Retail Strategy for the City of Cambridge
Outline

OBJECTIVES

CONSULTANT TIMELINE

OVERALL STATE OF RETAIL

CITYWIDE ANALYSIS

GUIDING PRINCIPLES & RECOMMENDATIONS

1. DRIVE EXPERIENCE
2. THRIVE ONLINE
3. HELP SMALL BUSINESSES REMAIN COMPETITIVE
4. IMPROVE ACCESS
5. SUPPORT AND BUILD CAPACITY OF LOCAL BUSINESS ASSOCIATIONS
6. FILL GAPS
7. ADDRESS REGULATORY BARRIERS
Objectives

Develop best practice policies and programs that will support and enhance the ground level active use and retail environment in Cambridge.

PUBLIC POLICIES/INVESTMENTS: Short and long term strategies for how to meet City’s unmet retail needs

MARKETABILITY/VISIBILITY: Actions and best practices that the City might consider to enhance marketability and visibility to retailers

TENANT MIX: Recommendations for appropriate retail mix for each commercial district

ADMINISTRATIVE CAPACITY: Determine roles and responsibilities for advancing retail initiatives
Consultant Timeline

Released RFP: Fall 2016
Contracted w/LOA: Dec 2016
LOA Kickoff: Jan 2017
Site visit 1: Feb 2017

Site visit 2: Mar 2017
Surveys, data collection: Mar-May 2017
Initial presentation: May 2017
Recommendations: June 2017
Overall State of Retail
Overall State of Retail

E-Commerce in the US reached nearly $395 billion in 2016. However, this only accounts for 11.7% of total retail sales.

Changes in Consumer Habits

Growth of e-commerce and online tools are leading consumers to merge online and offline into a single shopping experience.

People are buying more online

Online sales affect retail categories differently

Most retail sales in the US are influenced by digital tools

Computer and Electronics and apparel and accessories accounted for 45% of ecommerce sales.

78% of shoppers research online before heading to a store. At the same time, 72% of shoppers buy digitally after seeing a product in a store.
Overall State of Retail

In Cambridge:

A Cambridge business manager revealed that last year over 50% of his total sales were made online.

- Residents who have internet at home: 92%
- Residents who made a personal purchase online in the last 30 days: 60%

Source: ESRI Business Analyst Online 2016

In an interview with a local business in Cambridge, the owner revealed having spikes in visitation and sales after posting new products on Instagram.
Overall State of Retail

• Online retailers are also opening *bricks-and-mortar* so they can fulfill orders at different localities

• Retailers are using their stores as fulfillment centers
  • E.g. Target in Central Square features a separate entrance for online order pick ups

• Larger retailers are right-sizing and occupying smaller footprints that can be accommodated in downtown retail spaces
### Overall State of Retail

The industry is facing fundamental and cross-generational shifts in consumer dining habits.

<table>
<thead>
<tr>
<th>% of National Retail Sales</th>
<th>Source: U.S. Census Bureau</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Core retail sales excl. motor vehicles and parts dealers)</td>
<td></td>
</tr>
</tbody>
</table>

Restaurants make up 15% of all retail sales. Restaurant sales growth has surpassed all other retail categories since the recession, +19% between 2012 and 2015.

Expenditure data shows that U.S. consumers have started spending more on dining in restaurants and meals outside the home (+5%) than on buying groceries and eating in (0%)*

8 in 10 consumers say dining out with family and friends is a better use of their leisure time than cooking and cleaning up**

*Source: U.S. Census Bureau (Core retail sales excl. motor vehicles and parts dealers)
In Cambridge:

Restaurants are the largest retail category citywide by number of businesses (38% of total retail businesses). Total sales from food services and drinking places in 2016 was $404,153,691* with a $133 million surplus* confirming that Cambridge is already a dining destination.

Restaurants are the main retail anchors in Inman and Kendall Squares and provide key complementing anchor functions in Harvard and Central Squares.

*Source: ESRI Business Analyst Online 2016
Overall State of Retail

Consumers are spending less on products and more on experiences and service-based retail

Experience-related purchases (travel, sports events, shows) were the top spending category for consumers in the 2016 holiday season.*

Changes in Consumer Habits

US 2016 Census shows a decrease in total sales in the past year for retail categories including department stores (-5.6%), electronics and appliances (-3.2%), general merchandise (-1%) and clothing & accessories.

