

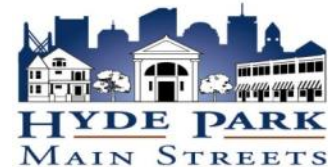
Presentation to the Hyde Park Planning and Rezoning Advisory Group: Retail Market Study of Cleary and Logan Squares



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Boston
Redevelopment
Authority



Project Background and Goals

- Study goals
 - Profile the commercial district, including existing conditions
 - Recommend strategies to improve the district
- Tie into neighborhood plan and rezoning

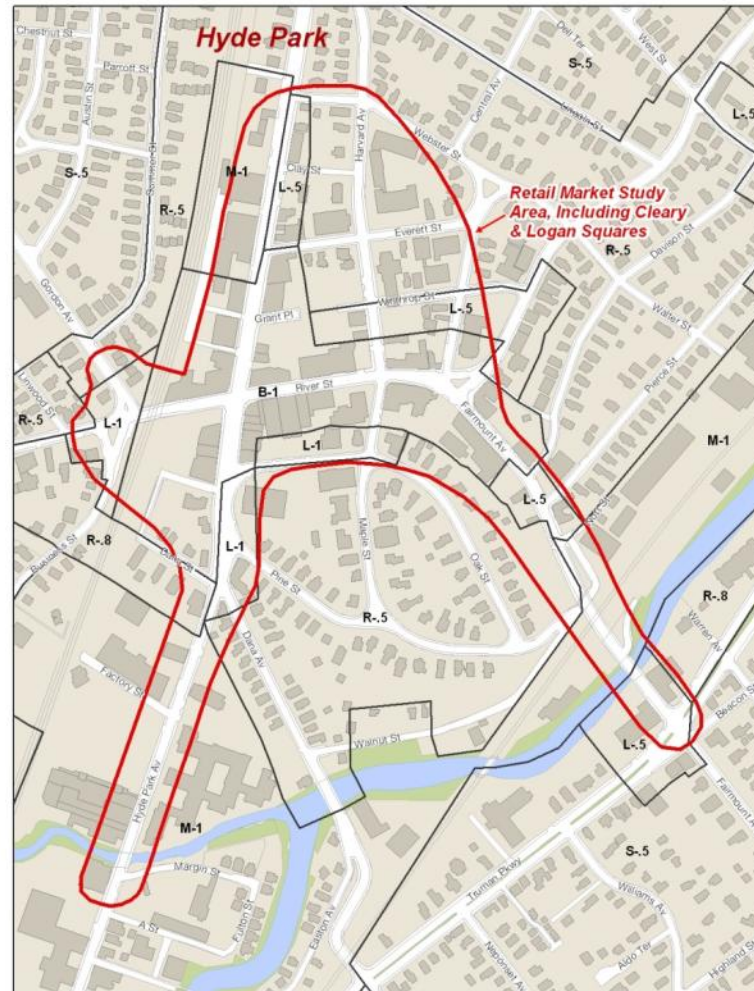


Study Process

- Market Analysis
 - Business mix
 - Customer demographics and spending
 - Customer survey
 - Interview summary
- Development Strategies
 - Strategy Areas
 - Action Steps
- Community input – 3 steering committee meetings, 15 interviews with local stakeholders, 2 focus groups on development strategies and 1 public meeting (February 2009)



