

# Dudley Square Retail Survey

Dudley Vision Project



Sponsored by Boston Redevelopment Authority

Survey Conducted by FinePoint Associates, LLC  
Peg Barringer, Project Director



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## Acknowledgements

### Thank You to many Partners that Helped Promote & Distribute the Resident Survey

Alternatives for Community & the Environment	Highland Park Association
Black Ministerial Alliance	Historic Moreland Street Association
Boston Ten-Point Coalition	John Elliot Square Neighborhood Association
Central Boston Elder Services	Madison Park Development Corp.
Dudley Square Library	Mt. Pleasant Neighborhood Association
Dudley Square Literacy Center	Nuestra Comunidad Development Corp.
Dudley Street Neighborhood Initiative	Roxbury Neighborhood Council
Dudley Vision Advisory Task Force	United Neighbors of Lower Roxbury
Fort Hill Civic Association	Vine Street Neighborhood Association
Garrison Trotter Association	Whittier Health Center
Hawthorne Area Association	Williams Street Neighborhood Association
	Yawkey Club of Roxbury - Boys & Girls Club

### Thank You to All that Helped Promote & Distribute the Employee Survey

Dudley Square Main Street  
All of the Dudley Square Businesses and Agencies that Participated  
Boston Public School Department

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And . . . Many, Many  
Thanks to the

**1,300**  
people that  
responded!!!


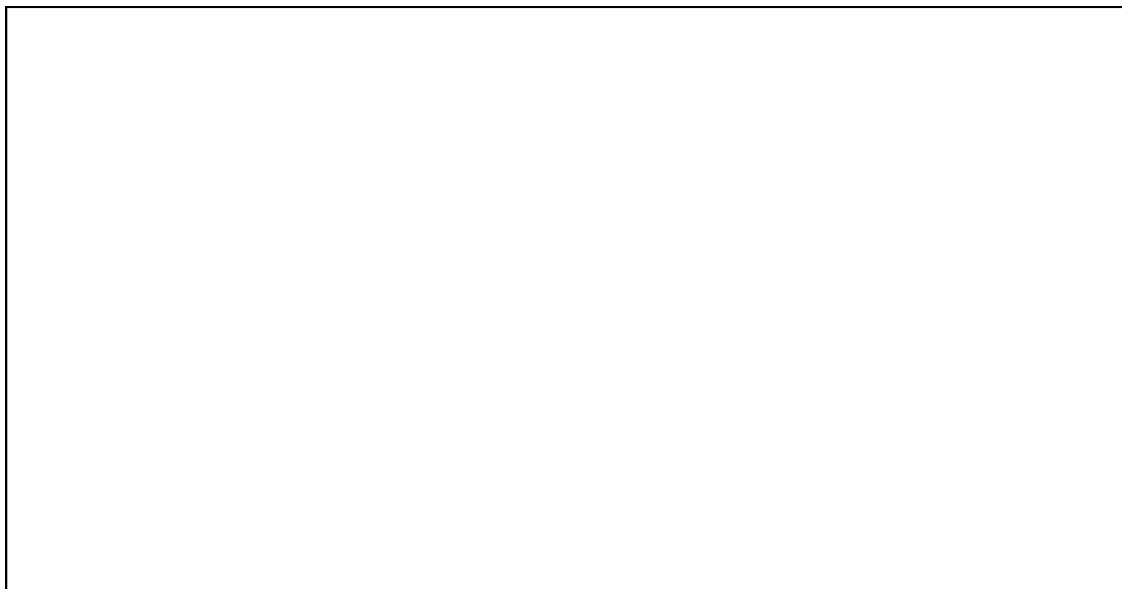


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## Overview of General Themes that Emerged

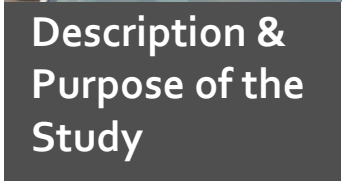

- People are committed to improving Dudley
- Not perceived as a destination
- Want more social-gathering opportunities, restaurants, entertainment
- Residents spending most of their \$ elsewhere -- potential opportunity for new & existing stores and restaurants
- There's room for improvement.
- In addition to residents, employees & commuters, are also important market segments.
- Employees are looking for additional food options
- Addition of BPS employees will provide significant market opportunity for existing & new businesses

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**Description, Purpose & Methodology**  
Part One

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**Description & Purpose of the Study**

**Description of the Study:**

Primary research and analysis exploring the shopping habits and preferences of Dudley Square's existing and potential customer base, including 3 distinct segments:

- Residents
- Commuters (that use Dudley Station)
- Employees (both existing and future)

**Purpose:**

To obtain information that will help support and guide redevelopment plans for an enhanced shopping district

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## Survey Respondent Targets

### Residents

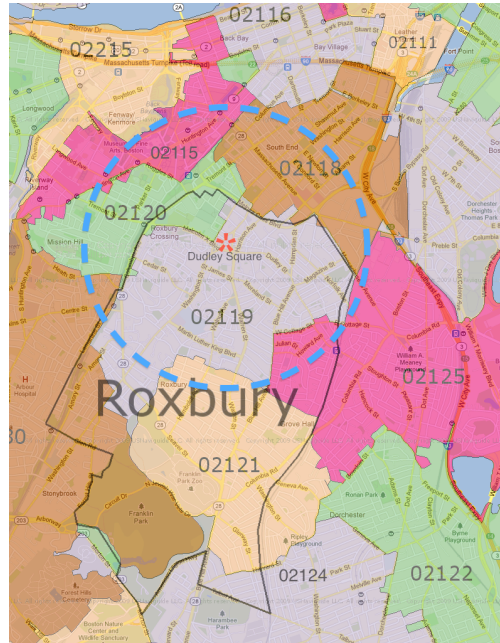
- that live in surrounding area
- particularly within 1 mile radius (target zip codes 02118, 02119, 02120)

### Commuters

- that Use the Dudley Station

### Employees

1. Current Dudley Square Employees
2. Future Dudley Square Employees (Boston Public School Dept.)



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## Methodology

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### FinePoint Associates

- independent consulting firm with experience in market research & community economic development
- led the survey design, administration & analysis process

