Retail Market Study and Action Plan for Cleary and Logan Squares in Hyde Park, MA

FINAL REPORT

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To advance efforts in revitalizing Hyde Park's historic neighborhood center, and in conjunction with Hyde Park Main Streets (HPMS), the Boston Redevelopment Authority retained ConsultEcon, Inc. and Karl F. Seidman Consulting Services to conduct a retail market study of the main business district which focused on Cleary and Logan Squares in Boston, MA. This report presents results from an analysis of the district customer base and business mix, and their implications for revitalization, which include four development strategy areas.

Key Findings from Market Study

The following major findings are based on research into consumer and household demographics and spending patterns, results of a combined intercept and web survey of district customers, evaluation of existing district business mix, comparison with competing shopping areas, and interviews with local business and community stakeholders.

- **Total consumer spending potential is an estimated $1.6 billion.** Primary trade area spending potential is $618 million or 39 percent of total. Secondary trade area spending potential is $969 million or 61 percent of total. Categories of consumer spending that are important for Cleary and Logan Squares include Food Away from Home ($145 million), Entertainment ($145 million), Household Supplies ($132 million), Clothing and Accessories ($108 million), and Personal Care Products and Services ($32 million).
- **Cleary and Logan Squares have a diverse mix of 178 businesses.** The largest business segment is retail and restaurants/bars, accounting for one-third of establishments. Another third in medical, professional and personal services. The remaining third is distributed among several sectors including auto/wholesale/ industrial uses, financial services, government offices and facilities, churches, civic organizations and arts/entertainment uses. Along with the 178 businesses, the district has 32 vacant units or 15 percent of the total occupied and vacant spaces. However, when measured by square feet, the vacancy rate is much lower at 7 percent.
- **Negative image due to traffic, appearance, and selection of goods, services and restaurants.** In the survey, a majority of customers rated the district fair or poor in all categories, with the exception of customer service. The interviews support this finding.
- **Diverse customer base and business mix.** According to demographic research, Hyde Park residents are "majority minority" and multi-generational, with children, young adults and seniors being important district denizens. Minority groups are diverse, with noteworthy differences in language, nation of origin and household income levels. Area households are economically diverse from low-income to high-income, resulting in considerable variation in regular and discretionary consumer spending. The business mix and interviews indicate that Cleary and Logan Squares' business environment reflects this ethnic and economic diversity, which poses a challenge to building a cohesive district identity.

- **Convenience orientation.** Business mix indicates that there are a large number of convenience food and personal service options. These goods and services are found in competitive districts as well, which does not necessarily help to differentiate the district, and are largely neighborhood-serving businesses with limited penetration into the secondary trade area. Moreover, competing districts have a greater share of their business mix in retail stores than Cleary and Logan Squares, which heighten their identities as shopping destinations. Interviewees said that while many people shop regularly for convenience goods in Cleary and Logan Squares, there are too many of the same kinds of stores. Survey results indicate that a greater variety of stores would spur customers to shop more in the district.
- **Food, arts and entertainment.** Compared to competing districts, Cleary and Logan Squares have an existing base of food and activity-oriented destinations to build on. There are more entertainment options, such as Ron's Bowling and Riverside Theatre Works, in Cleary and Logan Squares than in other districts. No competing district has a strong presence as an arts and entertainment center, creating a market opportunity for Cleary and Logan Squares. The renovated public library and Menino Arts Center, the opening of the Municipal Building, and the Hyde Park Arts Initiative programs and events give the district a more prominent profile in the arts than other districts.
- **Discount retail cluster.** Discount stores account for a good proportion of retail stores in Cleary and Logan Squares. The Family Dollar store reportedly draws a significant number of shoppers, and is a district anchor. This discount orientation would make it an important and convenient shopping destination for low- and middle-income households that largely reside in Hyde Park. A diversified and higher quality discount cluster can include stores that complement an arts-oriented identity, such as second hand goods, vintage clothing and antiques.

Vision for District Revitalization

This action plan is driven by a new community vision for Cleary and Logan Squares that suggests a vibrant and economically successful commercial, cultural and residential center, which:

- Preserves its history and physical character
- Celebrates its unique cultural and urban diversity
- Offers an experience that is pleasurable, attractive and accessible for all district users
- Contains a diverse mix of stores that appeal to all Hyde Park residents and attract spending from adjacent Boston neighborhoods and Massachusetts towns
- Functions as a center for nighttime activity with restaurants, entertainment and regular outdoor community-oriented events
- Enhances economic environment for existing businesses and attracts new businesses
- Enhances property values and fosters real estate investment and re-investment

Key Recommendations for Action Plan

Based on this vision, the market study findings and public and stakeholder input, the action plan focuses on realizing the following goals:

- Create a clean and safe shopping environment that is universally accessible and easy for pedestrians and vehicles to navigate to and through
- Increase consumer expenditures in the district by working with store owners to enhance product offerings in existing stores, improve public displays, and recruit new ground floor retail stores to attract more resident and visitor spending in more product categories
- Increase weekend and nighttime activity with a new weekly farmers and craft market, more seasonal events and festivals in public spaces, and new arts and entertainment uses and restaurants
- Strengthen the discount cluster by creatively linking it to arts and micro-enterprise through quality used goods or consignment stores, thrift and vintage stores, and used furniture and antique stores
- Create new economic opportunities for existing and prospective businesses through greater community outreach and business development partnerships with existing resources

Strategy Areas and Detailed Recommendations

The action plan recommendations support and reinforce the vision for district revitalization in four integrated and mutually supportive strategy areas: Niche Development, Public Realm, Events and Programming, and Organization and Capacity.

Niche Development Strategy

The Niche Development Strategy seeks to diversify the business mix in Cleary and Logan Squares and build a new identity for the area as an unique urban arts, culture and entertainment district. Other supporting businesses to enhance this new niche include sit-down restaurants, and vintage, antique and other quality used goods stores. Given the current economic environment, the niche development strategy will take time to implement, and should be viewed as a medium to long-term strategy. It will be complemented through shorter-term efforts to expand entertainment and shopping options under the events strategy detailed below. Additionally, it will be important to ensure that key arts and entertainment uses, such as Riverside Theater Works, remain in the district. Key components of this strategy include:

1. Establishing a proactive business recruitment campaign to attract targeted business to Cleary and Logan Squares with a business recruitment team, recruitment materials and direct outreach to candidate stores. Target business types to include sit-down restaurants, arts-related businesses and quality used goods stores that add to a funky arts-related image (e.g. vintage clothing, antiques, books and music, music instruments, and consignment clothing or home goods stores). One focus for recruitment efforts will be to attract branch stores of successful existing businesses.

2. Developing broad-based community support and advocacy for renovation of the Everett Theater as a new venue for entertainment, cultural and educational events and programming.
3. Working with existing businesses to expand their product offering, especially around specialty foods and locally-produced art and crafts.

Public Realm Strategy

The Public Realm Strategy seeks to improve the commercial district's attractiveness and appeal to shoppers, and improve access to convenient parking by helping visitors navigate Cleary and Logan Squares better while reducing long-term use of short-term parking spaces. It seeks to alter the poor perceptions of district appearance and parking by existing customers, and responds to the strong preference for addressing these issues that surfaced in focus group and the public meeting discussions. Key components of this strategy include:

1. An expanded cleanliness initiative to prevent litter, increase clean-up efforts, and promote improved cleaning and maintenance by merchants.
2. A campaign to promote more attractive window displays.
3. Creating signs and other wayfinding tools to better direct shoppers to public parking lots.
4. Reducing long-term use of short-term parking through an informal enforcement program, and creating alternative long-term parking options for employees and business owners.
5. Creating a broad-based committee to monitor city services to Cleary and Logan Squares, and advocate for their improvement.

Events and Programming

The Events and Programming Strategy seeks to generate new arts, cultural and commercial activities in the district, especially in the evenings and on weekends, through more events and programming of public spaces. This strategy would foster and enhance Cleary and Logan Squares' reputation as a vibrant and diverse art, food and cultural destination to attract residents who rarely shop in the district, encourage new and repeat shopping trips, and appeal to diverse market segments. Key components of this strategy include:

1. Start a new weekly seasonal outdoor farmer's market in 2010 that features, in addition to fresh produce, local arts, crafts, handmade and used goods, live music/DJ, and prepared foods.
2. Encourage new evening and weekend events in the district, including a film series and other music and entertainment events.
3. Encourage specialty events and promotions, such as senior discount days and health fairs.
4. Enhance event promotion with a new event calendar, and increase coordination with businesses, community partners and city departments.

Organization and Capacity

The Organization and Capacity Strategy seeks to expand HPMS' outreach to businesses through more pro-active engagement with entrepreneurs, their product offerings, and their market base while offering enhanced business development services. It also seeks to leverage existing community partners and volunteers to recruit new partners and volunteers needed for events, administrative and coordinating projects. New recruitment should attempt to diversify the business, resident and community partner base by targeting HPMS volunteers and leaders to better reflect neighborhood generational, cultural and socio-economic diversity. Key components of this strategy include:

1. Explore potential for HPMS office to relocate to a first floor location.
2. Expand outreach and board/committee/volunteer recruitment with businesses, the minority community and youth and schools.
3. Reinforce existing partnerships and create new ones with business development organizations to offer one-on-one business development services to complement regular networking breakfasts and other workshops.

Timeframe for Implementation

To ensure that the initial implementation of the Action Plan moves forward effectively and generates the buzz and momentum needed for long-term success, HPMS staff, Board and volunteers will need to meet regularly together, both in small teams and with community and city partners involved. To guide implementation, an implementation timeframe is proposed for each recommended action item. Timeframes are defined as:

- ♦ Short-term – Through the end of 2009
- ♦ Mid-term – 2010
- ♦ Long-term – 2011 and beyond

Table 1 details the overall implementation timeline with the proposed timeframe for each recommendation and partners involved.

Table 1
Implementation Timeline and Partners by Strategy Area and Recommendation

Strategy/Recommendations	Time Frame	Lead Entity	Partners
Niche Development			
Advocate for Everett Square Theater redevelopment	Short-term, on-going	HBI	HPMS, HPAI, property owners, BRA
Expand product offerings	Mid-term	HPMS	Businesses, BRA, DND
Business recruitment campaign	Mid-term to Long-term	HPMS	Property owners, businesses, BRA, DND
Public Realm			
Create community-city services coordinating committee	Short-term	HPMS	Businesses, public and private property owners, 02136, SWBCDC
Cleanliness initiative	Short-term	Community-city services coordinating committee	HPMS, property owners, businesses, government agencies and community and religious organizations
Window display initiative	Short-term	HPMS	Businesses, property owners, and HPAI
Parking signage for municipal lot and commuter lots	Short-term to Mid-term	BTD	HPMS, HPAI
Informal parking management	Mid-term	Community-city services coordinating committee	Businesses, property owners, HPMS, 02136, Parking Department, BTD
Traffic planning and improvements	Mid-term to Long-term	HPMS	City services committee, residents, businesses, property owners

Table 1 (cont.)
Implementation Timeline and Partners by Strategy Area and Recommendation

Strategy/Recommendations	Time Frame	Lead Entity	Partners
Events and Programming			
New Event Calendar	Short-term	HPMS staff	HPAI, Library, businesses, local newspapers
Senior Discount Days	Short-term	HPMS staff	Businesses and senior housing and agencies
Weekly food and crafts market	Mid-term	HPMS volunteers	HPAI
Film Series or other A/V nighttime and weekend event in parking lot or other public space	Mid-term	HPMS volunteers	HPAI, Banks, BTD, BPD
Event business promotion linkages	Mid-term	HPMS staff	Businesses, HPAI, event sponsors
Health Fair	Long-term	HPMS staff	Businesses
Organization and Capacity			
Explore storefront location and availability	Short-term	HPMS Staff and Board	Property owners
Outreach to new partners	Short-term	HPMS Board and Organization Committee	HPAI, City Councilors office, community, religious, human and social service organizations
Offer one-to-one business development services	Mid-term	HPMS staff	DND, BRA, SBDC, SWBCDC and other local economic development entities

List of Acronyms
BPD = Boston Police Department
BRA = Boston Redevelopment Authority
BTD = Boston Transportation Department
DND = Department of Neighborhood Development
HBI = Historic Boston, Inc.
HPAI = Hyde Park Arts Initiative
HPMS = Hyde Park Main Streets
SBDC = Small Business Development Center
SWBCDC = Southwest Boston Community Development Corporation

Section I
INTRODUCTION AND ASSUMPTIONS

To advance efforts in revitalizing Hyde Park's historic neighborhood center, and in conjunction with Hyde Park Main Streets, the Boston Redevelopment Authority retained ConsultEcon, Inc. and Karl F. Seidman Consulting Services to conduct a retail market study of the main business district which focused on Cleary and Logan Squares in Boston, MA. This report presents results from an analysis of the district customer base and district business mix, and their implications for district revitalization and new development strategies.

Assumptions

In preparing this report, the following assumptions were made. This study is qualified in its entirety by these assumptions.

1. Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. and Karl F. Seidman Consulting Services from their independent research efforts, general knowledge of the industry, and consultations with the client and community stakeholders. No responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study.
2. Outputs of computer models used in this report may be rounded. These outputs may therefore slightly affect totals and summaries.
3. This report was prepared during the period November 2008 through April 2009. It represents data available at that time.

Section II

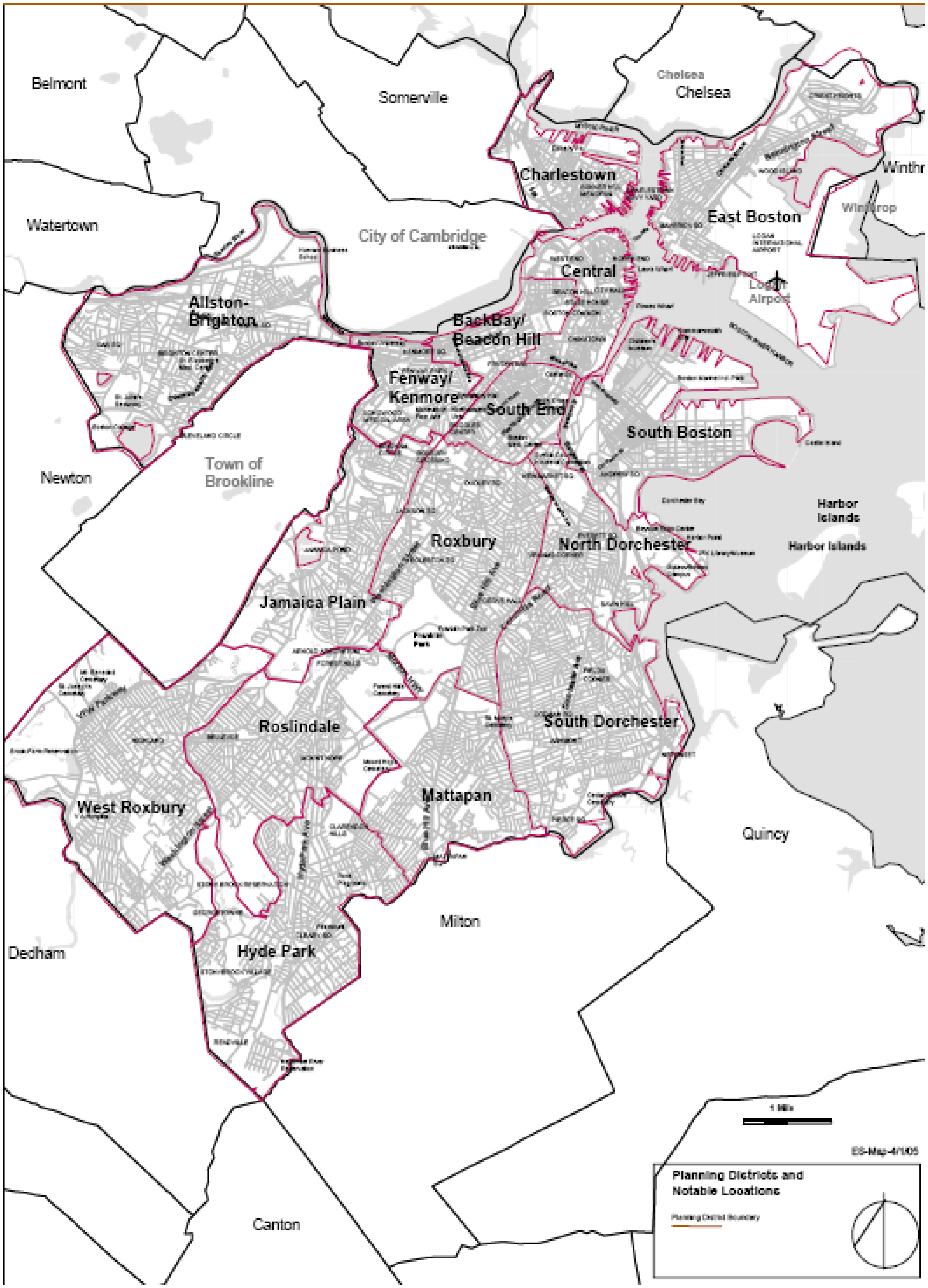
DISTRICT CONTEXT

This section provides a brief introduction to the business district centered on Cleary and Logan Squares in order to set the context for the market analysis and action plan by reviewing the project location and boundaries as well as transportation network. While the Hyde Park neighborhood contains a number of important shopping centers, Cleary and Logan Squares comprise the main commercial district in the neighborhood, with a diverse array of business and neighborhood activity. Moreover, the commercial district is the target area for Hyde Park Main Streets activities and is a place people associate with "Hyde Park" (similar to how Coolidge Corner is associated with Brookline).