Project Boundaries

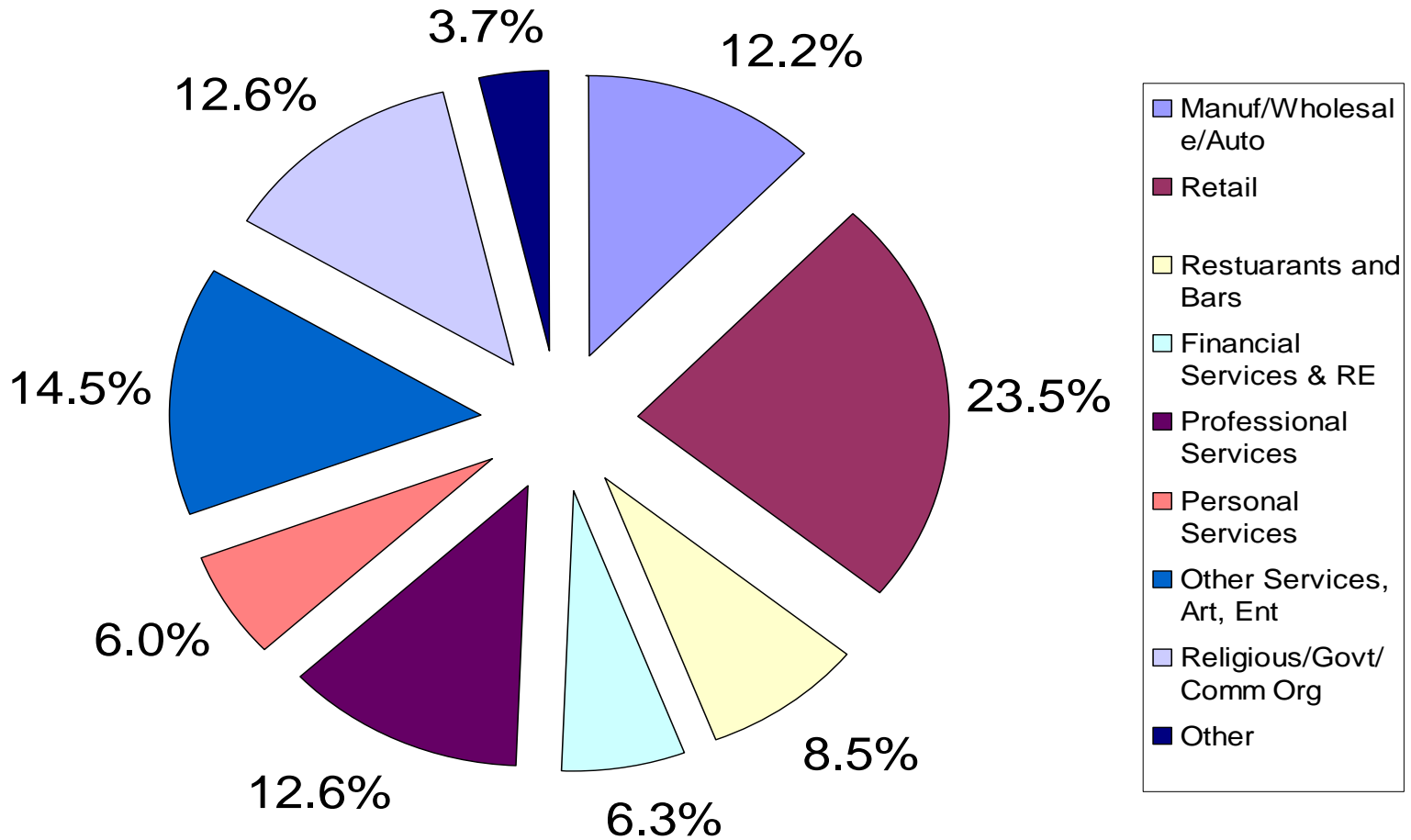


Business Mix

- Diverse mix
- Largest sectors: retail, professional services, restaurants/bars, and personal services
- Retail concentrations
 - 11 grocery stores with 41,100 sf.
 - 4 discount stores with 15,807 sf.
 - 4 pharmacy/cosmetic stores with 20,660 sf.
- 32 vacancies with 33,186 sf. (7.2% of total space)

Sector	Firms	SF
Retail	35	100,749
Professional Services	29	54,130
Restaurants/Bars	26	36,258
Personal Services	21	25,653
Finance/Real Estate	16	26,835
Other Serv/Art/Ent.	16	62,281
Relig/Govt/Comm Org	15	54,139
Man/Wholesale/Auto	13	52,146
Other	7	15,952
Total	178	428,143
Vacant	32	33,186