**Survey Instruments were designed** using results from interviews with residents, community representatives & BRA team

### Three Survey Instruments created:

1. Resident & Commuter Survey
2. Dudley Employee Survey
3. Boston Public School Dept. Employee Survey



**In-Person Interviews**

Interview stations set up at 2 locations (Yawkey Club, Stash's)

**Hard Copy Distribution**

Through community institutions and organizations  
Pick-up & drop off stations established at 3 locations

**E-mail/Online Survey Distribution**

Through community organizations and neighborhood associations  
Announcement & Link on Dudley Vision Website

**Other**

Newspaper articles and announcements



**Resident & Commuter Survey**

Resident Survey Methods

Responses: 524

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**In-Person Surveys & Interviews**

Conducted at bus station

Several different time slots over two week period:

7 AM – 9 AM

3 PM - 6 PM



**Resident & Commuter Survey**

Commuter Survey Methods

Responses at Bus Station: 320

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**Dudley Square Employees**

**In-Person Interviews**

Interview station set up at 1 location (Stash's)

**Hard Copy Distribution**

Hand delivered employee survey forms to businesses  
Returned later to pickup completed surveys

**E-mail/Online Survey Distribution**

E-mail sent to businesses with Web Link to survey

**Boston Public School Department Employees**

BPS sent e-mail to employees with Web Link to survey  
(online survey method only)

Employee Survey

Employee Survey Methods

Dudley Employee Responses: 234 Boston Public School responses: 226

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Six people were hired from the community & trained to assist with the surveying

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# Organization of Survey Findings

- Who are the potential customers?
- How do these customers utilize Dudley Square and how satisfied are they with the shopping & dining?
- What are their shopping habits & preferences?
- What new businesses are most desirable in Dudley Square?

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# Who are the potential Customers?



Part Two

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## Market Segments

### Residents

- 14,000 live within ½ mile, 80,000 within 1 mile
- Opportunity to offer shopping & dining within close proximity to home

### Commuters

- Come to Dudley Square for transit
- Opportunity to sell them goods & services while in District

### Workers

- In Dudley Square all day
- Opportunity to capture meal and snack purchases as well as other goods and services before, during or after work day
- BPS employees that will be moving in represent new opportunity

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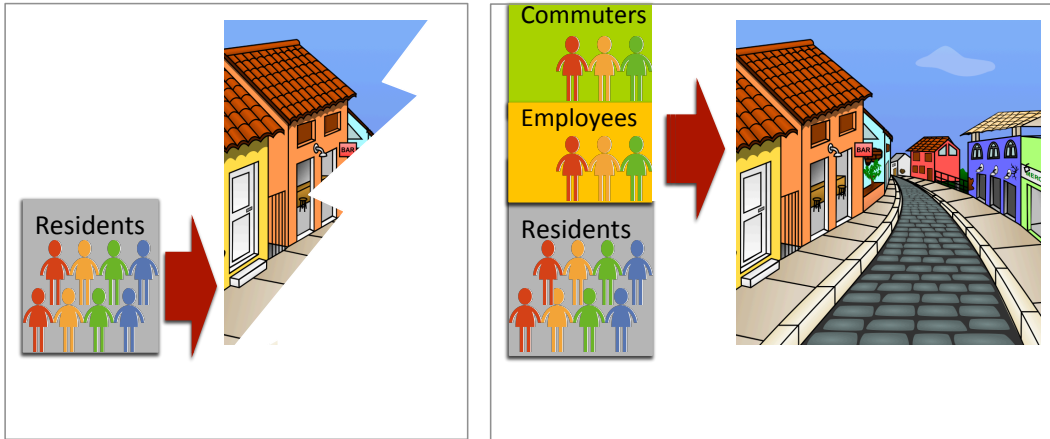


## Residents are the primary market segment

Non-resident market segments (commuters & employees) are important too

Contribute to potential market support (foot traffic)

Help to attract new businesses that residents want!



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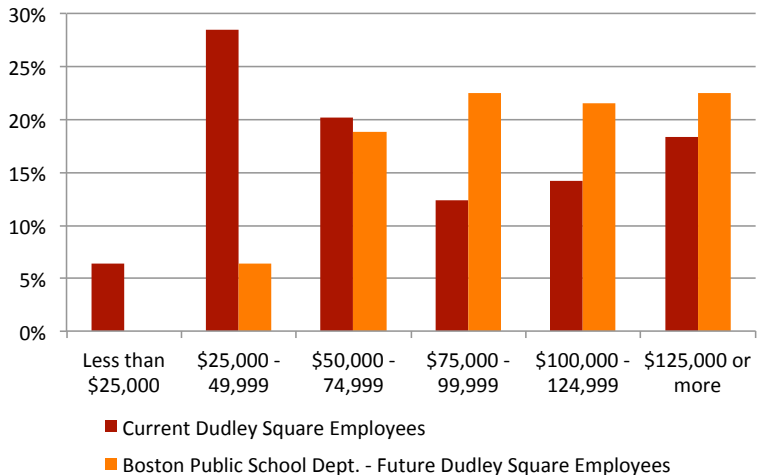
## Workers: Current & Future

**BPS Workers that will be moving to Dudley Square have higher incomes which means more spending power**

BPS Employee  
Median HH Income:  
\$75 – 100k

DS Employee  
Median HH Income:  
\$50 – 75k

Household Income of Workers



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# Utilization of Dudley Square and Satisfaction with Shopping & Dining

Part Three

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## How Dudley Residents use Dudley Square

