ALEWIFE & FRESH **POND** Customer Intercept Survey Report











Cambridge Community Development Department
Economic Development Division
December 2015

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1.1 Purpose

The purpose of the Commercial Districts Customer Intercept Survey is to give the Economic Development Division (EDD) a better understanding of how Alewife/Fresh Pond district residents and visitors utilize the district and how they would like the district to evolve in the future.

Understanding the different types of consumers in the district will improve our ability to assist business owners seeking a location, help current business owners understand their local market and collaborate with property owners to recruit new businesses.

1.2 Methodology

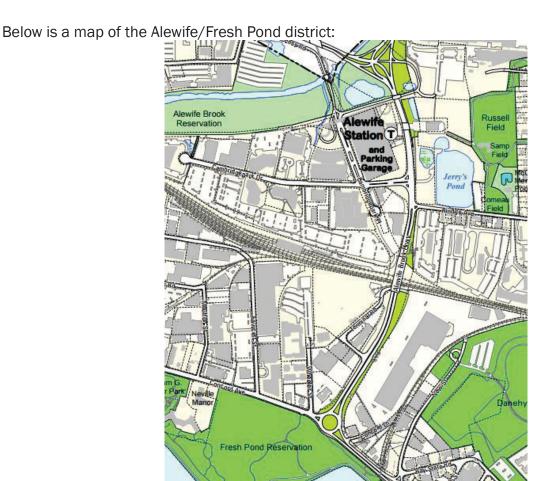
Using the Intercept Survey (see Section 6, Appendix A), a variety of Community Development Department staff and volunteers surveyed people in the Alewife/Fresh Pond district over two weeks in September of 2015. We received a total of 542 surveys from this effort. The goals of the survey are to get a better understanding of:

- Who comes to the area
- How long they stay
- How they get there (mode of transit)
- · Why they come
- Where they visit/shop
- What they like/dislike
- How the area could better meet their needs

We surveyed at the following times of day:

- AM Peak (7am-9am)
- Noon (12pm-2pm)
- PM Peak (4pm-6pm)
- Evening (5pm-7pm)

Surveyors were positioned at Danehy Park, the Alewife T-Stop, Whole Foods Market on Alewife Brook Parkway, the food trucks of Cambridge Park Drive, Trader Joe's on Alewife Brook Parkway, Ferro's Food Town on Rindge Avenue, Fawcett Street at Concord Ave, Concord Ave at Bay State. We also provided surveys to Evolve Fitness, the Atmark Apartments, Ferro's Food Town, and employees of businesses located on Cambridge Park Drive.



1.3 Tabulations

There were 542 survey respondents. Since not every respondent chose to answer each question, the tabulations for each question are based on the percentage of total respondents per question. For example: 496 respondents shared their gender, so percentages for male, female, and other are calculated based on those 496 replies and not the total 542 survey participants.

In Section 3, the number of retail and service businesses are based on the Economic Development Division's August 2015 ground floor inventory data of Alewife/Fresh Pond district. The definition of each type of business is based on their North American Industry Classification System (NAICS) Code, the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting and analyzing business data.

1.4 Key Findings & Observations

Fast Facts on Respondents:

- 33% of respondents live in Cambridge
- 81% of respondents work in Cambridge
- 52% of respondents were between the ages of 25-34 or 35-44
- 63% of respondents get to the Alewife/Fresh Pond district by driving alone

- 36% of respondents frequent the business and services in the Alewife/Fresh Pond district 3-5 times a week. 27% visit them every day.
- 59% of respondents spend less than an hour in the area per visit
- 34% of respondents' primary purpose in the district was work
- 54% of respondents said they rarely or never come to the Alewife/Fresh Pond district in the evening for dining or entertainment purposes

Top five most visited businesses by type:

- Grocery store
- · Quick Service Food
- Pharmacy
- Recreation
- Restaurants/Bars

Retail Findings

Top five current business offerings that respondents rate as "good":

- Grocery Store
- Office Supply
- Movie Theater/Entertainment
- Food Trucks
- Sporting Goods

Top five businesses that respondents would like to see more of in the district:

- Restaurants (Sit Down)
- Coffee Shop/Bakery
- Restaurants (Take Out)
- Food Trucks
- Home Goods

Characteristics

Top five characteristics that respondents rated as "good":

- · Access to transit
- Friendliness
- Price
- · Business Hours
- Safety

Overall findings

- Many residents and workers use and appreciate the Alewife/Fresh Pond district for daily needs such as coming to work, grocery shopping, and pharmacy shopping.
- Respondents love the bike path and Fresh Pond recreation area. Many felt that infrastructure
 improvements to the pedestrian and bike paths between CambridgePark Drive and Fresh Pond
 Mall would encourage them to shop more in other parts of the neighborhood.
- The Alewife/Fresh Pond area needs additional businesses such as coffee shops, quick service food, specialty retail and sit down restaurants to extend the stay of shoppers who visit for short periods of time and also to spark the need for nighttime activity in the district.
- Despite the frustrations with traffic congestion, 64% of respondents stated that access to public transit was good in the district.
- People enjoy the outdoor and public space amenities in the district, but are interested in seeing
 the addition of more public gathering places, outdoor lighting, and better cultural and nightlife
 activity.
- Many respondents desire better atmosphere and cohesion to the area, to make it a more accessible and friendly neighborhood.



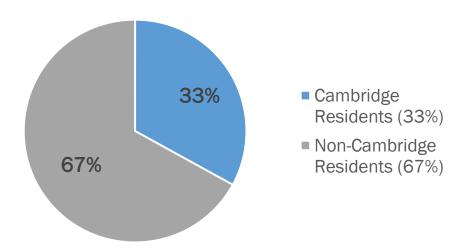
In this section, we provide information on the demographics of respondents and the nature of their average visits to the district, including modes of transit, length of visits, and frequencies of visits.

2.1 Respondent Demographics

Residency by Zip Code

Of the 525 respondents who provided their zip code, 33% are from Cambridge and 67% are not. Because many respondents commute to this district for work, those who were not based in Cambridge came from a wide variety of communities throughout Massachusetts and New Hampshire. Of those surveyed about renting or owning, 60% own and 40% rent. For more information about respondent residency, see Appendix B.