In early 2017, a large number of retailers closed an unprecedented number of stores throughout the country.

Source: Business Insider

Number of Retail Stores Closing in Early 2017

- Payless: 552
- Bebe: 170
- American Apparel: 138
- CVS: 110
- Macy's: 108
- Sears: 70
- American Apparel: 70
- Payless: 68
- American Apparel: 60
- Sears: 42

Source: Business Insider
Service-based retail involve in-person interactions and thus can be best transacted at physical locations, for example:
- Restaurants
- Cinemas
- Theaters
- Personal services
- Health and fitness facilities
- Art studios, galleries and stores

Traditional retailers are also adapting store formats to personalize services and offer hands-on, memorable experiences:

<table>
<thead>
<tr>
<th>Retailer</th>
<th>Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home improvement stores</td>
<td>DIY home décor classes</td>
</tr>
<tr>
<td>Electronics and appliance stores</td>
<td>Cooking classes, model kitchens</td>
</tr>
<tr>
<td>Sporting goods stores</td>
<td>Rock climbing walls, equipment testing, yoga classes</td>
</tr>
<tr>
<td>Café, restaurants</td>
<td>Social gatherings, outdoor dining*</td>
</tr>
</tbody>
</table>
In Cambridge:

Overall net retail establishments declined by approximately 15% from 2001 to 2015. Electronics & Appliance stores and Sporting goods/hobby/book/music stores accounted for ~70% of overall losses**.

Meanwhile, sales have improved in experience-based categories such as food and beverage, personal services, and entertainment retail*. An increasing number of stores are offering more in-store events and a number of restaurants are seeking to expand and enhance their dining experience by adding rooftop dining.

Harvard Book Store holds between 350-450 author readings annually to drive business to the store. Meanwhile, Schoenhof’s Foreign Books closed its physical store and sells online.
Overall State of Retail

Summary

1. Growth of e-commerce and online tools are leading consumers to merge online and offline into a single shopping experience

2. The industry is facing fundamental and cross-generational shifts in consumer dining habits

3. Consumers are spending less on products and more on experiences and service-based retail
Citywide Analysis
Citywide Analysis

Retail Mix

- Food Services and Drinking Places is the largest retail category followed by Health and Personal Care Stores.
- General Merchandise <1%

Note: Miscellaneous Goods refers to florists, office supplies, stationery and gift stores, used merchandise stores and others. Food & Beverage refers to grocery stores, specialty food stores and beer/wine/liquor stores.

Source: City of Cambridge Business Data
Citywide Analysis

Top Leakage + Surplus Categories (residential)

- General merchandise and grocers likely looking for opportunities.

- Surplus suggests Cambridge is already a regional eating and drinking destination.

- Opportunities lie in creating environments that support existing retailers.

Source: LOA; ESRI Business Analyst Online
Citywide Analysis

Cost of Doing Business

According to the 2017 Citywide Business Survey and focus groups, there has been an increase in cost of operating businesses, including rents, utilities, and property taxes. According to the survey respondents, the top 3 challenges to the profitability of their businesses are:

1. Increase in rent
2. Increase in cost of utilities
3. Increase in cost of real estate taxes

This is compounded by the fact that many retail properties in Cambridge have Triple Net Leases.

*Triple Net Leases require tenants to pay all insurance, maintenance, and taxes.*

The 2017 Citywide Business Survey was made available online for 6 weeks and 68 small business owners responded. Find the full survey results online: http://www.cambridgema.gov/CDD/Projects/EconDev/~/media/B0F690EA260F45449CC8E5F3C4B9FDD7.ashx
## Citywide Analysis

### Real Estate Landscape

- **Fresh Pond/Alewife**
  - Average asking rent: $30 - $60/SF

- **North/Upper Mass**
  - Average asking rent: $32/SF

- **Huron Village/Observatory Hill**
  - Average asking rent: $28/SF

- **Harvard Square**
  - Average asking rent: $106/SF

- **Central Square**
  - Average asking rent: $42/SF

- **Porter Square**
  - Average asking rent: $43/SF

- **Inman Square**
  - Average asking rent: $26/SF

- **Davis Square**
  - Average asking rent: $46/SF

- **Kendall Square**
  - Average asking rent: $35/SF

- **Union Square**
  - Average asking rent: $43/SF

- **Assembly Row**
  - Average asking rent: $50/SF

- **East Cambridge**
  - Average asking rent: $26/SF

### Business Environment

Despite increasing real estate costs, average asking rents are comparable or less than nearby competitive districts.