**Residents of 02118, 02119, 02120**

**Not frequent visitors, 26% go to store once/week or more; 28% rarely go to store**

**Most Often**

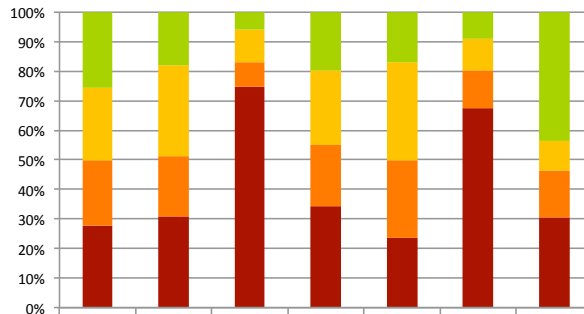
- ✓ Take a bus
- ✓ Shop at a store
- ✓ Use Post Office or Library

**Less Often**

- ✓ Go to a bank
- ✓ Go to a café

**Rarely/Never**

- ✓ Get hair, skin or nail service
- ✓ Go to community service agency



Frequency	Store	Restaurant/cafe	Hair/skin/nails	Bank	Post Office/Library	Com. Service	Bus
Once a week or more	26%	18%	6%	20%	17%	9%	44%
Once or twice per month	24%	30%	11%	25%	33%	11%	10%
Less than once per month	22%	21%	8%	21%	26%	13%	16%
Rarely/Never	28%	31%	75%	34%	24%	67%	30%

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# How Commuters use Dudley Square

**Most Often**

- ✓ Take a bus
- ✓ Shop at a store

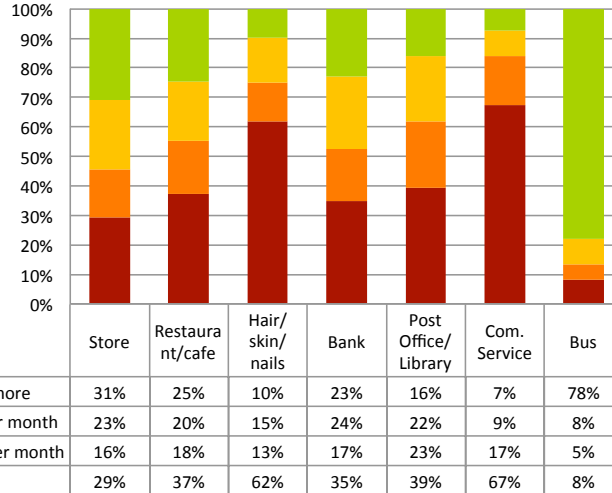
**Less Often**

- ✓ Go to a bank
- ✓ Go to a café
- ✓ Use Post Office or Library

**Rarely/Never**

- ✓ Get hair, skin or nail service
- ✓ Go to community service agency

Go to stores & restaurants about as frequently as residents



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# How Employees use Dudley Square

**Most Often**

- ✓ Go to a café
- ✓ Go to a bank
- ✓ Shop at a store

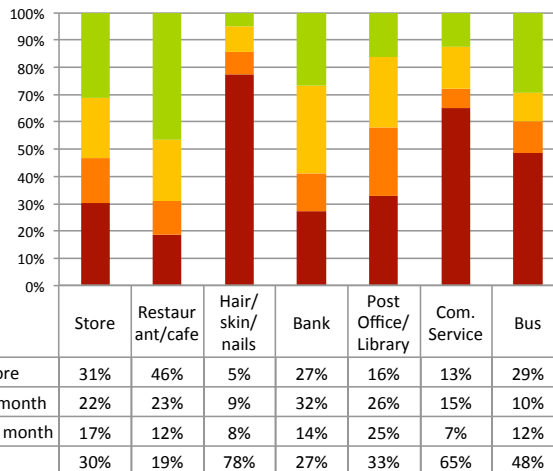
**Less Often**

- ✓ Use Post Office or Library
- ✓ Take a bus

**Rarely/Never**

- ✓ Get hair, skin or nail service
- ✓ Go to community service agency

Go to stores about as frequently as residents & go to restaurants much more frequently



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# Key Factors of Shopping District Success

## Retail Mix

- Selection of Stores
- Selection of Restaurants

## District Experience (outside store)

- Physical Appearance
- Security
- Access
- Amenities
- Events

## Inside the Store Experience

- Quality of Merchandise
- Customer Service
- Business Hours
- Price
- Interior Layout

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# Satisfaction of Dudley Residents with Selected Characteristics