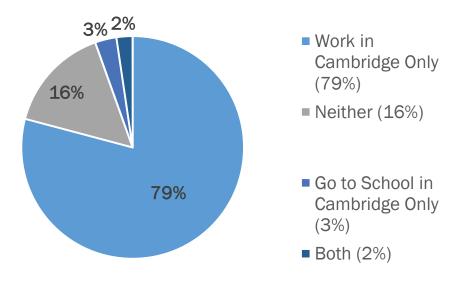
Chart 1: Respondents by Residency



Worker/Student Breakdown

502 respondents replied to the question of whether they work or attend school in Cambridge. 81% of those surveyed work in Cambridge, and 5% are attending school in Cambridge.

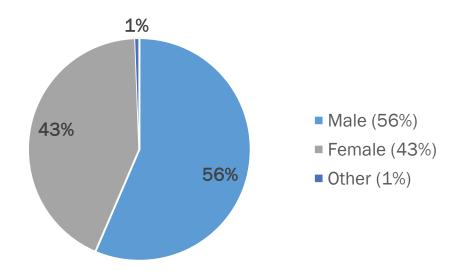
Chart 2: Respondents by Working/Studying in Cambridge



Gender

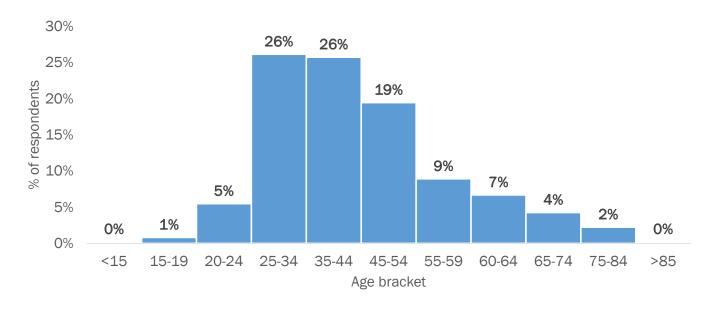
496 respondents shared their gender.

Chart 3: Respondents by Gender



Age 494 respondents provided their age. Over half of respondents (52%) were between 25 and 44 years of age, but we had answers from people as young as 13 and as old as 85+.

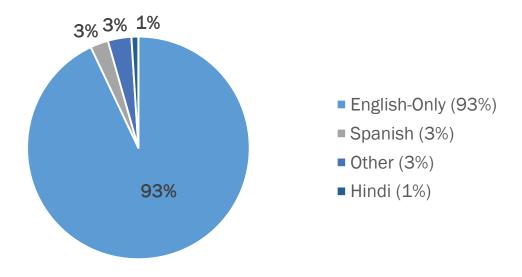
Chart 4: Respondents by Age



Language

498 respondents answered the question regarding languages spoken at home beyond English. The overwhelming majority spoke English only, but nearly fifteen different languages were mentioned. In Chart 5, "Other" includes not specified, Amharic, Arabic, Bengali, Chinese, Haitian-Creole, Indonesian, Korean, Nepali, Portuguese, Romanian, and Russian.

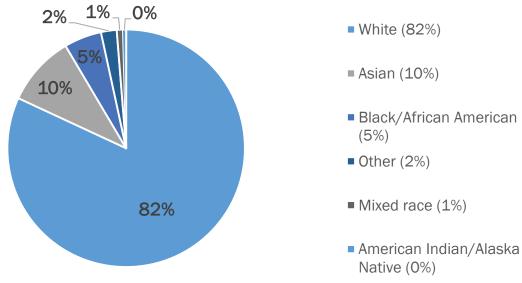
Chart 5: Respondents by Languages Spoken



Race & Ethnicity

Only 155 people responded to the question on ethnicity. 8% of these respondents identified as Hispanic. 470 respondents provided their race. 82% of these respondents are White, 10% are Asian, and 5% are black.

Chart 6: Respondents by Race

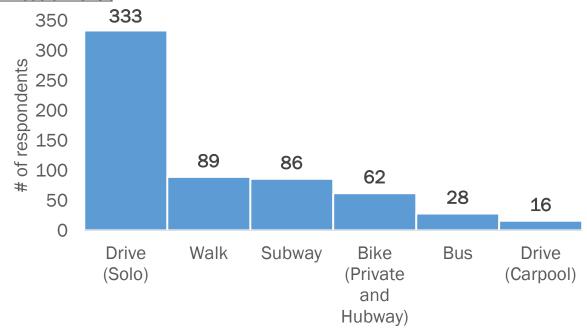


2.2 Transportation & Length of Stay

Mode of Transit

Respondents were asked to select the one mode of transit they use most frequently to get to the Alewife/Fresh Pond district, but 12% of the 532 respondents included more than one mode. Chart 7 captures all of the modes of transit respondents listed. 63% drive solo, but many walk or take the subway in addition to or instead of driving.

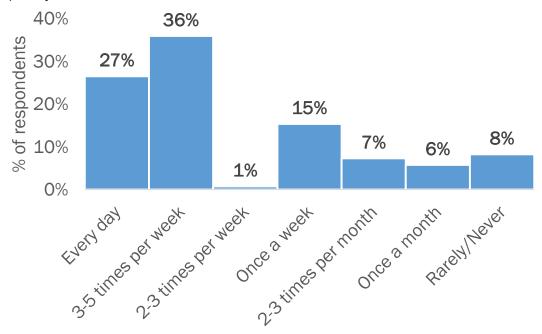
Chart 7: Mode of Transit



Visit Frequencies and Length

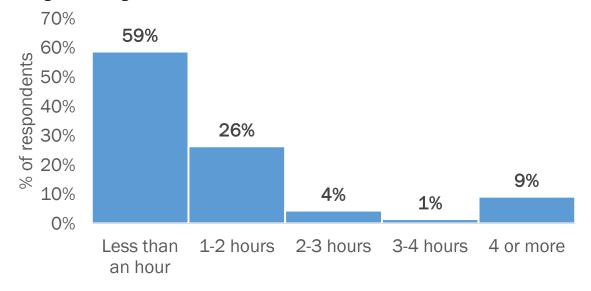
Respondents were asked how frequently they use the services and shops in the Alewife/Fresh Pond district. Of the 520 people who answered the question, 63% of respondents visit the area every day or close to every day at 3-5 times per week.

Chart 8: Frequency of Visits



482 answered the question regarding the length of their average visit to the district. The majority of trips are less than an hour. This suggests that shoppers are making quick but frequent visits to the area for errands; given that a third of our respondents were in the area for work (see Chart 10), much of this activity is probably on lunch breaks. We suspect that respondents who indicated they visit the area for more than four hours per visit may have been counting their places of employment.

