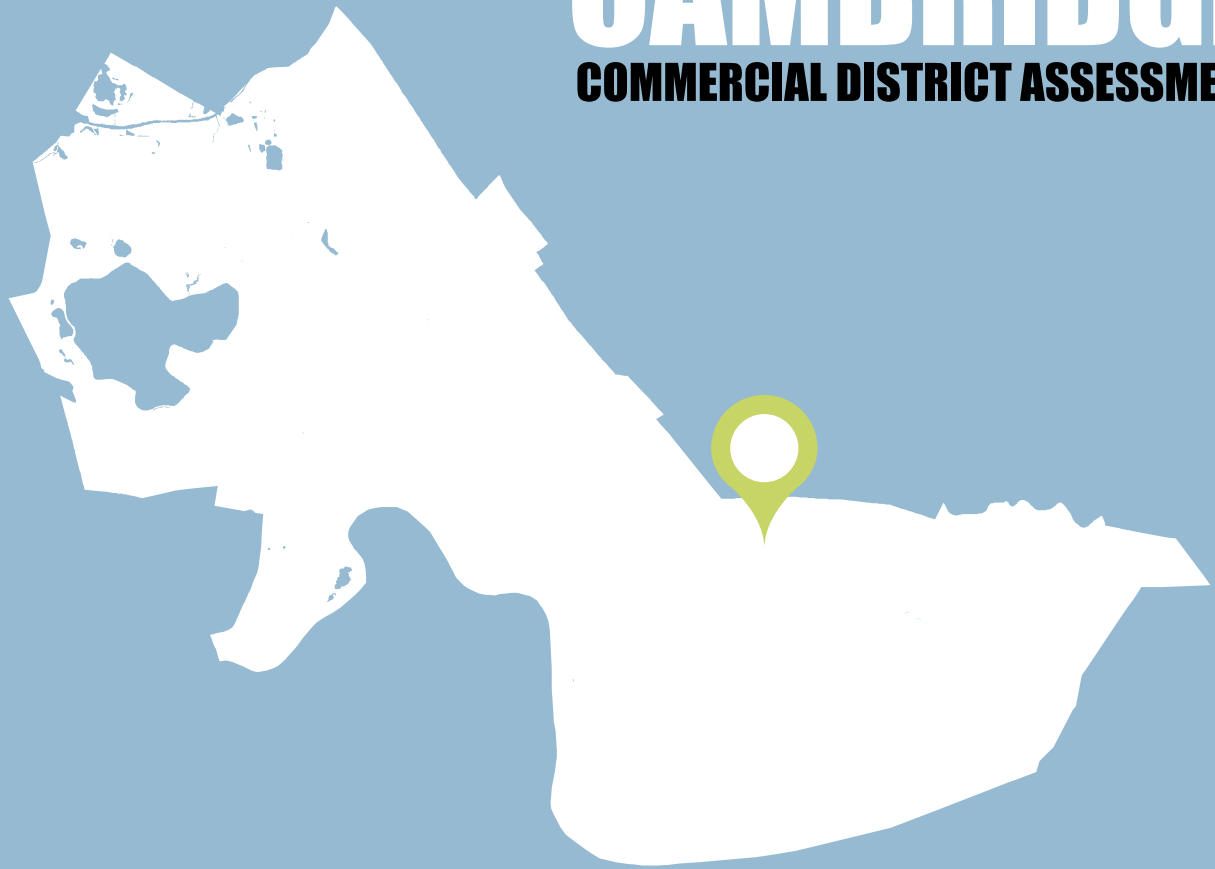


2019

INMAN SQUARE CAMBRIDGE

COMMERCIAL DISTRICT ASSESSMENT



Prepared by:
Community Development Department
Economic Development Division
City of Cambridge



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East Cambridge Business
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Existing conditions, business data, opportunities, and qualitative depictions of the Inman Square neighborhood were gathered from roughly 300 surveys of neighborhood businesses, shoppers, workers, and residents. Additional data was collected from a quarter-mile walking distance (“walk-shed”) around the commercial district. The boundaries of Inman Square trade area data and the survey methodology can be found on p.12 of this report.

An aerial photograph of a city, likely Inman Square, showing a dense residential area with colorful autumn foliage in shades of red, orange, and yellow. The image is partially obscured by a large, semi-transparent white circle that frames the text.

Purpose of the District Assessment

The purpose of the Inman Square Commercial District Assessment is to highlight the neighborhoods existing business landscape and consumer characteristics. Understanding the current business landscape provides the City and local business associations with a better understanding of how Inman Square visitors and residents utilize the district and how they would like the district to evolve in the future. Data in this report will also assist business owners seeking a location in Inman Square, and help current business owners understand potential opportunities for growth.

Key issues and opportunities identified in this assessment will help prioritize the City and local business association's initiatives and serve as an informational and marketing resource for the neighborhood.

ABOUT INMAN SQUARE

Background

Inman Square is a lively district with a mix of housing and ground floor retail uses that contribute to a strong sense of neighborhood in the area. Inman Square businesses are primarily owner-operated and include a variety of restaurants, personal services, and specialty stores.

Inman Square represents the power of Cambridge's local economy. Walking down Cambridge Street from Vellucci Plaza, one can access a variety of locally-owned banks, hardware stores, creative retail spaces, and diverse restaurants including Eastern Mediterranean, Indian, and Mexican cuisines. In addition to the vibrant dining scene, Inman Square is also known for its historic deli and Greater Boston's only community bathhouse. In recent years, the Square boasts an emerging art and crafts scene, including an artist-run performance space that features live jazz performances.

