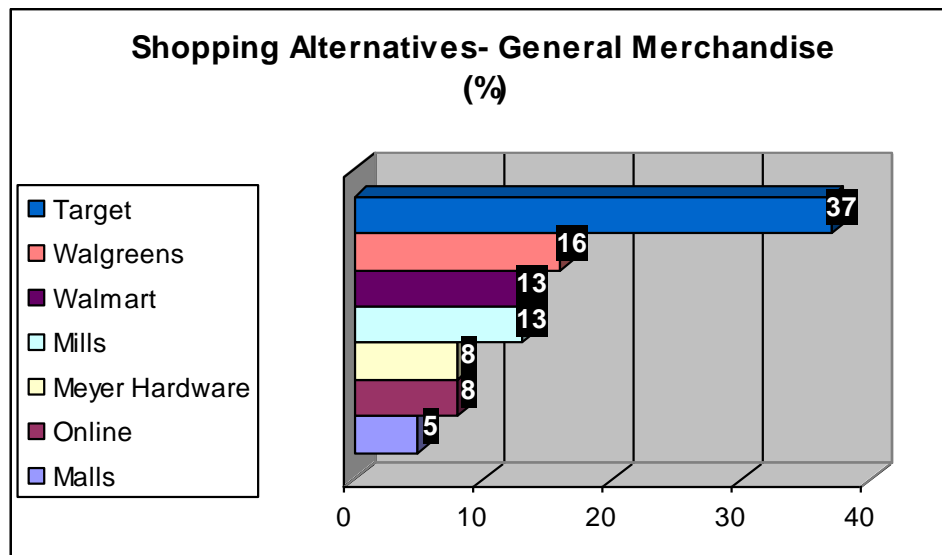
- 1) Target- 44 (37%)
- 2) Walmart- 23 (19%),
- 3) Meyer HW- 16 (14%)
- 4) Walgreens- 13 (11%)
- 5) HomeDepot- 12 (10%)
- 6) Costco- 6 (5%)
- 7) Kohls- 4 (3%)
- NR-205



DECEMBER 2008

General Merchandise _____

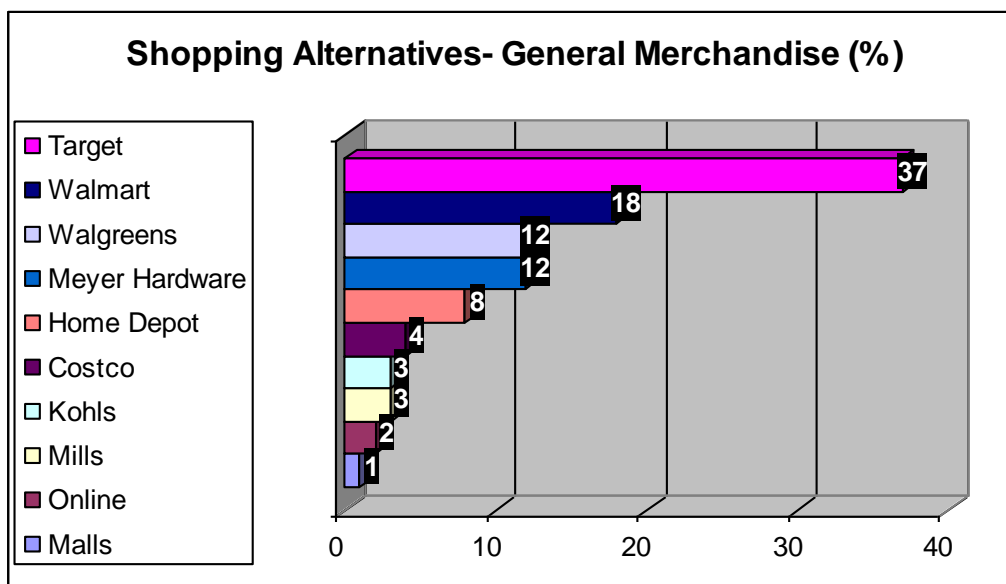
- 8) Target- 14 (37%)
- 9) Walgreens 6 (16%)
- 10) Walmart- 5 (13%)
- 11) Mills 5 (13%)
- 12) Meyer HW 3 (8%)
- 13) Online 3 (8%)
- 14) Malls 2 (5%)
- NR-78