Location and Project Boundaries

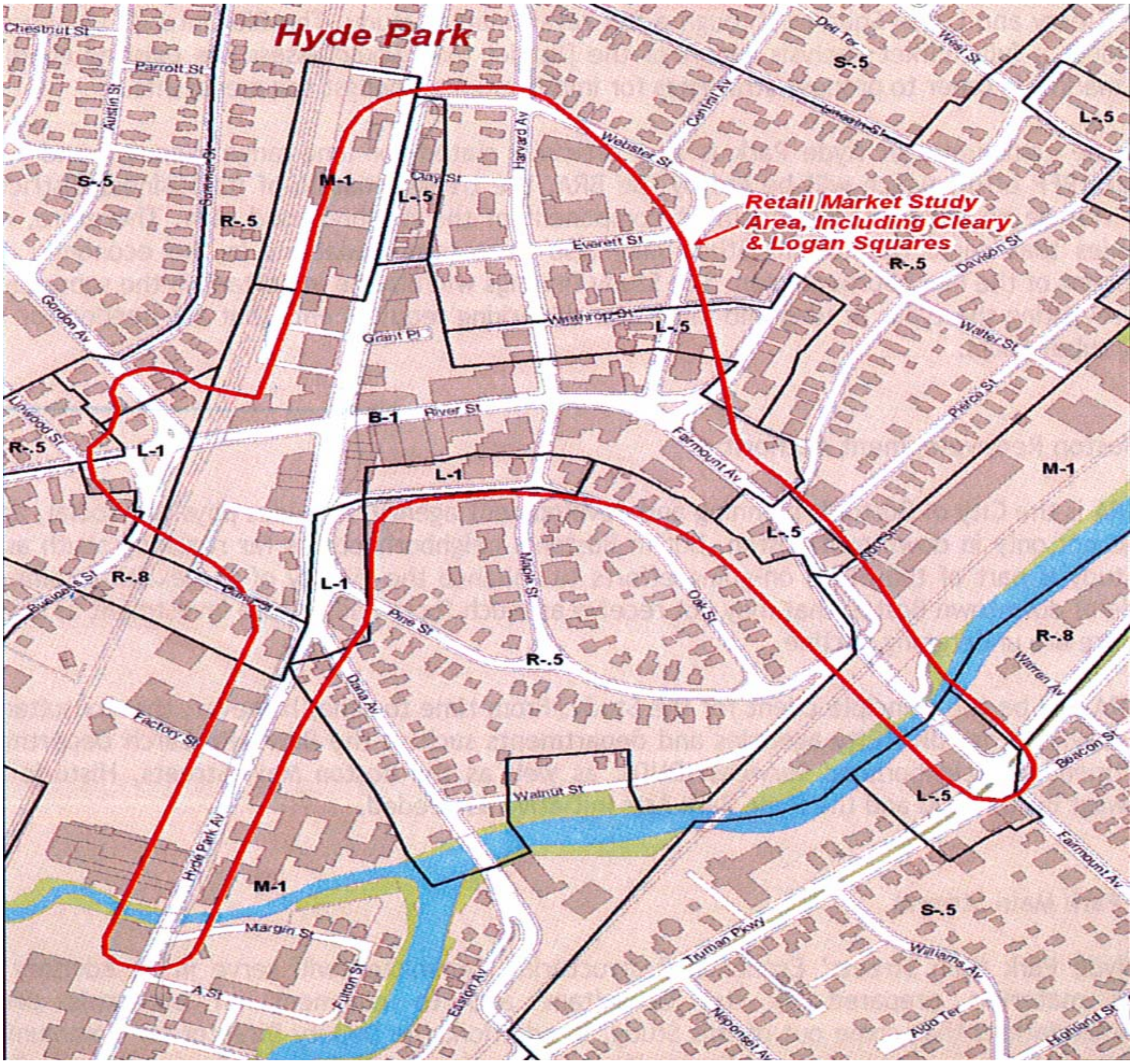
Cleary and Logan Squares are located in Hyde Park, the southernmost neighborhood of Boston that borders the towns of Milton and Dedham. Hyde Park neighborhood boundaries vary depending on source used. **Figure II-1** comes from the Boston Redevelopment Authority's Census 2000 Source Book and shows the boundary of Boston's planning districts. **Figure II-2** is a parcel map that identifies the project boundaries. **Figure II-3** is a district map that identifies land use within the district.

Figure II-1
Map of Boston Neighborhood Planning Districts



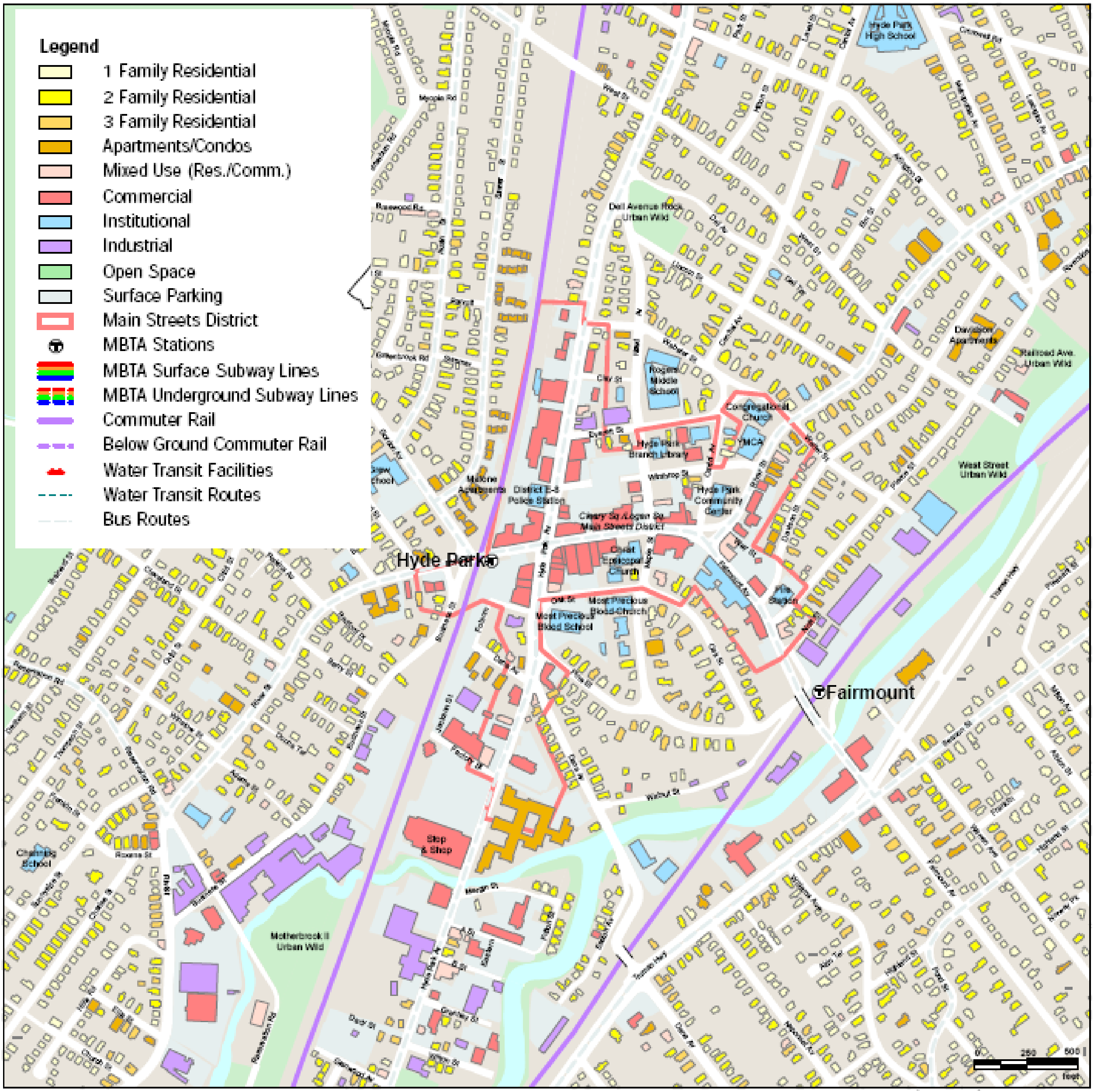
Source: Boston Redevelopment Authority.

Figure II-2
Map of Project Boundaries



Source: Boston Redevelopment Authority.

Figure II-3
Land Use Map of Cleary and Logan Squares



Note: Main Streets District boundaries do not match project boundaries, which include the Stop and Shop located on Hyde Park Avenue and commercial uses at the corner of Fairmount Avenue and Truman Highway.
Source: Boston Redevelopment Authority.

Main Streets, Squares and River

Hyde Park Avenue runs north south and is the primary arterial road through Cleary Square. River Street runs east west, crossing Hyde Park Avenue to form Cleary Square. River Street and Fairmount Avenue converge to form Logan Square. Truman Highway is an arterial road on the edge of the business district, located east of the Neponset River (as opposed to most of the business district, which is west of the Neponset River).

Public Transportation

Cleary and Logan Squares are accessible via two commuter rail lines that have stations within the district. Both stations are a short distance to the terminus at South Station in downtown Boston. Hyde Park Station located south of River Street and parallel to Hyde Park Avenue, is a stop on the Franklin and Providence/Stoughton Commuter Rail lines. Fairmount Station is on the Fairmount line, the second to last station for this short route. Fairmount Station and Hyde Park Station draw commuters from Hyde Park as well as Dedham and Milton. The MBTA is currently planning to add more stations to the Fairmount Line and increase the frequency of service.

Four bus routes, only one of which goes through both Cleary and Logan Squares, serve the district. Three bus routes—32, 33, and 50—serve Cleary Square, and two routes—24 and 33—serve Logan Square. Data in **Table II-1** show weekday and weekend boardings for bus and rail routes that service the district.

Table II-1
Weekday and Weekend Boardings on Public Transportation

Bus Route/ Commuter Rail	**Weekday 1/ 2/**	**Saturday**	**Sunday**
24	1,599	605	229
32	7,733	4,157	2,650
33	895	303	No Service
50	1,062	378	No Service
Franklin	1,094	No Count	No Count
Fairmount	331	No Count	No Count

1/ Average weekday inbound and outbound boardings for bus routes as of January 2008. Bus Route 33 total weekday boardings were 9 highest of 196 bus routes in MBTA system. Route 24 was 65 of 196, Route 50 was 94 of 196, and Route 32 was 110 of 196.
2/ Typical Boston bound weekday boardings April 2006 for Franklin and Fairmount commuter rail lines. Hyde Park Station has the highest number of boardings among all Boston commuter rail stations and ranked 11 highest among 124 total commuter rail stations. Fairmount station's boardings ranked 79 out of 124. Typical weekday Boston bound boardings have <u>increased</u> 52% at Hyde Park Station and <u>decreased</u> 29% at Fairmount Station over the prior five years, 2001 to 2006.
Source: MBTA Blue Book 2007 and ConsultEcon, Inc.

Summary

Cleary and Logan Squares are located in Hyde Park, the southernmost neighborhood of Boston that borders the towns of Milton and Dedham. The business district centers on Hyde Park Avenue, River Street and Fairmount Street and is well-served by public transportation, including two commuter rail lines and four bus routes.

Section III
BUSINESS MIX ANALYSIS

An analysis of Cleary and Logan Squares' business mix was conducted to understand the composition of the district's businesses better, to identify special niches and concentrations, as well as any competitive advantages or opportunities relative to nearby competing retail areas.

The analysis had two components. First, a profile of existing businesses in the Hyde Park Main Streets (HPMS) district was prepared based on categories under the North American Industrial Classification System (NAICS). The business inventory maintained by HPMS was updated for recent changes, cleaned for some duplicate listing of businesses that occupied more than one address and coded based on NAICS categories. Data from the revised inventory was then tabulated by major sectors and with a detailed breakdown of retail store types.

Second, a tour was conducted of six competing retail areas (Dedham Square, Route 1 in Dedham, East Milton Square, Mattapan Square, Roslindale Village and West Roxbury[1]) to inventory the business mix in these areas for comparison with the HPMS area. These inventories were based on a visual inspection by foot conducted on December 30, 2008, which concentrated on counting businesses in ground floor spaces. Some upper story uses for which exterior signage existed were also counted. Consequently, the inventories do not capture all of the upper story business in competing districts and thus are not fully comparable to the data for HPMS, which includes upper story and ground floor uses. However, it does capture the vast majority of businesses in each district, which are located on ground floor spaces, and thus provides a useful way to identify major differences in business mix between Hyde Park and other districts. Since retail uses are almost exclusively in ground floor spaces, the comparison provides an accurate comparison of variations in retail mix across these districts.

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[1] See Appendix A for discussion of boundaries of competing retail areas included in visual survey.

Overview of Business Mix

As shown by data in **Table III-1**[2], Hyde Park has a diverse mix of 178 businesses with just over one-third of establishments in retail and restaurants/bars, with another third in medical, professional and personal services. The remaining third is distributed among several sectors including auto/wholesale/ industrial uses, financial services, government offices and facilities, churches, civic organizations and arts/entertainment uses. Along with the 178 businesses, Hyde Park has 32 vacant units or 15 percent of the total occupied and vacant spaces. However, when measured by square feet, the vacancy rate is much lower at 7 percent.

Table III-1
Distribution of Hyde Park Businesses by Sector

Sector	Number	Square Feet	Percent by Number 1/	Percent by Squre Feet 1/	Average Size
Manuf/Wholesale/Auto	13	52,146	7.3%	12.2%	4,011
Retail	35	100,749	19.7%	23.5%	2,879
Restuarants and Bars	26	36,258	14.6%	8.5%	1,395
Financial Services & RE	16	26,835	9.0%	6.3%	1,677
Professional Services	29	54,130	16.3%	12.6%	1,867
Personal Services	21	25,653	11.8%	6.0%	1,222
Other Services, Art, Ent	16	62,281	9.0%	14.5%	3,893
Religious/Govt/Comm Org	15	54,139	8.4%	12.6%	3,609
Other	7	15,952	3.9%	3.7%	2,279
Total Businesses	**178**	**428,143**	**100.0%**	**100.0%**	**2,405**
Vacancies	32	33,186			
Total Spaces	**210**	**461,329**			
Percent Vacant Space	15.2%	7.2%			

1/ Not including vacant space
Source: Hyde Park Main Streets and Karl F. Seidman Consulting Services.

Retail is the single largest sector with 35 enterprises, followed by restaurants and bars with 26 and personal services with 21. Data in **Table III-2** show the breakdown of stores in Cleary and Logan Squares by major retail categories. Among retail business, grocery and food stores are the largest concentration with 11—eight of which are convenience stores. The next largest retail groups, with four stores each, are: discount stores, clothing and accessory stores and pharmacy/optical and medical supply stores.

[2] Two large housing developments included in the Hyde Park Main Street inventory are excluded from this analysis which focuses on business uses.

Table III-2
Distribution of Hyde Park Retail Businesses by Store Type

Retail Store Type	Number	Square Feet	Percent by Number 1/	Percent by Squre Feet 1/
Grocery/Food	11	41,100	31.4%	40.8%
Beer/Wine/Liquor	2	1,300	5.7%	1.3%
Home Furnishings/Improvement	3	9,545	8.6%	9.5%
Clothing/Jewelry/Accessories	4	5,711	11.4%	5.7%
Pharmacy/Medical/Costmetics	4	20,660	11.4%	20.5%
General Merchandise/Discount	4	15,807	11.4%	15.7%
Florists	3	2,815	8.6%	2.8%
Other Retail	4	3,811	11.4%	3.8%
Total Retail	**35**	**100,749**	**100.0%**	**100.0%**

1/ Not including vacant space
Source: Hyde Park Main Streets and Karl F. Seidman Consulting Services.

Outside of retail stores, the largest business niches (subsectors of those presented in Table III-1) are: restaurants (19, 11 of which are limited service), medical services (17), hair care (9), auto supplies and services (9), legal services (8) and community and civic organizations (8).