Occupied Square Feet by Sector



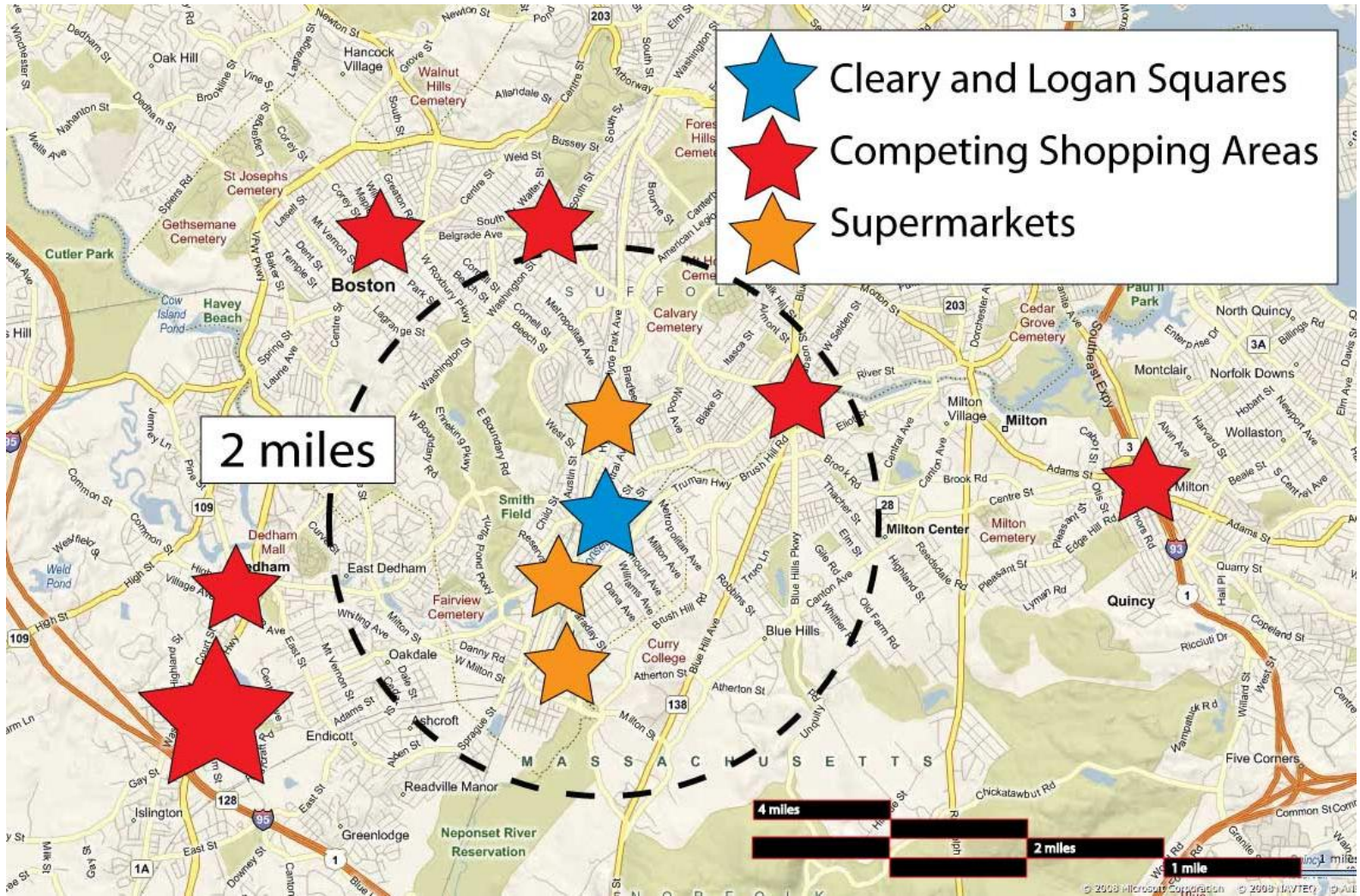
Business Clusters



- **Convenience Center:** 50 business with conv. stores, fast food, banks, personal services
- **Service Center:** 55 uses in financial, professional, medical services
- **Medical Services:** 17 health care offices and 4 medical-related stores