Inman Square's eclectic mix of historic and visionary businesses makes visitors feel simultaneously at home and invigorated.

Demographics

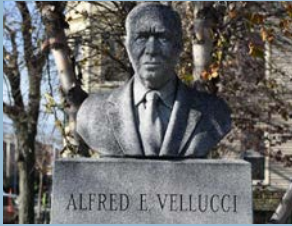
More than 13,000 residents¹ of both Cambridge and Somerville call the Inman Square area home (see page 12 for the area boundary). The Square has a growing population of African-American/Black (13.9%), Asian (13%), and Latina (11.4%) residents, contributing to the district's diversity. The daytime population (7,904 workers) brings additional energy during the week to shop, dine, and work. For more information on Inman Square demographics, see page 12.

Future Opportunities

Over the next few years Inman Square will undergo two exciting changes that will increase access, safety, and community. The Inman Square Safety Intersection Improvement Project will redesign an area that is one of the City's highest crash-rate locations. These crashes have involved all modes of travel (walking, biking, and driving) through the area, and improving the safety of Inman Square is a high priority. The redesign plan addresses the safety and operational issues of Inman Square, and meets other project goals including improving transit operations and experience, maximizing the quality and experience of the pedestrian plaza space, and providing necessary parking and commercial loading functions.

Inman Square will also be steps from the new Union Square MBTA Green Line Extension station (tentative completion date of 2021). The stop will increase access to Inman Square, and a short walk will allow Green Line riders to enjoy Inman Square's shops and restaurants.

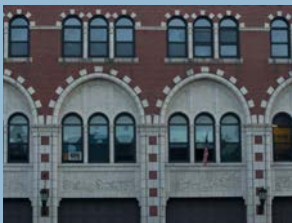
Notable Places



Vellucci Plaza



S+S Diner



FIRE HOUSE

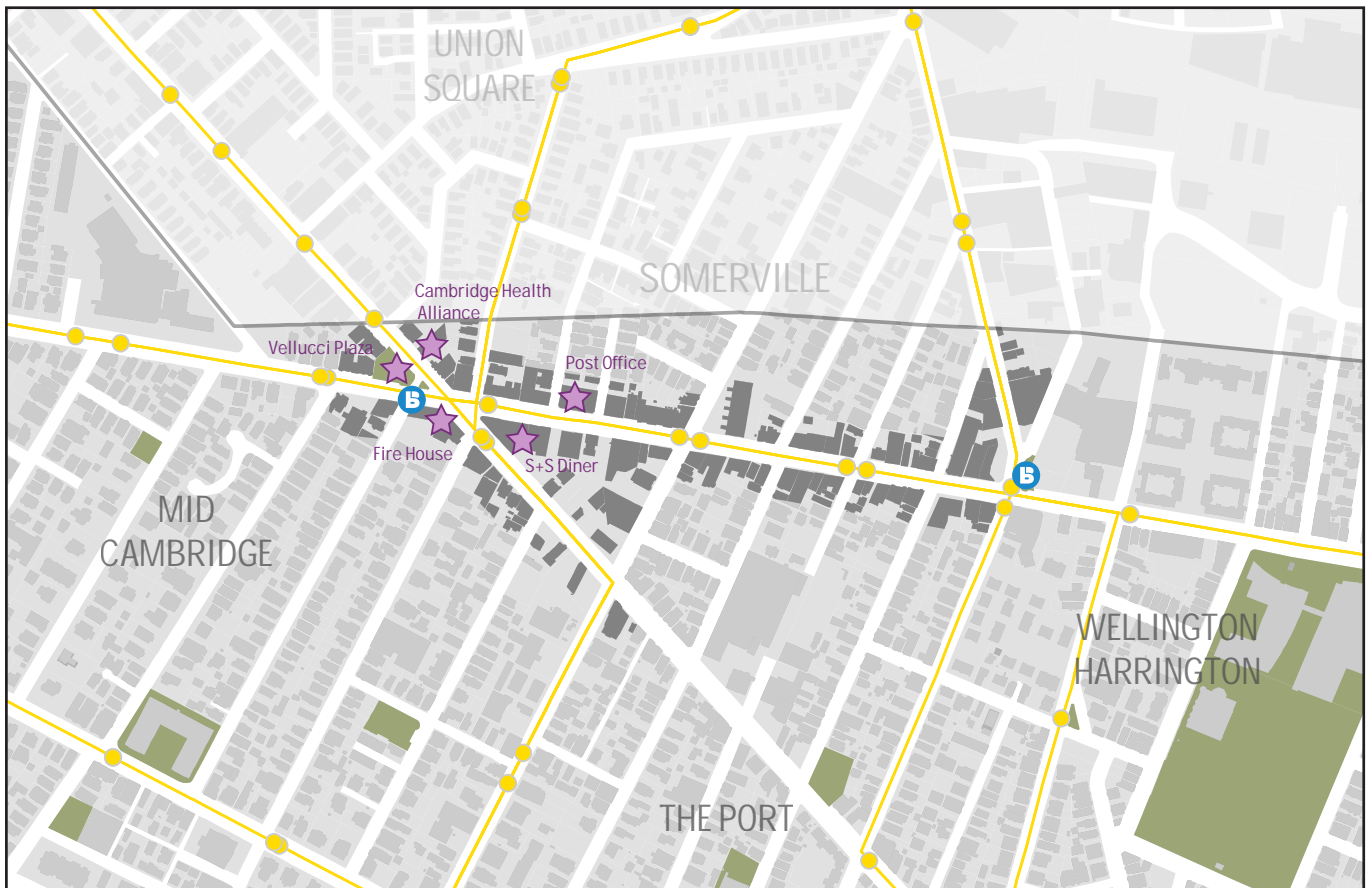


CAMBRIDGE HEALTH ALLIANCE

¹ - ESRI Community Analyst, November 2018)