Space Analysis

Since businesses occupy different size spaces based on use, the mix of uses by square footage is an important consideration in assessing Hyde Park's business mix and niches. (The following discussion refers to Table III-1 and Table III-2.) When measured by occupied space, retail remains Hyde Park's largest sector with 100,749 square feet or 23.5 percent of all occupied space. However, arts/entertainment and other services account for the second largest amount of occupied space, at 62,281 square feet or 14.5 percent. This is due to the large spaces occupied by Theater Works, the Hyde Park YMCA and two fitness and recreation businesses on Hyde Park Avenue. Other major uses measured by occupied space (each with over 50,000 square feet) are: professional services, government and civic organizations, and auto supplies and services. Although restaurants and bars are the second largest by number, they occupy relatively small spaces and thus account for 36,258 square feet, which is the sixth largest of the nine sectors in Table III-1. Vacancies (or unoccupied space) total 33,186 square feet or 7.2 percent of all space.

Business Concentration and Specialization

Based on the above summary of the business mix in Cleary and Logan Squares, Hyde Park has the following business concentrations and specializations:

- **A convenience center.** First, Hyde Park is heavily orientated to convenience-related businesses with many convenience stores, fast-food restaurants and personal services. Fifty businesses, or 28 percent of the total, can be considered convenience businesses, including convenience stores, beer/wine/liquor stores, hardware stores, pharmacies, banks/check cashing, fast food, hair/nail salons, and dry cleaning/laundry.
  - Convenience food is the largest component of this convenience niche with over 20 convenience grocery stores, limited-services restaurants and drinking places.
- **A multi-faceted service center.** Cleary and Logan Squares have many financial, legal and medical offices and a smaller number of real estate and educations services (55 in total for these five uses).
- **Medical supplies and services is a large niche** when the 17 health care offices and 4 retail medical businesses (pharmacies, optical stores and medical supplies) are combined.

Comparison with Other Centers

To better understand the Hyde Park Main Street district's unique niches, competitive position and opportunities, its business mix was compared to six other nearby commercial areas. Data in **Table III-3** compare Hyde Park to these six areas by major business sector.

Table III-3
Comparison of Business Mix by Sector, Hyde Park and Competing Districts

Sector	Roslindale	West Roxbury	Dedham Square	Dedham-Route 1	E. Milton Center	Mattapan	Hyde Park Main Streets
Manuf/Wholesale/Auto	7	5	6	5	3	6	13
Retail	40	33	20	48	14	36	35
Restaurants and Bars	19	22	14	13	9	9	26
Financial Services & RE	6	15	12	6	8	15	16
Medical Services	5	21	3	0	11	10	17
Legal, Professional & Other Services	19	27	12	9	6	9	25
Personal Services	25	29	13	9	12	13	21
Art and Entertainment	1	2	0	1	0	0	3
Religious/Govt/Comm Org	12	7	9	0	2	6	15
Other	0	2	2	1	0	2	7
Total Occupied	**134**	**163**	**91**	**92**	**65**	**106**	**178**
Vacant	9	12	2	10	2	3	32
Total Vacant & Occupied	**143**	**175**	**93**	**102**	**67**	**109**	**210**

Note: Hyde Park Main Streets figures may include second floor businesses whereas competing districts include storefronts only.
Source: Hyde Park Main Streets; Karl F. Seidman Consulting Services; and ConsultEcon, Inc.

Several observations about the comparative size and overall business mix emerge from this comparative data:

- Hyde Park and West Roxbury have the largest number of business with 178 and 163, respectively. Both districts have a good number of businesses (15 of more) in many sectors.
- East Milton Square is the smallest commercial center and has the fewest number of businesses in most sectors.
- Mattapan has a relatively low share of restaurants and medical, legal and professional services
- Dedham Route 1 has the highest retail concentration with 48 businesses and is the most significant retail destination among the seven areas with its many large big box chain stores.
- Roslindale Village has the second larger number of retail stores and personal service businesses even though its total number of businesses is less than Hyde Park.
- Most districts (except Route 1) are similar in their sector mix with a good-size core of retail stores, restaurants/bars, personal services and financial services. However, they appear to differ more in their retail mix and clientele served. Roslindale has more specialty and boutique stores and Mattapan Square is more oriented to price conscious and Black consumers.
- Hyde Park has the highest number of businesses among the seven districts in five sectors: (1) restaurants/bars; (2) religious/government/civic organizations; (3) financial services and real estate; (4) auto/wholesale/industrial; and (5) art and entertainment.
- Hyde Park has the second highest number of enterprises in two sectors: (1) medical services and (2) legal, professional and other services.
- Other than the large 15-screen Showcase Cinema complex at the Legacy Place on Route 1 in Dedham, no district has a large presence of arts and entertainment uses. Most areas have 2 or less entertainment uses while Hyde Park has three.

Given the importance of retail stores to both Hyde Park and other commercial areas, the retail mix in each district was analyzed separately and summarized in **Table III-4**.

Table III-4
Comparison of Retail Mix by Sector, Hyde Park and Competing Districts

Sector	Roslindale	West Roxbury	Dedham Square	Dedham-Route 1	E. Milton Center	Mattapan	Hyde Park Main Streets
Grocery/Food	15	4	2	2	1	6	11
Beer/Wine/Liquor	2	2	1	4	1	3	2
Home Furnishings/Improvement	4	6	2	10	2	4	3
Clothing/Jewelry/Accessories	6	7	6	11	3	13	4
Pharmacy/Medical/Cosmetics	2	6	2	3	1	3	4
General Merchandise/Discount	3	1	0	3	0	3	4
Florists	2	2	2	0	1	0	3
Sporting Goods	0	0	1	3	1	0	0
Gift/Souvenir/Novelty	2	2	3	1	2	1	0
Office supply/stationary	1	0	0	1	0	0	0
Book Stores	1	1	0	0	0	0	0
Hobby, toy, game	0	1	1	4	2	0	0
Other Retail	2	1	0	6	0	3	4
Total Retail	**40**	**33**	**20**	**48**	**14**	**36**	**35**

Note: Hyde Park Main Streets figures may include second floor businesses whereas competing districts include storefronts only.
Source: Hyde Park Main Streets; Karl F. Seidman Consulting Services; and ConsultEcon, Inc.

Key points from this comparison of the retail store mix are:

- Dedham –Route 1 is the largest retail destination with many national chains and large stores, and is especially strong for clothing and home furnishings. It also has a Sears department store and two large format supermarkets to attract customers. The opening of the Legacy Place with another 80 retailers will only strengthen Dedham as a retail center, particularly for high income shoppers.
- Two other districts have some retail concentrations, albeit much smaller than those found on Route 1. Roslindale has a specialty food cluster with bakeries and ethnic markets, while Mattapan has a concentration of clothing stores. Mattapan and Roslindale Village also have the largest share of their businesses in retail, which may heighten their identity as shopping destinations.
- Hyde Park does not have a strong retail niche relative to other districts, except in discount stores. None of the discount stores, however, are particularly large, unique or destination stores. (Stores largely offer general merchandise.) Although it ranks second in food and grocery stores, these are primarily convenience stores.
- Clearly and Logan Squares, with 35 retailers, have a comparable number of retail stores to West Roxbury and Mattapan Square at 33 and 36, respectively, but less than Dedham-Route 1 and Roslindale.

Implications for Strategies

Several implications for Hyde Park Main Streets future strategies emerge from this business mix analysis:

- Because Hyde Park has a slightly higher number of existing arts and entertainment uses, arts and entertainment present a promising opportunity for Hyde Park. The lack of strong clusters in other districts coupled with the new Arts Initiative and the potential reuse of the historic Everett Square Theater further enhance the neighborhood's strategic advantages in this area.
- Restaurants are another opportunity area for Hyde Park since it already has a good base in this sector. However, it needs to diversify beyond its heavy convenience and fast food orientation to offer more varied restaurants, such as more full-service and ethnic establishments.
- Milton and Mattapan appear to be good markets to attract more customers to Hyde Park given their proximity to Hyde Park and the more limited number of businesses and competition from these areas.

Section IV

CUSTOMER BASE ANALYSIS

This section presents an analysis of Cleary and Logan Squares' customer base, including trade area definition, demographic and income characteristics, and consumer spending potential by product category.

Trade Area Definition

The trade area for Cleary and Logan Squares is comprised of a primary trade area and a secondary trade area. The Primary Trade Area is defined as census tracts that comprise Hyde Park and West Milton. The Secondary Trade Area is defined as census tracts that comprise Dedham, East Milton and West Roxbury.[3] The trade area was defined based on telephone interviews with a mix of businesses, analysis of competing shopping areas (in Section III), and shopping and travel patterns. Nine total businesses interviewed included one full-service and two limited-service restaurants, one hardware store, one bank, one hair salon, one barbershop, and two discount stores. Businesses identified the proportion of customers from areas by neighborhood and town names, which largely reflect zip code areas. Few businesses cited credit card reports. Most businesses reported having customers from Hyde Park. Milton received the most weight of other neighborhoods and towns mentioned, followed by Dedham and West Roxbury, hence their inclusion in the Secondary Trade Area. West Milton is included in the Primary Trade Area largely because residents in Milton have few local shopping areas, and must go to Hyde Park or other surrounding areas to shop. Mattapan was mentioned more than Roslindale, but neither was mentioned as frequently as Milton, Dedham and West Roxbury. At the opposite end of the spectrum, Mattapan and Roslindale shoppers are oriented locally and more towards downtown shopping centers than people living in West Roxbury, Dedham and Milton who are more oriented towards closer suburban shopping centers including Route 1 in Dedham and the South Shore Mall.

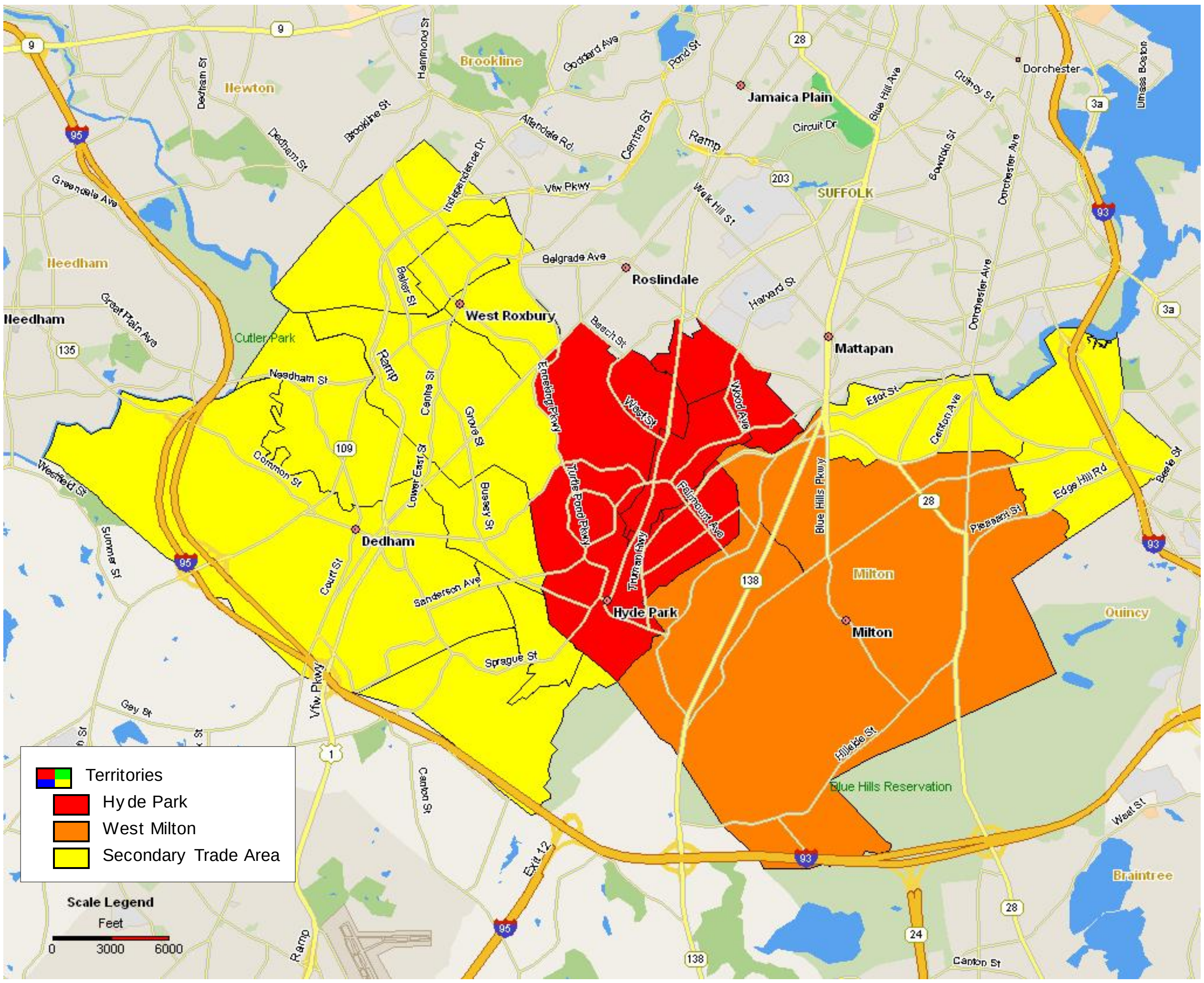
[3] Census tracts are used in this trade area definition for Boston neighborhoods. Census tract boundaries are approximate to the BRA's planning areas and U.S. zip code boundaries.

The trade area for Cleary and Logan Squares is defined as follows:

- **Primary Trade Area –** Hyde Park census tracts: 1401.02, 1401.0, 1401.04, 1402.01, 1402.02, 1403.00, and 1404.00. Milton census tracts: 4161.00 and 4162.00.
- **Secondary Trade Area –** West Roxbury census tracts: 1301.00, 1302.00, 1303.00, 1304.01, and 1304.02. Milton census tracts: 4163.00 and 4164.00. Dedham census tracts: 4021.01, 4021.02, 4022.00, 4023.00, 4024.00, and 4025.00.

Figure IV-1 is a map of the trade area for Cleary and Logan Squares.

Figure IV-1
Map of Cleary and Logan Squares Trade Area



Note: Most of West Milton population clustered towards Hyde Park.
Source: ESRI; TeleAtlas; and ConsultEcon, Inc.

Population

The population in the trade area has been stable in this historic urban and suburban area. Data in **Table IV-1** present population trends and projections. In 2008, an estimated 49,300 residents lived in the Primary Trade Area, and 59,300 residents lived in the Secondary Trade Area. The primary trade area accounts for 45 percent of the population.

Table IV-1
Trade Area Population

Population	2000 Census	2008 Estimate	2013 Estimate	Change, 2000-2008	Change, 2008-2013	Percent Change, 2000-2008	Percent Change, 2008-2013
Primary-Hyde Park	34,420	33,749	33,119	-671	-630	-1.9%	-1.9%
Primary-West Milton	15,267	15,564	15,740	297	176	1.9%	1.1%
Total Primary	**49,687**	**49,313**	**48,859**	**-1,036**	**-892**	-0.8%	-0.9%
Total Secondary	60,367	59,331	58,439	-1,036	-892	-1.7%	-1.5%
Total Trade Area	**110,054**	**108,644**	**107,298**	**-1,410**	**-1,346**	**-1.3%**	**-0.3%**
	2000 Census	**2007 ACS**		**Change 2000-2007**		**Percent Change, 2000-2007**	
City of Boston	***589,141***	***600,980***		**11,839**		***2.0%***	
Commonwealth	***6,349,097***	***6,437,759***		**88,662**		***1.4%***	

Source: Claritas, Inc. 2008 Estimates (trade area data); US Census Bureau, 2005-2007 American Community Survey 3-Year Estimates (Boston and MA data); and ConsultEcon, Inc.

Age Profile

Data in **Table IV-2** present a trade area age profile. Children and Young Adults under the age of 25 make up 36 percent of the primary trade area population and 30 percent of the secondary trade area. Seniors represent 15 percent of the primary trade area population and 17 percent of the secondary trade area.

Table IV-2
Trade Area Age Profile

Category	Under 18	18 to 24	25 to 34	35 to 44	45 to 59	60 and up	Median Age
Primary-Hyde Park	26.0%	9.2%	12.1%	14.8%	20.6%	17.3%	36.9
Primary-West Milton	23.8%	13.2%	8.1%	10.9%	23.7%	20.2%	40.0
Total Primary	**25.3%**	**10.4%**	**10.9%**	**13.6%**	**21.6%**	**18.2%**	**NC**
Total Secondary	**22.7%**	**7.2%**	**9.7%**	**15.5%**	**22.5%**	**22.4%**	**41.8**
Total Trade Area	**23.9%**	**8.7%**	**10.2%**	**14.6%**	**22.1%**	**20.5%**	**NC**
City of Boston	***19.0%***	***14.6%***	***19.6%***	***16.0%***	***16.7%***	***14.1%***	***33.2***
Commonwealth	***22.5%***	***9.9%***	***12.8%***	***15.4%***	***21.4%***	***18.0%***	***38.3***

Source: Claritas, Inc. 2008 Estimates (trade area data); US Census Bureau, 2005-2007 American Community Survey 3-Year Estimates (Boston and MA data); and ConsultEcon, Inc.