Other Commercial Districts



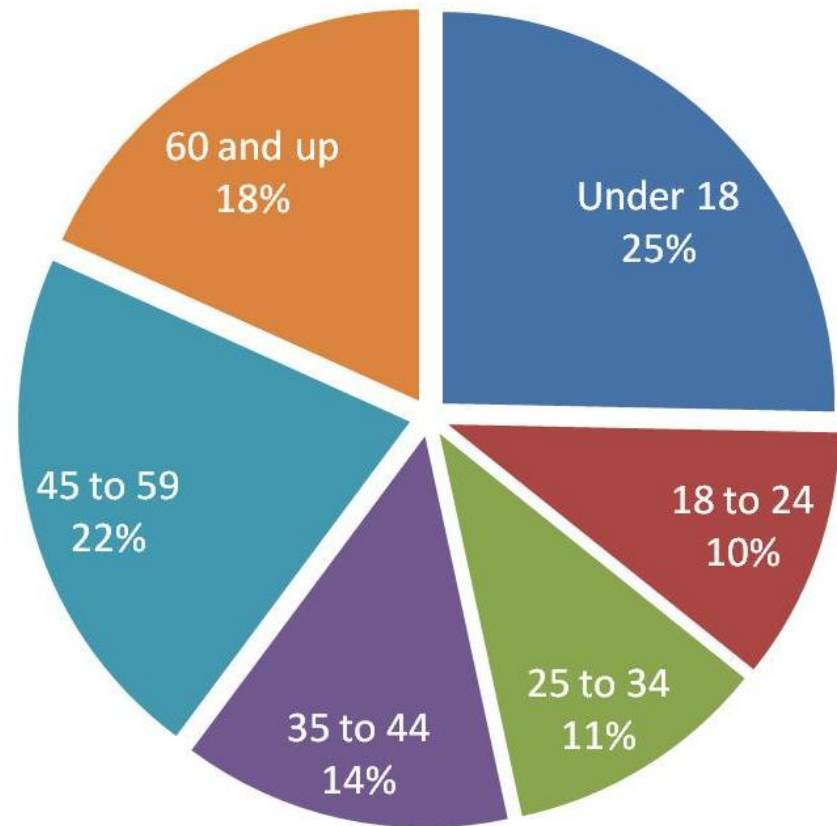
Comparison to Other Districts

- Hyde Park has most firms in 5 sectors:
 - Restaurant/bars, religious/government/civic, finance & RE, manufacturing/wholesale/auto, arts & entertainment
- Dedham Route 1 dominates retail
 - 48 stores with many large big box stores
- Roslindale/Mattapan also strong in retail
- East Milton smallest center by far
- No district has large arts/entertainment presence
- District differ by type of customer serviced

Trade Area Characteristics

- Racial, ethnic and cultural diversity
- Multi-generational: concentrations of young and old
- Economic diversity: household with wide range of incomes

Age Profile of Primary Trade Area



Spending by Category (in millions)

	Primary	Secondary	Total	Percent
Transportation	\$214	\$335	\$549	35%
Food and Beverage	\$139	\$218	\$357	23%
Entertainment	\$57	\$89	\$145	9%
Health Care	\$52	\$82	\$135	9%
Household Supplies and Furnishings	\$51	\$81	\$132	8%
Clothes, Shoes and Accessories	\$42	\$66	\$108	7%
Education	\$24	\$37	\$61	4%
Personal Care Products and Services	\$12	\$19	\$32	2%
Tobacco products and smoking supplies	\$7	\$11	\$18	1%
Reading	\$3	\$5	\$8	<1%

Customer Survey Response

- 253 surveys (203 web and 50 intercept)
- Respondents largely
 - Hyde Park residents (74%)
 - Homeowners (74%)
 - Higher income (58% with \$75,000 or higher)
 - Over 45 (65%)