Photos: Gretchen Ertl Photography, Micahel Rosenberg Pardis Saffari, Cambridge Health Alliance

NEIGHBORHOOD CONTEXT



Transit Scores

Bike Score

99

Walk Score

93

Transit Score

69

Transportation

2 Bluebikes Stations

5 Bus Routes
69, 83, 85, 91 and CT2

Parking*

/

1 Public Parking Lot

with

28 Parking Spaces

*Note: These numbers do not include street metered spaces.

Neighborhood Business Association



Community Events

- Inmanween
- Inman Eats + Crafts
- Handmade Holiday Market

Sources: MBTA, Walk Score, City of Cambridge Open Data, MBTA
Photos: Blue Bikes, East Cambridge Business Association

KEY FINDINGS

Identified through District Assessment Surveys

Strengths

- Many legacy businesses
- Accessible to diverse residential neighborhoods including parts of Somerville
- Excellent accessibility via foot, bus, bicycle, and car
- Growing restaurant and nightlife destination
- Anchor service providers (i.e. Cambridge Health Alliance, Post Office)
- Emerging craft/art scene supported by unique retailers

Challenges

- Navigating the Cambridge and Hampshire Streets intersection can be difficult
- Hours of operation make it difficult for the growing number of residents to use services and shops in the Square
- Larger competition from commercial districts nearby (Union Square, Central Square, etc.)
- Changing demographics and consumer preferences require longstanding businesses to adapt in order to grow and better serve a changing clientele



Photos: Kyle Klein, Molly Akin, Pardis Saffari, Gretchen Ertl



Opportunities

- Introduce programming to area open spaces (privately and publicly owned)
- Add new amenities and beautification elements to Inman Square streetscape
- Continue to support services for business owners that plan on growing in place
- Advocate for consistent and reliable bus access
- Experience improved safety, mobility, and transit operations along Cambridge and Hampshire Streets following the completion of the Inman Square Intersection Safety Improvements Project
- Increased access through the new Green Line station at Union Square could bring in more residents and visitors to the area