<table>
<thead>
<tr>
<th>City of Cambridge</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average asking rent per SF (excl. utilities + property taxes)</td>
<td>$43</td>
</tr>
<tr>
<td>Median asking rent per SF</td>
<td>$31</td>
</tr>
<tr>
<td>Range of spaces available</td>
<td>500 - 6,300 SF</td>
</tr>
<tr>
<td>Average space size</td>
<td>2,549 SF</td>
</tr>
<tr>
<td>Median space size</td>
<td>1,800 SF</td>
</tr>
</tbody>
</table>

Source: Costar and LoopNet February and March 2017; *HR&A 2016 Market Scan
The average asking rental rate per SF for Retail Commercial properties as of June 2016 was $33.84. Rental rates remained unchanged compared to the prior 3 months, with no change year-on-year.
Described by many business owners as long and uncertain.

Permitting process is onerous

Zoning and Table of Uses do not reflect new business dynamics

Special permit requirement/variances for ‘fast food’ establishments is a hurdle to entry for new local businesses (food to go options) and other regulations constrain experience-based retail.

Parking requirements ignore impacts of weather, special needs groups, and business needs

Walking and biking is less conducive to extreme weather conditions and to the needs of seniors and people with disabilities. Parking requirements disregards the needs of employees who do not live in transit accessible places.
Citywide Analysis

Cambridge has a large number of neighborhood and business associations that deliver key services to businesses and commercial districts and provide key links between the City and businesses.

However, there is a vast disparity amongst the associations in terms of budget and operating capacity which leads to imbalance support and services for businesses of various districts.

Administrative Capacity

Economic Development Division of Department of Community Development connects businesses to resources but has limitations on what they can do and provide directly to businesses due to Massachusetts State laws.

Budget Range
Less than $2k to $600k

Staff Size Range
0 - 3.5 full-time
Guiding Principles

1. DRIVE EXPERIENCE
2. THRIVE ONLINE
3. HELP SMALL BUSINESSES REMAIN COMPETITIVE
4. IMPROVE ACCESS
5. SUPPORT AND BUILD CAPACITY OF LOCAL BUSINESS ASSOCIATIONS
6. FILL GAPS
7. ADDRESS REGULATORY BARRIERS
Drive experience
Recommendation: Build experience of the diverse districts through necessary public improvements and local activities

**STRATEGY**
- Assess physical conditions of the city’s commercial districts and promote necessary public improvements

**ACTION**
- Creating district needs assessment for at least one commercial district per year. FY2018 - Central Square.
Recommendation: Encourage district-wide events + activities

**Strategy**
- Encourage stewardship and revenue generation through the activation of public spaces
- Consider providing competitive funding for events & programming held by local business organizations

**Action**
- Small Business Challenge (“Challenge”) program is designed to foster neighborhood engagement with the local business community and to support small business associations and groups of neighborhood businesses.
2 Thrive Online
Recommendation: Develop a city-wide effort to establish online marketing presence

STRATEGY

- Offer technical assistance and training to business associations and businesses on how to have a presence on review platforms

ACTION

- Continue the Small Business Enhancement Program, and offer workshops on creating/developing online presence for businesses. Currently developing interpreter services and translating our Steps to Starting a Business Guide.
Help small businesses remain competitive
Recommendation: Enhance business storefronts

**STRATEGY**

- Continue Storefront Improvement Program and determine if additional funding will enable for greater use.

**ACTION**

- Storefront Improvement Program is a successful business assistance grant program that leverages public-private investment.
- Using some CDBG funds to offer legal assistance for commercial lease review.