COMBINED

General Merchandise _____

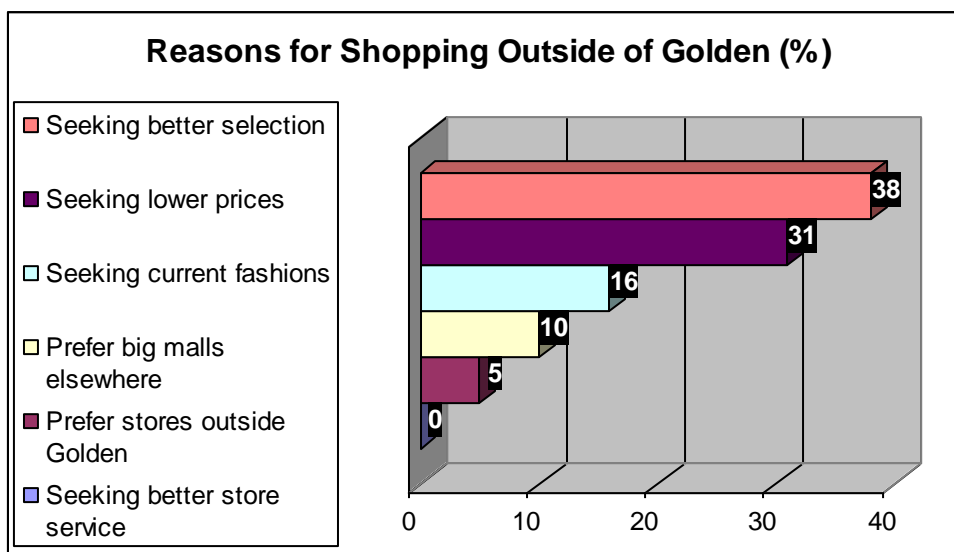
- 15) Target- 58 (37%)
- 16) Walmart- 28 (18%),
- 17) Meyer HW- 19 (12%)
- 18) Walgreens- 19 (12%)
- 19) HomeDepot- 12 (8%)
- 20) Costco- 6 (4%)
- 21) Mills- 5 (3%)
- 22) Kohls- 4 (3%)
- 23) Online 3 (2%)
- 24) Malls 2 (1%)
- NR-283



b. When you choose to shop outside of Golden, which of the following descriptions best describes your reason to choose that other location?