Race and Ethnicity Profile

Hyde Park has a dynamic history of demographic change driven by an influx of Italian and Irish immigrants in the late 19th and early 20th centuries and an influx of Latino, African and Caribbean populations in recent decades through today. Data in **Table IV-3** show a profile of trade area race and ethnicity estimates. The primary trade area has a large and diverse minority population, with old and new immigrant groups from different national origins, often with linguistic differences, including African American, African, and Afro-Caribbean and Hispanic and Latino groups. Over 10 percent of primary trade area residents and 4 percent of secondary trade area residents identify with some other race or more than two races.

Table IV-3
Trade Area Race and Ethnicity Profile

Category	White Alone	Black or African American Alone	American Indian and Alaska Native Alone	Asian Alone	Native Hawaiian and Other Pacific Islander Alone	Some Other Race Alone	Two or More Races	Percent Hispanic or Latino of Any Race
Primary-Hyde Park	41.8%	42.0%	0.3%	1.8%	0.1%	9.4%	4.6%	18.0%
Primary-West Milto	72.3%	21.3%	0.1%	3.0%	0.0%	1.1%	2.2%	3.4%
Total Primary	**51.4%**	**35.4%**	**0.2%**	**2.2%**	**0.1%**	**6.8%**	**3.9%**	**13.4%**
Total Secondary	**86.6%**	**6.1%**	**0.2%**	**3.4%**	**0.1%**	**1.8%**	**1.9%**	**4.5%**
Total Trade Area	**70.6%**	**19.4%**	**0.2%**	**2.9%**	**0.1%**	**4.0%**	**2.8%**	**8.5%**
City of Boston	***56.3%***	***23.5%***	***0.4%***	***8.3%***	***0.1%***	***8.9%***	***2.6%***	***15.6%***
Commonwealth	***83.0%***	***6.0%***	***0.2%***	***4.7%***	***0.0%***	***4.3%***	***1.7%***	***8.0%***

Source: Claritas, Inc. 2008 Estimates (trade area data); US Census Bureau, 2005-2007 American Community Survey 3-Year Estimates (Boston and MA data); and ConsultEcon, Inc.

Households Characteristics

Data in **Table IV-4** present household and income characteristics. There are 17,500 households in the primary trade area and 23,500 households in the secondary trade area for a total of 41,000 households in the trade area. Trade area household income totaled an estimated $3.4 billion in 2008. The primary trade area accounts for 41 percent of all households. Average household size in the total trade area is greater than the average household size in Boston and the Commonwealth of Massachusetts.

Table IV-4
Trade Area Household Characteristics

Population	Number of Households	Average Household Size	Average Household Income	Aggregate Trade Area Household Income	Percent of Trade Area Household Income
Primary-Hyde Park	12,216	2.76	$61,670	$753,360,720	21.1%
Primary-West Milton	5,280	2.95	$121,342	$640,685,760	17.9%
Total Primary	**17,496**	**2.82**	**$79,678**	**$1,394,046,480**	**39.0%**
Total Secondary	**23,456**	**2.53**	**$93,126**	**$2,184,363,456**	**61.0%**
Total Trade Area	**40,952**	**2.65**	**$87,381**	**$3,578,409,936**	**100.0%**
City of Boston	**232,099**	**2.43**	**$72,118**	**NC**	
Commonwealth	**2,448,608**	**2.54**	**$81,630**	**NC**	

NC = Not calculated.

Source: Claritas, Inc. 2008 Estimates (trade area data); US Census Bureau, 2005-2007 American Community Survey 3-Year Estimates (Boston and MA data); and ConsultEcon, Inc.

Income Profile

Data in **Table IV-5** present household income profile. About 59 percent of households in the primary trade area earned more than $50,000 annually compared to 66 percent in the secondary trade area. For comparison, 29 percent of Boston households and 59 percent of state households earned more than $50,000 annually. Higher (+17%) average and median (+14%) household incomes occur in the secondary trade area relative to the primary trade area.

Table IV-5
Trade Area Household Income Profile

Category	Under $25,000	$25,000 to $34,999	$35,000 to $49,999	$50,000 to $74,999	$75,000 to $99,999	$100,000 and up	Average Household Income	Median Household Income
Primary-Hyde Park	25.8%	8.7%	13.0%	21.3%	13.3%	18.0%	$61,670	$52,532
Primary-West Milton	12.2%	5.9%	7.2%	17.0%	12.6%	45.1%	$121,342	$90,338
Total Primary	**21.7%**	**7.8%**	**11.3%**	**20.0%**	**13.1%**	**26.2%**	**$79,678**	**$63,941**
Total Secondary	**14.7%**	**7.3%**	**11.8%**	**17.8%**	**14.8%**	**33.5%**	**$93,126**	**$72,682**
Total Trade Area	**17.7%**	**7.5%**	**11.6%**	**18.7%**	**14.1%**	**30.4%**	**$87,381**	**$68,948**
City of Boston	***30.6%***	***8.7%***	***11.5%***	***16.3%***	***11.1%***	***21.7%***	***$72,118***	***$48,729***
Commonwealth	***20.9%***	***8.3%***	***11.8%***	***17.8%***	***13.8%***	***27.5%***	***$81,630***	***$61,785***

Note: City of Boston and Commonwealth income estimates not adjusted for inflation.
Source: Claritas, Inc. 2008 Estimates (trade area data); US Census Bureau, 2005-2007 American Community Survey 3-Year Estimates (Boston and MA data); and ConsultEcon, Inc.

Local Employment Market

Hyde Park business workers are a market segment for businesses in Cleary and Logan Squares. In 2006, there were an estimated 3,667 employees in 385 establishments in Hyde Park.[4] Annual average payroll per employee was estimated at $41,490 in the same year. Employee spending is considered a subset of trade area household spending because many employees in Hyde Park would live within trade area.

Curry College Market

Students and staff at Curry College in Milton are a market segment that probably accounts for a portion of spending at restaurants that deliver, among others. Curry College has over 2,000 undergraduate students, 1,640 continuing educations students and 450 graduate students.[5] Like Hyde Park employees, student and staff spending is considered a subset of trade area resident spending. Nonetheless, Curry College represents a discrete and accessible target market opportunity.

[4] Data is from US Census Bureau County Business Patterns. Hyde Park is defined as 02136 zip code, which is approximately the same area as the census tract and planning district definitions of Hyde Park.
[5] Retrieved from http://www.curry.edu/About+Us/Fast+Facts.htm

Consumer Spending Potential

Data in **Table IV-6** presents aggregate consumer expenditures, a product of households, aggregate household income, and shares of consumer expenditures derived from the Consumer Expenditure Survey in 2007. Total consumer spending potential is an estimated $1.6 billion. Primary trade area spending potential is $618 million or 39 percent of total. Secondary trade area spending potential is $969 million or 61 percent of total.

Table IV-6
Aggregate Consumer Expenditure Potential in Cleary and Logan Square Trade Area

	Area Spending Potential	Percent of Total
Hyde Park	$334,212,045	21.1%
West Milton	$284,226,257	17.9%
Primary Trade Area	**$618,438,302**	**39.0%**
Secondary Trade Area	**$969,045,184**	**61.0%**
Total	**$1,587,483,486**	**100.0%**

Note: Estimates not adjusted for inflation.
Source: Claritas, Inc.; US Census Bureau 2007 Consumer Expenditure Survey; and ConsultEcon, Inc.

Spending Categories

Data in **Table IV-7** present consumer expenditures in selected spending categories. Categories and subcategories of consumer spending that are important for Cleary and Logan Squares include: Food Away from Home ($145 million), Entertainment ($145 million), Household Supplies ($132 million), Clothing, Shoes and Accessories ($108 million), and Personal Care Products and Services ($32 million).

Following are top spending categories from data in Table IV-7 ranked by percentage of total spending (not including all housing expenses):

1.	Transportation	35 percent	or	$549 million
2.	Food and Beverage	23 percent	or	$357 million
3.	Entertainment	9 percent	or	$145 million
4.	Health Care	9 percent	or	$135 million
5.	Household Supplies and Furnishings	8 percent	or	$132 million
6.	Clothes, Shoes and Accessories	7 percent	or	$108 million
7.	Education	4 percent	or	$61 million
8.	Personal Care Products and Services	2 percent	or	$32 million
9.	Tobacco products and smoking supplies	1 percent	or	$18 million
10.	Reading	<1 percent	or	$8 million

Table IV-7
Trade Area Consumer Spending Potential in Selected Spending Categories

Category	Hyde Park	West Milton	Primary Trade Area	Secondary Trade Area	Total Trade Area	Percent to Total
Food and Beverages						
Food at home	$38,926,528	$33,104,556	$72,031,083	$112,867,159	$184,898,243	11.6%
Food away from home	$30,585,129	$26,010,722	$56,595,851	$88,681,340	$145,277,191	9.2%
Alcoholic beverages	$5,560,933	$4,729,222	$10,290,155	$16,123,880	$26,414,035	1.7%
Subtotal	**$75,072,589**	**$63,844,500**	**$138,917,090**	**$217,672,379**	**$356,589,469**	**22.5%**
Household Supplies						
Laundry and cleaning supplies	$1,112,187	$945,844	$2,058,031	$3,224,776	$5,282,807	0.3%
Other household products	$3,336,560	$2,837,533	$6,174,093	$9,674,328	$15,848,421	1.0%
Postage and stationery	$1,668,280	$1,418,767	$3,087,046	$4,837,164	$7,924,210	0.5%
Household textiles	$1,668,280	$1,418,767	$3,087,046	$4,837,164	$7,924,210	0.5%
Furniture	$6,117,026	$5,202,144	$11,319,170	$17,736,268	$29,055,438	1.8%
Floor coverings	$556,093	$472,922	$1,029,015	$1,612,388	$2,641,403	0.2%
Major appliances	$2,780,466	$2,364,611	$5,145,077	$8,061,940	$13,207,017	0.8%
Small appliances, miscellaneous housewares	$1,112,187	$945,844	$2,058,031	$3,224,776	$5,282,807	0.3%
Miscellaneous household equipment	$9,453,585	$8,039,678	$17,493,263	$27,410,596	$44,903,859	2.8%
Subtotal	**$27,804,663**	**$23,646,111**	**$51,450,774**	**$80,619,400**	**$132,070,174**	**8.3%**
Clothes, Shoes and Accessories						
Men and boys	$5,004,839	$4,256,300	$9,261,139	$14,511,492	$23,772,631	1.5%
Women and girls	$8,897,492	$7,566,756	$16,464,248	$25,798,208	$42,262,456	2.7%
Children under 2	$1,112,187	$945,844	$2,058,031	$3,224,776	$5,282,807	0.3%
Footwear	$3,892,653	$3,310,456	$7,203,108	$11,286,716	$18,489,824	1.2%
Other apparel products and services	$3,892,653	$3,310,456	$7,203,108	$11,286,716	$18,489,824	1.2%
Subtotal	**$22,799,823**	**$19,389,811**	**$42,189,635**	**$66,107,908**	**$108,297,542**	**6.8%**
Transportation						
Vehicle purchases (net outlay)	$27,248,569	$23,173,189	$50,421,758	$79,007,012	$129,428,770	8.2%
Gasoline and motor oil	$22,243,730	$18,916,889	$41,160,619	$64,495,520	$105,656,139	6.7%
Other vehicle expenses	$28,916,849	$24,591,956	$53,508,805	$83,844,176	$137,352,980	8.7%
Vehicle finance charges	$2,780,466	$2,364,611	$5,145,077	$8,061,940	$13,207,017	0.8%
Maintenance and repairs	$7,785,306	$6,620,911	$14,406,217	$22,573,432	$36,979,649	2.3%
Vehicle insurance	$11,677,958	$9,931,367	$21,609,325	$33,860,148	$55,469,473	3.5%
Vehicle rental, leases, licenses, other charges	$6,673,119	$5,675,067	$12,348,186	$19,348,656	$31,696,842	2.0%
Public transportation	$8,341,399	$7,093,833	$15,435,232	$24,185,820	$39,621,052	2.5%
Subtotal	**$115,667,397**	**$98,367,823**	**$214,035,219**	**$335,376,703**	**$549,411,922**	**34.6%**
Health Care						
Health insurance	$16,682,798	$14,187,667	$30,870,464	$48,371,640	$79,242,104	5.0%
Medical services	$6,117,026	$5,202,144	$11,319,170	$17,736,268	$29,055,438	1.8%
Drugs	$4,448,746	$3,783,378	$8,232,124	$12,899,104	$21,131,228	1.3%
Medical supplies	$1,112,187	$945,844	$2,058,031	$3,224,776	$5,282,807	0.3%
Subtotal	**$28,360,756**	**$24,119,033**	**$52,479,789**	**$82,231,788**	**$134,711,577**	**8.5%**
Entertainment						
Fees and admissions	$8,897,492	$7,566,756	$16,464,248	$25,798,208	$42,262,456	2.7%
Television, radios, sound equipment	$11,121,865	$9,458,445	$20,580,310	$32,247,760	$52,828,069	3.3%
Pets, toys, and playground equipment	$6,117,026	$5,202,144	$11,319,170	$17,736,268	$29,055,438	1.8%
Other entertainment supplies, equipment,and services	$4,448,746	$3,783,378	$8,232,124	$12,899,104	$21,131,228	1.3%
Subtotal	**$30,585,129**	**$26,010,722**	**$56,595,851**	**$88,681,340**	**$145,277,191**	**9.2%**
Personal care products and services	$6,673,119	$5,675,067	$12,348,186	$19,348,656	$31,696,842	2.0%
Reading	$1,668,280	$1,418,767	$3,087,046	$4,837,164	$7,924,210	0.5%
Education	$12,790,145	$10,877,211	$23,667,356	$37,084,924	$60,752,280	3.8%
Tobacco products and smoking supplies	$3,892,653	$3,310,456	$7,203,108	$11,286,716	$18,489,824	1.2%
Miscellaneous	$8,897,492	$7,566,756	$16,464,248	$25,798,208	$42,262,456	2.7%
Total	**$334,212,045**	**$284,226,257**	**$618,438,302**	**$969,045,184**	**$1,587,483,486**	**100.0%**
Percent to Total	**21.1%**	**17.9%**	**39.0%**	**61.0%**	**100.0%**	

Note: Estimates not adjusted for inflation.

Source: Claritas, Inc.; US Census Bureau 2007 Consumer Expenditure Survey; and ConsultEcon, Inc.

Trade Area Findings

Following is a summary of findings based on customer base analysis.

- The trade area for Cleary and Logan Squares contains a young and culturally diverse population base, especially in primary market area, as well as a significant senior population throughout primary and secondary trade areas.
- The trade area population (108,600) and households (41,000) totals have been stable over time, if slightly decreasing. The primary trade area accounts for 45 percent of the population and 41 percent of all households of the overall trade area.
- There is considerable economic diversity in the trade area, from low-income to high-income households. The greatest income disparity is in the primary trade area—this disparity is less pronounced in the secondary trade area. Higher (+17%) average and median (+14%) household incomes occur in secondary trade area relative to the primary trade area.
- About 59 percent of households in the primary trade area earned more than $50,000 annually compared to 66 percent in the secondary trade area. For comparison, 29 percent of Boston households and 59 percent of state households earned more than $50,000 annually.
- Total consumer spending potential is an estimated $1.6 billion. Primary trade area spending potential is $618 million or 39 percent of total. Secondary trade area spending potential is $969 million or 61 percent of total.
- Categories of consumer spending that are important for Cleary and Logan Squares include Food Away from Home ($145 million), Entertainment ($145 million), Household Supplies ($132 million), Clothing and Accessories ($108 million), and Personal Care Products and Services ($32 million).

Implications for Strategy Development

Several implications for Hyde Park Main Streets future strategies emerge from this customer market analysis:

- Cleary and Logan Squares' customer base is generationally, culturally and economically diverse and presents a peculiar challenge to developing a cohesive business mix that adequately meets the needs of multiple market segments.
- Customer base is multi-generational, with larger numbers of young and old residents, which indicates the need for a universally accessible district.
- Greatest spending potential in district would meet existing demand by all trade area households, from low-income to high-income, from young to old, and from long-term residents to new immigrant residents.
- There is a potential for the district to capture an increased share of spending by secondary trade area households, which have greater per household spending than primary trade area households.