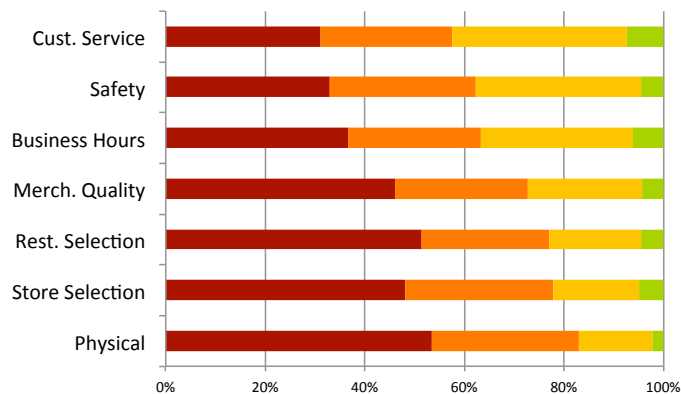
**Residents of 02118, 02119, 02120**

**More than ¾ Cited Room for Improvement**

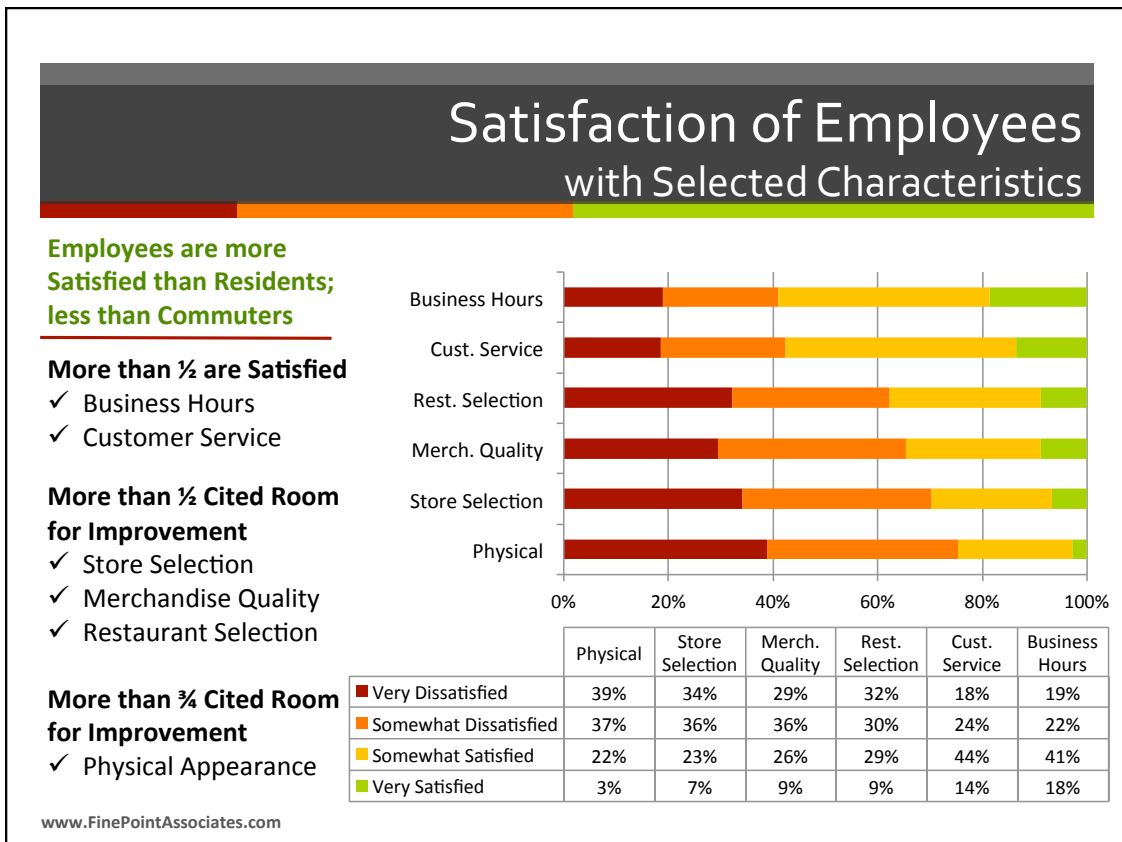
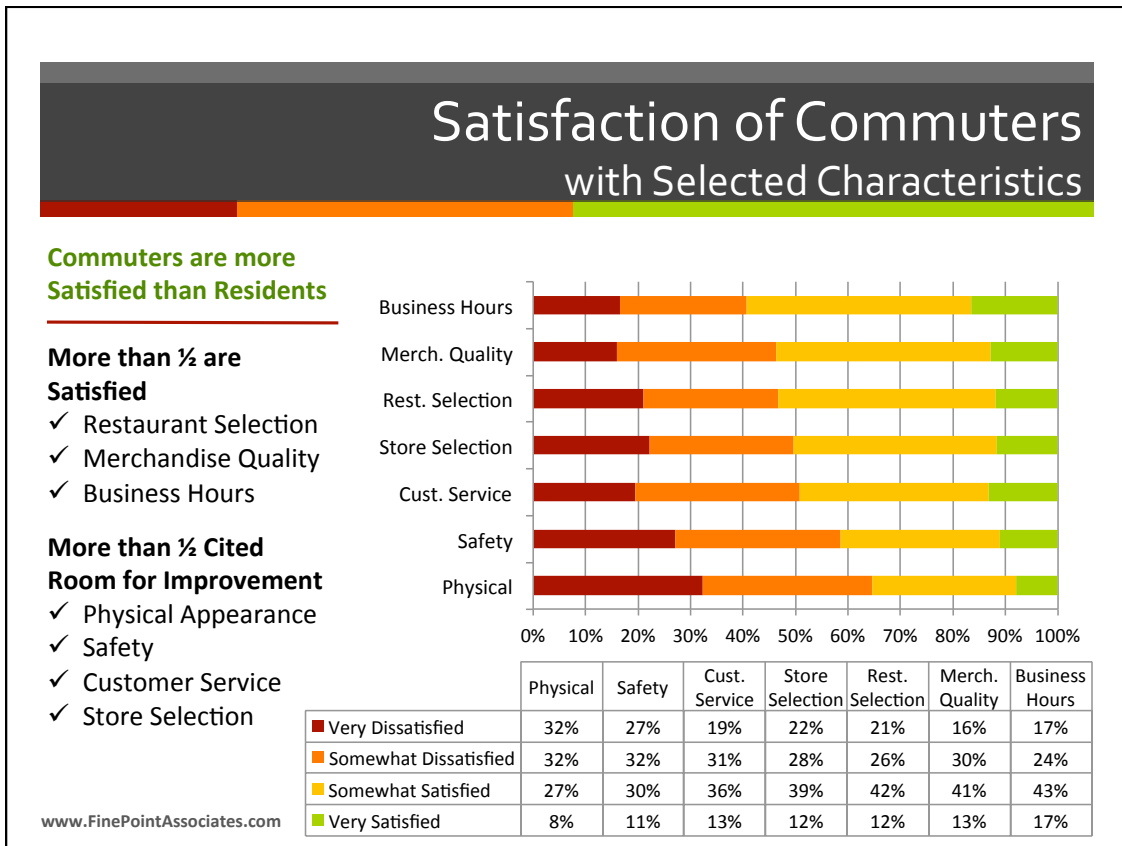
- ✓ Physical Appearance
- ✓ Store Selection
- ✓ Restaurant Selection
- ✓ Merchandise Quality

**More than ½ Cited Room for Improvement**

- ✓ Business Hours
- ✓ Safety
- ✓ Customer Service




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# Shopping Habits & Preferences