Chart 9: Average Visit Length



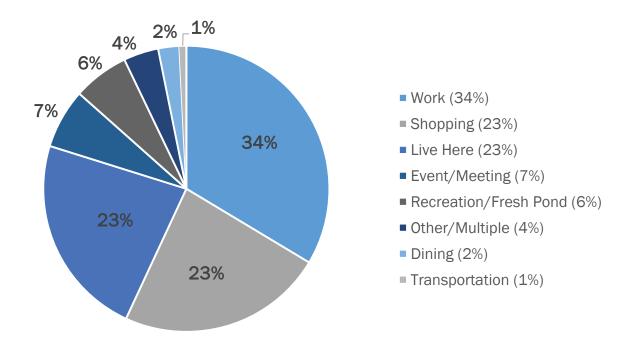


In this section, we review the respondents' visiting purposes, types of businesses visited, businesses desired, and ratings of current businesses that are in the Fresh Pond/Alewife district.

3.1 Primary Purpose

Respondents were asked what their primary purpose for being in the area was on the date of the survey. Over a third of respondents (34%) are in the district for work.

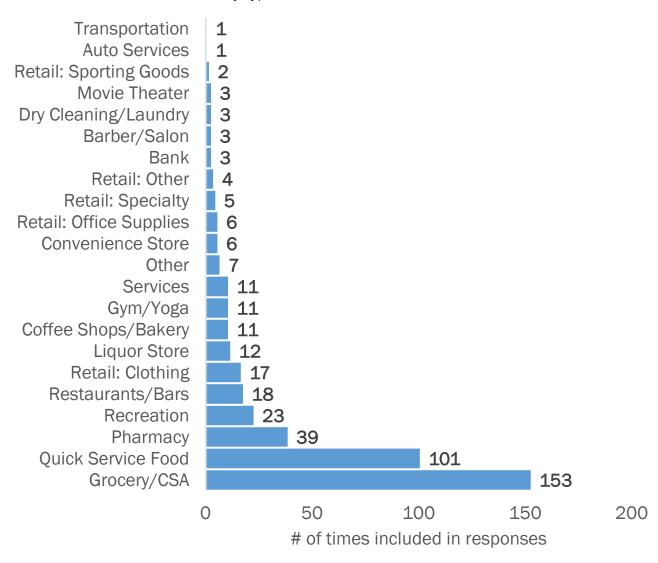
Chart 10: Primary Purpose for Being in Fresh Pond/Alewife District



3.2 Current Businesses Visited

Respondents were asked to name which businesses they were visiting on the day of the survey. We excluded places of employment for the purposes of this analysis. 256 respondents provided an answer, and many included multiple businesses. The answers were grouped into business type to generate Chart 11. Consistent with findings discussed in Charts 8-10, many respondents cited Quick Service Food places they utilize on lunch breaks from work, and even more mentioned grocery shopping.

Chart 11: Most Visited Businesses by Type



3.3 Businesses & Services Ratings

A portion of this survey asked respondents to rate how well the 13 current retail and service businesses in the Alewife/Fresh Pond district met their needs. The rating scale was good, fair, and poor. For each of the business types in this section, the survey also asked whether there should be new or more of that business type in the district.

Different survey participants used this portion of the survey differently; many filled out every rating, but others only rated some business types based on how often they used them or the relative strength of their opinion. The average response rate for each rating question was 60%. Those with the highest response rates were:

- Restaurants (Take Out) 69% response rate
- Grocery Stores 68% response rate
- Restaurants (Sit Down) 67% response rate.

Overview

The business types that had the most positive rating overall (defined by the percentage of people rating that type good) are: Grocery Stores, Office Supplies/Copying, and Movie Theater/Entertainment. The top three types of businesses respondents would like to see more of are: Restaurants (Sit Down), Coffee Shops, and Restaurants (Take Out).

Chart 12: Summary of Business Type Ratings (Sorted by Highest % Good)

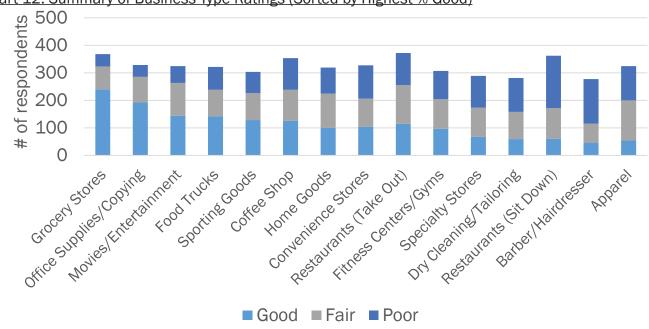
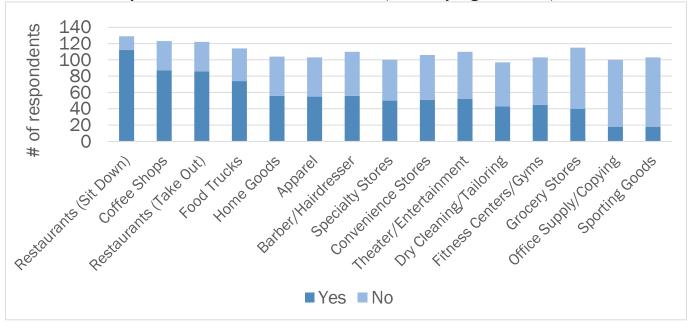
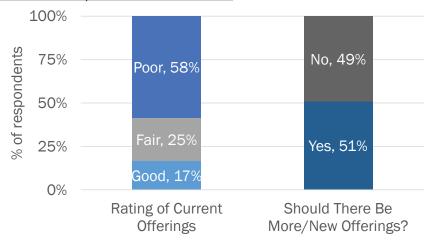


Chart 13: Summary - Should There Be More In District? (Sorted by Highest % Yes)



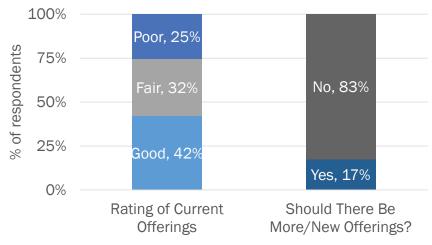
Barber/Hairdresser Services

Current number of Barber/Hairdresser services in the district: 0 Chart 14: Assessment of Barber/Hairdresser Services