Section V

SUMMARY OF CUSTOMER SURVEY

A combined web and intercept survey of area residents and shoppers was conducted in January 2009 to better understand residents' current use and perceptions of Cleary and Logan Squares and to identify changes that are most likely to expand shopping among area residents. The survey results indicate that Cleary and Logan Squares is a frequent shopping and dining destination. Its greatest strengths are in convenience goods and services, including fast food, hardware, discount stores and personal care services. It faces the strongest competition in most categories from Dedham. This section summarizes the survey results in three categories: resident shopping patterns, evaluation of Cleary and Logan Squares, and options to improve the district and attract more shopping and commercial activity.

Survey Methodology

A total of 253 surveys were obtained; 203 through the web and 50 from the intercept component. Survey respondents were primarily Hyde Park residents (74%) and homeowners (74%). Respondents were also weighted toward women (56%), higher income households (58% had incomes of $75,000+) and people over 45 years old (65%). When interpreting results, it is important to recognize that the survey was not fully representative of Hyde Park residents or the overall trade area population and thus may not be indicative of the behavior and preferences of the entire customer base.

Resident Shopping Patterns

Most respondents visit Cleary and Logan Squares regularly, primarily to bank, go to the Post Office, shop or dine. Seventy-three percent of respondents had visited the district within the past week and 91 percent had visited within three months. Only 4 percent had never or rarely visited Cleary and Logan Squares. Almost two-thirds (65%) of respondents come to Cleary and Logan Squares at least several times per month to purchase goods or services with 30 percent coming at least several times per week. The most common reasons for trips to Cleary and Logan Squares include:

- 60% come to bank
- 53% come to use the post office

- 43% for shopping
- 43% to dine
- 36% to visit the library

In terms of when residents shop, Saturday is the most common shopping day (48%) followed by Friday (10%). Tuesday is the least popular shopping day; only 4 percent of respondents indicating that they are most likely to shop then. The most common time of day for shopping is the afternoon (34%) followed by morning (30%) and after work (15%). Less than 5 percent of respondents cited evening at the most likely time to shop, although 64 percent indicated a preference for district stores to expand their evening hours (6 PM to 9 PM).

Residents were surveyed on their primary shopping destination for different goods and services. Data in **Table V-I** summarize these results. Several conclusions emerge from these results:

- **Cleary and Logan Squares is most competitive for fast food and personal care (hair/nail/beauty) services** for which it is the primary destination among respondents. Its strongest market share is for fast food takeout: 43 percent of respondents cite it as their primary dining destination compared to 19 percent for other areas in Hyde Park (the second ranked dining destination). Cleary and Logan squares is also the primary destination, by a large margin, for obtaining hair, nail and beauty services.
- **Cleary and Logan Squares is also a key destination for hardware/home improvements and discount stores.** Dedham and Cleary/Logan Squares are the main shopping locations for both of these categories. Both areas attract 33 percent of shoppers for hardware/home improvement goods while a slightly higher share of respondents (30% vs. 28%) cite Cleary and Logan Squares as their primary place to shop at discount stores.
- **Competition Varies by Category with Dedham the Most Common Competitor.** The primary destination differs considerably by type of good and service; and when Cleary/Logan Squares is the primary destination, the secondary destination varies considerably as well., "Other Hyde Park" locations is most common for groceries, the South Shore Mall for clothing, Dedham for sporting goods and gifts/crafts and other areas for medical services and dining. However, Dedham is the primary or secondary destination for six categories and, as noted above, is essentially tied with Cleary/Logan Squares in the two leading retail categories for Cleary/Logan Squares.
- **Patronage is most diffuse for dining out and other services.** Of these categories, no one area is the primary shopping destination for more than one-fifth of respondents.
- **Cleary and Logan Square** is the strongest destination for convenience-oriented goods and services rather than comparison shopping items.

Table V-1
Percent of Respondents Reporting Cleary and Logan Squares and Dedham as their Primary Shopping Destination

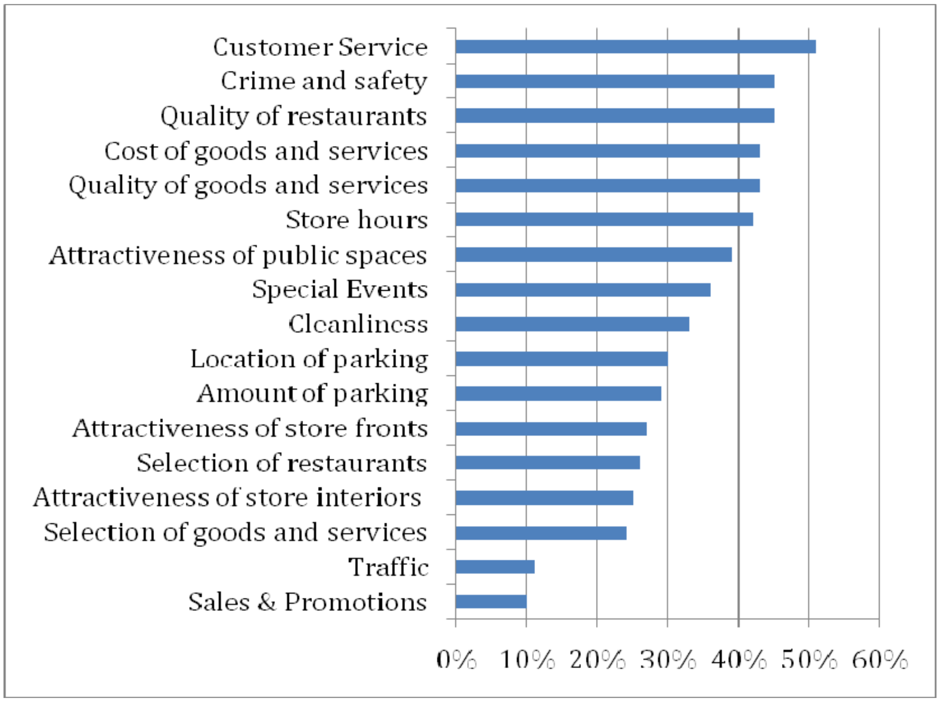
Product\Service	Cleary and Logan Squares is Primary Destination	Dedham is Primary Destination	Area with Largest Share
Groceries	18%	15%	Other Hyde Park (38%)
Clothing	3%	21%	South Shore Mall (36%)
Home Furnishings	3%	27%	Other (49%)
Hardware/Home Improvement	33%	33%	Dedham and Cleary/Logan Squares
Sporting Goods / Dance/ Hobby Supplies	3%	54%	Dedham
Books	7%	8%	Internet/Mail Order (32%)
Discount Stores	30%	28%	Cleary/Logan Squares
Gifts, Framing and Crafts	8%	35%	Dedham
Medical Services	17%	5%	Other (50%)
Hair/Nail/Beauty Services	36%	14%	Cleary/Logan Squares
Other Services	16%	16%	Other (43%)
Fast Food/Takeout	43%	10%	Cleary/Logan Squares
Dining Out	18%	21%	Other (37%)

Source: Karl F. Seidman Consulting Services and ConsultEcon, Inc.

User Evaluation of Cleary and Logan Squares

When asked to rate the district for 17 characteristics, respondents were most positive about the customer service, (lack of) crime and safety, and the quality of restaurants (see **Figure V-1**). They were least positive about traffic and sales/promotions. Overall, however, Cleary and Logan Squares received unenthusiastic ratings in almost all areas. Less than half of respondents rated the commercial district as good or excellent in 16 of 17 categories (customer service is the one exception with 51 percent rating it good or excellent). Beyond traffic and sales & promotions, other poorly perceived areas are selection of goods and services and of restaurants, parking and appearance. Over 70 percent of respondents rated the selection of restaurants as fair or poor while 73 percent view the selection of goods and services as fair or poor. Two-thirds rated Cleary and Logan Squares as fair or poor for the amount and location of parking. Traffic fared even worse: 87 percent of respondents reported traffic conditions to be fair or poor. Finally, store appearance and cleanliness in Cleary and Logan Squares is not viewed positively.

Figure V-1
Percent of Respondents Rating Logan & Cleary Squares as Good or Excellent



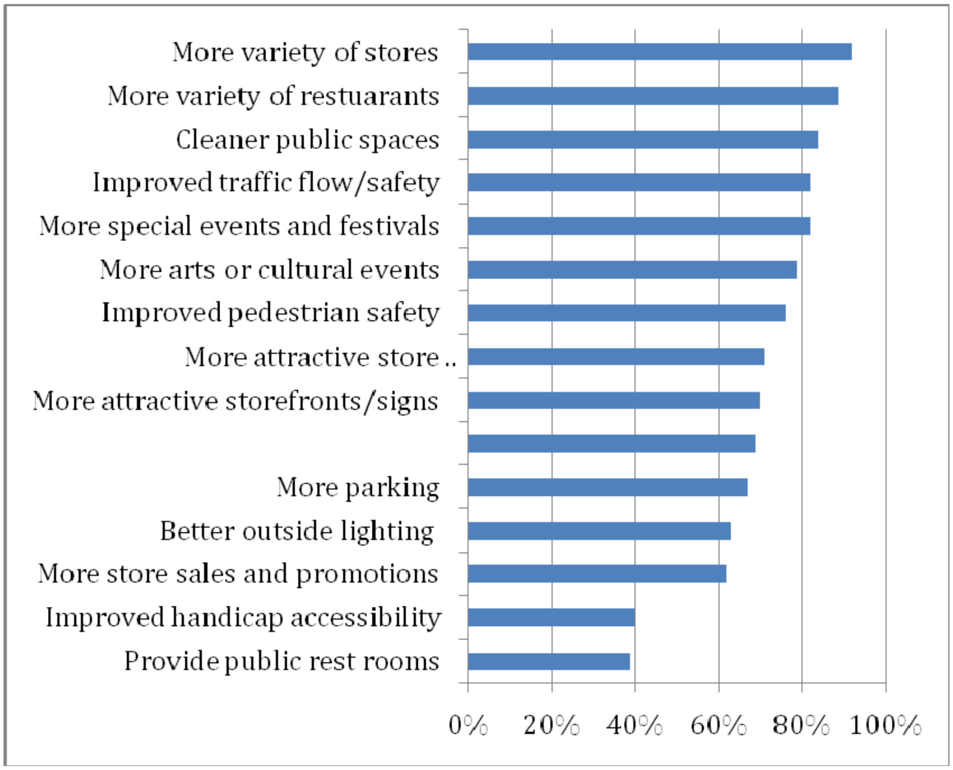
Source: Karl F. Seidman Consulting Services and ConsultEcon, Inc.

Improving District and Expanding Shopping

To improve the district and expand shopping, residents cited more diverse shopping and dining options, improved traffic and parking, expanded festivals, arts and cultural events, cleaner public spaces and better pedestrian safety as mostly likely to increase their shopping in Cleary and Logan Squares (see **Figure V-II**). Over 75 percent of respondents indicated that the following seven of the 14 improvements presented in the survey, would likely increase their visits and shopping:

- Greater variety of stores 92%
- Greater variety of restaurants 89%
- Cleaner public spaces 84%
- Special events or festivals 82%
- Improved traffic flow/safety 82%
- More arts or cultural events 79%
- Improved pedestrian safety 76%

Figure V-2
Percent of Respondents More Likely to Shop
in Cleary and Logan Squares for Each Improvement



Source: Karl F. Seidman Consulting Services and ConsultEcon, Inc.

The survey provided indications of the types of stores and businesses that the survey respondents were most interested in and that would attract them to the district. These include: Bakeries and other restaurants were cited by 58 percent and 53 percent of respondents, respectively, as the most likely to increase district shopping. In third place was specialty food store with 43 percent of those surveyed reporting that it would attract them to shop more often in the district. Following is a summary by store type:

- 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%

- Grocery Store 20%
- Other 20%
- Furniture or Home Furnishings 16%

Customers also were surveyed about what type of arts and entertainment events would attract them Cleary and Logan Squares. Arts and entertainment attractions were cited as having greater potential for attracting people to the district than new store types. Over 60 percent of respondents reported that they would come to the district more often for all arts and entertainment options in the survey. Arts and entertainment offerings that would attract the highest share of respondents to Cleary and Logan Squares are:

- Movies 91%
- Street festivals 78%
- Live theater and dance 76%
- Galleries and visual arts 74%

Section VI

SUMMARY OF INTERVIEWS

This section offers a summary of interviews that focuses on assets, challenges, opportunities and threats in the business district centered on Cleary and Logan Squares. Data in **Table VI-1** summarize the subsequent discussion of assets, challenges, opportunities, and threats in Hyde Park's historic neighborhood center. The analysis is based on 14 interviews with property and business owners and civic and community leaders, all of whom are listed in Appendix B.

Table VI-1
Cleary and Logan Squares Assets, Challenges, Opportunities and Threats

Assets	**Challenges**
♦ Transportation Infrastructure ♦ Sense of Place and Historic Character ♦ Hyde Park Arts Initiative ♦ Public and Community Uses ♦ Consumer and Business Service Center ♦ Ron's Bowling and Ice Cream ♦ Family Dollar ♦ Papa Gino's ♦ Hardware Store ♦ People and Politicians ♦ New Construction and Storefronts	♦ Misperceptions about Parking and Public Safety ♦ Traffic, Parking and the Pedestrian Management ♦ Image, Self-Esteem and Negativity ♦ Socio-Economic Diversity ♦ Lack of Business Sophistication ♦ Few Sit-Down Restaurants ♦ The Economy ♦ Product and Service Redundancy ♦ Lack of Store Cross-Over Appeal ♦ Inactive and Unwelcoming Storefronts ♦ Limitations of the Main Street Model
Opportunities	**Threats**
♦ Arts and Historic Preservation ♦ Food and Nightlife ♦ Proximity to Middle- and High-Income Customer Markets ♦ Transit-Oriented Development	♦ Persistent Negativity and Finger Pointing ♦ Not Embracing Diversity and Recruiting New Leaders ♦ The Economy ♦ New Retail Development ♦ Resource Constraints

Source: ConsultEcon, Inc. based in interviews with persons listed in Appendix B.

District Assets

Following is a review of district assets, which are not in any particular order.

- **Transportation Infrastructure –** Both Cleary and Logan Squares are served by MBTA commuter rail routes and there are a number of business routes through the district.

- **Sense of Place and Historic Character –** Hyde Park's historic urban fabric, architecture and public spaces contribute to the district's sense of place and authenticity of experience that is unique, especially to people from most suburban towns and outside of the Boston region. A number of interviewees described the district as a "village" or "urban village" rather than describing the district as a "town" to evoke the quality of the experience.
- **Hyde Park Arts Initiative** - Founded in 2004, the Arts Initiative is a partnership of artists, non-profits, businesses and individuals that organize and support several cultural events in Cleary and Logan Squares and promote the Hyde Park arts community.
- **Public and Community Uses –** Recent development of the library, one of the strongest branches in the Boston Public Library's System, the redevelopment of the Municipal Building , the planned YMCA redevelopment and police station.
- **Consumer and Business Service Center –** High usage of the district for business, professional, and personal services, with 3 banks, post office, library, community center, barbers and salons, cleaners and take-out food. Three grocery stores within 5 minute drive (but not pedestrian accessible). Strong primary trade area penetration in multiple market segments.
- **Ron's Bowling and Ice Cream –** This bowling alley, a true entertainment destination, draws a diverse customer base that penetrates the secondary trade area and beyond with its famous ice cream.
- **Family Dollar –** An anchor that draws a significant amount of customer traffic, this national discount chain has maintained sales strength in the down economy.
- **Papa Gino's –** Regional pizza chain at highly visible location at Hyde Park Avenue and River Street.
- **Hardware Store –** Long-term stable business that provides a neighborhood alternative to big box home improvement stores.
- **People and Public Servants –** There are many community organizations, political leaders and public servants that call Hyde Park home that form a foundation for neighborhood revitalization.
- **New Construction and Storefronts –** The district has a new building that extends the storefront toward the station on the south side of Fairmount Street, reportedly only the second new building built in the district in the past 50 years.
- **Commercial Affordability –** Storefront real estate rents in Hyde Park are among the lowest of any shopping district. A 2006 BRA report shows Hyde Park as having the lowest range among neighborhood business districts. Interviewees reported asking and current rents for storefronts ranged from $10 to $15, with a high of $18 at the 100-percent River Street and Hyde Park Avenue corner.
- **Neighborhood Amenities –** Hyde Park has a diverse and historic residential building stock, with a significant amount of open space and recreational opportunities.

District Challenges

Following is a review of district challenges, which are not in any particular order.