Part Four



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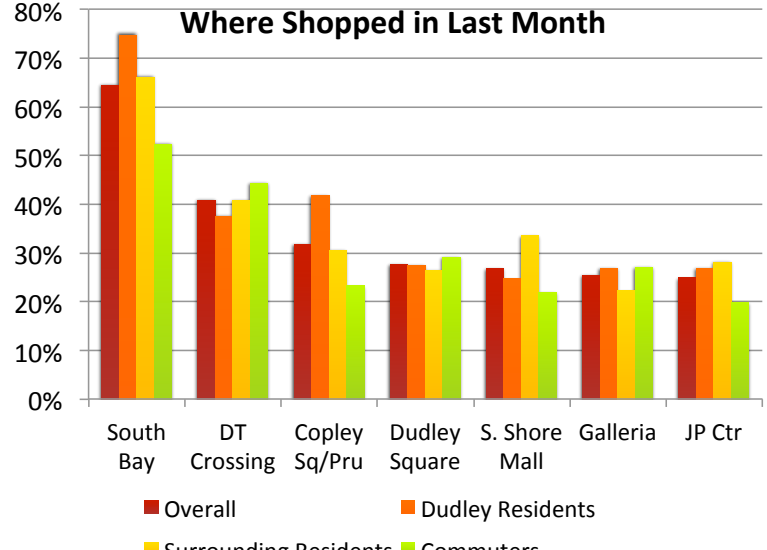
## Where do people shop (in general)?

**1/3 of all respondents made a purchase online last month**

Just over 1/4 of all segments shopped in DS in last month

**Top for Dudley Residents**

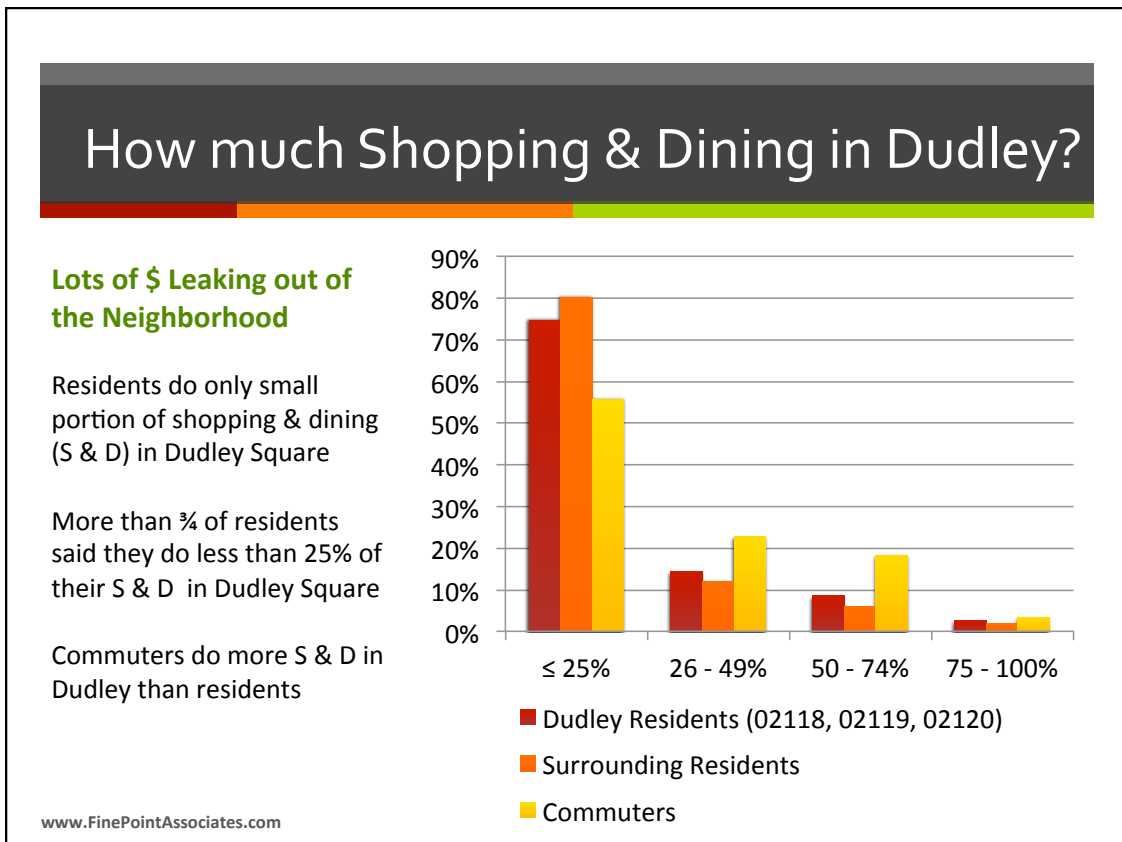
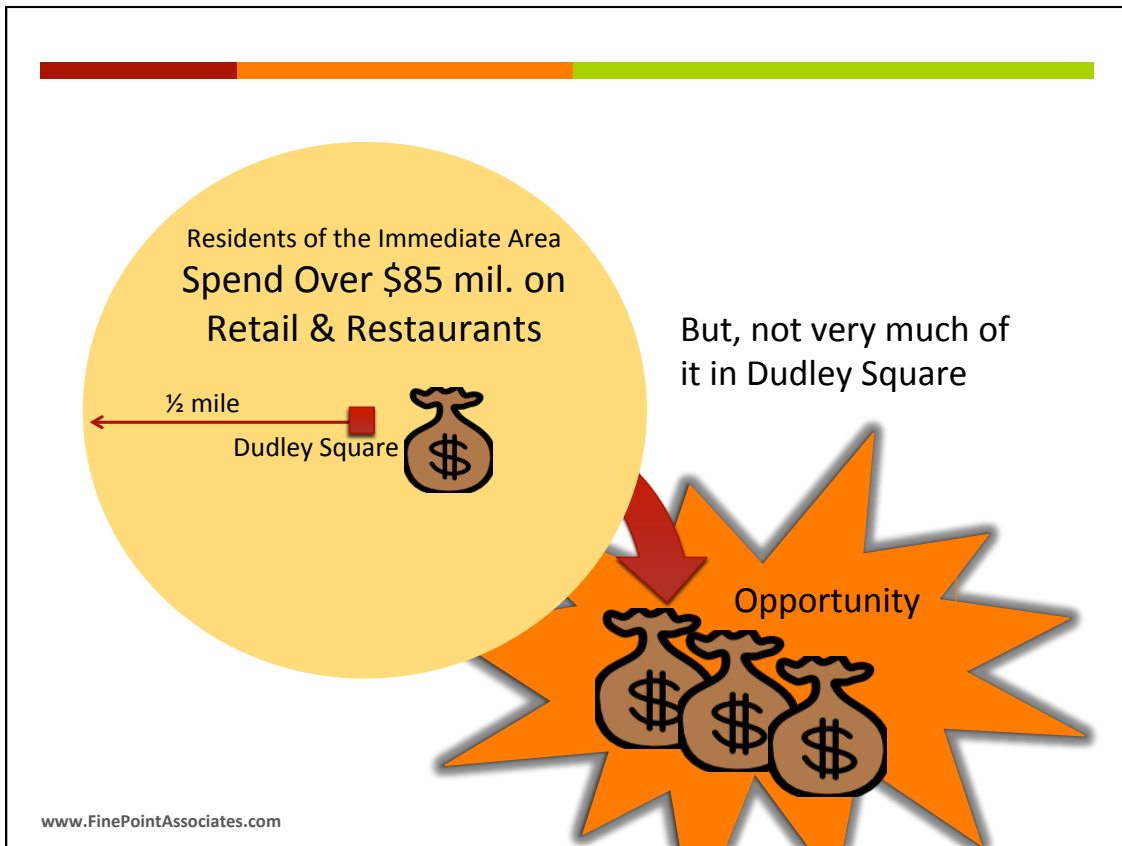
1. South Bay
2. Copley Sq/Pru
3. DT Crossing