BUSINESS LANDSCAPE

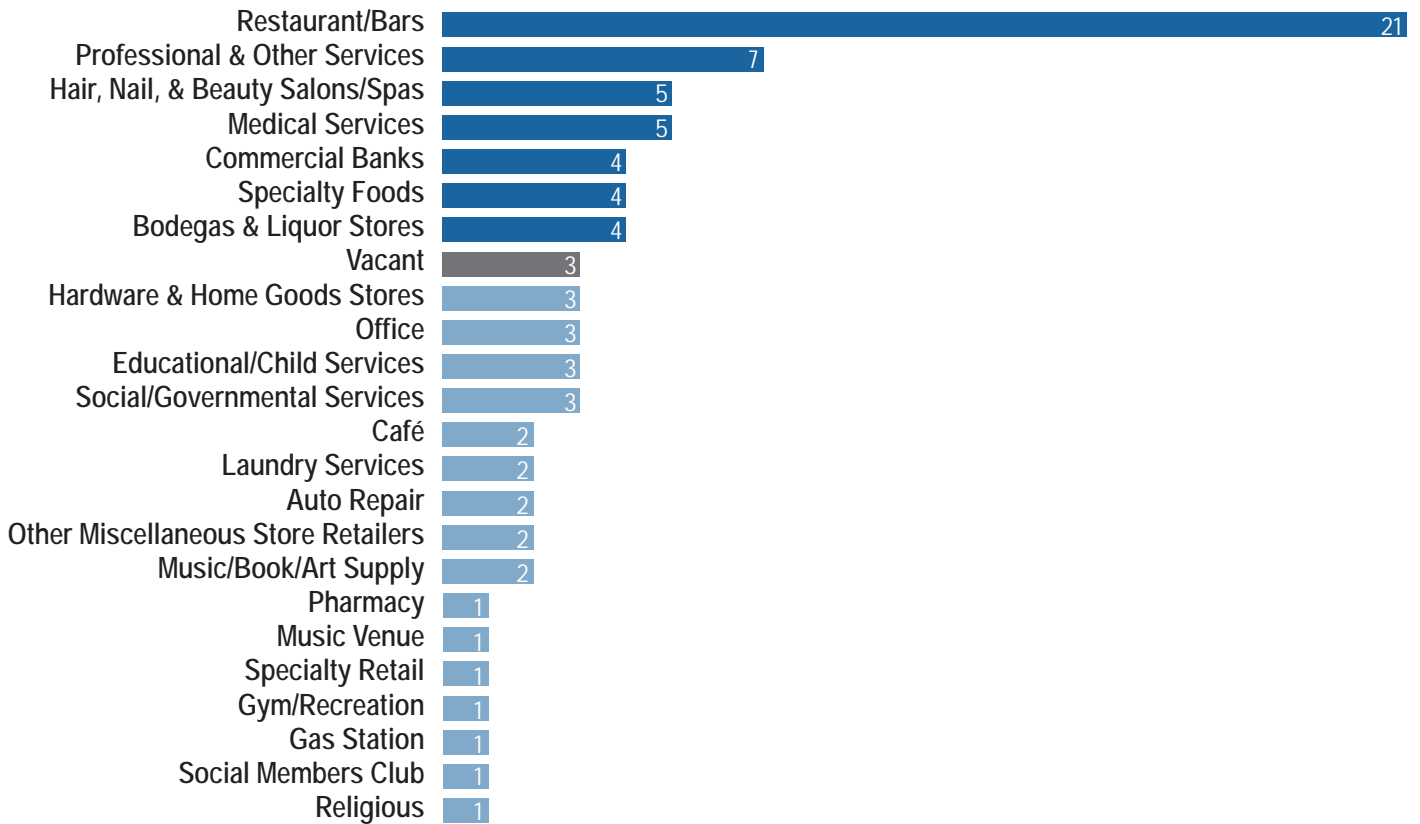
Ground Floor Business Inventory

83
Total Number of Storefronts

4%*
Storefront Vacancy

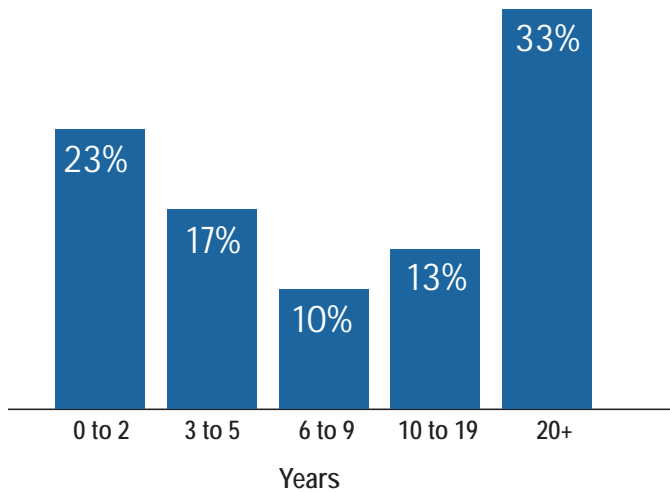
*Note: Numbers are based on a ground floor storefront survey conducted in October 2018, some of the vacant properties were under lease negotiations at time of the survey

Storefront & Retail Mix



What We Heard From Inman Square Business Owners

How many years have you been in business here?



How many employees do you have?



Do you Own or Rent your property?



Over the past year, has your business improved, stayed the same, decreased?



What changes need to occur on or around your corridor to attract more shoppers?*

	% Businesses
Safety	74%
Sanitation	60%
Parking	55%
Community Events/Marketing	47%
Storefront Improvements	33%
Business to Business Communication	24%

What kind of resources would help you grow your business?*

	% Merchants
Marketing Support	41%
Space Improvements	29%
Assistance with Regulatory Compliance	15%
Training for Staff	9%
Financing	6%
Legal/Lease Support	0%

What changes would you suggest to improve Inman Square for residents, pedestrians, and shoppers?



Better Parking



More Activity
(Retail and Pedestrian)



Safer/ Better
Intersection Design



More Events

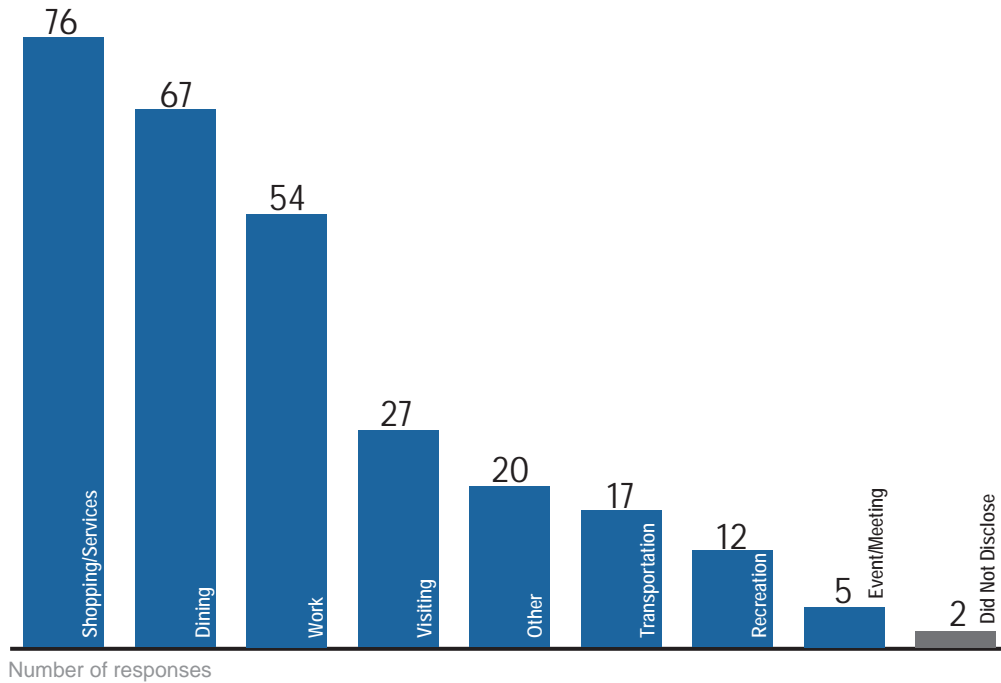
Source: Inman Square Business Owner Survey - 30 Responses (September 2018)

*Note: Respondents were allowed to choose more than one answer, totals may be more than 100%

CUSTOMER OUTLOOK

What We Heard From Shoppers

What is your primary purpose for being in Inman Square?