Lamplighter is a recipient of Cambridge Storefront Improvement Grant.
Recommendation: Offer other support for small businesses

**STRATEGY**
- Provide additional support for small businesses.

**ACTIONS**
- Educate business owners about shift-sharing platforms and tools to coordinate business activity (e.g. business hours, programming, employees roles and availability)
- Dozens of business improvement workshops – some moving to web-based
- Grant programs – Small Business Enhancement, Small Business Challenge, Interior Accessibility, Storefront Improvement Program.
- Other programs: Cambridge Entrepreneurship Assistance Program; Small Business Coaching Program, and 10 –week Cambridge Business Planning Program
4 Improve access
Recommendation: Mitigate impacts of construction projects on small businesses

**STRATEGY**

- Continue supporting wayfinding and promotion strategy for businesses in affected areas
  - Assist businesses in procuring additional signage
  - District-wide promotion and marketing during construction periods

**ACTION**

- Placing Banners in impacted neighborhoods
- Coordinating with DPW on future construction impacts starting Spring 2018
Support and build capacity of local business associations
Recommendation: Strengthen the role of local business associations in managing and promoting their commercial districts

**ACTION**

- Support efforts of local business association(s) in Business Improvement District Formation
- Researching variety of training opportunities for business association leadership

**WHAT ARE THE BENEFITS OF A DISTRICT MANAGEMENT ORG?**

A 10-year Philadelphia study found a demonstrable correlation between the presence of a district management organization with sustainable funding and retail sales growth over time.
Fill Gaps
Recommendation: Encourage short term/ pop-up uses

**STRATEGY**
- Activate and add amenities to public spaces, expand entrepreneurial opportunities and provide diverse food options

**ACTION**
- Launched Cambridge New Food Truck Pilot Program
- Researching Vacant Storefronts Pilot
Address regulatory barriers
Recommendation: Adapt commercial land use classification to allow for flexible retail formats

**ACTION**

- Adopt recommendations from the 2015 Commercial Land Use Classification study for retail

**HOW IS THE CURRENT TABLE HURTING SMALL BUSINESSES?**

<table>
<thead>
<tr>
<th>PRACTICE SPACE</th>
<th>HONEYCOMB CREAMERY</th>
<th>ZINNEKEN’S BELGIAN WAFFLES</th>
<th>LAMPLIGHTER BREWING CO.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classes triggered higher parking requirements (Educational Institution)</td>
<td>Classified as fast food; required a variance</td>
<td>Change of Use triggered a variance or special permit</td>
<td>No classification; required variance</td>
</tr>
</tbody>
</table>
# Administrative Capacity

## Roles & Responsibilities

<table>
<thead>
<tr>
<th>City of Cambridge</th>
<th>Business Association</th>
<th>Business</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Citywide</strong></td>
<td><strong>District-level/Outside the Store</strong></td>
<td><strong>Inside the Store</strong></td>
</tr>
<tr>
<td>▪ Regulatory/Zoning</td>
<td>▪ Promotion/Marketing</td>
<td>▪ Operations</td>
</tr>
<tr>
<td>▪ Clean/safe</td>
<td>▪ Placemaking</td>
<td>▪ Merchandise</td>
</tr>
<tr>
<td>▪ Public realm improvement</td>
<td>▪ Technical Assistance</td>
<td>▪ Customer Service</td>
</tr>
<tr>
<td>▪ Technical Assistance</td>
<td>▪ Outreach/Advocacy</td>
<td>▪ Marketing</td>
</tr>
<tr>
<td>▪ Education</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Thank you!

www.cambridgema.gov/CDD/Projects/EconDev/retailstrategicplan
APPENDIX
District Categories

Regional/ Specialty Commercial District

• High worker to resident ratio
• Higher number of businesses/retail offerings

Neighborhood/ Community Commercial District

• Serving mostly local residents
• Lower number of businesses/retail offerings
## Regional/ Specialty

<table>
<thead>
<tr>
<th></th>
<th>Harvard Square</th>
<th>Central Square</th>
<th>Kendall Square</th>
<th>Inman Square</th>
<th>Fresh Pond/ Alewife</th>
</tr>
</thead>
<tbody>
<tr>
<td>No of businesses</td>
<td>210</td>
<td>119</td>
<td>65</td>
<td>69</td>
<td>46</td>
</tr>
<tr>
<td>Total Population*</td>
<td>16,165</td>
<td>24,788</td>
<td>7,018</td>
<td>21,244</td>
<td>6,495</td>
</tr>
<tr>
<td>Population Density (per sq mile)</td>
<td>20,462</td>
<td>31,377</td>
<td>12,017</td>
<td>26,891</td>
<td>8,222</td>
</tr>
<tr>
<td>Total No. of Workers</td>
<td>23,379</td>
<td>11,277</td>
<td>36,303</td>
<td>10,291</td>
<td>5,779</td>
</tr>
<tr>
<td>Worker-Resident Ratio</td>
<td>1.4:1</td>
<td>2:1</td>
<td>5:1</td>
<td>0.5:1</td>
<td>1:1</td>
</tr>
<tr>
<td>MHI</td>
<td>$65,380</td>
<td>$73,057</td>
<td>$62,118</td>
<td>$75,162</td>
<td>$43,951</td>
</tr>
</tbody>
</table>