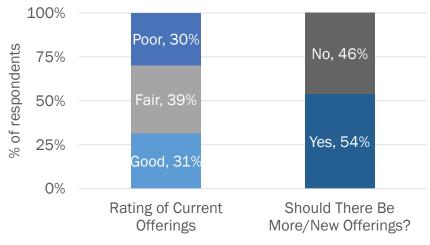
Sporting Goods

Current number of Sporting Goods stores in the district: 2 Chart 15: Assessment of Sporting Goods Stores



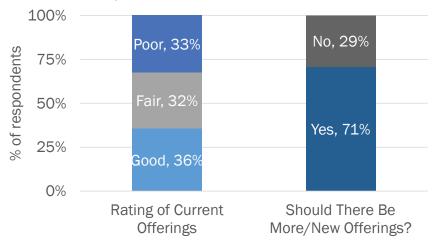
Home Goods

Current number of Home Goods stores in the district: 10 Chart 16: Assessment of Home Goods Stores



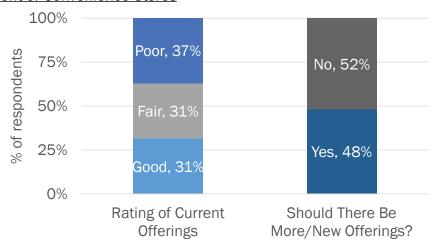
Coffee Shops

Current number of Coffee Shops in the district: 2 Chart 17: Assessment of Coffee Shops



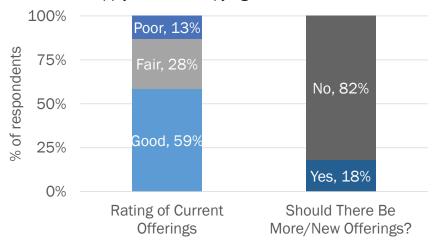
Convenience Stores

Current number of Convenience Stores in the district: 2 Chart 18: Assessment of Convenience Stores



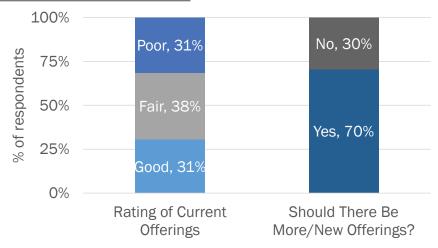
Office Supply/Copying Services

Current number of Office Supply Stores and Copying Service Providers in the district: 1
Chart 19: Assessment of Office Supply Stores & Copying Service Providers



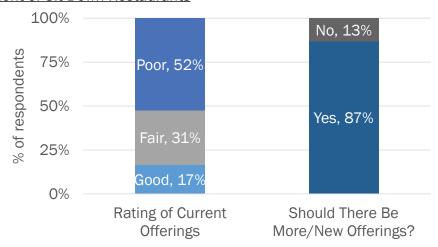
Restaurants (Take Out)

Current number of Take Out Restaurants in the district: 4
Chart 20: Assessment of Take Out Restaurants



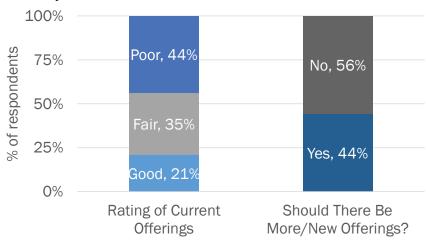
Restaurants (Sit Down)

Current number of Sit Down Restaurants in the district: 4 Chart 21: Assessment of Sit Down Restaurants



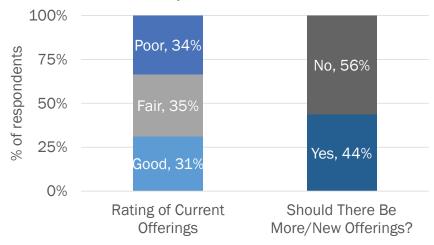
Dry Cleaning and Tailoring

Current number of Dry Cleaners and Tailors in the district: 1
Chart 22: Assessment of Dry Cleaners & Tailors



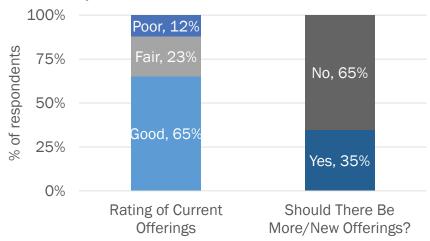
Fitness Centers/Gyms

Current number of Fitness Centers and Gyms in the district: 8 Chart 23: Assessment of Fitness Centers & Gyms



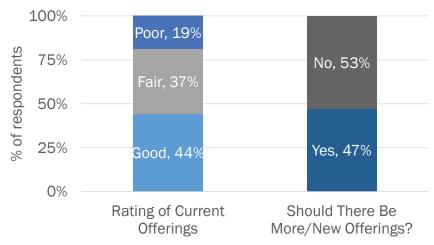
Grocery Stores

Current number of Grocery Stores in the district: 2
Chart 24: Assessment of Grocery Stores



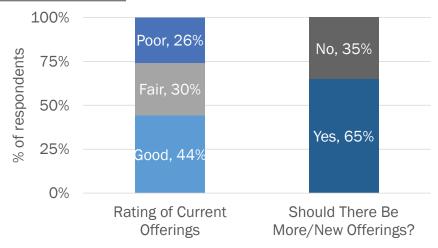
Movie Theater/Entertainment

Current number of Movie Theaters and other Entertainment Venues in the district: 1
Chart 25: Assessment of Movie Theaters & Entertainment Venues



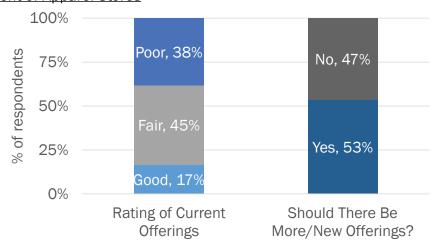
Food Trucks

VECNA and others have arranged for food trucks to serve on Cambridge Park Drive during the week. Chart 26: Assessment of Food Trucks



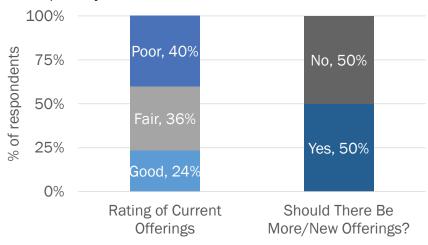
Apparel

Current number of Apparel stores in the district: 2
Chart 27: Assessment of Apparel Stores