What are the most common items you purchase in Inman Square?*

	% Shoppers
Food/Groceries	78%
Wine/Beer/Spirits	35%
Home Goods	24%
Arts/Crafts	18%
Beauty/Personal Care Products	6%
Accessories	2%
Clothing	2%
Electronics/Gifts	2%

What are the most common services you use in Inman Square?*

	% Shoppers
Restaurant (Sit-Down)	70%
Restaurant (Take-Out)	64%
Pharmacy	18%
Music/Performing Arts Venue	11%
Medical	11%
Other	10%
Hair Salon/Barber	8%
Dental	1%

If not Inman Square, where do you shop?



Elsewhere in Cambridge
42%



Somerville
35%



Online
31%



Boston
18%



Other Communities
16%



Did not Respond
38%

Note: Percentages for these categories are based on the 62% of survey respondents who responded to this question.

Source: Inman Square Customer Intercept Survey (September 2018)

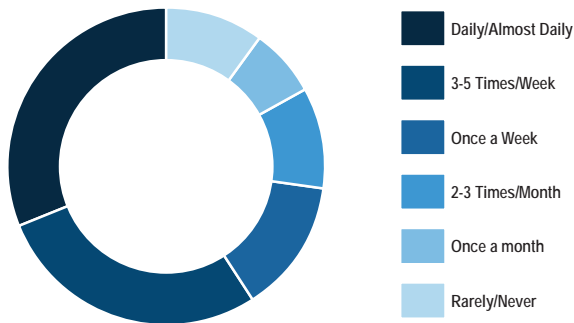
*Note: Respondents were allowed to choose more than one answer, totals may be more than 100%

What We Heard From Shoppers

How do you usually travel to get to Inman Square?*

	<i>% Shoppers</i>
Walk	71%
MBTA	25%
Bus	18%
Subway	3%
Bike	25%
Own	23%
Bluebikes	2%
Drive	24%
Alone	15%
Uber/Lyft/Taxi	7%
Carpool	3%
Company Shuttle	0%

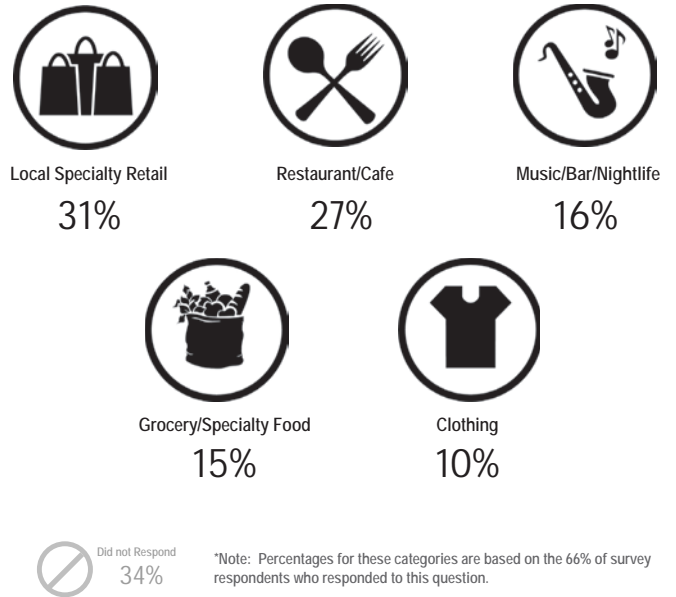
How often do you usually go shopping in Inman Square?



When do you usually go shopping in Inman Square?*

	<i>% Shoppers</i>
Weekdays	36%
Weekday Nights	18%
Weekends	21%
Weekend Nights	7%
No Set Time	21%

What new businesses would you like to see?



What would make you shop here more?



What changes would you like to see?



Source: Inman Square Customer Intercept Survey (September 2018)

*Note: Respondents were allowed to choose more than one answer, totals may be more than 100%