### Top Leakage Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Harvard Square</th>
<th>Central Square</th>
<th>Kendall Square</th>
<th>Inman Square</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Merchandise</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Building/ Garden Materials</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Clothing &amp; Accessories</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Furniture &amp; Home Furnishings</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Surplus/Leakage</th>
<th>Surplus</th>
<th>Leakage</th>
<th>Surplus</th>
<th>Leakage</th>
<th>Surplus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upcoming retail SF</td>
<td>-</td>
<td>41,916</td>
<td>212,853</td>
<td>1,546</td>
<td>13,428</td>
</tr>
<tr>
<td>Surplus/Leakage</td>
<td>Surplus</td>
<td>Leakage</td>
<td>Surplus</td>
<td>Leakage</td>
<td>Surplus</td>
</tr>
</tbody>
</table>
# Neighborhood/ Community

<table>
<thead>
<tr>
<th></th>
<th>East Cambridge (Cambridge St)</th>
<th>Porter Square</th>
<th>North/ Upper Mass</th>
<th>Huron Village/ Observatory Hill</th>
</tr>
</thead>
<tbody>
<tr>
<td>No of businesses</td>
<td>55 (excl/ Galleria)</td>
<td>39</td>
<td>52</td>
<td>33</td>
</tr>
<tr>
<td>Total Population</td>
<td>11,989</td>
<td>16,887</td>
<td>13,235</td>
<td>12,528</td>
</tr>
<tr>
<td>Population Density</td>
<td>15,176</td>
<td>21,376</td>
<td>16,753</td>
<td>15,858</td>
</tr>
<tr>
<td>Total No. of Workers</td>
<td>16,992</td>
<td>4,832</td>
<td>4,612</td>
<td>1,329</td>
</tr>
<tr>
<td>Worker to Resident Ratio</td>
<td>1.5:1</td>
<td>0.3:1</td>
<td>0.3:1</td>
<td>0.1:1</td>
</tr>
<tr>
<td>MHI</td>
<td>$67,931</td>
<td>$85,990</td>
<td>$79,381</td>
<td>$101,017</td>
</tr>
</tbody>
</table>

## Top Leakage Categories

<table>
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<td>✓</td>
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</tr>
<tr>
<td>General merchandise</td>
<td></td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
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<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
</tr>
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<td>Clothing &amp; Accessories</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Food/ Drinking Places</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Upcoming retail SF</td>
<td>36,440</td>
<td>9,293</td>
<td>480</td>
<td></td>
</tr>
</tbody>
</table>
Harvard Square
Harvard Square is a young and vibrant district anchored by many cultural and educational institutions.

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>16,165</td>
</tr>
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</tr>
<tr>
<td>Worker to Resident Ratio</td>
<td>1.4:1</td>
</tr>
</tbody>
</table>

- **Walk score**: 98
- **Bike score**: 98
- **Transit score**: 81
- **Transit Riders**: 23,199

**Total No. of Businesses**: 210

- **Food Services and Drinking Places**: 36%
- **Health and Personal Care**: 20%
- **Clothing and Clothing Accessories Stores**: 16%
- **Open Space**: 9%
- **Hotel**: 8%
There is an overall surplus of $40 million in Harvard Square. Customers noted a preference for independent and affordable businesses. In addition to these retail categories, they would also like to see more restaurants, entertainment venues and specialty retail.
Central Square
Central Square is a popular dining, entertainment and shopping destination for local residents, workers and visitors.

- **Total Population**: 24,788
- **Population Density**: 31,377/ sq mile
- **Median Household Income**: $73,057
- **Total No. of Workers**: 11,277
- **Worker to Resident Ratio**: 2:1

### Business Categories

- **Food and Beverage**: 8%
- **Food Services and Drinking Places**: 46%
- **Health and Personal Care**: 13%
- **Miscellaneous Store**: 8%

### Key Points
- **Walk score**: 97
- **Bike score**: 99
- **Transit score**: 72
- **Transit Riders**: 16,525
Successful retailers will offer products that are moderately-priced but hip and trendy.