- **Misperceptions about Parking and Public Safety –** A majority of interviewees reported that in general Hyde Park customers, especially irregular shoppers, felt there was too little convenient parking and that the district was unsafe. Most people were quick to debunk these myths by pointing the 2001 MIT study's parking assessment and recent crime statistics, which indicated that Hyde Park was Boston's third safest neighborhood.
- **Traffic, Parking and the Pedestrian Management –** Vehicular and pedestrian congestion detract from the shopping experience. Hyde Park Avenue, a major commuter arterial, acts as a barrier that limits linkage between the Post Office, a major activity generator with a socio-economically diverse customer base, and the businesses on the east side of Hyde Park Avenue. One interviewee called crossing Hyde Park Avenue at River Street "taking your life into your hands."
- **Image, Self-Esteem and Negativity –** Few interviewees mentioned the Main Streets motto, "Small Town in the City," first; rather, indicating a generally negative perception of the district some described as "poor" and "down and out." Related to this is frustration associated with having missed the real estate boom that helped transform other neighborhood business districts, such as West Roxbury and Roslindale.
- **Socio-Economic Diversity –** Business owners and entrepreneurs are representative of neighborhood demographics, but have yet to be engaged in Main Streets or formal business development.
- **Lack of Business Sophistication –** Some businesses do not market extensively or at all, do not have a formal business plan, and have seemingly cluttered or disordered merchandising.
- **Few Sit-Down Restaurants –** Though Townsend's Restaurant reports initial success, especially with penetrating the secondary trade area, there are few sit-down restaurants in Cleary and Logan Squares. The building that housed Mario's restaurant has been vacant for a number of years and the restaurant planned for the space has yet to open. Interviewees indicated that there can be significant capital costs associated with starting a sit-down restaurant and a slow permitting process with the City.
- **The Economy –** Economic times are tight for businesses. Consumers, businesses and governments are reducing spending across the country. Reportedly, Hyde Park is no exception. Some stores have closed recently and some landlords report that tenant businesses are having difficulties.
- **Product and Service Redundancy –** Some stores offer too many of the same goods and services offered at other stores.
- **Lack of Store Cross-Over Appeal –** Some stores focus on a narrow a product mix that appeals to a narrow market segment.
- **Inactive and Unwelcoming Storefronts –** Hobby and limited-hour businesses, storefront clutter, professional services and other missing teeth can function as vacancies.
- **Limitations of the Main Street Model –** The Main Streets model does not typically focus on business recruitment and technical assistance.

District Opportunities

Following is a review of district opportunities, which are not in any particular order.

- **Arts and Historic Preservation –** The Hyde Park Arts Initiative plans to continue and expand its activities in the neighborhood, with a focus on regular and special events. Arts businesses focused on dance instruction draw customers from outside of the primary and secondary market trade areas. Historic Boston, Inc. has retained a theater consultant to study the feasibility of renovating and rehabilitating the Everett Square Theater.
- **Food and Nightlife –** The district can extend its hours, capture more spending and appeal to new market segments by adding more sit-down restaurants and additional evening entertainment uses, such as performing arts, live music and movies.
- **Proximity to Middle- and High-Income Customer Markets –** Some Hyde Park businesses already appeal to these markets, but there is potential to penetrate this market deeper, especially among Milton residents, who have few alternatives locally.
- **Transit-Oriented Development –** The proposed "Indigo Line" includes adding stations to the Fairmount Commuter Rail Line and more frequent service, thereby creating redevelopment opportunities adjacent to Fairmount Station, including the Chemical Lewis "brownfield" site. The district is a transportation hub, but reportedly sees limited shoppers from its commuter rail stations.

District Threats

Following is a review of district threats, which are not in any particular order.

- **Persistent Negativity and Finger Pointing –** Negativity about the business district in general and assignment of blame on stores and property owners creates a barrier to developing a positive and cohesive district image, hinders coordination and collaboration in the business community, and limits consumer market development.
- **Not Embracing Diversity and Recruiting New Leaders –** Hyde Park is a majority minority neighborhood, yet community organizations and business leaders are not representative of neighborhood demographics. Interviewees noted the commitment of a core group, but acknowledged the fact that the same people were always involved.
- **The Economy –** Persistent economic woes may create a difficult business environment.
- **New Retail Development –** Proposed and under construction retail developments, such as Legacy Place in Dedham, the Shops at Riverwood (former Bay State Paper Mill on River Street) and the redevelopment of the Truman Highway Shopping Center anchored by the Stop and Shop may capture a greater share of consumer spending at the expense of businesses in Cleary and Logan Squares.
- **Resource Constraints –** Like many non-profit groups, Hyde Park Main Streets faces an uncertain funding environment with limited capacity and resources that may be compounded by current economic conditions.

Section VII

RESEARCH SYNTHESIS AND STRATEGY AREAS

The research phase focused on current and past business conditions in Cleary and Logan Squares, including district business composition and customer market dynamics, district assets and challenges. This section highlights major findings and opportunities for strategy development. Cleary and Logan Squares have many assets but lack a strong and compelling identity to expand its business and customer base. A repositioning of district image based on market realities that debunk misperceptions and stronger organizational capacity to implement strategies that match the opportunities and community ambition are central to revitalizing the commercial district.

The following major findings are based on prior research including consumer demographic and spending data, customer survey results, business mix, comparison with competitive shopping areas, and interviews with local business and community informants.

- **Negative image due to traffic, appearance, and selection of goods, services and restaurants.** In the survey, a majority of customers rated the district fair or poor in all categories, with the exception of customer service. The interviews support this finding.
- **Diverse customer base and business mix.** According to demographic research, Hyde Park residents are "majority minority" and multi-generational, with children, young adults and seniors important district denizens. Minority groups are diverse, with noteworthy differences in language, nation of origin and household income levels. Area households are economically diverse from low-income to high-income, resulting in considerable variation in regular and discretionary consumer spending. The business mix and interviews indicate that Cleary and Logan Squares' business environment reflects this ethnic and economic diversity, which may pose a challenge to building a cohesive district identity.
- **Convenience orientation.** Business mix indicates that there are a large number of convenience food and personal service options. These goods and services are found in competitive districts as well, which does not necessarily help to differentiate the district, and are largely neighborhood-serving businesses with limited penetration in secondary trade area. Moreover, competing districts have a greater share of their business mix in retail stores than Cleary and Logan Squares, which heighten their identities as shopping destinations. Interviewees said that while many people shop regularly for convenience goods in Cleary and Logan Squares, there are too many of the same kinds of stores. Survey results indicate that more variety of stores would spur customers to shop more in the district.
- **Food, arts and entertainment.** Compared to competing districts, Cleary and Logan Squares has an existing base of food and activity-oriented destinations to build on. There are more entertainment options, such as Ron's Bowling and Riverside Theatre Works, in Cleary and Logan Squares than in other districts. No competing districts have a strong

presence as an arts and entertainment center, creating a market opportunity for Cleary and Logan Squares to fill. The new public library and Menino Arts Center, the imminent opening of the Municipal Building, and Arts Initiative programs and events give the district a more prominent profile in the arts than other districts.

- **Discount retail cluster.** Discount stores account for a good proportion of retail stores in Cleary and Logan Squares. The Family Dollar store reportedly draws a significant number of shoppers and is a district anchor. This discount orientation would make it an important and convenient shopping destination for low- and middle-income households that largely reside in Hyde Park. An expanded discount cluster can include stores that complement an arts-oriented identity, such as second hand goods, vintage clothing and antiques.

Following are recommended strategy areas based on the research and evaluation. Each strategy area is composed of action items with implementation steps, timeline and resources. These areas will be developed in the second phase of project (i.e. steering committee meetings, focus groups, public meeting, and final action plan document). These strategies are intended to reinforce each other to foster a stronger positive image and identity for Cleary and Logan Squares that build on key strengths and to improve capacity to implement effective strategies.

- **Public Realm –** Initiatives to enhance customer shopping experience, upgrade district appearance such as cleanliness and store window displays, and address traffic and parking issues.
- **Niche Development –** Strengthen discount cluster through new store recruitment, development and existing store product mix. Strengthen arts and entertainment niche by supporting expansion and increased programming at existing venues, attracting new uses and businesses and linking this niche to cultural diversity, food and nightlife.
- **Organization and Capacity –** Expand capacity to work pro-actively with entrepreneurs and enhance business development. Diversify business, resident and community partner base, including recruiting HPMS volunteers and leaders to better reflect neighborhood diversity.
- **Events and Programming –** Expand events and programming in the district, such as festivals, films series, and the like. Link events and programming to niche development, build stronger partnerships to implement this programming and capacity, and enhance the district shopping experience.

Section VIII
ACTION PLAN

The action plan sets an agenda for the commercial revitalization of Cleary and Logan Squares. Prior market analysis sections form the foundation for action plan recommendations. The Strategy areas and specific recommendations in this plan were refined through various participation forums during February and March 2009. Forums included a client and advisory group meetings, two focus groups, and a public meeting attended by more than 35 people. In addition, an Interim Final Draft Report was available for public comment period on the Boston Redevelopment Authority (BRA) website, through the Hyde Park Main Streets (HPMS) office, and the local branch public library. These various forums included presentation of market research findings that facilitated community input and discussion of potential strategies and activities for commercial district revitalization. Participant feedback from these forums was important to developing this action plan because many of these public and private stakeholders—Hyde Park participant residents, businesses, property owners and community organizations—will need to collaborate on implementing the recommendations contained herein.

Vision for District Revitalization

This action plan is driven by an improved community vision for Cleary and Logan Squares that encompasses a vibrant and economically successful residential, commercial and cultural center, which:

- Preserves its history and physical character
- Celebrates its unique cultural and urban diversity
- Offers an experience that is pleasurable, attractive and accessible for all district users
- Contains a diverse mix of stores that appeal to all Hyde Park residents and attract spending from adjacent Boston neighborhoods and Massachusetts towns
- Functions as a center for nighttime activity with restaurants, entertainment and regular outdoor, community-oriented events
- Enhances the economic environment for existing businesses and attracts new businesses
- Enhances property values and fosters real estate investment and re-investment

Key Recommendations for Action Plan

Based on this vision and the opportunities identified by the market analysis, the action plan focuses on realizing the following goals:

- Create a clean and safe shopping environment that is universally accessible and easy for pedestrians and vehicles to navigate to and through
- Increase consumer expenditures in the district by working with store owners to enhance product offerings in existing stores, provide effective and attractive public displays, and recruit new ground floor retail stores to attract more resident and visitor spending in more product categories
- Increase weekend and nighttime activity with a new weekly farmers and craft market, more seasonal events and festivals in public spaces, and new arts and entertainment uses and restaurants
- Strengthen the discount cluster by creatively linking it to arts and micro-enterprise through quality used goods or consignment stores, thrift and vintage stores, and used furniture and antique stores
- Create new economic opportunities for existing and prospective businesses through business development partnerships and greater community outreach

Strategy Areas and Detailed Recommendations

Action plan recommendations support and reinforce the vision for Cleary and Logan Squares' revitalization and are organized into four integrated and mutually supportive strategy areas: A) Niche Development, B) Public Realm, C) Events and Programming, and D) Organization and Capacity.

A) Niche Development Strategy

The Niche Development Strategy seeks to diversify the business mix in Cleary and Logan Squares and help build a new identity for the area as an unique urban arts, culture and entertainment district. Other supporting businesses to enhance this new niche include sit-down restaurants and vintage, antique and other quality used goods stores. Given the current economic environment, the niche development strategy will take time to implement and should be viewed as a medium to long-term strategy. It will be complemented through shorter term efforts to expand entertainment and shopping options under the events strategy detailed below. Key components of this strategy include:

1. Establishing a proactive business recruitment campaign to attract targeted business to Cleary and Logan Squares with a business recruitment team, recruitment materials, and direct

outreach to candidate stores. Target business types include sit-down restaurants, arts-related businesses and quality used goods stores that would add to a funky arts-related image, such as vintage clothing, antiques, books and music, music instruments, and consignment clothing or home goods stores. One focus for recruitment efforts will be to attract branch stores of successful existing businesses.

2. Broad-based community support and advocacy for renovation of the Everett Theater as a new venue for entertainment, cultural and educational events and programming. This community support and advocacy can translate to other redevelopment projects that would impact the district, such as the vacant Lewis Chemical site.
3. Working with existing businesses to expand their product offering, especially around specialty foods and locally-produced art and crafts.

The following action plan is recommended to implement the Niche Development Strategy:

- **Establish a business recruitment team and leader.** This recruitment team would oversee a sustained effort to recruit target businesses to Cleary and Logan Squares. Team members should include the Hyde Park Main Streets Executive Director, major property owners, commercial brokers serving the area, representative of the Hyde Park Board of Trade and merchants. A team leader, likely the Main Street Executive Director, should be designated to oversee recruitment efforts. The leader’s role includes: (1) coordinating implementation of the recruitment campaign; (2) undertaking direct marketing to target businesses; and (3) serving as the contact person for follow-up with interested firms.
- **Create a recruitment information package.** Effective collateral materials that make the case for locating in Cleary and Logan Squares are needed to support recruitment. The following materials should be included in the recruitment package:
  1. A *Market Profile* that documents Cleary and Logan Squares’ market size, demographics, spending related to target stores, and position as a retail and entertainment center. Data from this Retail Market Analysis and Action Plan report provides the basis for this profile.
  2. *Business Profiles*. Profiles of successful businesses located in Cleary and Logan Square, including information on businesses that have recently located in area. These profiles can be updated as new businesses open.
  3. A *Hyde Park Revitalization Brief* that summarizes the overall revitalization and improvement strategy for Cleary and Logan Square; the city and community commitment to improving the business district; and, new projects and investments (such as the Menino Art Center). Positive news articles on Hyde Park, Cleary and Logan Squares and HPMS programs also should be part of the package.
  4. A listing, updated regularly, of available spaces to lease or buy downtown.
  5. Contact information for follow-up with the team recruitment leader.
- **Continue to maintain an up-to-date vacant space inventory**. Hyde Park Main Streets has a comprehensive inventory of space and businesses. This inventory needs to be maintained and updated regularly to ensure that current information on vacant space to lease or purchase

is available. This is a good task for a student intern or Main Streets volunteer to perform on a monthly basis.

- **Establish leasing targets and a process with property owners.** Niche development should focus on recruiting businesses that help to build and establish Cleary and Logan Squares as a unique arts, culture and entertainment district, diversifying its retail stores to support an image as a funky arts-related area. Recommended target businesses include:

  - Arts and crafts-related businesses, including art supplies, framing, crafts or art galleries and new craft and entertainment format such as stores providing pottery painting classes and parties and music education and performance.
  - Sit-down restaurants
  - Specialty food stores
  - Quality and interesting used goods stores (that might also offer similar new products), including consignment shops (both clothing and home goods), antique stores, used books and music, music instrument stores, and vintage clothing stores.
  - A second component of the targeting strategy is to attract new branch stores of successful businesses currently serving other Boston neighborhoods, such as Jamaica Plain, or surrounding cities and towns (e.g. Cambridge, Somerville). Stores with experience catering to urban neighborhoods and diverse demographics are a good fit for Cleary and Logan Squares.

  In addition to these targets, the business recruitment team should work with property owners to coordinate recruitment efforts with the owners' leasing of vacant space and to gain their agreement to prioritize leasing ground floor space to target businesses for a set period of time before considering other tenants. We recommend establishing a 120-day time frame for this targeted leasing period.

- **Conduct outreach to target businesses regarding locating in Cleary and Logan Squares.** A mix of formal and informal approaches can be used to reach owners of businesses targeted for recruitment. Formal recruitment includes direct outreach to the owners of businesses of the types listed above (and any other types developed by the recruitment team). The recruitment leader or another committee member would contact a business owner about the advantages of locating in Cleary and Logan Squares, send her/him a recruitment package and follow-up with an individual meeting. Businesses that express interest in locating in Cleary and Logan Squares would receive assistance from the Main Street program in identifying an appropriate space and navigating any required city permits and licenses. Informal recruitment activities can also include encouraging local businesses, property owners, cultural organizations, HPMS board members and other volunteers and city staff to identify potential recruitment prospects, and promote Cleary and Logan Squares with friends and colleagues to generate "word-of-mouth" interest in and excitement about the revitalization of downtown Hyde Park.

- **Support and Advocacy for the Everett Theater Redevelopment and future redevelopment beneficial to business district.** Historic Boston is currently working with the owner of the Everett Theater to complete a feasibility study for the theater's restoration and reuse. A restored theater with active programming and events would be a key anchor for establishing Cleary and Logan Squares as an arts, culture and entertainment destination. Since successful restoration is likely to require considerable financial and political support from the community and government, HPMS can play an important role in organizing local community support and helping to advocate for broader city and state government support for the project. Although the specific steps and plan for theater restoration await the completion of the feasibility study, HPMS can help establish an Everett Theater Restoration Committee to work closely with and support Historic Boston; and in organizing resident and business community support for the project after the feasibility study is completed and specific restoration plans are formulated. The experience with the Everett Square Theater redevelopment can provide a framework for supporting future redevelopment projects affecting the district, such as the vacant Lewis Chemical site owned by the City of Boston and others. Mixed-use development that introduces new residential uses into the district would expand the market support for the existing businesses and create additional demand for evening and weekend shopping and activities. HPMS should advocate for mixed and residential uses in the district during the neighborhood planning and rezoning process on the horizon. Arts and cultural uses have been proposed for the Lewis Chemical site, which would reinforce the district's identity as a center for arts and entertainment. However, building and site programming should not transplant existing arts or entertainment businesses or organizations from the district's core because it would reduce economic spillover to adjacent businesses. The Lewis Chemical site is located outside of the primary shopping area.