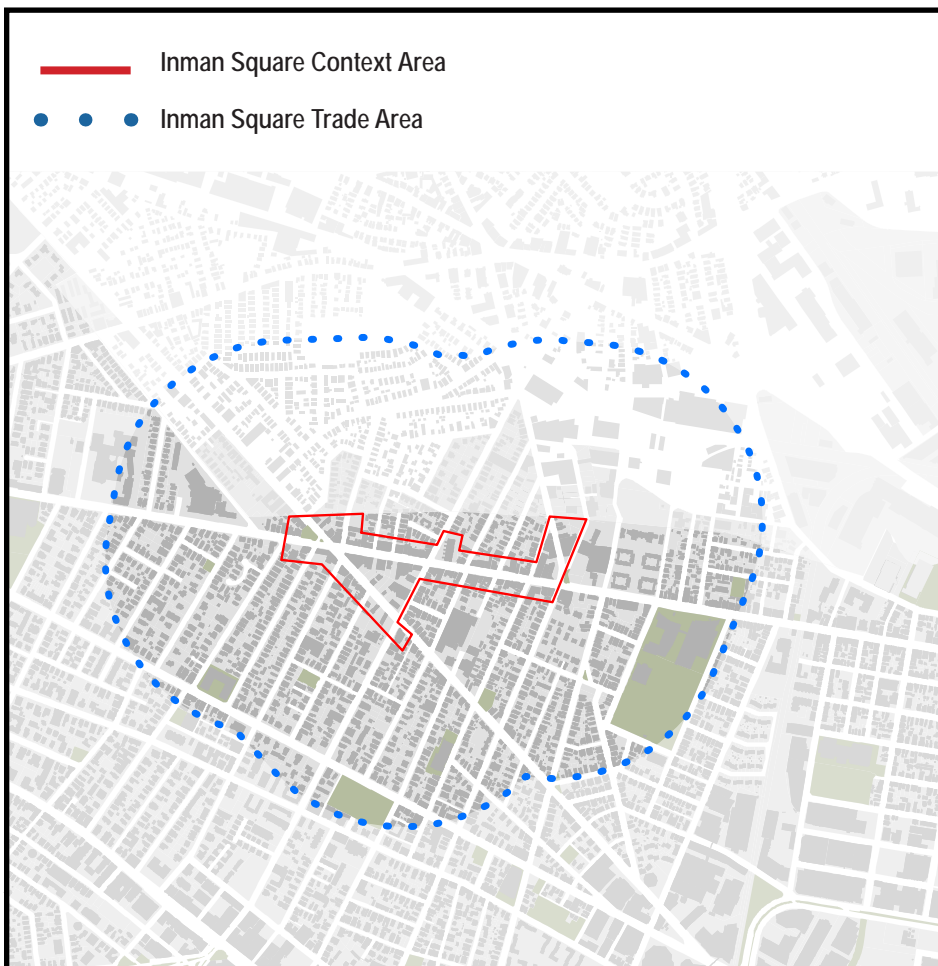
DATA APPENDIX

Survey Methodology

A variety of City staff and volunteers surveyed people in Inman Square over two weeks in September 2018 during peak times: morning, mid-day, and evening. We received 268 surveys from this effort. Additionally, City staff and the East Cambridge Business Association conducted a merchant survey. The merchant survey was conducted online and in person, and was available for 4 weeks, starting in mid-August. We received 30 responses to the business owner survey.

Context Area

Inman Square is defined in two ways in this report. The “Context Area” outlined in the map below refers to the commercial district boundaries identifying the greatest concentration of businesses in the Inman Square area. The data presented in the Ground Floor Business Inventory on p.8 refers to businesses located in the Context Area and all surveys were distributed and taken within this boundary. The “Trade Area” represents the location of the residents who live within a quarter mile from the Context Area and are most served by the commercial district. Responses from this demographic are reflected in the report’s Appendix, pp.14-15.



Trade Area Demographics

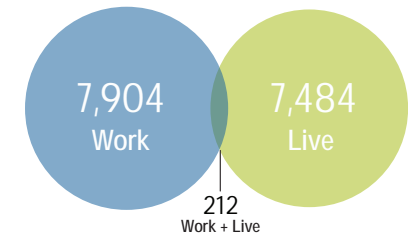
Total Population

13,597	Inman Square
116,577	Cambridge
6,925,129	Massachusetts

Average Household Size

2.21	Inman Square
2.02	Cambridge
2.50	Massachusetts

Commuting Patterns



7,904	Work in Inman Square, live elsewhere
212	Live & Work in Inman Square
7,484	Live in Inman Square, work elsewhere