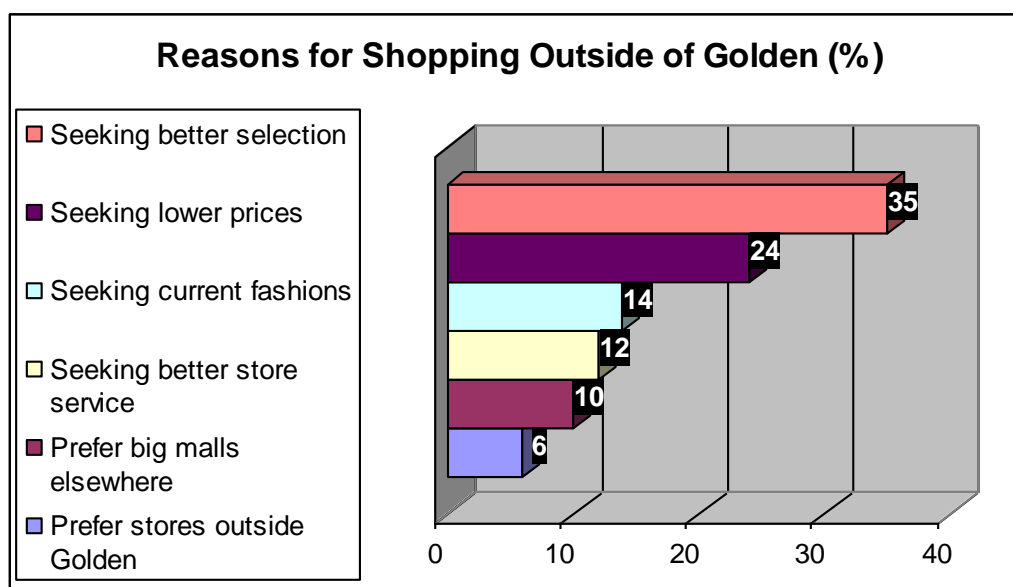
MAY/JUNE 2008

| REASONS FOR SHOPPING OUTSIDE OF THE CITY OF GOLDEN (Ranked) | | |
|---|---------------|--|
| | Responses (%) | |
| 1. Seek stores with better selection of merchandise | 93 (38%) | NR's-195 %s derived from total number of responses; NR's (no responses) not factored. |
| 2. Seek lower prices outside of Golden | 74 (31%) | |
| 3. Leave Golden to find current fashions | 38 (16%) | |
| 4. Leave Golden in favor of big malls elsewhere | 25 (10%) | |
| 5. Just prefer stores outside of Golden | 12 (5%) | |
| 6. Leave Golden for better store service | 0 (0%) | |



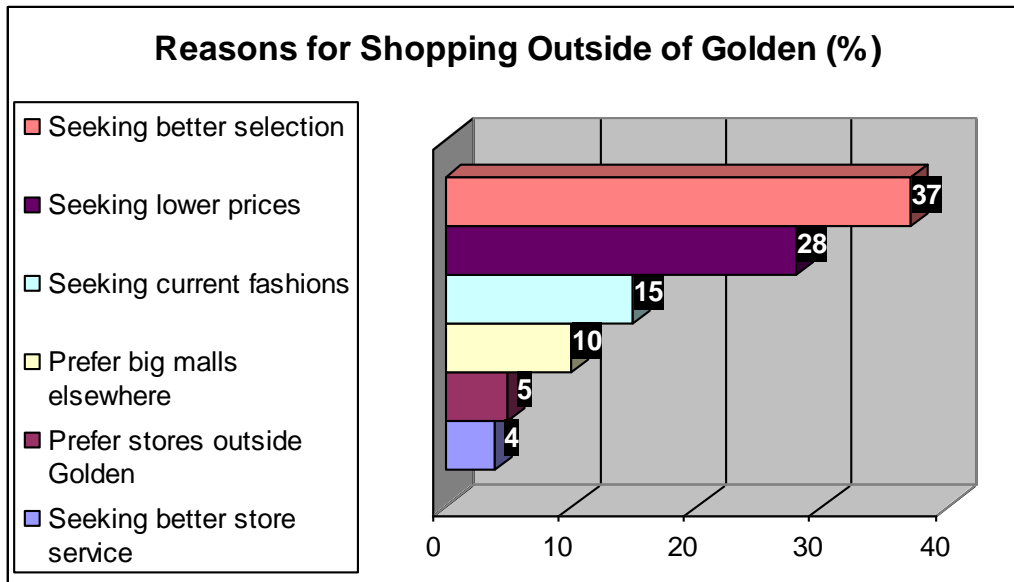
DECEMBER 2008

| REASONS FOR SHOPPING OUTSIDE OF THE CITY OF GOLDEN (Ranked) | | |
|---|---------------|--|
| | Responses (%) | |
| 1. Seek stores with better selection of merchandise | 38 (35%) | NR's- 71 %s derived from total number of responses; NR's (no responses) not factored. |
| 2. Seek lower prices outside of Golden | 26 (24%) | |
| 3. Leave Golden to find current fashions | 15 (14%) | |
| 4. Leave Golden for better store service | 13 (12%) | |
| 5. Leave Golden in favor of big malls elsewhere | 11 (10%) | |
| 6. Just prefer stores outside of Golden | 6 (6%) | |



COMBINED

| REASONS FOR SHOPPING OUTSIDE OF THE CITY OF GOLDEN (Ranked) | | |
|---|---------------|--|
| | Responses (%) | |
| 1. Seek stores with better selection of merchandise | 131 (37%) | NR's-195 %s derived from total number of responses; NR's (no responses) not factored. |
| 2. Seek lower prices outside of Golden | 100 (28%) | |
| 3. Leave Golden to find current fashions | 53 (15%) | |
| 4. Leave Golden in favor of big malls elsewhere | 36 (10%) | |
| 5. Just prefer stores outside of Golden | 18 (5%) | |
| 6. Leave Golden for better store service | 13 (4%) | |