Specialty Stores

Current number of Specialty stores in the district: 15 Chart 28: Assessment of Specialty Stores

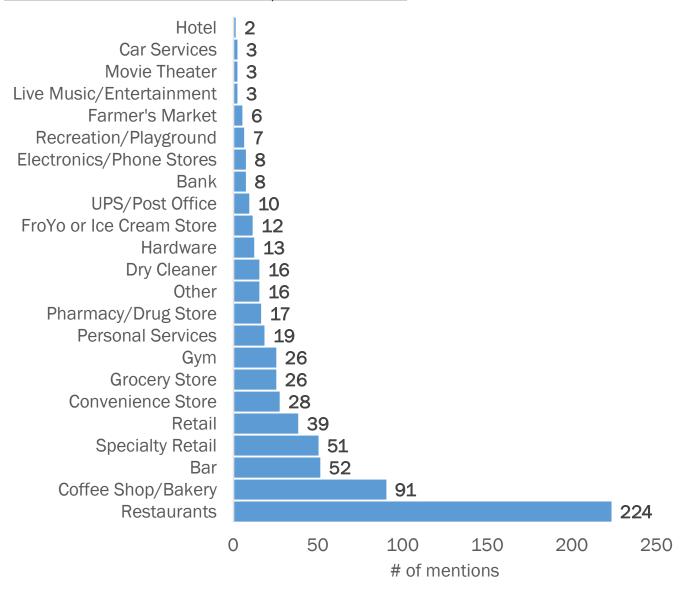


3.4 Businesses Desired

In addition to rating the current mix of retail and service businesses in the Alewife/Fresh Pond district, respondents were asked an open-ended question about what types of businesses they would like to see in the area that are not there now. We received 680 different suggestions from 320 respondents. In general, respondents wanted more places to eat and socialize. Those who included details on what kind of restaurants they wanted heavily favored quick service food options.

Specialty retail and general retail closely followed in number of mentions. Some specified what kind of specialty retail they were missing; these suggestions were varied, but many cited book stores and bike shops. The specified types of general retail were also varied, but home goods and clothing was a common theme. Some mentioned discount department or wholesale stores, while others requested more upscale retail options.

Chart 29: Businesses Desired in Alewife/Fresh Pond District





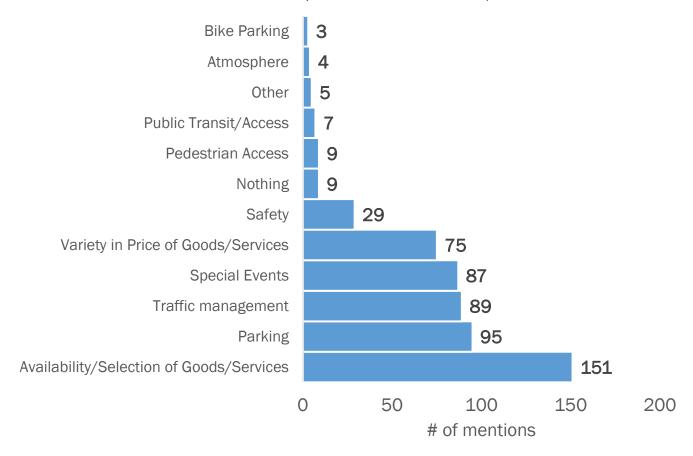
In this section, we review what respondents like about the district and what they would improve.

4.1 Characteristics of the District

In order to better understand customer reactions to the Alewife/Fresh Pond district, surveyors asked fifteen questions regarding different characteristics and their importance.

Respondents were asked "What would make you visit/shop more in the Fresh Pond district?" They were asked to check one option from special events; variety in price of goods/services; availability/selection of goods/services; parking; safety; and other, which had a space for free-form answers. 411 people answered the question, and many people selected multiple options, so Chart 30 displays all provided answers.

Chart 30: What Would Make You Visit or Shop More Often in the Alewife/Fresh Pond District?



Characteristics Ratings

Respondents were asked to rate several traits of the Alewife/Fresh Pond district. The rating scale was good, fair, and poor. Surveyors also asked respondents to rate the importance of each characteristic when deciding where to shop. That scale was very important, somewhat important, and not very important.

Access to Parking, Access to Transit and Infrastructure

The characteristics that had the most positive rating overall (defined by the percentage of people rating that type good) are: Access to transit, friendliness and price. The most important characteristics are: Safety, quality, and infrastructure.

Chart 31: Summary of Characteristics Ratings (Sorted by Highest % Ranked as Good)

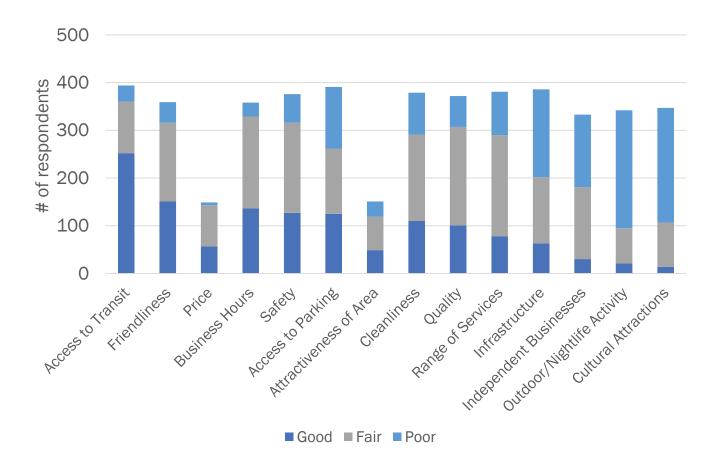


Chart 32: Summary of Characteristics Importance (Sorted by Highest % Ranked as Very Important)