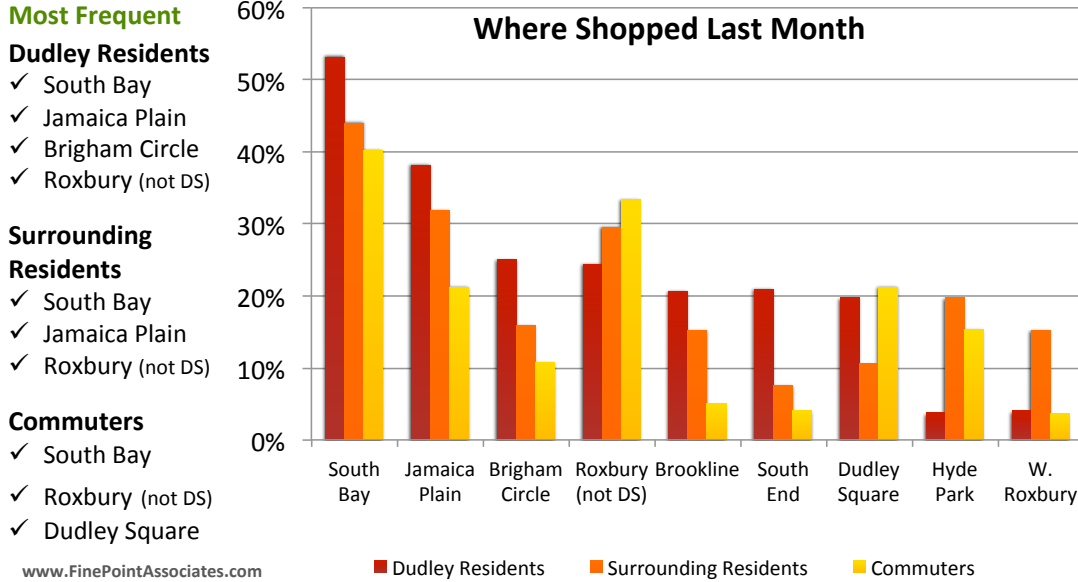
Location	Overall	Dudley Residents	Surrounding Residents	Commuters
South Bay	65%	75%	68%	53%
DT Crossing	41%	38%	41%	45%
Copley Sq/Pru	32%	42%	31%	24%
Dudley Square	28%	27%	26%	29%
S. Shore Mall	27%	25%	34%	22%
Galleria	26%	27%	22%	27%
JP Ctr	25%	27%	28%	20%

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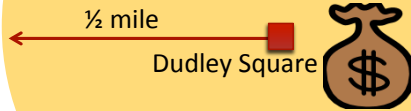




# Where do people shop for groceries?



Residents of the Immediate Area  
Spend over \$15 mil. at  
Restaurants



But, not very much of  
it in Dudley Square

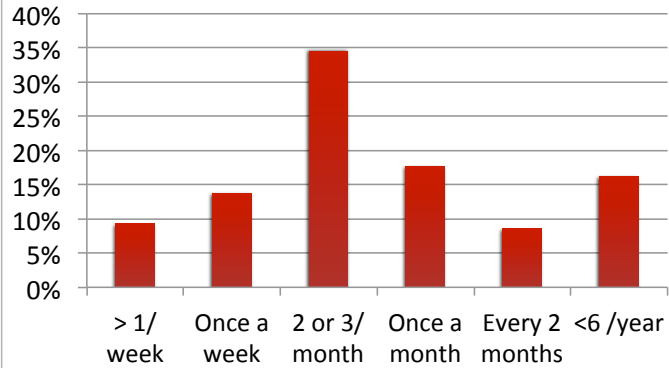


## Full Service Dining – where and how often?

1. Friday's
2. Olive Garden
3. Applebee's
4. Legal Seafood
5. Cheese Cake Factory
6. Merenge
7. Uno's
8. Darryl's\*\*
9. IHOP
10. Cathay Pacific
11. Chili's
12. Toro
13. Stella
14. Long Horn Steakhouse
15. Stephanie's

\*\* has Live music  
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**Over 50% of Dudley Residents\* eat dinner at FS Restaurant 2-3 times per month or more (23% once/week)**