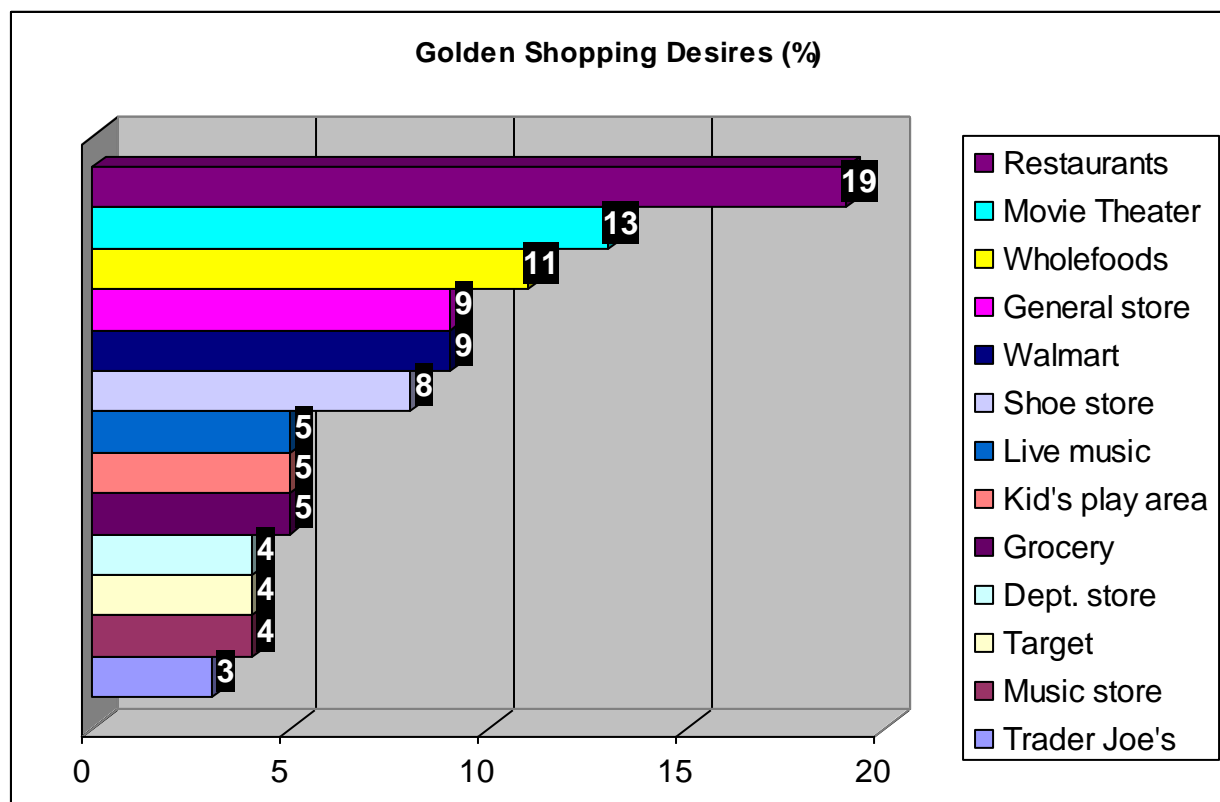
9. GOLDEN AREA SHOPPING DESIRES

What is the one restaurant, store, or service that would get you to spend more time in downtown Golden? _____

Top responses in order of frequency. [Please note the number of non responses (NR's) listed and that statistically insignificant responses (less than 2) are not recorded below.]