- **Help Existing Businesses Diversify Product Offerings.** While the longer term business recruitment campaign is underway, the Hyde Park Main Streets (HPMS) program can promote short-term efforts to diversify the products supplied in local stores. To achieve this goal, HPMS must take on the role as an informal broker between the producers or suppliers of desired products and local businesses interested in selling new goods. Potential products for which HPMS might play this role include (1) baked goods and other specialty foods produced by Boston area producers; and (2) arts and crafts produced by Hyde Park and other nearby artists and artisans. The first step is to identify local business that would like to diversify their product mix to include these types of products. Once the interested retailers are identified, HPMS and the Hyde Park Arts Initiative (if products are arts/crafts-related) can reach out to supplier businesses, artists, and artisans to determine their interest in and capacity to supply local retailers. Subsequently, the supplier firms can be provided with a list and contact information on local retailers seeking to add new products. HPMS can also assemble product and contact information for these suppliers to distribute to interested local retailers. Regular follow-up with local retailers would be helpful to gauge the extent to which they have succeeded in securing new products and determine if any additional efforts are needed to broker these new supplier relationships.

Implementation Entities and Priorities

Implementation of the niche development strategy requires collaboration among the different stakeholders responsible for revitalizing Cleary and Logan Squares. These parties include HPMS, business and property owners, Historic Boston, the Hyde Park Arts Initiative and the Hyde Park Board of Trade. However, implementation depends on having a clear lead organization for each action item. Two organizations are in the best position to lead and coordinate the proposed initiatives in the Niche Development Action Plan. Hyde Park Main Streets is recommended to lead the business recruitment initiative and to work with existing businesses to expand their product offering. Historic Boston is recommended to organize and lead the local Everett Theater Restoration Committee, which would include active participation by the HPMS.

Putting the business recruitment system in place is the first priority under this strategy. This entails forming the recruitment team, creating the recruitment package, and confirming the leasing targets and process with property owners. The creation of the Everett Theater Restoration Committee can also be initiated this year.

Required Resources

The key resource for this strategy is the time and effort by the HPMS Executive Director and volunteers on the business recruitment team. Some funding will be needed to design and print the recruitment package and perhaps to hire a student intern to assist with maintaining the business inventory and other tasks related to this and other strategies. The costs of recruitment materials can be shared between the HPMS and building owners. Pro bono design and printing services from local businesses could also help offset these costs.

B) Public Realm Strategy

The Public Realm Strategy seeks to improve the commercial district's attractiveness and appeal to shoppers, and improve access to convenient parking by helping visitors navigate Cleary and Logan Squares better while reducing long-term use of short-term parking spaces. It seeks to alter the poor perceptions of district appearance and parking by existing customers, and responds to the strong preference for addressing these issues that surfaced in focus group and the public meeting discussions. Key components of this strategy include:

1. An expanded cleanliness initiative to prevent litter, increase clean-up efforts and promote improved cleaning and maintenance by merchants.
2. A campaign to promote more attractive window displays.
3. Creating signs and information to better direct shoppers to the public parking lot.
4. Reducing long-term use of short-term parking through an informal enforcement program and creating alternative long-term parking options for employees and business owners.

5. Creating a broad-based committee to monitor city services provided within Cleary and Logan Squares and advocate for their improvement.

The following action plan is recommended to implement the Public Realm Strategy:

- **Undertake District Cleanliness Initiative.** A multi-prong initiative would be undertaken to improve cleanliness and maintenance in Cleary and Logan Squares. One part of the initiative is to increase business participation in preventing litter and cleaning their sidewalks, windows and interior space. An information sheet for businesses on resources and responsibilities for keeping their business (and the district clean) will be prepared and distributed through one-on-one meetings with existing businesses and with every new business when it opens. A goal of these meetings is to establish "community standards" for cleanliness and maintenance that may require follow-up visits by volunteers, other merchants and residents to reinforce the message delivered at the first meeting. Second, a regular clean-up and beautification squad can be created to supplement efforts by city agencies, businesses and property owners. The squad's work would need to be coordinated with existing public and private efforts to beautify the district and the neighborhood. This squad would undertake and help organize district wide cleanings (such as the Boston Shines efforts) a few times each year, undertake more regular cleanings of high litter areas (perhaps weekly) and maintain spring and summer flower plantings. This squad could be staffed with volunteers, high school students (for pay or as part of community service) or both. An outreach effort to local schools discussed under the organization and capacity building strategy (on page VIII-13) could help identify the best ways to involve local students in this initiative. HPMS, perhaps through its Design Committee, would organize and direct the clean-up squad.
- **Create Window Display Campaign.** Cleary and Logan Squares have many cluttered and unappealing window displays that make the district less inviting to customers and contribute to perceptions of the district as unattractive. This campaign would include: (1) one-on-one outreach to businesses to discuss the value of attractive window displays and to develop ideas to improve their displays; (2) follow-up assistance with improving displays; and (3) holding regular contests (perhaps quarterly in conjunction with key promotions or events) for the best window display with prizes. The HPMS Executive Director would conduct this outreach and organize the regular contests, but would draw on volunteers, artists and consultant expertise to install new displays. Another part of the campaign is a concerted effort to target businesses with some of the largest and/or most prominent windows for a greater visual impact. This targeting might include several adjacent windows in an important part of the district or multiple windows at a major intersection.
- **Improve Parking Information and Signage.** Although Cleary and Logan Squares benefit from a large municipal parking lot and commuter lots, they are not highly visible. In particular, the municipal lot is difficult to access from Fairmount Avenue. The installation of several signs at different entry routes to the district to direct drivers to the municipal lot and commuter lots will both increase awareness of these parking lots and assist new visitors with finding the district and shopping there. In addition to the map, HPMS can prepare an 8 ½ by 11inch map that identifies available parking in Cleary and Logan Squares and the best routes to parking lots. This map can be provided to businesses for distribution to customers

and posted on web sites for HPMS and other organizations and businesses. HPMS can work with City Councilor Consalvo and the Boston Transportation Department to secure funding and identify the appropriate locations for the new parking signs.

- **Create Tools to Deter Long-Term Parking in Short-Term Parking Spaces.** Two steps are recommended to promote better adherence to the two-hour parking limit in Cleary and Logan Squares. The first step is to use fliers to alert long-term parkers who are violating the two-hour parking limit and hurting local businesses. This would take the form of a catchy flier that businesses would place on the windshield of cars that are parked outside their store for an extended period of time. The flier might say "Did You Mean to Hurt Local Businesses?" and explain that local merchants depend on the parking outside their store to survive and need people to keep to the two hour parking limit. It is important to watch the use of these flyers to ensure that they don't become a source of litter. A second longer-term tool would be to identify long-term employee parking options outside the district but within walking distance, and work with businesses to have their workers park in these designated locations instead of at short-term spaces within Cleary and Logan Squares.
- **Use the Recent Traffic Study and Upcoming Neighborhood Planning Process to Address Traffic Issues.** Improving the traffic flow in Cleary and Logan Squares and addressing pedestrian safety were consistent concerns expressed in the customer surveys and at project meetings. Although the Hyde Park Market study was neither designed nor intended to address traffic issues, there are opportunities to make progress on local traffic concerns. First, several proposed improvements to Hyde Park Avenue are recommended in recent traffic planning work by the Department of Public Works. Moreover, the upcoming neighborhood planning process for Hyde Park will address transportation and traffic issues and provides an additional opportunity to improve traffic conditions in Cleary and Logan Squares. HPMS and other local stakeholders need to ensure that these issues receive sufficient attention in the upcoming plan and advocate for implementation of recommended improvements.
- **Establish a Citizens Committee to Monitor City Services.** City services, particularly for street cleaning, trash removal, snow removal and the maintenance of city facilities and buildings, have a large impact of the appearance and accessibility of Cleary and Logan Squares. The proposed Citizens Committee would work to monitor the consistency and quality of these city services and work with city agencies, the Mayor's Office, and its City Councilor's office to address problems and improve overall service delivery. This committee will need a good base of volunteers and representatives of businesses, property owners, residents and community organizations to be effective. It would develop and coordinate the tools needed to track these services, train volunteers to use the tools to collect and report data on service quality and issue a regular "report card" on city services. The report card and underlying data would form the basis for follow-up discussions with agency staff on how to improve services.

Implementation Entities and Priorities

Implementation of the Public Realm Strategy will require collaboration among the many organizations and stakeholders to be successful. The cleanliness and parking and traffic issues addressed in this strategy are priorities not only for the businesses and property owners in Cleary and Logan Squares, but for local residents and a range of community organizations. Thus, the buy-in for and participation in implementation efforts (especially the cleanliness and traffic issues) needs to extend beyond HPMS and the immediate commercial district businesses to include key community groups. Partners might include Southwest Boston CDC, the 02136 organization and city agencies located in Cleary and Logan Squares. HPMS is recommended to lead implementation of the Window Display Campaign and parking initiatives. However, a larger coalition of community organizations, as mentioned above, is recommended as the appropriate vehicle to oversee the cleanliness initiative, advocate for traffic improvements and monitor city services.

Organizing a community-wide effort around district cleanliness and implementing the window display campaign are the first priorities under this strategy. This will entail considerable outreach to businesses, property owners, other community organizations and schools by HPMS, and thus can be integrated to the outreach and organizational development efforts discussed in the Organization and Capacity strategy. Other action steps that can be initiated in the short-term are creating a map on parking locations and directions, and the leafleting of violators of short-term parking.

Required Resources

Several actions under this strategy can be implemented with minimal cost through volunteer efforts, outreach and information. However, funding will be needed to install parking signs and to undertake expanded and more regular cleaning efforts. The former will require City of Boston funding while the clean-up efforts could be supported through a combination of grants (especially if they are part of a larger youth education and development program) and contributions from businesses, property owners and local non-profit organizations.

C) Events and Programming

The Events and Programming Strategy seeks to generate new arts, cultural and commercial activities in the district, especially in the evenings and on weekends, through more events and programming of public spaces. This strategy would foster and enhance Cleary and Logan Squares' reputation as a vibrant and diverse art, food and cultural destination that attracts residents that rarely shop in the district, encourages new and repeat shopping trips, and appeals to diverse market segments. Key components of this strategy include:

1. Start new weekly seasonal outdoor farmer's market in 2010 that features, in addition to

fresh produce, local arts, crafts, handmade and used goods, live music/DJ, and prepared foods.

2. Encourage new evening and weekend events in the district, including a film series and other music and entertainment events.
3. Encourage specialty events and promotions, such as senior discount days and health fairs.
4. Enhance event promotion with new event calendar and coordination with businesses, community partners and city departments.

The following action plan is recommended to implement the Events and Programming Strategy:

- **Re-start a weekly seasonal outdoor market with new farmers, arts, crafts, used goods, prepared foods, micro-entrepreneurs, and local resident businesses.** Weekly markets are becoming increasingly popular to provide communities with access to fresh food and to develop local businesses and micro-entrepreneurs. In 2008, weekly markets were located in Roslindale Village, Mattapan, Dedham Square and East Milton.[6] A market in Cleary or Logan Square would compete with and complement these existing markets. The market should include fresh farm goods, prepared foods and arts, handmade crafts, music and performance arts, and other regular and rotating experiences and exhibitions. Local restaurants can have prepared foods and other businesses and stores can cross-promote by sponsoring the market or having their own booths. It is recommended that the market target 2010 for a first season (June through September) in order to allow enough time to plan for the market, secure the best site and identify and recruit potential vendors. A short-term goal for the market organizers in 2009 would be to visit other farmers markets, talk to vendors and market organizers about their experiences, especially in finding vendors. (See Appendix E for list of Boston Area farmers markets.) HPMS should be the lead organization, but will have to rely on volunteers committed to seeing the market become a reality over the long-term because of the likely time commitments involved and limited opportunities for revenue. Market organizers will also need to draw on the resources of the Arts Initiative to recruit art vendors and other ideas for entertainment such as musicians and other performers. There are also a number of other resources that detail the creation of a farmers market, including the Federation of Massachusetts Farmers Markets, the State Department of Agricultural Resources, Project for Public Spaces and materials from the National Main Street Center.

- **Develop new and regular events on weekday evenings and weekends.** A movie series was identified as a way to generate activity in the square. Outdoor movies are a popular way to bring communities together. Existing outdoor movies are largely located in parks, but when located in business districts they create opportunities for spillover to local merchants. The Department of Conservation and Recreation (DCR) offers movies in a number of locations in the Boston area, including a popular weekly series at Charles River Hatch Shell as well as weekly movies on Tuesdays at the Martini Shell in Hyde Park and on Thursdays at Pope John Paul II Park in Dorchester (in 2008). The Asian CDC in Chinatown

[6] Hyde Park Main Streets sponsored a farmers market several years ago that bounced around the squares, but didn't get traction due to lack of visibility (which led to its re-location to a number of different locations in Cleary and Logan Squares) small number of vendors and limited market awareness.

operates a Chinese movie festival in a vacant lot for four nights running in September that is cross-promoted with local restaurants. For the past few years, the ParkArts program of the City's Parks and Recreation Department offered movies in Franklin Park and other Boston parks on a rotating basis, but the movies series is not offered this year due to budget cuts. In the case of Hyde Park, a movie series would be a good way to cross-promote the Everett Square Theater redevelopment and could help to raise money for a theater restoration fund. Overall costs per movie can run anywhere from $1,000 to $5,000 or more depending on the equipment rented (i.e. screen, projector, seats, etc.) and the movie licensing fees. Volunteers, perhaps youth, will need to organize the movie series and provide on-site set up and dismantling of the screen, projector and chairs. There are several companies that do full-service outdoor movie events, such as Mass AV and Big Wave Entertainment. Some film series offset costs by offering sponsorships or purchasing their own equipment.

- **Offer new specialty events and promotions, such as special discount days for seniors (includes certifying businesses as "elder-friendly") and community health fair.** The market analysis revealed that few district businesses run regular promotions to attract shoppers. HPMS is currently working with businesses to obtain elder-friendly certifications and offer discounts to seniors. With a critical mass of certified and participating stores, HPMS can sponsor regular senior discount days on one day of the week. This short-term strategy can reinforce existing shopping patterns and potentially introduce seniors to new stores. A health fair combined with blood drives and free medical services is a long-term event recommendation that would reinforce the existing cluster of businesses in medical services and products, and inform community members of a variety of health and wellness offerings available locally. The seniors discount initiative and health fair would require business outreach that is largely the responsibility of HPMS staff. Volunteers can be used for supportive roles for each project by developing promotional materials for senior discounts and as on-site staffing for set up and clean up for health fair.

- **Create new event calendar to coordinate better with businesses, community partners and city departments.** Like an updated business inventory, HPMS should have a regular and special event calendar mapped out for the next few years. It should be updated at least quarterly (if not monthly) and shared with public and private partners. The events and programming strategy suggests increasing the amount of public activity in different places in Cleary and Logan Squares, which will require an increasing degree of coordination and management among public and private partners, including HPMS, the City of Boston Police Department, Public Library, the Arts Initiative, and local businesses and property owners. HPMS' event calendar should reflect a coordinated public private partnership while attracting new residents and visitors for regular fun and entertainment events. The new event calendar should be available online, integrated with the HPMS website, the Arts Initiative, 02136 and other partners.

- **Work with local businesses to cross promote events and shopping in Cleary and Logan Squares.** To realize the synergies between special events and building the customer base for local businesses, HPMS can help organize special promotions as part of its events or fairs. One example might be a "dinner and a movie" promotion that provides a discounts at local restaurants during the outdoor movie night. Local businesses can also help promote these events through distributing fliers in their store and window displays, such as window painting.

Implementation Entities and Priorities

The Events and Programming Strategy will require active and passionate volunteers to organize and coordinate new events. Regular collaboration between HPMS and its public partners and businesses for sponsorship and support is necessary. Volunteer recruitment will be a critical first step in the short-term, and should be pursued with other partners such the Arts Initiative and the SWBCDC in Hyde Park. Successful events require long-term volunteer commitment as well as proactive promotion and publicity to generate awareness. In addition, events have the potential to appeal to a diverse cross-section of the community. (Events can be used as a tool to celebrate district diversity and to engage under-represented communities in district revitalization.) HPMS should be actively engaged in providing leadership and support to its volunteers. HPMS staff time should also be dedicated to event calendar updating and regular meetings with primary event partners and community and city collaborators. A new community event web presence should also be created and integrated/linked in with all existing event calendars online.