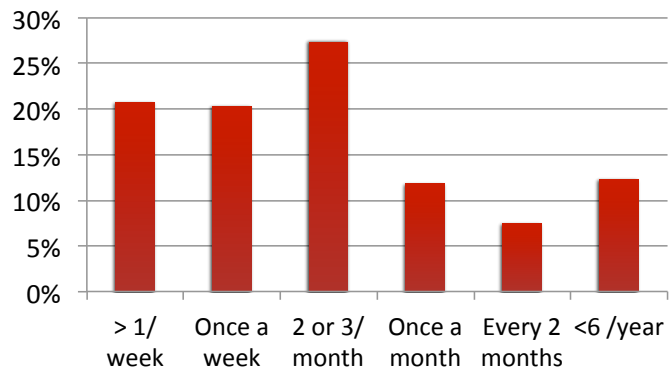
\* Includes commuters that live in 02118, 02119, 02120

## Limited Service Dining – where and how often?

1. McDonald's
2. Stash's\*\*
3. Joe's Famous Subs\*\*
4. Haley House Café\*\*
5. Panera Bread
6. Burger King
7. Wendy's
8. Dunkin Donuts\*\*
9. Popeye's Chicken
10. Flour Bakery Café
11. AK's Pizza
12. Subway
13. Au Bon Pain
14. Boloco
15. South End House of Pizza

\*\* Located in Dudley Square  
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**Over 40% of Dudley Residents\* eat dinner at LS Restaurant once per week or more**



\* Includes commuters that live in 02118, 02119, 02120

## How much purchasing is done by Workers?

	Dudley Square Employees	BPS Employees
	Average Spent each Week	Average Spent each Week
Bought coffee/breakfast	\$8.75	\$11.44
Bought lunch at restaurant	\$16.11	\$22.70
Bought lunch at convenience store	\$2.25	\$0.55
Bought prepared food to take home	\$7.20	\$10.08
Stopped for drinks/dinner after work	\$8.00	\$13.20
Went to dry cleaners	\$3.00	\$3.30
Received skin care/massage service	\$1.80	\$3.60
	<b>\$47.11</b>	<b>\$64.87</b>

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*\*Expenditures being made before, during or after work, not necessarily all being made in the business District -- opportunity*

## Opportunity for Dudley Businesses: BPS Annual Expenditures

**BPS Employees moving into DS could result in more than \$1.6 mil. of additional sales for local service businesses**

To capture sales, business must offer what customers want

If the right offerings were available, employees (BPS and existing) might spend more \$ (e.g., stop for dinner after work)

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	Amt. Spent per Employee per year (assume 50 weeks)	Total Expenditures (assume 500 BPS employees)
Bought coffee/breakfast	\$572	\$286,000
Bought lunch at restaurant	\$1,135	\$567,500
Bought lunch at convenience store	\$28	\$13,750
Bought prepared food to take home	\$504	\$252,000
Stopped for drinks/dinner after work	\$660	\$330,000
Went to dry cleaners	\$165	\$82,500
Received skin care/massage service	\$180	\$90,000
<b>Total</b>	<b>\$3,244</b>	<b>\$1,621,750</b>

*\*\*\* Does not include other retail purchases*

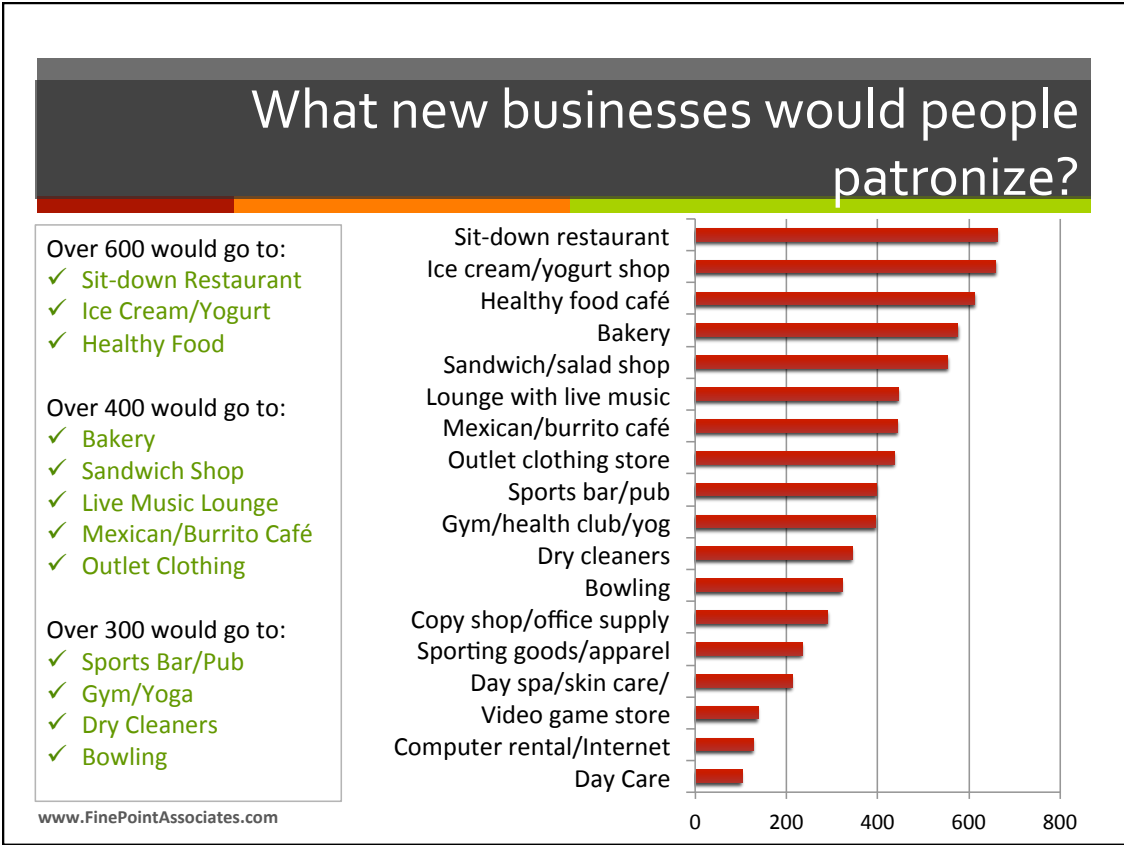
# New Businesses Most Desirable for Dudely Square

Part Five



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## Other Businesses that Respondents Specifically Mentioned

**Coffee Shop** – most frequent “write-in” response

- preferences expressed: **open after 4PM and Sundays, with seats & with Internet**

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## Summary

### **People are committed to improving Dudley**

- ✓ You don't get 1,300 people to answer a survey if they don't care

### **Potential customers do not perceive Dudley Square as a destination**

- ✓ Seen as more of a place that serves the employees and commuters for quick in and out purchases.