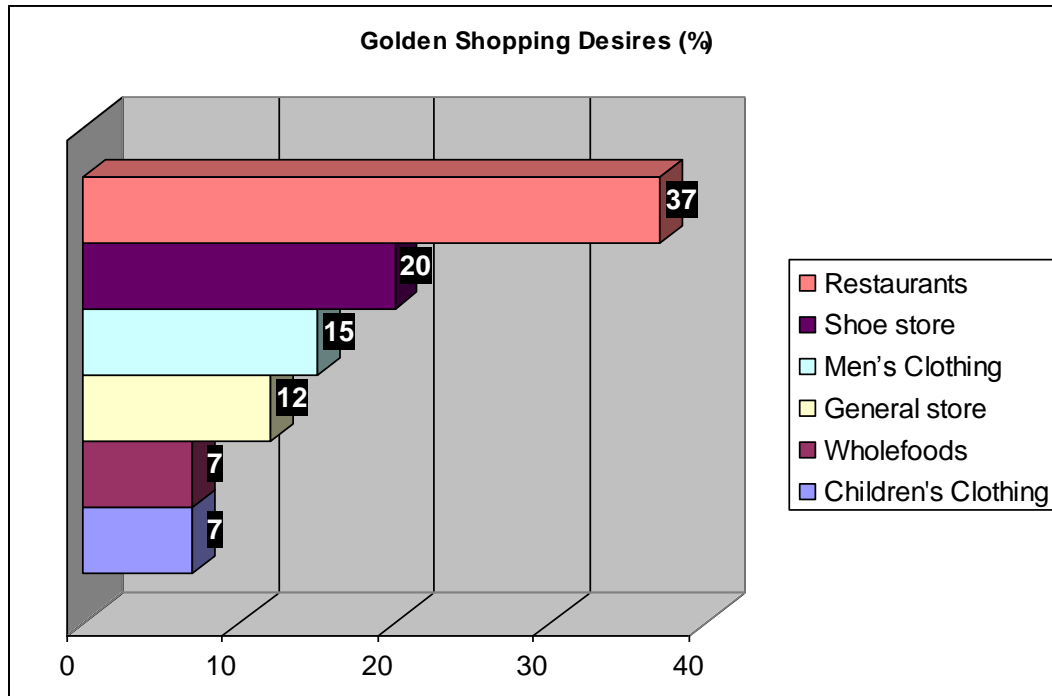
MAY/JUNE 2008

- 1) Restaurants- 14 (19%) [sushi, Chipotle, and upscale restaurants all mentioned more than once]
- 2) Movie Theater- 10 (13%)
- 3) Wholefoods (Natural Grocery)- 8 (11%)
- 4) Gen. store- 7 (9%)
- 4) Walmart- 7 (9%)
- 6) Shoe store- 6 (8%)
- 7) Live music- 4 (5%)
- 7) Kid's play area- 4 (5%) [the idea of a central fountain/play area was mentioned 3 times]
- 7) Grocery- 4 (5%)
- 10) Dept. store- 3 (4%)
- 10) Target- 3 (4%)
- 10) Music store- 3 (4%)
- 13) Trader Joe's- 2 (3%)
- NR's- 199