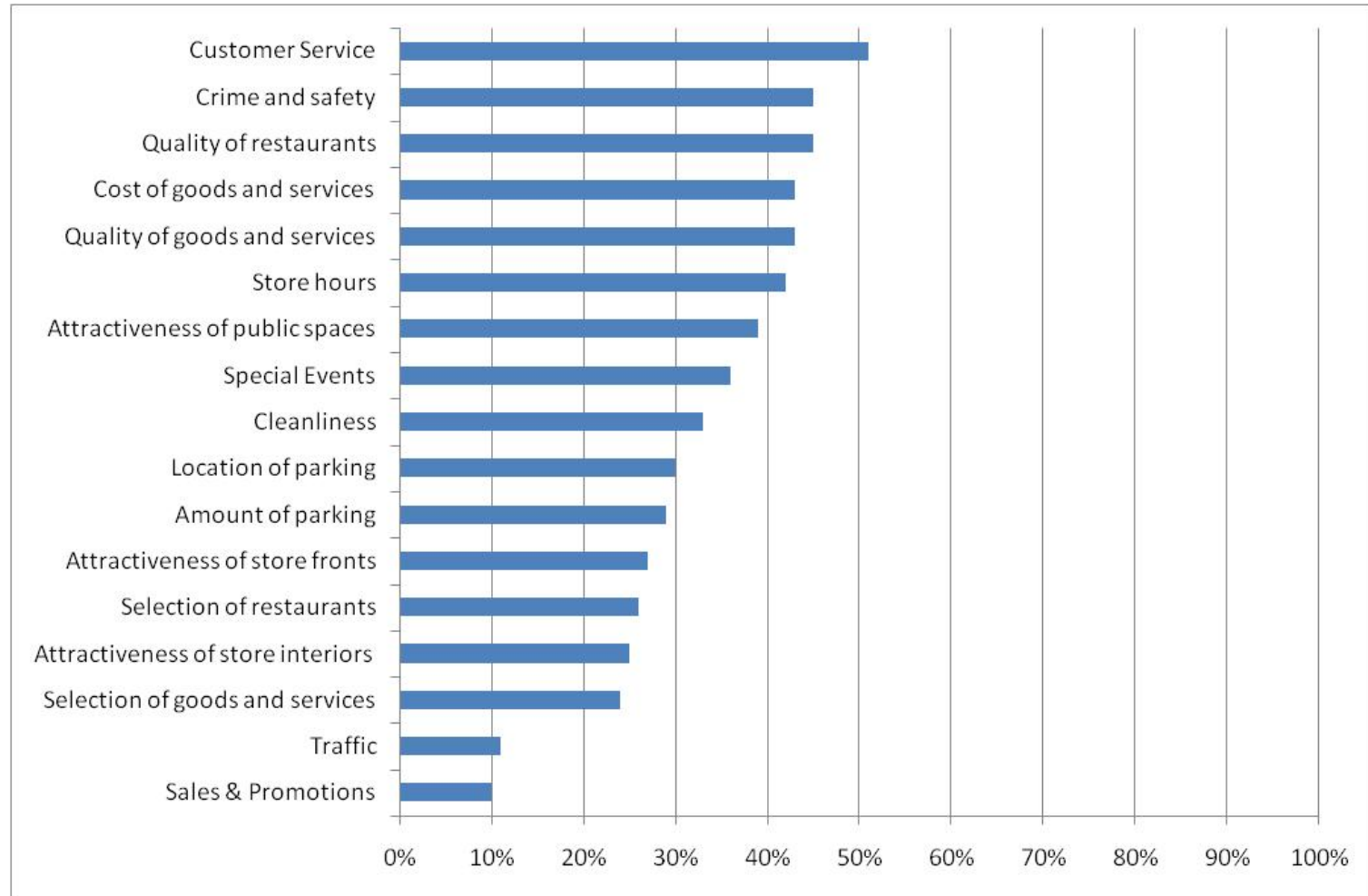


Respondent Shopping Patterns

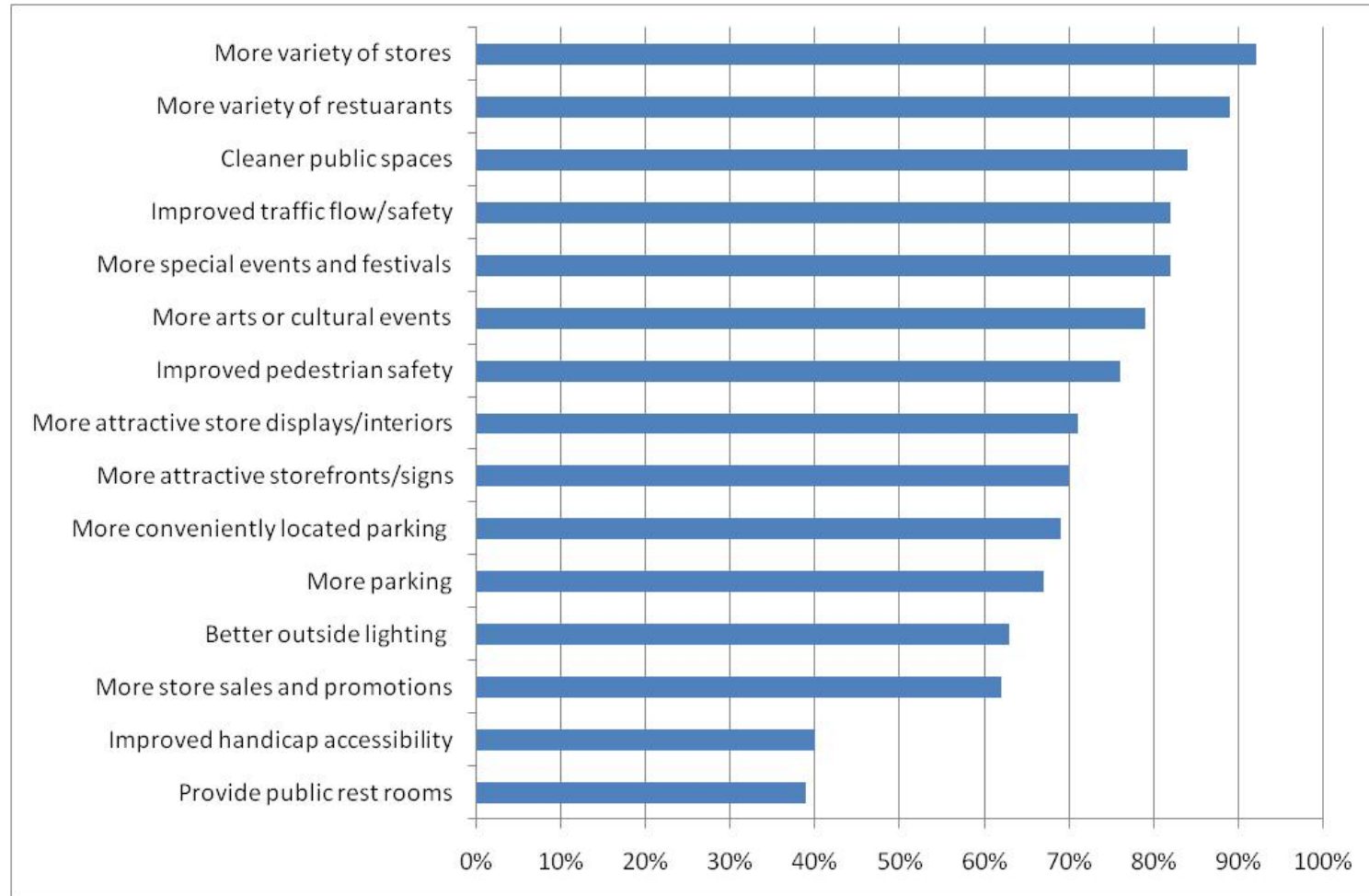
- 65% visit at least several times per month
- 30% visit several times/week
- Banking (60%), post office (53%) and shopping (43%) are most common reasons for a visit
- Cleary and Logan Squares are the primary destination for take out food and personal services
- Dedham and Cleary and Logan Squares are main destinations to shop at discount stores and hardware/home improvement stores



% Rating Squares Good or Excellent

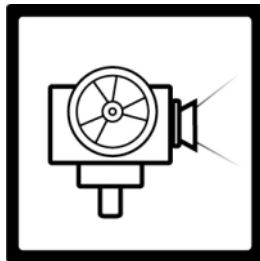


Changes Likely to Increase Shopping



Stores & Events Likely to Attract Shoppers

- Top stores desired are centered on food
- Over 60% of respondents indicated that they would come to the district more often for all arts and entertainment options listed in survey