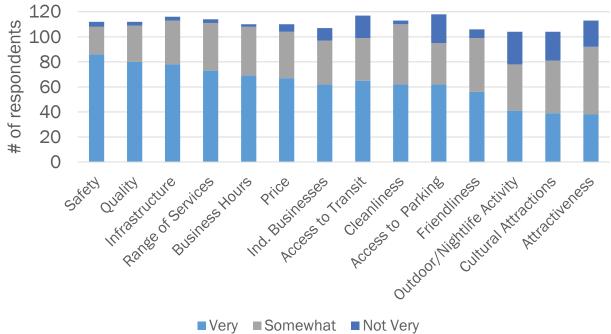


Chart 33: Access to Parking

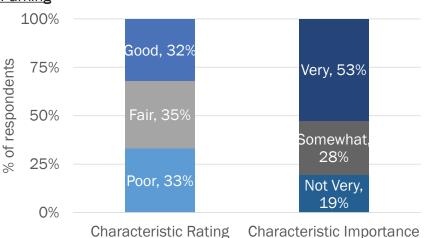


Chart 34: Access to Public Transit

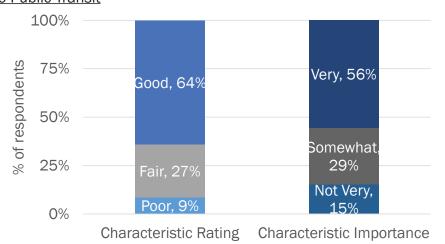


Chart 35: Range of Services

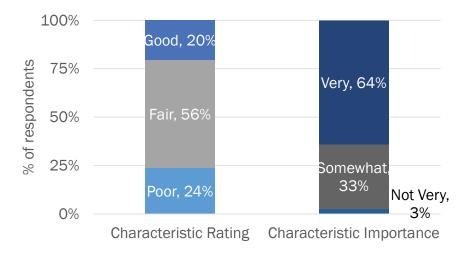


Chart 36: Quality of Goods & Services

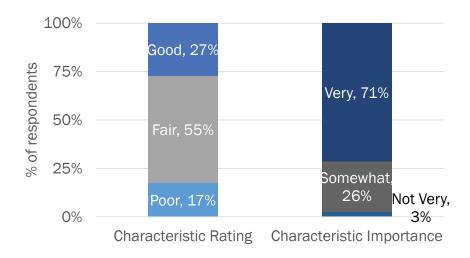


Chart 37: Prices of Goods & Services

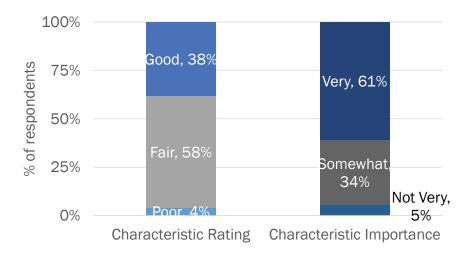


Chart 38: Friendliness of Service in Shops

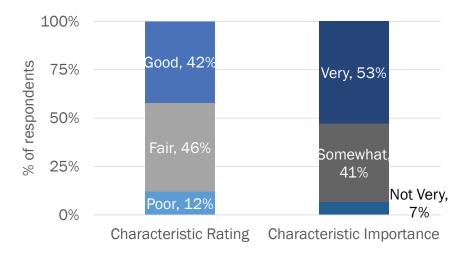


Chart 39: Attractiveness of Storefronts

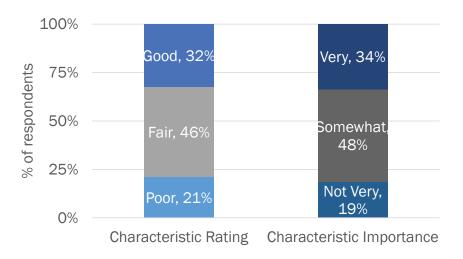


Chart 40: Cleanliness of the Area

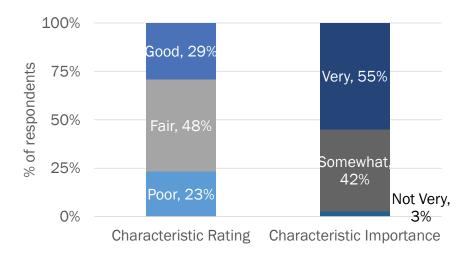


Chart 41: Infrastructure (Sidewalks, Bike Racks, Lighting)

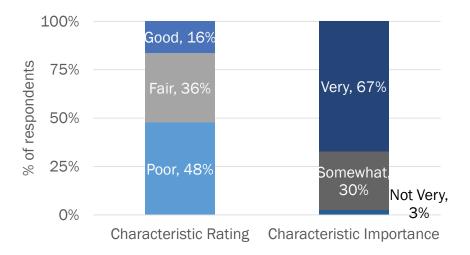


Chart 42: Sense of Safety

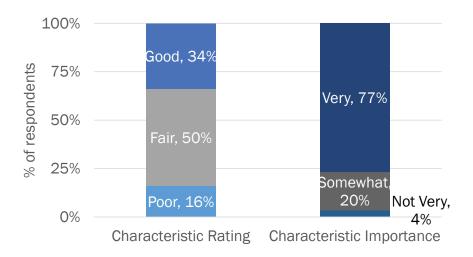


Chart 43: Business Hours

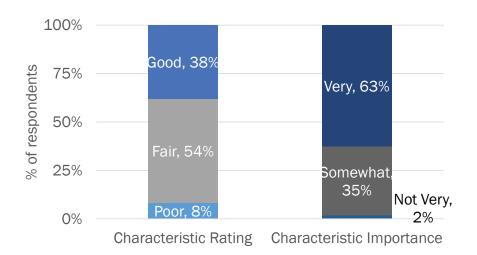


Chart 44: Presence of Independent Businesses

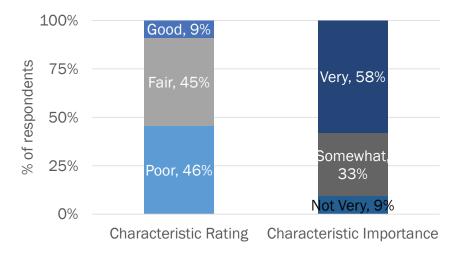


Chart 45: Cultural Attractions

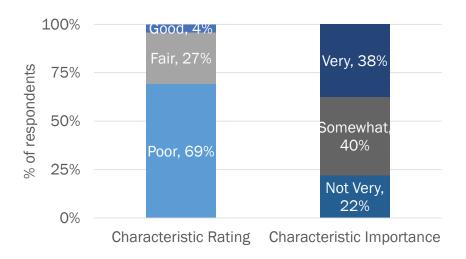
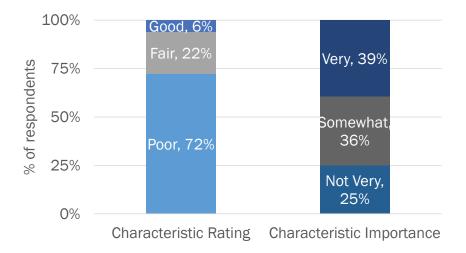


Chart 46: Outdoor and Nightlife Activity





This section reviews what respondents feel about the district overall and captures their free-form feedback.