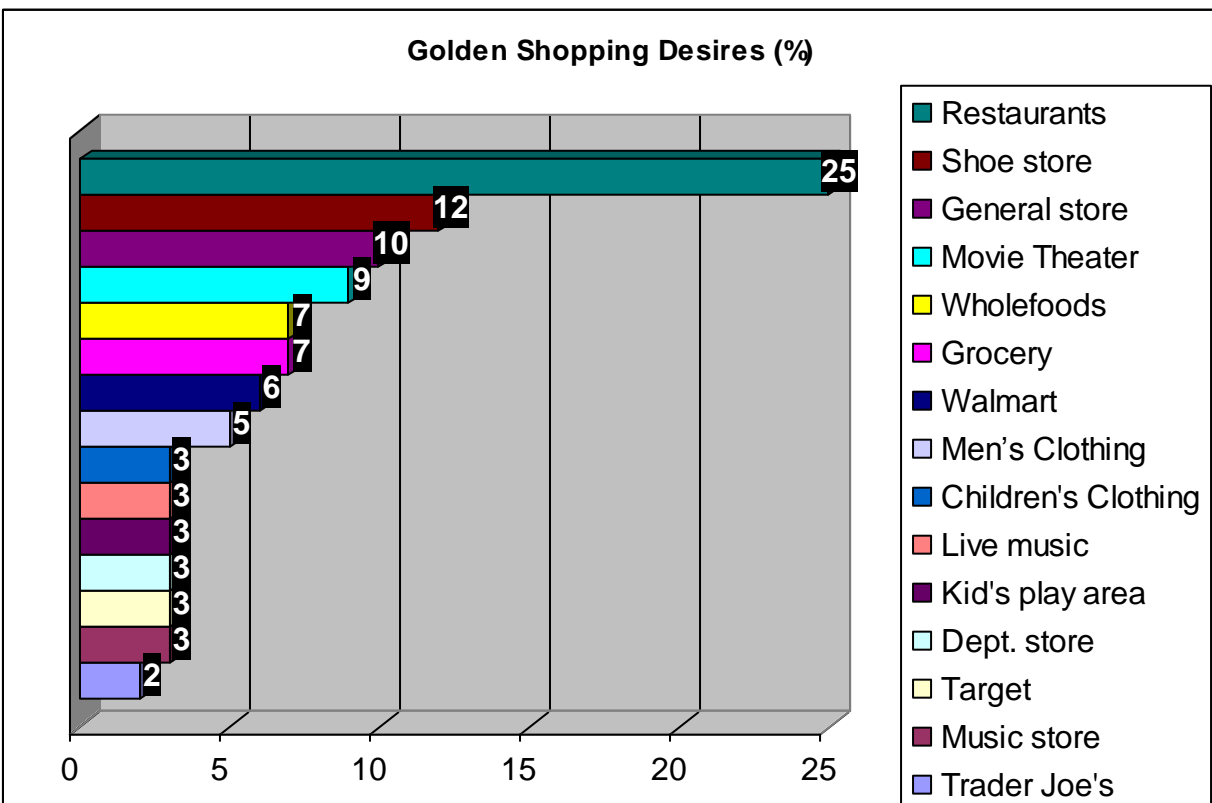
DECEMBER 2008

- 1) Restaurants- 15 (37%)
 - 2) Shoe store- 8 (20%)
 - 3) Men's Clothing- 6 (15%)
 - 4) General Store- 5 (12%)
 - 5) Wholefoods (Natural Grocery) - 3 (7%)
 - 6) Kid's Clothing- 3 (7%)
- NR's- 71



COMBINED

- 1) Restaurants- 29 (25%)
- 2) Shoe store- 14 (12%)
- 3) General store- 12 (10%)
- 4) Movie Theater- 10 (9%)
- 5) Wholefoods (Natural Grocery)- 8 (7%)
- 6) Grocery- 8 (7%)
- 7) Walmart- 7 (6%)
- 8) Men's Clothing- 6 (5%)
- 9) Kid's Clothing - 4 (3%)
- 9) Live music- 4 (3%)
- 11) Kid's play area- 3 (3%)
- 11) Dept. store- 3 (3%)
- 11) Target- 3 (3%)
- 11) Music store - 3 (3%)
- 15) Trader Joe's- 2 (2%)
- NR's- 270



10. RATINGS OF DOWNTOWN CHARACTERISTICS

Rank the following characteristics or attributes of Downtown Golden using a 1 to 5 scale. (A low score (1 or 2) indicates a low rating or agreement level; a high score (4 or 5) represents a high rating or agreement level.)

MAY/JUNE 2008

→ How would you describe the overall atmosphere of Downtown Golden?

Sum 1247, Avg. Rating- 4.45, NR's 35

→ How would you describe the customer service skills of helpfulness and product knowledge of personnel in the shops and restaurants in Downtown Golden?

Sum 1090, Avg. Rating- 4.08, NR's 48

→ How effective or helpful would you say are the directional signs indicating the driving route to Downtown Golden?