Intercept surveys correspond with leakage data. Customers said they would like to see more independent boutiques, apparel stores, art spaces and book stores.
Kendall Square
Kendall Square is a rapidly developing district with a large daytime worker population. The tech employment center is currently well-served by restaurants and drinking places.

<table>
<thead>
<tr>
<th>Kendall Sq</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>7,018</td>
</tr>
<tr>
<td>Population Density</td>
<td>12,017/sq mile</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$62,118</td>
</tr>
<tr>
<td>Total No. of Workers</td>
<td>36,303</td>
</tr>
<tr>
<td>Worker to Resident Ratio</td>
<td>5:1</td>
</tr>
</tbody>
</table>

### Demographics

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Services and Drinking Places</td>
<td>72%</td>
</tr>
<tr>
<td>Fitness/Gym</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Walk, Bike, and Transit Scores

- Walk Score: 88
- Bike Score: 99
- Transit Score: 75

### Business Statistics

- Total No. of Businesses: 65
Successful retailers will offer products that are more contemporary but range from low to high price points.

There is an overall surplus of $164 million in Kendall Square.

Intercept surveys correspond with leakage data. Customers said they would like to see more grocery stores, convenience stores, and specialty food stores. However, customers also wanted more restaurants and bars, book stores and sporting goods.
Fresh Pond/ Alewife
Fresh Pond/ Alewife is a car-centered shopping district. It has convenience retail offerings at low prices to meet the needs of the lower income immigrant community.

**Total Population:** 6,495

**Population Density:** 8,222/ sq mile

**Median Household Income:** $43,951

**Total No. of Workers:** 5,779

**Worker to Resident Ratio:** 1:1

**Furniture and Home Furnishings Stores:** 15%

**Food Services and Drinking Places:** 26%

**Miscellaneous Store:** 20%
There is an overall surplus of $50 million in Fresh Pond.

Customers needs are being met in most categories but those interviewed would like to see more food and drinking places including cafes and bakeries, and food trucks for workers.
East Cambridge/ North Point
East Cambridge is a culturally diverse and walkable district with regional retail offerings.

<table>
<thead>
<tr>
<th>East Cambridge</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>11,989</td>
</tr>
<tr>
<td>Population Density</td>
<td>15,176/sq mile</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$67,931</td>
</tr>
<tr>
<td>Total No. of Workers</td>
<td>16,992</td>
</tr>
<tr>
<td>Worker to Resident Ratio</td>
<td>1 ½ :1</td>
</tr>
</tbody>
</table>

- **Walk score**: 93
- **Bike score**: 88
- **Transit score**: 83
- **Transit Riders**: 6,421

### Economic and Demographic Data

- **Total No. of Businesses**: 55
- **Food and Beverage**: 12%
- **Food Services and Drinking Places**: 33%
- **Health and Personal Care**: 33%
- **Miscellaneous Store**: 10%
- **Retail / Restaurant**:
- **Sports / Entertainment**:
- **Cultural**:
- **Open Space**:
- **Hotel**:
- **Office**:
- **Anchors**:
  - Hotel
  - Office
  - Multicultural Arts Center
  - Cambridge Antique Market
  - Cambridge Galleria
  - Hub Spot Cambridge
  - Lynch Family Skate Park
  - Cambridge Antique Market
  - Cambridge Galleria
  - Hub Spot Cambridge
  - Lynch Family Skate Park

### Transportation

- **Walk score**: 88
- **Bike score**: 83
- **Transit score**: 6,421

### Anchor Establishments

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park
- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park
- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Mixed-Use District

- Multicultural Arts Center
- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Open Space

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Retail / Restaurant

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Sports / Entertainment

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Cultural

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Open Space

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Hotel

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park

### Office

- Cambridge Antique Market
- Cambridge Galleria
- Hub Spot Cambridge
- Lynch Family Skate Park
There is an overall surplus of $289 million in East Cambridge.