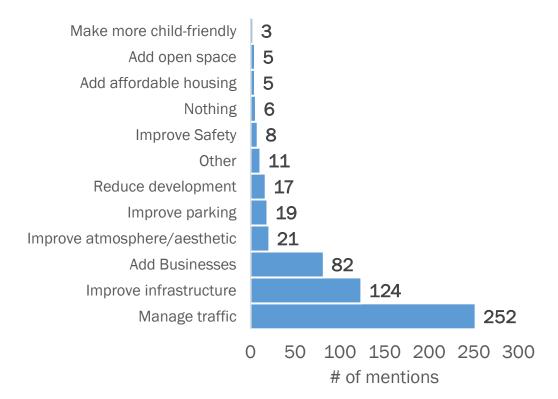
5.1 Vision Responses

Respondents were asked, "What would you change, keep, or eliminate in the district?" Since the answers to these questions vary, we grouped the responses based on the subject matter to explore similarities among responses.

Change

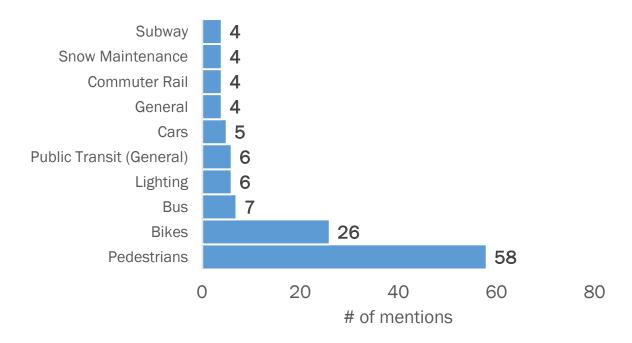
406 people suggested changes. When respondents mentioned multiple points, we counted each. The overwhelming majority of respondents mentioned traffic management and infrastructure improvements. Additionally, there seemed to be a tension between those who wanted more businesses in the area to meet their needs and those who felt all development—commercial and residential—should be stopped for fear that additions would exacerbate problems in traffic and infrastructure.

Chart 47: What Would You Change in the Alewife/Fresh Pond District?



Of the 252 who mentioned traffic management as something they wanted to change, 9 mentioned that having traffic cops in the area during rush hour would help. Of the 124 respondents who requested infrastructure improvements, specific suggestions were broken down as follows:

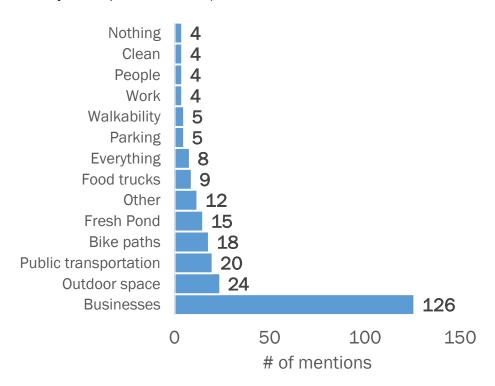
Chart 48: Types of Infrastructure Improvements Suggested



Keep

223 people responded to the question about what to keep in the Alewife/Fresh Pond district. In the event that a respondent included more than one answer, we counted each. The most popular reply was to keep the businesses in the area. We counted food trucks separately since many people identified them specifically. Respondents also enjoyed the outdoor space, bike paths, and Fresh Pond, as well as the public transportation options available to them.

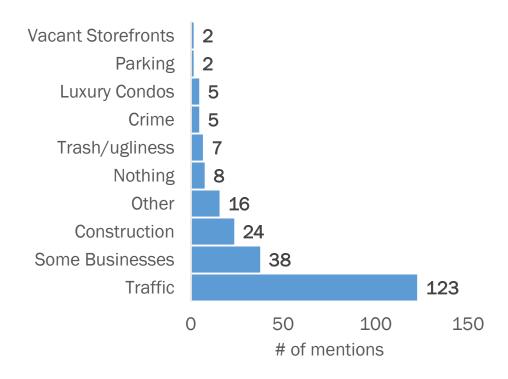
Chart 49: What would you keep in the Alewife/Fresh Pond District?



Eliminate

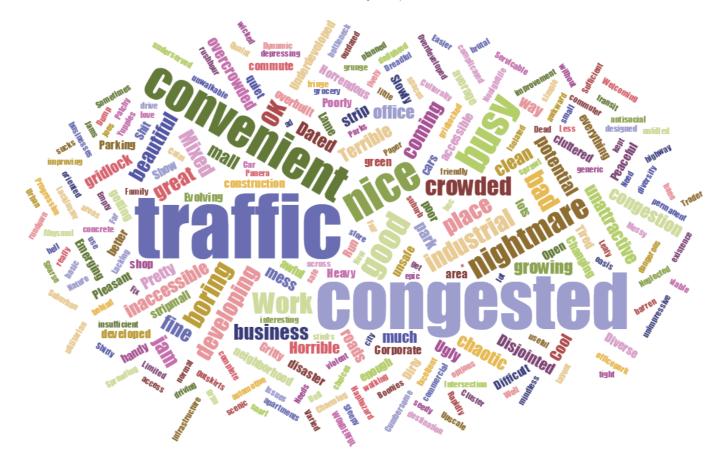
218 people responded to our question about what to eliminate in the Alewife/Fresh Pond district. In the event that respondents mentioned more than one answer, we counted each. The majority of respondents said traffic was what they wanted to eliminate, but several mentioned specific businesses they did not like and continuing construction that disrupted their travel and work environment.

Chart 50: What Would You Eliminate From the Alewife/Fresh Pond District?



5.2 One-Word Summary

Respondents were asked to describe the Alewife/Fresh Pond district in one word. We received 436 answers. The word cloud in the below represents the different words and phrases we heard; the larger the word in the cloud, the more often it was stated by respondents.