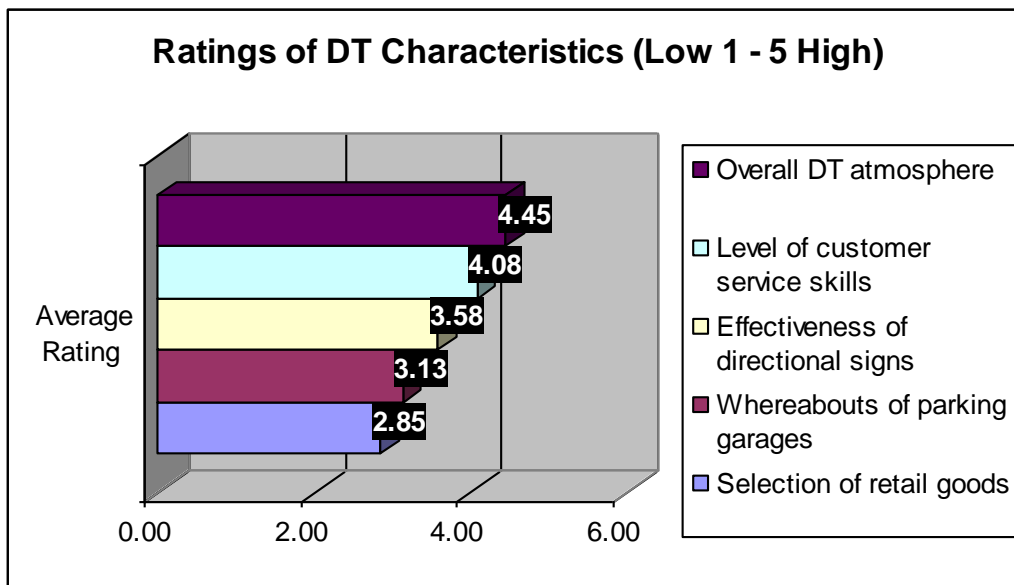
Sum 932, Avg. Rating- 3.58, NR's 55

→ Do you know where the free public parking garages are located?

Sum 863, Avg. Rating- 3.13, NR's- 39

→ How would you describe the selection of retail goods available in Downtown Golden?

Sum 753, Avg. Rating- 2.85, NR's- 51



DECEMBER 2008

→ How would you describe the overall atmosphere of Downtown Golden?

Sum 405 Avg. Rating- 4.66, NR's 26

→ How would you describe the customer service skills of helpfulness and product knowledge of personnel in the shops and restaurants in Downtown Golden?

Sum 391, Avg. Rating- 4.65, NR's 29

→ How effective or helpful would you say are the directional signs indicating the driving route to Downtown Golden?

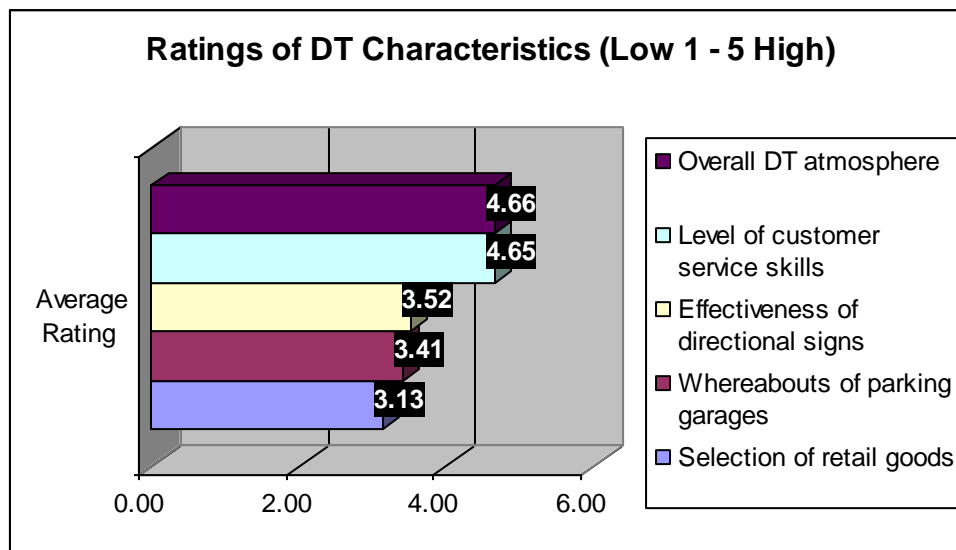
Sum 285, Avg. Rating- 3.52, NR's 32

→ Do you know where the free public parking garages are located?

Sum 293, Avg. Rating- 3.41, NR's- 27

→ How would you describe the selection of retail goods available in Downtown Golden?

Sum 250, Avg. Rating- 3.13, NR's- 33



COMBINED

→ How would you describe the overall atmosphere of Downtown Golden?

Sum 1652, Avg. Rating- 4.50, NR's 61

→ How would you describe the customer service skills of helpfulness and product knowledge of personnel in the shops and restaurants in Downtown Golden?

Sum 1481, Avg. Rating- 4.22, NR's 77

→ How effective or helpful would you say are the directional signs indicating the driving route to Downtown Golden?

Sum 1217, Avg. Rating- 3.57, NR's 87

→ Do you know where the free public parking garages are located?

Sum 1156, Avg. Rating- 3.19, NR's- 66

→ How would you describe the selection of retail goods available in Downtown Golden?

Sum 1003, Avg. Rating- 2.92, NR's- 84