Required Resources

Outdoor movies would require at least $3,000 and a volunteer cohort for event staffing. The weekly market poses fewer event costs, but will require dedicated volunteer organizers as well as event staffing for set-up and clean-up and event planning and coordinating with the Boston Police Department, and businesses and property owners.

D) Organization and Capacity

The Organization and Capacity Strategy seeks to expand HPMS' outreach to businesses through more pro-active engagement with entrepreneurs, their product offerings and their market base while offering enhanced business development services. It also seeks to leverage existing community partners and volunteers to recruit new partners and volunteers needed for events, administrative and coordinating projects. New recruitment should attempt to diversify the business, resident and community partner base by targeting HPMS volunteers and leaders to better reflect neighborhood generational, cultural and socio-economic diversity. Key components of this strategy include:

1. Explore potential for Hyde Park Main Streets office in a first floor location.
2. Expand outreach and board/committee/volunteer recruitment with businesses, the minority community, and youth and schools.
3. Reinforce existing partnerships and create new ones with business development

organizations to offer one-on-one business development services to complement regular networking breakfasts and other workshops.

The following action plan is recommended to implement the Organization and Capacity Strategy:

- **Explore first floor location for HPMS offices.** Relocating HPMS to a ground floor location could activate a currently inactive storefront while giving the organization increased visibility among all district users, including shoppers, businesses and vehicular and pedestrian traffic. HPMS leadership must decide whether the benefits of a storefront location outweigh the affordability of the rent they have currently. The first step would be to explore potential locations with property owners, perhaps in the context of a leasing strategy that turns HPMS into a district information center. This would require keeping open regular business hours, which demands additional staffing or volunteers.
- **Engage more businesses, minority community members, and youth through schools, public library, YMCA, Art Center, Municipal Building and other youth programs.** Throughout the process and among the findings of the market analysis, participants grappled with the fact that the stakeholders and survey participants were not representative of the cultural diversity of the community, which has changed from a largely white neighborhood to a neighborhood with a strong minority presence over the past few decades. The HPMS will be conducting regular outreach to all businesses, minority and non-minority, in both the Public Realm Strategy and Niche Development Strategy recommendations. Immigrant community and social service organizations are targets for identifying new immigrant entrepreneurs, businesses and community volunteers. Youth comprise a large part of the Hyde Park population, are frequent district users and often misunderstood especially by the elderly who perceive them as a threat to their safety. Building bridges with the diverse resident and business segments is a long-term proposition that will require leveraging existing networks. Potential networks would include the City Councilor’s and other city offices and local non-profit organizations. Outreach to new organizations will be an important component. Potential new organizations would include religious communities and immigrant serving agencies and businesses, such as the New Bostonians, Haitian Reporter, Catholic Charities, the Nigerian community center in Logan Square, and local schools. Language may pose a barrier to connecting to immigrant communities; therefore, existing organizations will play a critical role in helping HPMS communicate these groups. Events must appeal to youth and diverse socio-economic groups if they are to reflect a complete cross-section of residents and visitors. To ensure that this outreach occurs, and does not get pushed to the back burner under the press of day-to-day projects, HPMS should establish a formal outreach campaign with a list of organizations targeted for outreach, identify specific outreach assignments to staff, board and other volunteers, and develop a simple protocol for summarizing the outreach visits and next steps. An important goal of this outreach campaign is recruiting a specific number of new board members, committee members, and other volunteers from key under-represented groups. Where possible, this outreach should be pursued with like-minded community organizations, such as the SWBCDC, so as to avoid duplicating efforts.
- **Focus on direct one-to-one business services through increased business outreach and partnerships with existing economic development agencies.** HPMS would take the lead on business outreach to create demand for regular visits by agencies that provide direct

technical assistance in accounting, taxes, financing, advertising, etc. Many businesses and single entrepreneurs are not readily available via email and respond best to face-to-face in store outreach. Outreach conducted for the window displays campaign, cleanliness initiative and informal parking enforcement program can serve as a foundation for testing demand among local businesses for business development services and ongoing engagement with HPMS. Regular in store visits by HPMS staff will go a long way to increasing business participation and awareness of business development opportunities. HPMS could then build on these initial relationships to deliver more intensive services to individual businesses through a system of partner agencies committing to a regular time (perhaps bi-monthly or quarterly) when they would come to Hyde Park to work with businesses. Likely economic development partners include staff at BRA's Economic Development Division, DND's Office of Business Development, the UMASS Small Business Development Center office, SWBCDC, and Historic Boston. The first step will be to create a resource map of different partner programs, services and capabilities that may appeal to district businesses. HPMS can provide collateral co-branded materials that list available services to businesses for both existing and prospective businesses. Subsequent steps would be: (1) confirming with each agency its capacity and willingness to come regularly to Hyde Park to meet with business on specific business needs: and (2) identifying a set of businesses that want and are committed to obtaining this assistance; (3) scheduling a set of appointments for the regular time a partner agency can come to Hyde Park.

Implementation Entities and Priorities

The Organization and Capacity Strategy will require the HPMS executive director, HPMS Board, and HPMS Organization committee to provide leadership by introducing HPMS to new partners and expanding social networks. In the short-term, HMPS leadership should decide whether it is possible to offer affordable rents by inquiring with local property owners about the availability of space. A second short-term item is to elicit a board leadership group to oversee the outreach campaign. In the long-term, Board and Organization committee members are envisioned to work with staff and community leadership of a diverse set of resident groups, businesses, community organizations and city departments.

Required Resources

New lease terms may impact the cost of office space, positively or negatively, depending on the targeted space. Retail space tends to be more affordable than office space if storefront vacancies persist in the current "down" economy. HPMS may be able to find mutually agreeable terms with a landlord for space that enhances its organizational effectiveness. It is recommended that a cost benefit analysis be conducted of the increased visibility derived. Most beneficial will be space that is highly visible and accessible to shoppers. The Cleary Square area has more visibility to shoppers and people in vehicles passing through than the Logan Square area or along Fairmount Avenue. However, storefront rents are higher.

Extended outreach and new networks will require sufficient staff, Board and volunteer time to implement recommendations around expanding social networks, which would require little financial investment, but more time organizing people and leveraging existing community networks.

Timeframe for Implementation

To ensure that the initial implementation of the Action Plan moves forward effectively and generates buzz and momentum needed for long-term success, HPMS staff, Board and volunteers will need to meet regularly together, both in small teams, and with community and city partners involved. To guide implementation, an implementation timeframe is proposed for each recommended action item. Timeframes are defined as:

- ♦ Short-term – Through the end of 2009
- ♦ Mid-term – 2010
- ♦ Long-term – 2011 and beyond

Table VII-1 details the overall implementation timeline with the proposed timeframe for each action and partners involved.

Table VIII-1
Implementation Timeline and Partners by Strategy Area and Recommendation

Strategy/Recommendations	**Time Frame**	**Lead Entity**	**Partners**
Niche Development			
Advocate for Everett Square Theater redevelopment	Short-term, on-going	HBI	HPMS, HPAI, property owners, BRA
Expand product offerings	Mid-term	HPMS	Businesses, BRA, DND
Business recruitment campaign	Mid-term to Long-term	HPMS	Property owners, businesses, BRA, DND
Public Realm			
Create community-city services coordinating committee	Short-term	HPMS	Businesses, public and private property owners, 02136, SWBCDC
Cleanliness initiative	Short-term	Community-city services coordinating committee	HPMS, property owners, businesses, government agencies and community and religious organizations
Window display initiative	Short-term	HPMS	Businesses, property owners, and HPAI
Parking signage for municipal lot and commuter lots	Short-term to Mid-term	BTD	HPMS, HPAI
Informal parking management	Mid-term	Community-city services coordinating committee	Businesses, property owners, HPMS, 02136, Parking Department, BTD
Traffic planning and improvements	Mid-term to Long-term	HPMS	City services committee, residents, businesses, property owners

Table VIII-1 (cont.)
Implementation Timeline and Partners by Strategy Area and Recommendation

Strategy/Recommendations	Time Frame	Lead Entity	Partners
Events and Programming			
New Event Calendar	Short-term	HPMS staff	HPAI, Library, businesses, local newspapers
Senior Discount Days	Short-term	HPMS staff	Businesses and senior housing and agencies
Weekly food and crafts market	Mid-term	HPMS volunteers	HPAI
Film Series or other A/V nighttime and weekend event in parking lot or other public space	Mid-term	HPMS volunteers	HPAI, Banks, BTD, BPD
Event business promotion linkages	Mid-term	HPMS staff	Businesses, HPAI, event sponsors
Health Fair	Long-term	HPMS staff	Businesses
Organization and Capacity			
Explore storefront location and availability	Short-term	HPMS Staff and Board	Property owners
Outreach to new partners	Short-term	HPMS Board and Organization Committee	HPAI, City Councilors office, community, religious, human and social service organizations
Offer one-to-one business development services	Mid-term	HPMS staff	DND, BRA, SBDC, SWBCDC and other local economic development entities

List of Acronyms
BPD = Boston Police Department
BRA = Boston Redevelopment Authority
BTD = Boston Transportation Department
DND = Department of Neighborhood Development
HBI = Historic Boston, Inc.
HPAI = Hyde Park Arts Initiative
HPMS = Hyde Park Main Streets
SBDC = Small Business Development Center
SWBCDC = Southwest Boston Community Development Corporation

Appendix A

BOUNDARIES OF COMPETING RETAIL AREAS

Six competing retail areas include Dedham Square, Route 1 in Dedham, East Milton Square, Mattapan Square, Roslindale Village and Centre Street in West Roxbury. Boundaries for visual survey in Section III include:

- **Dedham Square –** Stores on High Street between East Street and Chestnut Street, and stores on Washington Street from VFW Parkway to Spruce Street.
- **Route 1 in Dedham –** Shopping centers northbound and southbound on Route 1 from Route 128 to High Street.
- **East Milton Square –** Stores and shopping center Granite Avenue from Wood Street to Pierce Street, and stores on Adams Street from Church Street to Bryant Avenue.
- **Mattapan Square –** Stores on Blue Hill Avenue from River Street to rail overpass north of Fremont Street, and stores on River Street from Riverbank Place to Tesla Street.
- **Roslindale Village –** Stores and shopping centers on Washington Street from South Street to Kittredge Street, stores on South Street and Belgrade to Pinehurst Street, stores on Corinth Street and Poplar Street, and stores on Birth Street between South Street and Corinth Street.
- **West Roxbury –** Shops and shopping centers on Centre Street between West Roxbury Parkway and Spring Street.

Appendix B
LIST OF INTERVIEWEES

The following people were interviewed as a part of this study. These interviews are summarized in Section VI of this report.

1. Paul Bunker, Hyde Park Savings Bank
2. Brian Clinton, Councilor Consalvo's Office
3. Rob Consalvo, City Councilor
4. John Corey, property owner
5. Alan Dana, property owner
6. Nancy Fedele, property manager
7. Mike Feloney, Southwest Boston CDC
8. Patrice Gattozzi, Hyde Park Main Streets
9. Jeffery Gonyeau, Historic Boston, Inc.
10. Janice Kenney, Hyde Park Arts Initiative
11. Tim Lowney, business owner
12. Michael Moskow, property owner
13. Mike Tallon, business and property owner
14. Bill Taub, Hyde Park Bulletin
15. Pat Tierney, business and property owner

Appendix C

LIST OF ADVISORY COMMITTEE MEMBERS

The following people participated in regular retail study meetings and provided input and feedback on interim draft report.

1. Scott Batey, resident and Hyde Park Main Streets Board Member
2. Brian Clinton, President, Hyde Park Main Streets and Councilor Rob Consalvo's Office
3. Lisa Consalvo, State Rep. Angelo Scaccia's Office
4. Alan Dana, property owner
5. Dennis DiMarzio, resident
6. Russ Rylko, resident
7. Patrice Gattozzi, Executive Director, Hyde Park Main Streets
8. Jeffery Gonyeau, Historic Boston, Inc.
9. Diana Kelly, Southwest Boston CDC
10. Janice Kenney, Hyde Park Arts Initiative
11. Larry Mayes, City of Boston, Human Services
12. Dave McNulty, City of Boston, Office of Neighborhood Services
13. Marie Mercurio, City of Boston, Boston Redevelopment Authority
14. Jay Paget, resident and Hyde Park Main Streets Board Member
15. Ted Schwartzberg, City of Boston, Boston Redevelopment Authority
16. Mike Tallon, business and property owner

Appendix D

MARKET ANALYSIS SUMMARY USED IN PUBLIC FORUMS

Following is a summary of key findings from the market analysis used in public participation forums.

Business Mix

- Hyde Park has a diverse mix of business
- Largest sectors: retail (35), professional services (29), restaurants/bars (26), and personal services (21)
- Major 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)
- Main economic clusters:
  - **Convenience Center:** 50 uses with conv. stores, fast food, banks, personal services
  - **Service Center:** 55 firms in financial, professional, medical services
  - **Medical Services;** 17 health care offices and 4 medical-related stores

Comparison to Other Districts

- Hyde Park has most firms in 5 sectors: restaurant/bars, religious/government/civic, finance and real estate, manufacturing/wholesale/auto, and arts/entertainment
- Dedham Route 1 dominates retail with 48 stores, many are large big box stores
- East Milton is smallest center by far
- No district has large arts/entertainment presence
- District differ by type of customer serviced

Customer Demographics

- Primary trade area: Hyde Park and West Milton;
- Secondary trade area: Dedham, West Roxbury, balance of Milton
- Diverse trade area population by race , ethnicity, age and income
- Primary and secondary area median household incomes ($64K and $72K) are above city and state levels
- Total spending: $618 million in primary area; $969 million in secondary trade area

Customer Survey (253 responses from web and intercept)
(Respondents: 74% Hyde Park residents, 74% homeowners, 65% over 45, 58% income ≥ $75K)

- 65% visit at least several times per month
- Banking (60%), post office (53%) and shopping (43%) are most common reasons for a visit
- Cleary/Logan Square is the prime destination for takeout food and personal services
- Dedham and Cleary/Logan Squares are main destinations for discount and hardware stores
- Most characteristics rated poor or fair by majority of respondents
- More variety of stores and restaurants, more events, a cleaner district and improved traffic are most likely to attract more shoppers

- Food-related businesses, arts and entertainment are the strongest customer draws

Key Findings

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

Appendix E

LIST OF BOSTON AREA FARMERS MARKETS

Table E-1
Selected Farmers Markets in Boston Area

Neighborhood/ Town	Location	Days	Time	Season
Boston, City Hall FMFM	Boston City Hall Plaza (Government Center)	Mondays and Wednesdays	11:00 - 6:00	May 28 to November 26
Boston, Copley Square FMFM	Copley Square, along Street James Avenue	Tuesdays and Fridays	11:00 - 6:00	May 20 to November 25
Canton	MA Hospital School, 3 Randolph Street	Thursdays	2:00 - 6:30	
Dedham	Permit Parking Lot, next to Keystone Lot, Downtown	Wednesdays	1:00 - 6:00	July 9 October 29
Dorchester / Codman Square	Codman Square Health Center, 637 Washington Street	Thursdays	4:00 - 7:00	June 12 to October 23
Dorchester / Fields Corner	Park Street Shopping Center Parking Lot	Saturdays	9:00 - Noon	July 5 to October 25
Dorchester / Franklin Park	Franklin Park Rd., next to Main entrance of the Zoo	Sundays	1:00 - 4:00	Mid August to End of October
Dorchester/ Bowdoin Square	Bowdoin Street Health Center, Bowdoin Street	Thursdays	3:00 - 7:00	July 10 to October 30
Jamaica Plain	Bank of America Parking lot, Centre Street	Tuesdays and Saturdays	Tuesdays, Noon - 5:00 Saturdays, Noon - 3:00	July to November
Mattapan	Church of the Holy Spirit, 525 River Street	Saturdays	10:00 - 2:00	July 12 to October 11
Milton	Wharf Street Park off Adams Street in Milton Village	Thursdays	1:00 - 6:00	June 19 to October
Mission Hill	Brigham Circle, Intersection of Huntington Avenue and Tremont Street	Thursdays	11:00 - 6:00	Late June to end of October
Roslindale	Adams Park	Saturdays	9:00 am - 1:00 pm	June to end of October
Roxbury/ Dudley Town Common	Dudley Town Common, Dudley Street and Blue Hill Avenue	Tuesday and Thursday,	3:00 pm - 7:00 pm	June 3 to October 30

Source: Retrieved from http://www.massfarmersmarkets.org/t-allmarkets.aspx and http://www.mass.gov/agr/massgrown/farmers_markets.htm on February 21, 2009. May reflect 2008 season days and times.