Source: OnTheMap data 2015
Data based on Origin Destination Employer Statistics

Median Household Income

\$80,774	Inman Square
\$84,738	Cambridge
\$77,518	Massachusetts

Inman Square Retail Opportunity

\$289 M

spent by residents on goods and services each year

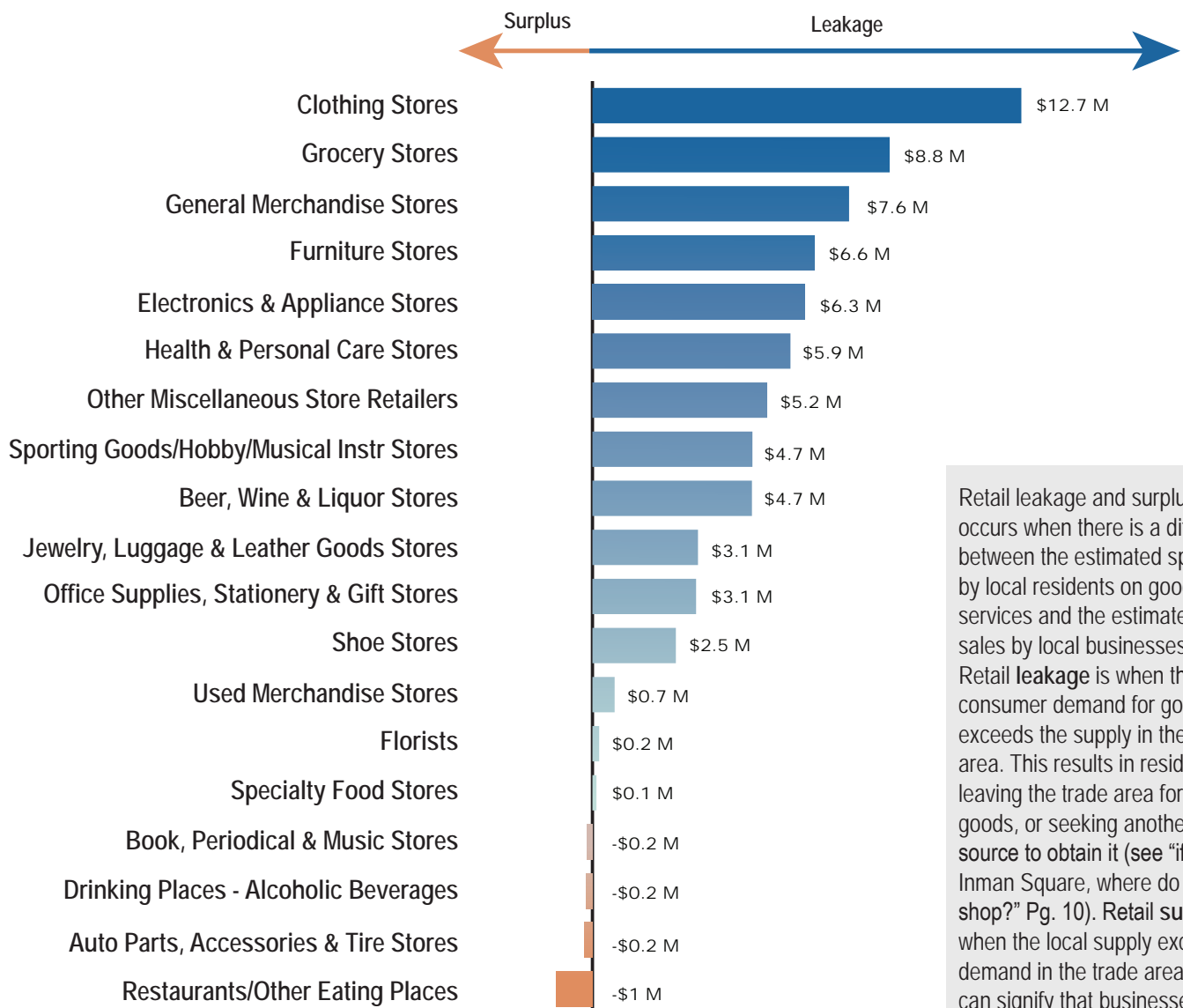
\$163 M

made in retail sales by local businesses each year

\$126 M

spent outside of Inman Square by residents each year

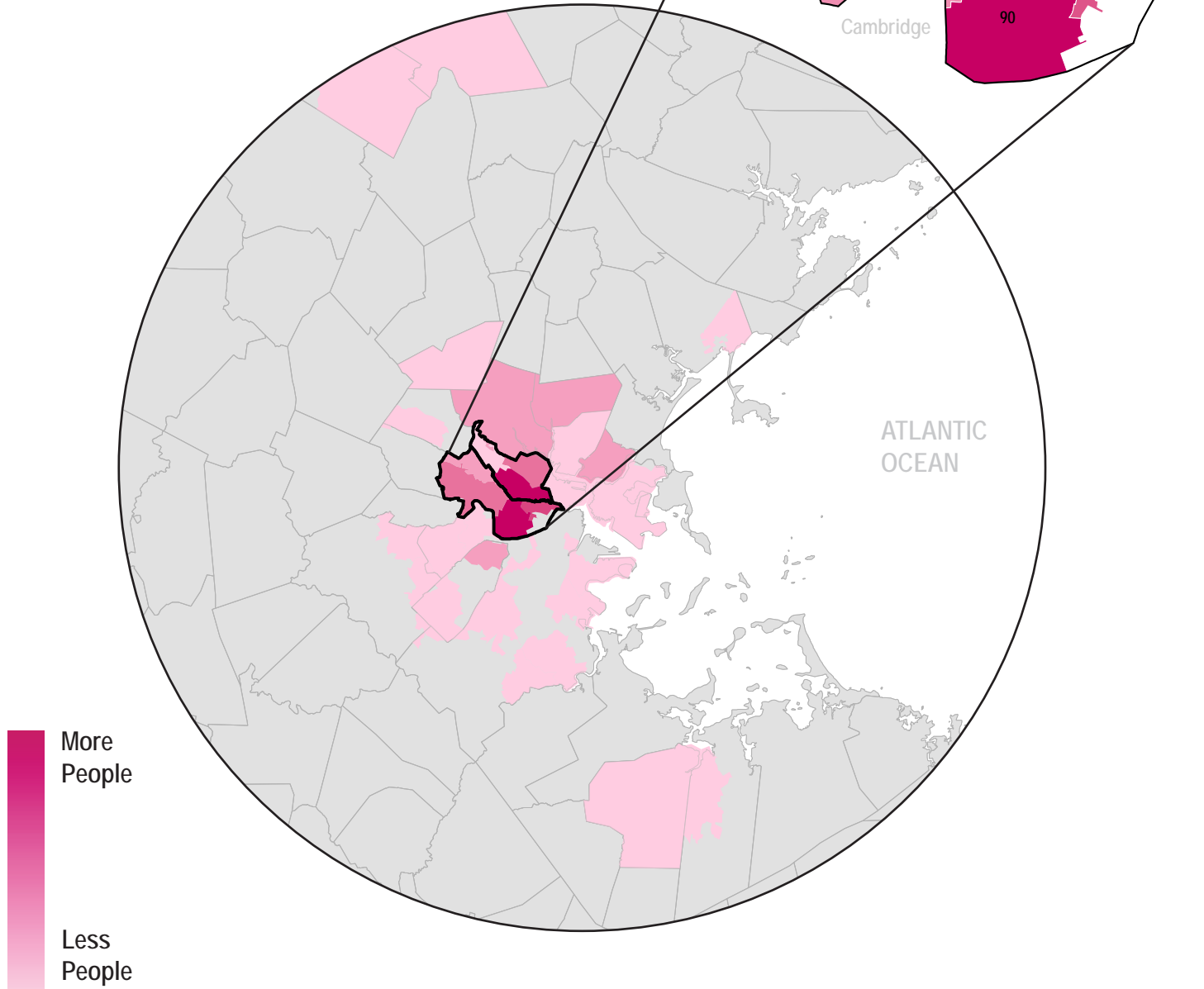
Retail Leakage & Surplus



Retail leakage and surplus occurs when there is a difference between the estimated spending by local residents on goods/services and the estimated sales by local businesses. Retail **leakage** is when the local consumer demand for goods exceeds the supply in the trade area. This results in residents leaving the trade area for these goods, or seeking another source to obtain it (see "if not Inman Square, where do you shop?" Pg. 10). Retail **surplus** is when the local supply exceeds demand in the trade area. This can signify that businesses are attracting consumers from outside the trade area.

Survey Respondent Locations

The map below shows the home location of survey participants. They provided their home location by zip code and the most frequent are mapped here. 257 (96%) survey respondents shared their zip code.



48%
Cambridge Residents

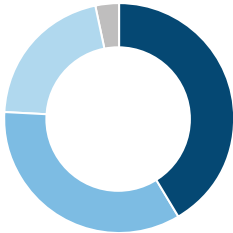
NOT PICTURED:
Respondent home zip codes located in other areas of MA, CA, NM, and NY

Source: Inman Square Customer Intercept Survey (September 2018), Massachusetts GIS

Demographics

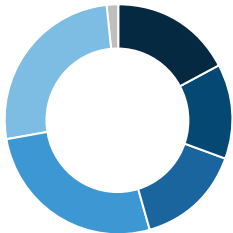
Shoppers | Inman Square | Cambridge

What is your relationship to Inman Square?



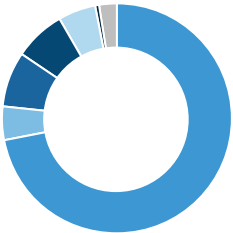
	<i>% Shoppers</i>
Resident	44%
Other	36%
Worker	22%
Did not Disclose	9%

What is your age?



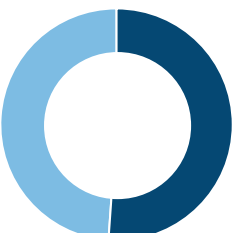
	<i>% Shoppers</i>	<i>% Inman Square</i>	<i>% Cambridge</i>
60+	17%	15%	16%
50-59	13%	9%	9%
40-49	15%	10%	10%
30-39	26%	24%	20%
20-29	26%	28%	29%
<19	0%	12%	16%
Did not Disclose	1%	X	X

What is your race or ethnicity?