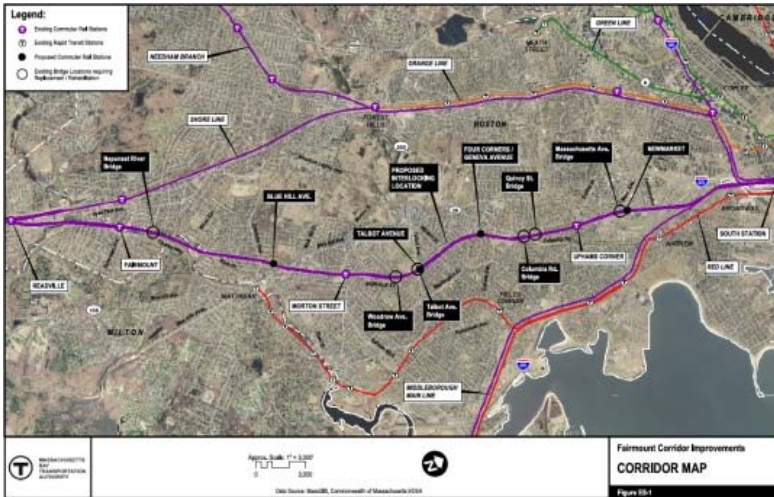
Stores

- | | |
|------------------------------|-----|
| • Bakery | 58% |
| • Other restaurants | 53% |
| • Specialty food | 43% |
| • Office Supply/Stationary | 35% |
| • Ethnic Restaurant | 30% |
| • Art/Framing/Craft Supplies | 30% |
| • Clothing Store | 27% |
| • Sporting/Dance Goods | 21% |

Arts & Cultural Events

- | | |
|---------------------------|-----|
| • Movies | 91% |
| • Street festivals | 78% |
| • Live theater & dance | 76% |
| • Galleries & visual arts | 74% |

Interview Results: Opportunities and Threats



Opportunities

- Transit-Oriented Development
- Arts and Historic Preservation
- Food and Nightlife
- Proximity to Middle- and High-Income Customer Markets

Threats

- Persistent Negativity and Finger Pointing
- Not Embracing Diversity and Recruiting New Leaders
- The Economy
- New Retail Development
- Resource Constraints

LEGACYplace



Summary of Major Findings



- Negative image due to traffic, appearance, and selection of goods, services and restaurants
- Diverse customer base and business mix
- Convenience orientation
- Food, arts and entertainment
- Discount retail cluster

Strategy Areas

- Overall, district in need of new, stronger identity
 - Embrace “urban-ness” and celebrate diversity that reflects existing assets and opportunities
- Group recommendations into four areas:
 - Public Realm
 - Niche Development
 - Organization and Capacity
 - Events and Programming



Niche Development

- Strengthen discount cluster and arts and entertainment niche
 - Advocate for Everett Square theater redevelopment
 - Work with existing businesses to expand product offerings
 - Recruitment campaign to attract stores in target niches:
 - Create recruitment package
 - Used goods: thrift stores, consignment, vintage, and antique shops
 - Sit-down restaurants
 - Arts, culture, and entertainment



Public Realm

- Initiatives to enhance customer shopping experience by upgrading district appearance and addressing traffic and parking issues
 - Create community-city services coordinating committee
 - Long-term goal of informal parking management
 - Cleanliness initiative
 - Improve window displays and merchandising
 - Parking signage for municipal lot and commuter lots
 - Support improvements to traffic circulation and pedestrian crossings, especially in Cleary Square



Events and Programming

- Expand events and programming, link events and programming to niche development, and build stronger partnerships to implement this programming
 - Create and promote community calendar of events
 - New event calendar
 - Senior discount days
 - Create weekly Farmers Market that also features local arts, crafts and prepared food
 - Movie nights or other A/V nighttime and weekend events in parking lots or other public spaces
 - Link events with special business promotions
 - Health fair

Organization and Capacity

- Expand local business development capacity and strive for greater diversity
 - Explore moving Main Street office to storefront as in Roslindale, West Roxbury to expand presence in district
 - Recruit and foster more diverse Hyde Park Main Streets volunteers and leadership, including business owners
 - Reinforce existing partnerships and create new ones with business development organizations to offer one-on-one business development services to build on existing networking breakfasts and other workshops



Thank you