### **People are looking for more social-gathering opportunities**

- ✓ Full service restaurants
- ✓ Coffee shops, with seats and Internet, where they can stay for a while
- ✓ Entertainment options like places with live music and a sports bar.
- ✓ Interest in having retail to browse.
- ✓ Would like a reason and a place to be in the District.

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## Summary (cont'd)

### **Opportunity to Capture Sales leakage.**

- ✓ Residents do not use the District frequently
- ✓ Only do a small portion of shopping and dining in Dudley (<25%)
- ✓ Potential opportunity to capture some of this leakage – if the quality, variety and service that residents want can be found in the District.

### **Potential Restaurant Opportunity**

- ✓ Over 50% of Dudley residents eat dinner at a full-service restaurant 2 to 3 times per month or more (but not in Dudley).
- ✓ Sit-down restaurant was #1 choice for new businesses in Dudley.

### **There's room for improvement.**

- ✓ Physical appearance
- ✓ Variety of stores & restaurants

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## Summary (cont'd)

### **Employees & commuters are important market segments.**

- ✓ utilize the district as frequently as residents
- ✓ 3 markets segments together can help support & attract new businesses

### **Addition of BPS employees will provide a significant market opportunity for existing and new businesses**

- ✓ Several hundred BPS employees
- ✓ could result in more than \$1.6 million dollars of potential additional restaurant/food sales (not including retail)
- ✓ Offerings have to meet what the customers want
- ✓ Potential opportunity to attract similar businesses to those that BPS employees currently patronize near their office (e.g., boloco)

### **Employees are looking for additional food options including:**

- ✓ Ice cream/yogurt shop, healthy food café, bakery, sandwich shop, Mexican/burrito café.

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**How these results might be useful:**

- Inform existing businesses about the shopping preferences of potential customers – provide ideas for merchandise/service changes that could attract more customers
- Guide property owners/real estate developers in tenant selection – encourage them to recruit the types of commercial enterprises that residents, employees and commuters are looking for
- Set priorities for aspects of the District that could be improved – that might result in residents utilizing the District more frequently

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## Appendix A

### DUDLEY SQUARE RETAIL & CONSUMER SURVEY - HIGHLIGHTS

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#### **Background**

The goal of the survey is to help support and guide redevelopment plans for an enhanced shopping district.

The survey, implemented during April and May 2012, focused on three segments:

- Residents
- Commuters (that use Dudley Station)
- Workers (Current Dudley Square Employees and Boston Public School employees)

Over 1,300 people responded.

- 871 Residents & Commuters (320 commuters at bus station & 550 Residents)
- 440 Employees (209 Dudley Square & 231 BPS)

#### **Themes/General Observations from Survey Results**

People are committed to improving Dudley.

People would like to view the District as more of a destination than a place to “pass through”.

People are looking for more social-gathering opportunities, sit-down restaurants and coffee shops, with seats and Internet, where they can stay for a while. They want entertainment options such as places with live music and a sports bar. They showed interest in having retail to browse. They would like a reason and a place to be in the District.

It appears there could be potential opportunity for new and existing businesses. Currently, there’s a significant amount of sales leakage -- residents do most of their spending outside of Dudley Square. Residents living within ½ mile spend over \$85 million at retail stores and restaurants however, most residents do not visit the District frequently and only do a small portion of their spending in Dudley Square. Survey findings indicate that residents do less than 25% of their shopping and dining in the District. There may be opportunity to capture some of this leakage -- if the quality, variety and service that residents want could be found in the District.

A majority of all respondents expressed that they would like to see the physical environment in Dudley enhanced.

Residents also indicated that there was room for improvement in the selection of stores/restaurants and merchandise quality as well as other aspects.

#### **Shopping & Dining Habits of Respondents**

- 1/3 of all respondents made an online purchase last month
- Only about 1/4 of the survey respondents shopped in the District in the last month
- More than 3/4 of residents do less than 25% of their shopping and dining in District.

Top shopping location (in general) for residents:

- South Bay
- Copley Square/Prudential
- Downtown Crossing

Residents grocery shop most frequently in:

- South Bay
- Jamaica Plain
- Brigham Circle
- Other Roxbury (not Dudley)

Top considerations that guide grocery shopping decisions include: merchandise quality & selection

About ½ of residents eat dinner out twice a month or more at destinations such as: Brigham Circle, South Bay, South End, Quincy, Back Bay, Fenway

### **Findings Regarding Business Opportunity**

Most desired businesses for residents, employees, and commuters:

- Sit-down restaurant
- Ice cream and yogurt shop
- Healthy food café
- Bakery
- Sandwich shop
- Live music lounge
- Mexican/burrito café
- Outlet clothing
- Sports bar/pub restaurant
- Coffee shop/Café was the most frequently “written in” response. Respondents specifically asked for coffee shop with expanded hours, seating and Internet access.

Workers are an important market segment for Dudley Square Businesses. The addition of the BPS employees could result in more than \$1.6 million in additional expenditures on meals and other purchases. BPS employees that will be moving into the district have higher incomes which means more spending power— BPS Employee Median Household Income is \$75-100K.

### **How results might be useful:**

- Inform existing businesses about the shopping preferences of potential customers – provide ideas for merchandise/service changes that could attract more customers
- Guide property owners/real estate developers in tenant selection – encourage recruitment of commercial enterprises that residents & employees are looking for (perhaps create and distribute a set of business development priorities/goals for the District & market the district to desired business prospects)
- Help establish priorities for potential areas of improvement that might result in residents utilizing the District more frequently