Appendices

Appendix A: The Alewife/Fresh Pond District Customer Intercept Survey

Appendix B: Fresh Pond/Alewife District Survey Respondents by Zip Code of Residence

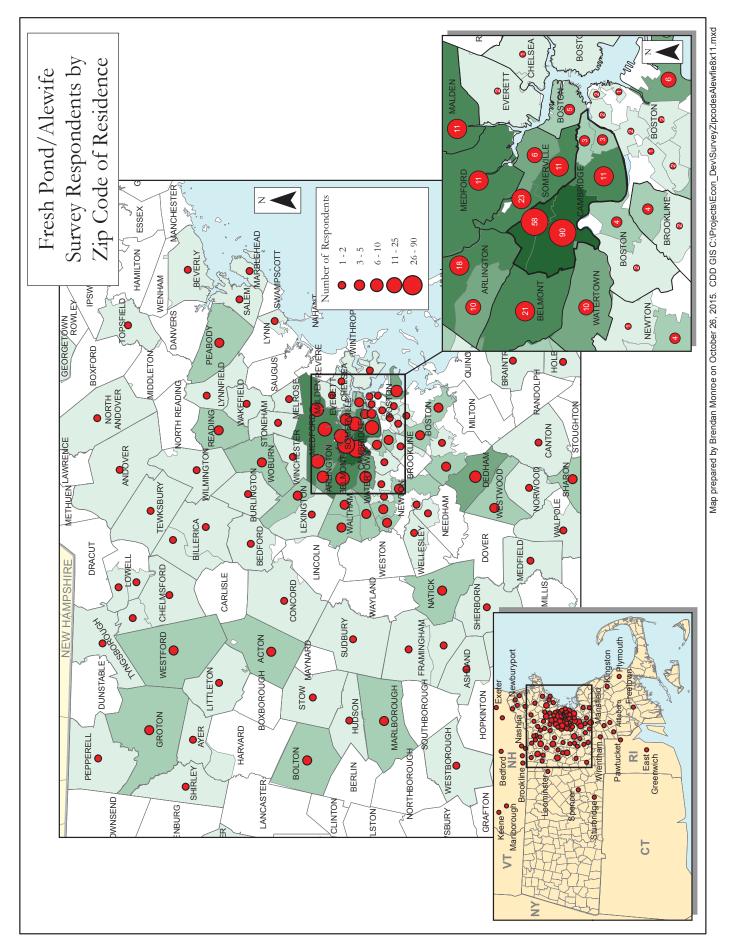
CUSTOMER SURVEY

The City of Cambridge is sponsoring this survey in order to get information that will help us create a business district that better meets your needs. Thank you for your participation!

1. What is your prin	-			resh Pond	today? (Check only	1)	
Shopping	_Dining _	Recreatio	n (Gym, H	ang out)	Event/Meeting	Work	
Services (i.e., law	yer) Ti	ransportation	nl	Fresh Pond	Live Here		
Other:							
2. What particular b	ousinesses (be	sides work)	are you vi	siting today	? (list each)		
3. Please tell me thro	ee types of bu	sinesses you	would lik	e to see tha	t are not here now.		
4. How often do you Every day/almost About once a more	every day	3-5 time		*	• /	2-3 times per month	
5. How long is your Less than an h	average visit our 1-2 h	(outside of v	vork) to Fi	resh Pond r 3-4 hours	reighborhood? 4 or more		
6. How do you mostBikeWalk	frequently ge	t to the Fre	sh Pond/A	lewife? (Ch	eck only 1).	s Hubway	
7. Please rate how well to	he <u>current</u> bu	sinesses in 1	Fresh Pond	l/Alewife m	eet your needs.		
		Rate how well existing businesses meet your needs. Do you feel there should be new/more of this in the district?					
Service/Product	Good	Fair	Poor		Yes	No	
Barber/Hairdresser							
Sporting Goods							
Home Goods							
Coffee Shops							
Convenience Stores							
Office Supply/Copying Services							
Restaurants (Take out) (ex: Chipotle)							
Restaurants (Sit Down) (ex Summer Shack)							
Dry Cleaning/Tailoring							
Fitness Centers/Gyms							
Grocery Stores							
Movie Theater/Entertainment							
Food Trucks							
Apparel							
Specialty Stores (e.g. Pet Store)							
8. Approximately how many evening?1-23-5 _			ome to Fre	sh Pond for	dining/entertainme	ent purposes in the	
9. What would make you vis	sit/shop more	often in Fre	esh Pond d	istrict? (Ch	eck only 1)		
			Goods/Servi	ices	_ Availability/Selecti	ion of Goods/Services	
Parking	_ Safety Othe	er					

	Rate this characteristic of Fresh Pond/Alewife				How Important is that characteristic to you when decided where to visit/shop?			
Service/Product	Good	Fair	Poor		Very	Somewhat	Not Very Importar	
Access to convenient parking								
Access to public transportation								
Variety/Range of Goods and Services								
Quality of goods and services								
Prices of goods and services								
Friendliness of service in shops								
Attractiveness of storefronts								
Cleanliness of the area								
Infrastructure (sidewalks, bike racks, lighting)								
Sense of Safety								
Business Hours								
Presence of Independent Businesses								
Cultural Attractions								
Outdoor and Nightlife Activity								
CUSTOMER PROFILE								
1. What is your zip code? a. If Cambridge zip, what neighb	_ orhood?	2. a. Do b. Do	o you wor o you go t	k in C o scho	Cambridge? ool in Camb	Yes	No Yes No	
		If	yes to sch	ool, w	here:			
3. Gender? Male Female					435-44 8485 +	45-54 _	55-59	
5. What do you speak most often at English Spanish Other	home?					your own resid		

a. If Cambridge zip, what heighborhood?	o. Do you go	to school i	n Cambrid	ige:	res
	If yes to se	chool, wher	e:		
3. Gender? Male Female 4.	What is your age	range?			
	_ 15 -19 20-24	25-34 _	35-44 _	45-54 _	55-59
	60-6465- 74 _	75-84 _	85 +		
5. What do you speak most often at home? English Spanish Other	6. Do you: _	_ Rent or _	Own yo	ur own resid	dence?
7. What is your ethnic background?	ania.				
Hispanic Non-Hispanic If Non-Hisp	Danic:				
8. What is your race?WhiteBlack or African AmericanAsianNative Hawaiian/Other Pa	ı acific İslander			an or Alask	
<u>VISION</u>					
In one word, how would you describe Alewife					
What would you change, keep or eliminate in					
Change:					
Keep:					
Eliminate:					



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