Intercept surveys suggest that customers would like to see more restaurants and bars, coffee shops and bakeries, and hobby stores. Aligned with leakage data, they would also like more fresh produce options.
Porter Square/ Lower Mass Ave.
Porter Square is a wealthy and dense residential neighborhood that is easily accessible and has a variety of food and drinking places.

<table>
<thead>
<tr>
<th>Porter Square</th>
<th>Total Population</th>
<th>16,887</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population Density</td>
<td>21,376/ sq mile</td>
<td></td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$85,990</td>
<td></td>
</tr>
<tr>
<td>Total No. of Workers</td>
<td>4,832</td>
<td></td>
</tr>
<tr>
<td>Resident to Worker Ratio</td>
<td>3:1</td>
<td></td>
</tr>
</tbody>
</table>

- **Walk score**: 94
- **Bike score**: 78
- **Transit score**: 73
- **Transit Riders**: 8,850

- Food Services and Drinking Places: 28%
- Health and Personal Care: 28%
- Hobby, Book, and Music Stores: 10%
- Miscellaneous Store Retailers: 10%
Successful retailers will offer products that are contemporary, hip and trendy in the moderate to high price points.

In addition to these retail categories, customers would like to see more local businesses. They also noted the need for stationery stores and quick, affordable dining options, including cafes and bakeries.
Inman Square
Inman Square is a convenience-oriented shopping district serving a large residential market with moderate to high incomes.

- **Total No. of Businesses**: 69
- **Walk score**: 93
- **Bike score**: 88
- **Transit score**: 70
- **Transit Riders**: 4,236
- **Total Population**: 21,244
- **Population Density**: 26,891/ sq mile
- **Median Household Income**: $75,162
- **Total No. of Workers**: 10,291
- **Resident to Worker Ratio**: 2:1

### Business Categories

- **Food and Beverage**: 12%
- **Food Services and Drinking Places**: 42%
- **Health and Personal Care**: 22%
- **Sports and Entertainment**: 5%
- **Retail and Restaurant**: 10%
- **Institution (Public/Private)**: 5%

### Anchors
- **Cambridge Hospital**
- **Spaulding Hospital**
- **Gather Here**
- **Whole Foods**
In addition to these retail categories, customers would like more affordable grocery and specialty retail stores. The hip and trendy customer base would also enjoy special events organized in the district.

North/ Upper Mass is a fast-developing residential neighborhood with a moderate to high income customer base.

- **Total No. of Businesses:** 52
- **Walk score:** 91
- **Bike score:** 83
- **Transit score:** 70

No distinct anchors in the district

### Population Statistics

<table>
<thead>
<tr>
<th>Metric</th>
<th>North/ Upper Massachusetts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>13,235</td>
</tr>
<tr>
<td>Population Density</td>
<td>16,753/ sq mile</td>
</tr>
<tr>
<td>Median Household Income</td>
<td>$79,381</td>
</tr>
<tr>
<td>Total No. of Workers</td>
<td>4,612</td>
</tr>
<tr>
<td>Resident to Worker Ratio</td>
<td>3:1</td>
</tr>
</tbody>
</table>

### Business Composition

- **Furniture and Home Furnishings Stores:** 10%
- **Food and Beverage:** 15%
- **Food Services and Drinking Places:** 27%
- **Health and Personal Care:** 23%
- **8%**
North/ Upper Mass still has the opportunity to build its offerings in categories such as grocery stores, building materials & garden equipment, and hobby stores in the moderate to high price range.
Huron Village/ Observatory Hill
Huron Village is a very wealthy, residential neighborhood with a home furniture retail niche.

**Total No. of Businesses:** 33

**Huron Village/ Observatory Hill**

- **Total Population:** 12,528
- **Population Density:** 15,858/ sq mile
- **Median Household Income:** $101,017
- **Total No. of Workers:** 1,329
- **Resident to Worker Ratio:** 10:1

**Business Categories:**
- **Home Furnishings Stores:** 18%
- **Food and Beverage:** 12%
- **Food Services and Drinking Places:** 18%
- **Health and Personal Care:** 15%
- **Miscellaneous Store:** 21%

**Scores:**
- **Walk Score:** 80
- **Bike Score:** 93
- **Transit Score:** 64
Huron Village has the highest leakage of $358 million in the city of Cambridge. However, there are no available retail spaces for lease in the area.

Successful retailers will provide contemporary and trendy offerings that are moderately priced.