	<i>% Shoppers</i>	<i>% Inman Square</i>	<i>% Cambridge</i>
American Indian/Alaskan Native	1%	0.2%	0.2%
Asian	7%	13%	19.6%
Black/African American	8%	13.9%	12.8%
Caucasian/White	72%	64.7%	59.7%
Latino/Hispanic	5%	11.4%	9.6%
Mixed/Multi-racial	5%	4.8%	5.1%
Did not Disclose	2%	X	X

What is your gender?



	<i>% Shoppers</i>	<i>% Inman Square</i>	<i>% Cambridge</i>
Female	51%	50.8%	51%
Male	49%	49.2%	49%
Other	0%	X	X
Did not Disclose	0%	X	X

Source: ESRI Community Analyst: US Census 2010 ESRI 2018 Estimates (November 2018), Inman Square Customer Intercept Survey (September 2018)

INMAN SQUARE CAMBRIDGE

The Community Development Department (CDD) is the planning agency for the City of Cambridge. With **five programmatic divisions, Community Planning, Housing, Economic Development, Environmental and Transportation Planning and Zoning and Development**, CDD takes an interdisciplinary approach to manage and guide physical change in a manner consistent with the City's priorities, engaging and collaborating with community partners and other government agencies to make Cambridge a desirable place to live and work.

CDD's Economic Development Division is responsible for a wide range of activities designed to meet **the City's need for a diversified and thriving economic base. We promote thriving commercial districts;** cultivate a supportive environment for small businesses and women and minority-owned businesses; and market Cambridge as a desirable business location. We offer a variety of resources and services, including site search and selection assistance, one-on-one meetings with staff, business workshops and classes, expert consulting services, and grants for accessibility, interior, and storefront improvements. For more information:

cambridgema.gov/business

Sources

ESRI and Infogroup, Inc. November 2018 ESRI Retail MarketPlace Profile.
ESRI and U.S. Census Bureau. November 2018 ESRI Community Profile.
U.S. Census Bureau. 2015. OnTheMap Application.

Photo Credits: Gretchen Ertl Photography; Kyle Klein Photography; Michael Rosenberg; Molly Akin Photography; Pardis Saffari

cambridgema.gov/cdd

